PROTRAV TRIP CREATION DOCUMENT

Contents

Create New Trip

A trip should be created for anyone traveling on behalf of the University, regardless if the University is funding the trip or a 3rd party is paying the expenses. Registering a trip will ensure that there is necessary information to get ahold of a traveler should the need arise due to an emergency situation.

Click Create new trip on the sidebar to the left.
You may create a trip for any UI employee, student or non-ui employee without them being listed under your "my Travelers" section.

Principal Traveler

Who is Traveling: Indicate whether the traveler is yourself or another individual. When "Myself" is selected, it will enter you as the traveler.

If you select someone else, you may search for UI Faculty/Staff, UI student or Non-ui Traveler. If searching for UI employee or student, you may search by their HAWK ID.

Click "Add traveler", a list of all who match the criteria you listed will be returned. If there is only one result, the name will automatically populate.

If more than one result, select the appropriate traveler by clicking on the radio button to the left of their name.

Trip Essentials — Purpose of Travel

Enter Trip Description, Purpose of Travel, select Individual or Group travel and Type of travel. Comments may be added but are not required.

Justification for Business Travel:

Based upon purpose of travel, the Justification for Business Travel will be required.   The options for justification include; Attendee/Participant, Presenter, Support, or Other.

Itinerary Destination — Where and when travel will take place

Enter the Destination Country, state and city. If the desired city is not listed, select other and type the city name in Other City box. Enter the traveler's departure and return dates.

Click Save Destination.

To add additional destinations to this trip, select add a destination. Be sure to not use the same travel dates as already saved. For example, the traveler is in Alaska 5/17-5/20, then going to California 5/20-5/22.

Click Save destination. To add more destinations, continue to select Add a destination. Once all destinations have been added scroll to the next section.

Originating Location — For UI employee travel to Iowa City

When creating a trip for a UI employee, if the destination of Iowa City, IA has been entered, the section below will appear which requests additional required information.

Once the information has been entered, select Save Location.

International destinations with travel advisories

If a trip is being created to a destination that has been issues a travel warning or alert by the US State Department, a link will appear that the user may click to review the travel warning or alert.

Once the user clicks on the link, a window will open with the complete text of the advisory which includes additional links to the US State Department website. This advisory may be accessed through the trip summary after the trip has been created.

Advisory e-mail notifications

If a new advisory is issued after a trip has been created, an e-mail notification will be sent to the traveler and workflow approvers announcing details of the new advisory. If there was an advisory at the time the trip was created, but now is canceled, an e-mail notification will be sent to the traveler and workflow approvers announcing it has been canceled.

Personal/Business Travel

The personal travel section has been added to all trips set up in ProTrav for UI Faculty/Staff. In this section, you will record your actual business travel dates.

Personal Travel   help

Does the departure date and return date defined include any portion of personal travel?

○ Yes

○ No

If the user clicks no, move on to the next section of the trip set up.

If the user clicks yes, enter the dates of the **business** travel only.
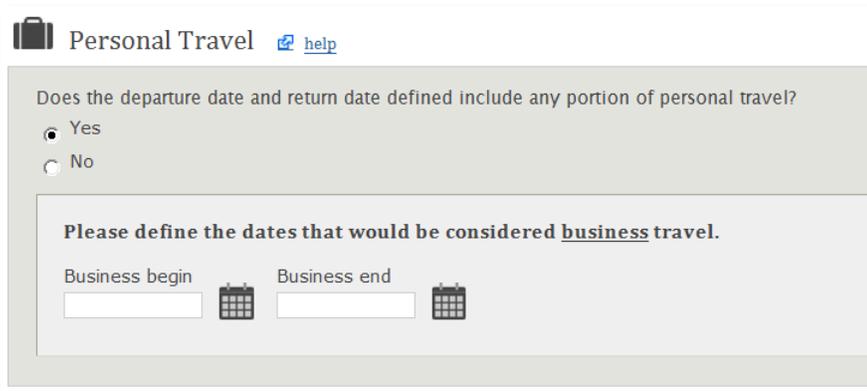
Personal Travel   help

Does the departure date and return date defined include any portion of personal travel?

⦿ Yes

○ No

Please define the dates that would be considered business travel.

Business begin   Business end

Once the dates are selected, scroll down to the next section in the trip creation process.

Destination Address — where the traveler will be staying.

If it is known at the time the trip is being created, it is requested you enter where the traveler will be staying. In case of an emergency, it will be known where they are.

If the traveler is staying multiple places, you may enter additional addresses. Click Add an address, then save address each time you wish to add.

Traveler Contact Information

Contact information directly to the traveler or other designated contact

This information is being requested in case of an emergency, departments may get a hold of the traveler quickly.

Click Add contact

The screen will open to an editable state. Enter the traveler your contact information or Other/Personal contact information it may be a cell phone or e-mail address. Click Save contact.

Click Add contact if there are multiple points of contact for the traveler.

Passport

This information is only requested for UI faculty/Staff or Students traveling internationally

Click Add passport to provide the Issuing Country, Passport number, and date of issue. ProTrav will default the expiration date to 10 years past the date of issue. Once this information has been entered, it will default into future trips up to the expiration date of the passport. If the traveler has passports for multiple countries, they may all be added to the traveler profile. Click save passport. If you need to add another passport, click Add passport.

Additional Considerations

Select whether the trip is being funded by University of Iowa funds or not. If yes is selected the user clicks continue, they will be taken to the Funding screen to enter the funding MFK and Cash Advance information if one is needed. If no is selected, you will be taken to the trip summary screen to review the trip information entered in Step 1.

