Travel:
Create, Manage and Approve Travel

Employees and Budget Managers that Approve/Reject Travel

Terminology

- **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

- **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

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Bear Trax Travel Benefits

- **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.**

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Key Concepts for Travel affecting Budget

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

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.

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The Travel Request Process: After Travel

- **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.**

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Additional Travel Fast Facts

- **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."

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The End

Thank you for reviewing this business process overview!

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