

FREQUENTLY ASKED QUESTIONS FOR E-TRAVEL

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Questions:

How to create an authorization

- Log into U-Business <https://busaff.uncw.edu/ubusiness/index.cfm>. By entering your username and password, which is the same as you use to log onto your computer.
- This will bring you to the U-Business Applications page. You will then click E-Travel
- Once you are in UNCW Travel System you will select Options to create a Travel Authorization
- You will select Employee or Student. **Students who are not on UNCW payroll are classified as Students and Students who are on UNCW payroll are treated as employees. Students cannot use Blanket Authorizations**
- Is the Travel Authorization for you or someone else? Click on the circle for yes or no. Type in the traveler's email without the @UNCW.edu.
- Type in Default FOPA. This is the fund number that will be charged for the entire trip. If you have multiple fund numbers to use, you will have to add the additional fund numbers for each line item(Add FOPA)
- Purpose of Trip. Include the name of the conference or meeting you will be attending
- Travel Destination: Choose the state and city or foreign country for your destination. Please note Hawaii and Alaska are considered Foreign Travel
- Departure and Return Information: Enter specific departure and arrival dates and times to document eligibility for meal reimbursement. Please note and include any personal days attached to the trip.
- Student Supervisor's Email. Student Supervisors are only required for Student Employees. Otherwise, leave this field blank.
- Enter Alternative Preparer's Email: This is where you would enter the name and e-mail for the alternative preparer. This allows someone other than you or the traveler to access the travel and make changes
- Maximum Reimbursement: this is NOT a require field
- Estimated Total Cost of Travel: This is a REQUIRED FIELD. Enter the estimated costs for Lodging, Airfare, Registration, Ground Transportation, Meals, Other expenses
- Review the information on the screen and if correct click the Submit Button
- This will take you to the Authorization Summary for TA00000

➤ Adding Lodging

- You will click the (Click to Add) button next to Lodging
- You will first enter the check in date and check out date for your entire stay. If the room rates are different you will have to enter the room rate plus taxes for the different amounts as a separate entry for each night.
- You will then enter the city and state and country where the hotel is located
- You will then add the cost per night. If there were personal days or no lodging expenses you will have to enter \$0 for those night(s). If the room rates were different for each night of lodging put the amount in for the first night(s). Fill in the remaining information and click the submit button.
- If the lodging expense will be charged to a fund number that is not the same as the Default FOPA you will enter the “other” fund number in the FOPA block
- You will then click the submit button
- You will have to (Click to Add) for additional nights for different amounts. EX: 10/2-3 is \$52.85 per night and 10/3-5 is \$0 per night, Repeat the above steps to add the information for the different room rate amount

➤ Adding Meals

- You will (Click the Edit) meals module. You will unclick the check made for the meals the traveler is not eligible for.
- When foreign travel is involved, foreign rates do not start until the traveler arrives in the foreign country on the departing flight. EX: if you leave Wilmington at 6AM and land in Paris, France at 3PM the same day you would receive breakfast & lunch US per diem rates and Paris, France dinner per diem rates. Follow the link. http://aoprals.state.gov/content.asp?content_id=184&menu_id=78.
- If the meals expense will be charged to a different fund number other than the Default FOPA you will enter the new fund number in the Fund box.
- Once you have made sure the information has been entered and calculated correctly click the submit button.

➤ Adding Transportation

- Taxi, shuttles, airfare (if paid by the traveler), car rentals, fuel (for rental car only) and personal vehicle expenses are entered here.
- You will (Click to Add) next to the Transportation module
- You will select the mode of transportation and fill in the blanks tabing to each box and then clicking submit when all the information has been added.

› Route authorization for approval

- Once you have entered all of the prepaid expenses and all estimated expenses, you must click the Teal Click to Route Button on the top left hand side of the page.

How do I create an advance check request?

