



**Travel:**

**Create, Manage and Approve Travel**

Employees and Budget Managers that  
Approve/Reject Travel

# Terminology

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- **Expense Card**—a card used to request non-compensation related reimbursements outside of the procurement module
- **Expense report**—a report submitted by select employees and managers to track budget spending on expense items
- **Expense item**—an item which needs to be mentioned in expense reports for cost tracking
- **Accommodation**—a reasonable expense necessary for employees to complete tasks while travelling
- **Travel authorization**—a requisition to the University for electronic approval of unit funds for travel purposes



# Terminology

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- **Expense card transaction**—an approved transaction which can be paid for using an expense card
- **Out-of-pocket transaction**—a transaction which must be paid for by the employee out of pocket and may be reimbursed later
- **Itemize**—the task of “breaking down” your different expenses into easily understandable details
- **Commitment**—an encumbrance to the unit budget for the purchase requisition made through the Procurement module
- **Purchase requisition**—a requisition made through procurement for allocation of funding; electronically approved



# Bear Trax Travel Benefits

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- **Bear Trax eliminates hard-copy paperwork previously required for formal prior approval for overnight trips.**
  - Formal prior supervisor approval is required.
  - Supervisors will track requests & implement internal approval processes.
- **Travel authorization is done through the Procurement tile.**
  - Select Purchase Requisition > Non-Catalog Request.
  - **Note! This is an estimate of the travel's total expense. Actual expenses may differ.**
- **Travel authorization is no longer required for same day travel.**



# Key Concepts for Travel affecting Budget

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**The new travel process will reflect real-time commitments in the budget.**

- This allows budget managers to make data-driven decisions for approvals.

## **Travel Details:**

- Travel purchase requisitions contain a one-line description that include:
  - Name, Date of travel, and Destination.
- To provide a more detailed estimate of travel expenses, employee can attach an itemized “Overnight Travel Authorization” form
  - Available from the Procurement Department



# The Travel Request Process: Before Travel

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## **All overnight travel authorizations must be completed in Bear Trax.**

- Employees must submit a purchase requisition for all overnight travel through Bear Trax.
  - Overnight travel requires *prior* approval.
  - If travel is funded by more than one account, requestor must split the costs in the requisition.
    - All applicable budget managers will approve the request electronically.



# The Travel Request Process: After Travel

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- **After travel, employee must submit an expense report claiming all necessary expense items.**
  - If splitting an item between accounts, split the cost as necessary.
- The expense report is processed electronically.
- Employee will receive approved reimbursements via bank account designated in the Expense modules.

***Important!* Employees must submit an expense report within 60 days of travel.**



# Additional Travel Fast Facts

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- **Supplier** for Travel purchase requisition is “SSU Travel AUTH.”
- **Category** for Travel is “Travel.”
- Check the box for “Negotiated” to automatically create a Purchase Order.
- Employees can track real-time approval status of travel requests via “Manage Approvals.”





# The End

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Thank you for reviewing this business process overview!

Please contact your Department Bear Trax representative or your Manager for more information.

