Creating a Travel Request

Log into Firefly:  https://firefly.nebraska.edu

Click on Employee Self Service

Click on Travel Request Create
The Create Travel Request screen appears.

You will see several links to useful websites related to travel. Your Default Cost Center name and number will be displayed on this screen. Although the default information is displayed, you will have an opportunity to change the cost center/WBS funding source(s) when you create your Travel Request. Instructions on how to change the account to reflect where travel expense will post, will follow in the instructions.

Do not contact your HR coordinator to change the default account as indicated below. This is an account that is assigned to your organizational unit and should not be changed.

To create a new Travel Request, click on (located at bottom left). The Travel Request screen appears.
Enter the required fields (noted with *).
Times are entered with a 24-hour clock system.

- Start Date/Time
- End Date/Time
- Destination/City
- Country/State
- Trip Reason: enter the specific purpose of the trip.

Enter the optional fields

- Activity: select an activity that describes the general purpose of the trip from the drop down menu.
- Estimated Costs: enter the total estimated cost for the trip.

**Additional Destinations:** if you are traveling to more than one location, click on \textbf{Additional Destinations} to enter all of your destinations.

Click on the \textbf{Add} button to enter each additional location.
**Trip Cost Assignment**: this provides the opportunity to assign the appropriate cost center/WBS for the trip. Clicking on the cost center/WBS number provides the ability to change the cost center/WBS or split between multiple cost objects.

Click on the cost Center/WBS number

A pop-up window will appear. You can change the percentage or the Cost Center or WBS number. Instructions for splitting the cost between two or more cost centers/WBS number follow.

After making any changes, click on the OK button.
Splitting the Percentage between Cost Centers/WBS Numbers:

Click on the Cost Center/WBS Number

The following pop-up window will appear. Change the percentage to the desired amount and click OK.

The following example splits the cost of the trip 50/50 between two accounts.

Back on the main screen, the new percent is listed (50% see below). Click on
The pop-up window will appear. Change the percentage (as applicable) and the Cost Center/WBS number.

Click on OK

The new Cost Center/WBS assignments for the Travel Request are now listed on the main screen.

**Comments**: allows you to enter a cost breakdown for the trip, or to enter any additional comment for the approver. For example, if the request needs to be delegated to someone other than your travel approver. Any or all of the text that defaults can be changed and/or deleted as necessary.
**Estimated Trip Costs (including expenses paid by your employer):**

- Airfare: $1,050
- Lodging: $500
- Meals: $350
- Taxi: $100
- Registration Fee: $1,600
- Mileage: $300

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[Save button]
Once you have entered all the information, click on (bottom right of screen). The
Confirmation screen will appear.

If the travel request is ready to be submitted for approval, click on

Then click on

If you want to save the request as Open for further changes, click on

Then click

A confirmation screen will appear.
The Travel Request is now saved and shown on the left side of the menu.

Editing a Saved Travel Request

Click on the saved request from the left side menu. From this screen you can Edit or Print. To Cancel the request, contact your IANR business center travel coordinator.

To Edit the request, click on  (located at the bottom of the screen).
To **Add an Attachment**: the travel request needs to be saved before a document can be attached.

- This allows documentation (for example: a conference brochure) to be attached for the approver information.
- Staff/Graduate Students/Students Workers are required to attach an email from the owner of the funding providing approval to travel and use the account assigned.

**Please note:** Without this approving documentation, the request will not be approved.

Click on [Upload].

Select the file you want to attached to this travel request and click on [Open].

You can follow the workflow of the travel request by clicking on [WORKFLOW STATUS].
Once you have entered all the information, click on (bottom right of screen).

The Confirmation screen will appear.

To submit for approval click on . Then click on .

A confirmation screen will appear.
The travel request is now shown as Pending/Awaiting Approval. You cannot make any changes at this time.

Your Travel Approver will receive an email with the option to Approve, Return for Changes, Reject & Cancel, or Delegate to another person for approval.

- **Approve:** You will receive an e-mail stating that the request has been approved along with a copy of the Travel Request form. If necessary, you can print the approved Travel Request for your records and make the necessary travel arrangements. The Travel Request document can be modified as necessary, but if the amount in the Estimated Cost field is increased, or if the cost assignment information is changed, a new workflow will be sent to your Travel approver.

- **Return for Changes:** You will receive an e-mail stating that the request was returned for changes, along with comments from the approver about what needs to be changed. You will need to go back into ESS, open the Travel Request, make the necessary changes and resubmit the request.

- **Reject & Cancel:** You will receive an e-mail stating that the request has been rejected along with comments from the approver. Once a request has been rejected, it cannot be changed.

- **Delegate Approval:** The Travel Approver has the option to delegate the approval to one or more individuals. The same options listed above are available to the delegated approver.

Help video: [https://fireflyhelp.nebraska.edu/fireflyhelp/tutorials/ess_travel_request/index.html](https://fireflyhelp.nebraska.edu/fireflyhelp/tutorials/ess_travel_request/index.html)
Once your Approver has acted on the Travel request, you will receive an e-mail

INSTRUCTIONS:
Review trip details for accuracy.

NOTE: Approval includes authorization for out of town meals and use of a privately owned vehicle.

Add the request as an appointment to Microsoft Outlook / Office 365 calendar (blocks out free time)
Add the request as a reminder to Microsoft Outlook / Office 365 calendar (does not block out free time)

### Travel Request

<table>
<thead>
<tr>
<th>Name</th>
<th>Carol A Cartwright</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip No</td>
<td>6600072622</td>
</tr>
<tr>
<td>Personnel No</td>
<td>16194</td>
</tr>
<tr>
<td>Dept</td>
<td>IANR / IANR Finance &amp; Personnel</td>
</tr>
<tr>
<td>Address</td>
<td>313C AGH, UNL, 68583-0705, 000-000-0000</td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:ccartwright1@unl.edu">ccartwright1@unl.edu</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination</th>
<th>SAN FRANCISCO, USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>CA</td>
</tr>
<tr>
<td>Reason</td>
<td>ATTEND CONFERENCE</td>
</tr>
<tr>
<td>Start Date</td>
<td>Monday 10/16/17 08:00</td>
</tr>
<tr>
<td>End Date</td>
<td>Friday 10/20/17 17:00</td>
</tr>
<tr>
<td>Cost Object</td>
<td>50.00% To 2166166001</td>
</tr>
<tr>
<td></td>
<td>50.00% To 2166166003</td>
</tr>
<tr>
<td>Est Costs</td>
<td>3,600.00</td>
</tr>
</tbody>
</table>

**Comments**
Estimated Trip Costs (including expenses paid by your employer)
Airfare: $1,050
Lodging: $500
Meals: $350
Taxi: $100
Registration Fee: $1,600
Mileage:

-----------------------Delegate to the Dean-----------------------
The request is now shown as being Approved. You can now Edit or Cancel the request if necessary. Your Travel Approver will receive an email informing them of any changes.

For questions or additional training, please contact your IANR Business Center.