This only applies to Student Group Trips that a Faculty/Staff Member will be paying for all of the expenses

- The only Travel Advance given is for Meal Per Diem amounts and this is given at 100%
- An Other Prepaid Expense check request will need be created under the Faculty/Staff member travel using student group account codes.
- The payee is faculty/staff member paying for the expenses.
- Once all of the information has been filled in you will need to click the submit button
- You will then need to route the check request for approvals.
- If you have created this on the authorization side this will be routed with the authorization. If you have created this on the reimbursement side you will need to route this individually.
- Once everyone has approved this check request in E-Travel you will have to print and forward to the Travel Office.

How do I add a prepaid expense?

› Agency Airfare

- **If needed**, create a prepaid agency airfare using one of the UNCW contract travel agencies. (<http://uncw.edu/travel/employees/airfare.html>). Make sure you click the agency NOT airfare button.
 - You have made the flight arrangements and you have received the itinerary that shows the travel dates and times and the price plus the service fees. Check with the agency to verify how long the ticket price is valid. 24 hrs from the time of your phone call or less?
 - You are now ready to enter the information in E-Travel. You will go to the Prepaid Check Requests at the bottom of the Summary Page
 - You will (Click to Add) next to Prepaid Airfare and then click on the Agency Link
 - You will choose the Agency you used from the Drop Down menu. If you do not see the Drop Down Menu with the Agencies listed click cancel and make sure you click the Agency link.
 - Next type in the Originating Departure City. Your flight leaves from Wilmington to fly to Orlando, type in Wilmington
 - Next type in the Returning Departure City. Your flight leaves Orlando to return to Wilmington, type in Orlando

- Departure Date- this is the date your flight leaves
- Return Date- this is the date your flight returns
- Cost- this is where you would enter the cost of the airline ticket plus service fees
- FOPA- if the airfare will be charged to a fund number other than the Default FOPA this is where you would enter the Other fund number
- Click the submit button
- Please note that ALL APPROVALS must have gone through in E-Travel before the ticket will be purchased

› Registration

- **If needed**, create the prepaid registration check request payable directly to the vendor. Go to Prepaid Check Requests at the bottom of the Authorization Summary Page. Click the (Click to Add) link next to Prepaid Registration
 - Payee - type in the Payee. Please verify that this is who the check will be payable to on the registration form
 - Type in the Address where the check will be mailed
 - Use the drop down arrows to enter the date the check is needed
 - Distribution- check which box applies to you
 1. Mail to the Traveler- this would be used if you have additional documentation or you want to hand deliver the check. Please write your name, CB# and phone # on the front of the check request
 2. Mail to Payee- the check will be mailed to the Address listed in the Address lines
 - Cost- type in the cost of the registration only
 - Purpose- type in the purpose of the registration
 - FOPA- if the registration will be charged to a fund number other than the Default FOPA you will enter the new fund number in the FOPA box.
 - Click the submit button when you have entered all of the registration information
 - Please note that the registration will be routed with the ENTIRE Authorization

How do I enter a note?

- Go to the Reimbursement Summary Page
- Click the Click to Add A Note yellow post it on the top right hand side of the page.
- A new screen will pop up.
- Put your cursor in the box and type your note. Click Submit when you are done.
- To close the box, click the Red X on the top right hand side of the box
- If you run out of space, the characters left will be zero. Click submit and then finish your note in the next box.

How do I change the alt preparer?

- Go to the Reimbursement Summary page.
- Directly above the yellow box is the (Edit Authorization Info) link
- Type in the Alternate preparer e-mail **without** @uncw.edu and then click the submit button.

How do I create a travel reimbursement?

- You have returned from your trip with all of your receipts. You Log into U-Business. (<https://busaff.uncw.edu/ubusiness/index.cfm>) by entering your username and password, which is the same as the one used to log onto your computer.
- This will bring you to the U-Business Applications page. You will then click E-Travel
- Select TR00000, the travel number for this trip. (The “A” in the authorization summary number changes to an “R”). This is under Reimbursements.
- Verify that the departure and return times and dates are correct. Make any changes if necessary. Click the edit dates and times link to make changes.

➤ Increase the max on a travel?