Funding MFK

Enter the funding information for this trip

You may only enter one funding MFK during trip set up. If multiple sources are funding this trip, you may add them at the time you are claiming out of pocket reimbursement to the traveler.

You may add the funding MFK by utilizing your favorites ⭐, enter a funding MFK and add it to your favorites, or hand type the funding MFK into the spaces. Once the MFK is populated, click Save MFK ⭐

Travel Cash Advance

Travel cash advances are used to cover miscellaneous expenditures that will be incurred while in travel status (taxi, meals, tips, etc.). An approved Request for Travel (ProTrav Trip Request), authorizing the advance amount and funding must be submitted to the Travel Department in order to obtain a cash travel advance.

Travel cash advances will be limited to domestic travel over 14 days, all foreign travel, and emergencies.   The advance amount is limited to $60 the first day in travel status and $20 for each additional day. The standard amount will default in based on the trip dates. If a different amount is requested, an email will need to be sent to protrav@uiowa.edu requesting the different amount. If traveling internationally, the user will type in the amount requested and provide justification.

Travel cash advance checks can be picked up at the Travel Department five working days prior to the start of the trip. Questions can be directed to protrav@uiowa.edu.

Click **Add cash advance**

If you do not wish to request a cash advance, skip this step.

Review trip details and submit

This is a summary view of the trip information entered in steps 1 and 2. If all the information is correct, click Submit Trip. If any corrections need to be made click "Prev" to the screen in which the change needs to be made. Edit or delete and re-enter the information and then click Continue until you are back to the Review Trip Details panel.

There is also a link so the user may print the itinerary of the trip.

STEP Registration

Users have the option to register their international travel at the State Department's Smart Traveler Enrollment Program (STEP) through a link in ProTrav.

Once the user clicks the orange button, a new window or tab will open to the US Department of State's website to enter the trip information. For more information about the STEP program, click here.

Submit to Workflow

Electronic pre-trip approval through Workflow may or may not be required by the funding department.

If the funding department does not require electronic approval, and there is no cash advance requested, the trip creation is complete.

If your department does require electronic pre-trip approval, or if a cash advance has been requested, the form must now be submitted to Workflow.

Copy Trip

Function allows user to copy an existing trip already in ProTrav. The traveler &/or trip dates may remain the same or be changed. After the trip has been created the user will be able to make further edits.

Click Copy trip on the sidebar to the left.

This will open a search screen which will allow the user to search for an existing trip to copy.

Once the user has entered the search criteria and selected search trips, the results will be displayed similar to what's shown here.

Select Copy Trip for the trip you wish to copy.

The next screen will look similar to below. Review the trip information. Only the traveler and/or the destination dates may be edited at this time.

Select Create Trip to create the copied trip.

The next screen will be the trip summary page, similar to the below. Additional changes may be entered and the trip may be submitted to workflow if required. If this copied trip is an international trip, the user also has the opportunity to register the traveler for the Smart Traveler Enrollment Program (STEP).

Once the user clicks "Register trip with State Department, a new window or tab will open to the US Department of State's website to enter the trip information. For more information about the STEP program, click here.

If the trip requires workflow approval, select the "Submit to Workflow" button. If workflow approval is not required, this button will not display. (see screenshot on next page)

Trip: 2012 Conference

Workflow approver history:

Seq #	Received	Approver/Title	Approval	Routing	Y/N	Comments
0	Initiator	JENNIFER PORTWOOD / PROGRAM COORDINATOR	Required		Y	

Key to Y/N Column: (R) Requested Returned; (Y) Approved; (V) Voided; (N) Not Approved; (T) Tacit Approval

[Update Trip] [Submit to Workflow] [Cancel Trip]

Trip information:

STEP: [Register trip with State Department]

Trip ID: 290721

Descr.: 2012 Conference

Comments:

Assigned TEVs: No TEVs assigned

Change history: View changes

Purpose: Conference/Professional Development ▼

Departing: 10/08/2012 00:00

Returning: 10/10/2012 00:00

Update trip dates

Traveler information:

The traveler cannot be changed once a trip is created. If this trip is for someone else, please cancel this trip and create a new trip.

Traveler: Jennifer E Portwood (PORTWOOD)

Travel type: ● Individual travel
○ Group/Team travel

Campus address: VPFO-Accounts Payable & Travel 211-7 PCO

SSN: 482865081

Record history:

Created by: PORTWOOD

Last updt.: PORTWOOD on 05/11/2012 14:20

Users with access to this trip

Default MFK

MFK	Actions
0S0 - 0S - 0311 - 23000 - 00000000 - 6027 - 000 - 00000 - 60 - 0000	Edit

Trip destinations

» Add new destination

Dest ID	Location	Depart - Return	Actions
349508	Wallis City, WLF	10/08/2012 - 10/10/2012	Edit | Remove

Business Travel

Personal travel?	Business Start Date	Business End Date	Actions
			Edit

Destination addresses

» Add new address

Type	Address	Assoc Dest ID	Actions
No address(es) for this trip.			

Cash advances

» Request new cash advance

Cash Adv. ID	Type	Amt. Req.	Sch. Pay Dt.	Amt. Paid	Date paid	Actions
No cash advances requested/paid.						

Passports

» Add new passport

Country	Number	Issued	Expires	Actions
United States	**********	05/12/2011	05/12/2021	Edit | Remove

Contacts

» Add new contact

Type	Name	Method	Value	Actions
No contact(s) for this traveler.				

Attachments

Add/Edit \| Show/hide thumbs

No attachments available

[Update Trip] [Submit to Workflow] [Cancel Trip]