The (new) UMBC Travel System

The new system replaces the former E-travel system, and provides an electronic workflow for travel pre-approval and reimbursements. Other travel processes are not affected by this change. For example, the application for the CAHSS Faculty Scholarly Activity Fund (formerly known as CAHSS Faculty Scholarly Travel Fund) is still required if you are requesting travel support from the Dean's Office.

Department roles set-up in the new travel system.

The following descriptions and suggestions are applicable to the pre-approval (PA) and reimbursement (RB) processes. We've recently forwarded to Financial Services the information you provided to clean up the role set-up in your departments. They expect the revised roles to be updated by early next week.

Each department will be set up with the following roles:

Reviewer: We recommend that the Reviewer should be an administrative staff person. They can review and edit details for each request (e.g. that department processes have been followed, confirm that chartstrings are correct, that the correct approvers have been selected, and that all necessary documentation is attached). **We highly recommend that all requests are assigned to a reviewer before they are sent on to the department approver.**

Approver: Every transaction in the system will have to be approved. We highly recommend that every department have two individuals in the Approver role to ensure that there is an alternate when the Chair or Director is not available. Eva Dominguez will have the Approver role for each department. This is needed to approve the Chair's or Director's travel, and should **not** be selected for other department travel. If a Reviewer isn't assigned as part of the workflow, the system will require that the Approver serve in both roles.

Next Higher Authority: This is a required role for certain transactions, and it is filled by the Dean's Office. The system will automatically open the relevant field only when Next Higher Authority approval is required. Maria (Eva) Dominguez and the department contact Associate Dean (AD) should be the only names listed in this category. You should always select Eva Dominguez. **If Eva is not available** you can select the contact AD as the alternate.

Department administrator: The individual in this role can update roles within the department. However, Approver and Next Higher Authority roles can only be updated by Financial Services through a PS Security Access Form.

There are a few additional roles that you may have use for in your department. You can get information on roles in the "Administration" section of the travel system.

Navigating the UMBC Travel System:

The following is a very brief description of the travel workflow and process. More information and training material are available on the UMBC Travel page at https://businessservices.umbc.edu/travel

Go to the UMBC Travel System through myUMBC or directly to https://www.umbc.edu/go/travel-system. If you receive an email notification, you can also follow the link in the email.

Either the traveler or someone assigned to submit travel requests on behalf of the traveler can initiate pre-approval and reimbursement requests. (See below for recommendations about assigning someone to submit requests for the department.)

To initiate a transaction (by the traveler or on behalf of the traveler):

1. Select pre-approval or reimbursement from https://umbc.edu/go/travel-system, and follow the prompts.
2. There are four pages for each transaction. You can navigate between pages with the buttons at the top of your screen.
    - The Details page records the traveler's name and address and other general information about the trip
    - The Estimates page records budget and chartstring information, and provides a list of department Approvers.
    - The Documents page is where you can upload any required documents.
    - The Communications page allows you to send email and record emails related to the travel, and also provides a history of activity on the request.
3. Once all the necessary information is completed, you can forward the transaction to a department Reviewer and/or Approver. **Select "save" then "submit for review" from the drop-down menu in the "Actions" button on the upper right-hand corner of the page**. When a PA or RB is submitted for review, the approver selected in the drop down box and any reviewer listed for the department will be notified.

We recommend that all requests are "assigned to" the appropriate department Reviewer. This would be done in the Details page, and is especially important if there is more than one person as a Reviewer in your department.

To navigate to a transaction that someone has already initiated:

1. If you are navigating to a transaction that has already been started, you should select either pre-approval or reimbursement, then select the "Business Office" button, then select either assigned to "me" or "my department" in order to find your transaction. The upper left hand corner of the page provides information on the request and its current status.
2. **Reviewers** can find transactions that have been assigned to them or transactions that are active in their department. They can check that the transaction is correct and has all the required information, verify chartstring information, and that the correct Approver(s) have been selected. If the Reviewer is satisfied that the information is correct and that all internal department procedures have been followed, they can submit the request for formal approval by selecting

“send to DocuSign” in the “Actions” button on the upper right-hand corner of the page. **It is important to remember to select “Save” in the “Actions” button if any changes are made.**

- It is also important for the Reviewer to confirm that internal department processes have been followed before submitting the request for approval, since the Approver may not be seeing the request until it is sent through DocuSign. You can’t make changes to the request once it’s sent to DocuSign, which means that a new request will have to be initiated if there are any issues.

3. Everyone connected to the request will receive a notification from DocuSign, which is the prompt for processing formal approval.

You will be using the **“Actions” button** on the upper right hand of the page for many purposes. You can use it to navigate between different sections of the travel system, to save or cancel a request, and to forward the request to the next person in the workflow.

Assigning someone to submit requests on behalf of a traveler: This has to be set up as a one–to–one relationship in the system, and can be set up by the Department administrator. This is done in the Administration section of the system. (Select “Go to Administration” in the “Actions” button, then select the “Profile” button.) We suggest that you set up this feature as an alternative, even if the department practice is to have each person initiate their own travel requests.

International travel: In addition to the standard requirement for requesting travel approval, you are required to register international travel with the Center for Global Engagement (CGE). You should do this as early as possible, and certainly before you book your trip and before you start the travel pre-approval process. Here’s a link to CGE’s International Travel page: **https://studyabroad.umbc.edu/international-health-safety-security/** includes the link to the required travel registry and other useful information. This is a separate process and is outside of the Financial Services UMBC Travel System.

Nice features:

- You can easily update address information.
- The system automatically sends an email to the Travel Agent when the request has been approved. If you have booked with the Travel Agent, tickets are issued quickly after approvals are completed.
- The DocuSign workflow allows you to manage your approvals, to see where the request is, and when the Travel Agent receives the final approval notice.
- The “Estimates” page helps you work out a budget for the trip, provides Per Diem information (including information for high-cost locations), and allows you to distributes expenses across multiple chartstrings.
- There is a useful drop-down list above the “Actions” button that provides direct links to training material, FAQs, and other links that will be helpful to complete your transactions in the new system.