- Go to the Reimbursement Summary page.
- Directly above the yellow box is the (Edit Authorization Info) link
- Type in the Maximum Reimbursement Amount and then click the submit button
- Increasing the Maximum Reimbursement Amount will require the travel to be re-routed and have budget authority approval

➤ Update the dates and times of a trip

- Go to the Reimbursement Summary page.
- Click on the (Edit Dates and Times) link
- Type in the changes to the dates and times and then click the submit button. (remember that the dates and times affects the meals eligibility)

➤ Edit the lodging

- You will click the (Click to Add) button next to Lodging
- You will first enter the check in date and check out date for your entire stay. If the room rates are different you will have to enter the room rate plus taxes for the different amounts as a separate entry.
- You will then enter the city and state and country where the hotel is located
- You will then add the cost per night. If there were personal days or no lodging expenses you will have to enter \$0 for those night(s). If the room rates were different for each night of lodging put the amount in for the first night(s).. Fill in the remaining information and click the submit button.

- If the lodging expense will be charged to a fund number that is not the same as the Default FOPA you will enter the “other” fund number in the FOPA block
- You will then click the submit button
- You will have to (Click to Add) for additional nights for different amounts. EX: 10/2-3 is \$52.85 per night and 10/3-5 is \$0 per night, Repeat steps a-e to add the information for the different room rate amount

➤ **Edit meals?**

- You will (Click to Edit) the meals module. You will un-click the check made for the meals the traveler is not eligible for.
- When foreign travel is involved, foreign rates do not start until the traveler arrives in the foreign country on the departing flight. EX: if you leave Wilmington at 6AM and land in Paris, France at 3PM the same day you would receive breakfast & lunch US per Diem rates and Paris, France dinner per Diem rates. Follow the link. http://aoprals.state.gov/content.asp?content_id=184&menu_id=78.
- If the meals expense will be charged to a different fund number other than the Default FOPA, you will enter the new fund number in the Fund box.
- Once you have made sure the information has been entered and calculated correctly click the submit button.

➤ **Edit Transportation**

- Taxi, shuttles, airfare if paid by traveler, car rentals, fuel for rental car only and personal vehicle expenses are entered here.
- You will (Click to Add) next to the Transportation module
- You will select the mode of transportation and fill in the blanks tabing to each box and then clicking submit when all the information has been added.

➤ **How do I enter/update the receipt date for fuel, taxi and other transportation expenses?**

- If the receipt date was entered incorrectly or you need to change /add the receipt date you will click the edit button next to the specific expense
- If any of the transportation expenses will be charged to a fund number other than the Default FOPA, you will enter the new fund number in the FOPA box.

➤ **Enter in other expenses**

- This is where you would enter business entertainment expenses, baggage fees expenses and internet charges that do not fit in one of the above categories but are related to your travel
- Enter the cost of the expenses
- If the Other expense will be charged to a fund number other than the Default FOPA, you will enter the new fund number in the FOPA box.
- Next, you will choose an Account Code from the drop down menu. You can view the account codes at <http://uncw.edu/Purchasing/documents/uShop%20Expenditure%20Accts%20Reference>

[%20Guide%20-%2012202012.pdf](#) before you choose. The account codes are in numerical order.

- You will then have to fill in the description and the reason.
- Click the submit button when all the information has been entered

➤ Change the fund

- You will go to expense and ([Click to Edit](#))
- The box that shows FOPA next to it is where you would enter the New fund number
- Click the submit button

➤ How do I route the reimbursement check request?

- You will now go to the Options screen at the top of the page and click the Create Reimbursement Check link.
- Make sure that the correct reimbursement amounts and the boxes are checked off. **If the amount to be reimbursed does not total the receipts amount do not click the submit button.** Go back to the Reimbursement Summary page and make sure all of the amounts and receipt dates have been entered correctly. If you are still having problems please contact the Travel Office.
- If all of the information is correct click the submit button.
- Another screen will pop up and you will have to click the ROUTE TRAVEL button

➤ How do I reimburse someone else who paid for the travelers expenses?

○ Airfare

- When someone besides the traveler paid for the **traveler's airfare**. You would create a Prepaid Airfare Check Request with the "other" person as the payee. Make sure you click Airfare NOT Agency. You will have to click the submit button and then route the check request for approvals. Once everyone has approved the travel you will have to print the check request and forward to the Travel Office along with the supporting documentation

○ Other Expense

- When someone besides the traveler paid for **lodging, baggage fees or other expenses**, they will have to be reimbursed on a separate check request. A Prepaid Other Expenses check request will have to be created under the travelers authorization with the "other person" as the payee. You will have to click the submit button and then route the check request for approvals. Once everyone has approved the travel you will have to print the check request and forward to Travel along with the supporting documentation.

How do I change the fund for an expense already in the system?

- You will go to expense and ([Click to Edit](#))
- The box that shows FOPA next to it is where you would enter the New fund number
- Click the submit button

How to create a reimbursement check request?

- You will now go to the Options screen at the top of the Reimbursement Summary page and click the Create Reimbursement Check link.
- Make sure that the correct reimbursement amounts and the boxes are checked off. **If the Amount to be reimbursed does not total the receipt, amounts do not click the submit button.** Go back to the Reimbursement Summary page and make sure all of the amounts and receipt dates have been entered correctly. If you are still having problems please contact the Travel Office.
- If all of the information is correct click the submit button.
- Another screen will pop up and you will have to click the ROUTE TRAVEL button
- You will go back to the reimbursement summary page. At the bottom of the reimbursement, summary page will be a block that shows Reimbursement Check Summary.
- When the Status shows Approved you will click the View Check link. Print the check request and forward to Travel Office (CB5660) along with any supporting documentation.

Why does the reimbursement check request not match the expenses entered in E-Travel?

- Most likely the receipt dates are incorrect or were not entered for one of the transportation expenses.
- Check to make sure that the receipt dates for your expenses fall within the departure and return dates listed at the top of the Reimbursement Summary page
- Make the corrections and click the submit button

Where can I see the status of the prepaid expense or Reimbursement?

- Go to the Reimbursement Summary of the TR00000 in question
- For Prepaid Expenses go to the Prepaid Check Requests Section towards the bottom of the page
- The Red Status line next to the check in question will show Not routed for approvals, Approved-Ready to Print, or Posted.
 - Not Routed – Means that you have not routed the check request for all the required approvals.

- Approved –Means that the budget authority and all other required parties have signed off and you need to print the check request and send that with the supporting documentation to the Travel Office.
 - Posted – means the Travel Office has reviewed and approved your travel. You will be receiving a check/direct deposit within a week.
- The Status of the reimbursement is located at the bottom of the reimbursement summary page

Why was my reimbursement changed from what I requested?

- Go to the Options link at the E-travel home page and click View Closed Travel.
- You will choose the travel number from History. This list gives the traveler's name and the travel number.
- Select the correct traveler's and travel number by putting your cursor on the information which will be highlighted and then right click
- The traveler's name and travel number will appear in the box and the click the submit button.
- Click the Click to View the page. The explanation will be in the notes. To see the Notes click on the yellow post it on the upper right hand side of the page.

How do I close a travel reimbursement?

- Go to the Reimbursement Summary Page and click the options button at the top of the page
- You will then click the Close Reimbursement link
- Another screen will pop up. Are you sure? Click OK

What is the status of my check request?

- Go to the Reimbursement Summary of the TR00000 in question
- The Red Status line next to the check in question will show Not routed for approvals, Approved-Ready to Print, or Posted.
 - Not Routed – Means that you have not routed the check request for all the required approvals.
 - Approved –Means that the budget authority and all other required parties have signed off and you need to print the check request and send that with the supporting documentation to the Travel Office.
 - Posted – means the Travel Office has reviewed and approved your travel. You will be receiving a check/direct deposit within a week.
- The Status of the reimbursement is located at the bottom of the reimbursement summary page

When can I use my Blanket?

Employee Blanket Travel Authorizations

- In order to eliminate preparation of individual Travel Authorizations for repetitive in-state trips, Employee Blanket Travel Authorizations are not allowed in all departments. Please check with your Department Head.
- At the discretion of the department head, an annual blanket Travel Authorization may be prepared for any university faculty member or staff employee traveling on official business.
- One blanket authorization for each university employee per year regardless of the default fund.
- A new Blanket Authorization must be created each fiscal year.
- Blanket authorizations are not allowable if the travel involves a mode of travel other than a state or private car. In this case, a separate Travel Authorization form must be completed for each trip.
- Trips are within North Carolina
- Trips are limited to 2-3 day duration
- Travel expenses are minimal
- Blankets cannot be used for any expenses that are being paid by grants unless pre-approved by Grant Officer.
- Agency airfare cannot be processed on a blanket travel.
- Student cannot be processed on blankets

Departmental Blanket Travel Authorizations

- One Department blanket authorization for each university department per year.
- Department blankets are not allowed in all departments. Please check with your Department Head first.
- Departmental blankets are used for prospective employees
- Blankets cannot be used for any expenses that are being paid by grants unless pre-approved by Grant Officer.
- Agency airfare cannot be processed on a blanket travel.
- Students cannot be processed on blanket authorizations.

How do I create a Blanket Authorization?

- Log into U-Business. <https://busaff.uncw.edu/ubusiness/index.cfm>. By entering your username and password, which is the same as you use to log onto your computer.
- This will bring you to the U-Business Applications page. You will then click E-Travel
- Once you are in UNCW Travel System you will select Options to create a Blanket Authorization
- You will select either Employee or Departmental Blanket Authorization. **Students cannot use Blanket Authorizations**
- Is the Travel Authorization for you or someone else? Click on the circle for yes or no. Type in the traveler's email without the @UNCW.edu.

- Type in Default FOPA. This is the fund number that will be charged for the entire trip. If you have multiple fund numbers to use you will have to add the additional fund numbers for each line item(Add FOPA)
- Purpose of Trip: Include the name of the conference or meeting you will be attending
- Enter Alternative Preparer's Email: this is where you would enter the name and e-mail for the alternative preparer. This allows someone other than yourself or the traveler to access the travel and make changes.
- Review the information on the screen and if correct click the Submit Button
- This will take you to the Authorization Summary for TB00000

How do I create a Blanket Reimbursement?

- If you need to create a new reimbursement you will log into E-Travel
- You will select the TB00000(blanket authorization) for the traveler
- You will then select the Create a New Reimbursement from Blanket link
- This will pop up a new screen for you to fill in.
 - The purpose of the trip
 - Travel Destination
 - Departure and Return information
 - Enter an alternate preparer's name
 - Click submit
- The Blanket Reimbursement Summary Page will pop up B000000
- You will fill in all of the expenses
- You will now go to the Options screen at the top of the Blanket Reimbursement Summary page and click the Create Reimbursement Check link.
- Make sure that the correct reimbursement amounts and the boxes are checked off. **If the Amount to be reimbursed does not total the receipts amount do not click the submit button.** Go back to the Blanket Reimbursement Summary page and make sure all of the amounts and receipt dates have been entered correctly. If you are still having problems please contact the Travel Office.
- If all of the information is correct click the submit button.
- Another screen will pop up and you will have to click the ROUTE TRAVEL button
- You will go back to the Reimbursement Summary page. At the bottom of the Reimbursement Summary page will be a block that shows Reimbursement Check Summary.
- When the Status shows Approved you will click the View Check link. Print the check request and forward to Travel Office (CB5660) along with any supporting documentation.

How do I approve travel if I am listed as a Budget Authority or Supervisor?

- Log into U-Business. <https://busaff.uncw.edu/ubusiness/index.cfm>. By entering your username and password, which is the same as you would use to log onto your computer.
- This will bring you to the U-Business Applications page. You will then click E-Travel
- This will bring you to the UNCW Travel Systems home page
- You will click the Approvals Box at the top the page
- The list of travel that is awaiting for your approval will be listed
- Click the Select button for the travel you want to approve
- The check request that you are being asked to approve will appear
- You will click (which will show a check mark) on the box beside approve.
- You will click the Approve button
- Another box will pop up. Are you sure you want to approve the check request? Click the OK button
- Check request has been approved pops up in another box Click the OK button

