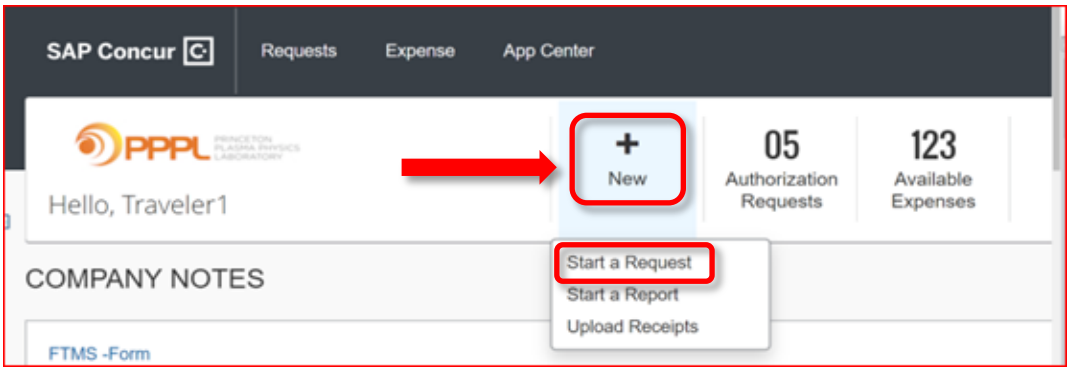
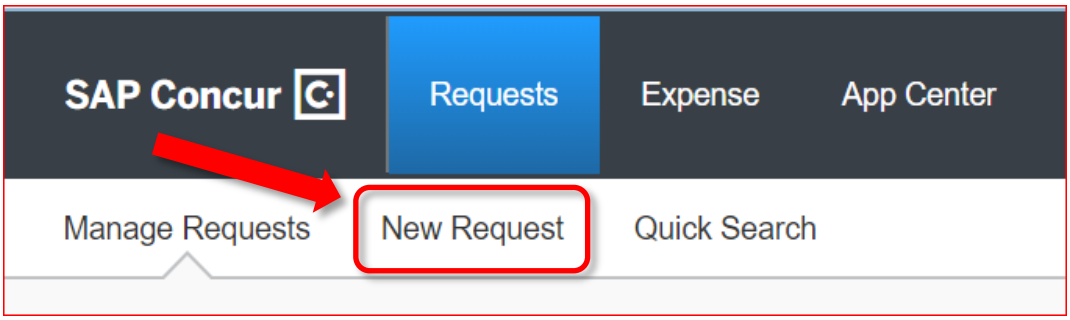
Creating a Travel Request

Objective: This section will go over the steps in detail on how to create a Travel Request

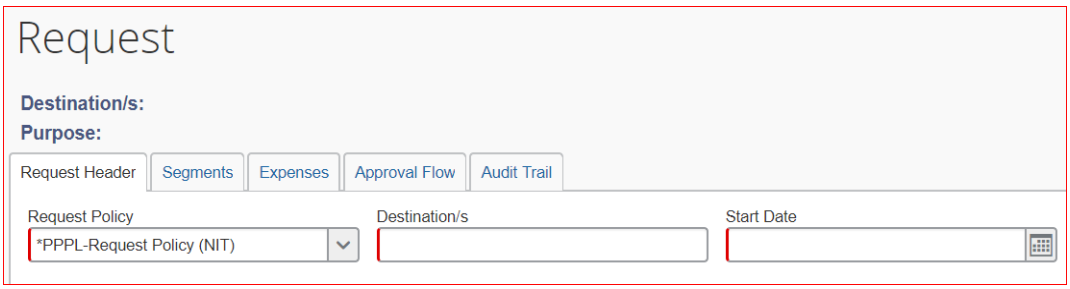
1. Hover over the + *New* button near the top of the screen and **select** *Start a request.*



OR **click** on Requests at the top of the screen. This will take you to a screen with your active requests shown. You can then **click** *New Request* in order to create a new request.



2. On the Request page, you will see 5 tabs, titled Request Header, Segments, Expenses, Approval Flow, and Audit Trail



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3. Complete all required fields of the *Request Header* form.
All the fields with a red side bar are required fields.

Note: Be sure to account for the full duration of your trip, including personal/non-PPPL business days.

Note: Make sure to select a trip type and sub-trip type that matches your request.

Note: Charge to Multiple Cost Centers?

If your trip will be supported by multiple cost centers, select YES. You will be able to make the appropriate allocation after you have entered all your estimated expenses.

Note: Do you have sig auth for any cost centers that will be charged?

If you have signature authority on any of the cost centers / project accounts that are funding your trip, select YES. This will route your trip to the appropriate approver based on the signature authority table.

Note: When a Cost Center is selected, the dropdown for Work Package and Job Package will narrow down to only show what is applicable to the Cost Center selected.

Note: 3rd Party Sponsored Trip | 3rd Party Name | 3rd Party Payment Amount

If any portion of your trip will be funded by a 3rd party organization (including Princeton University), select YES and provide the funding information.

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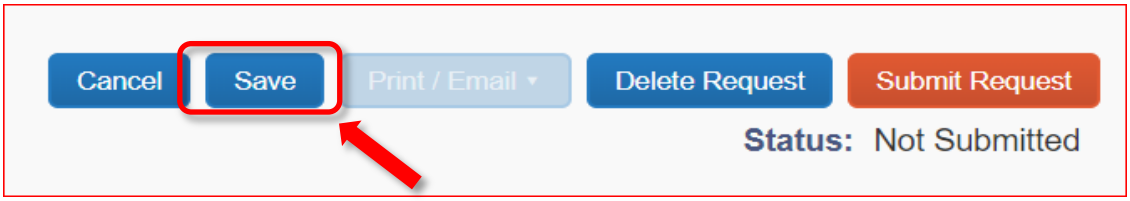
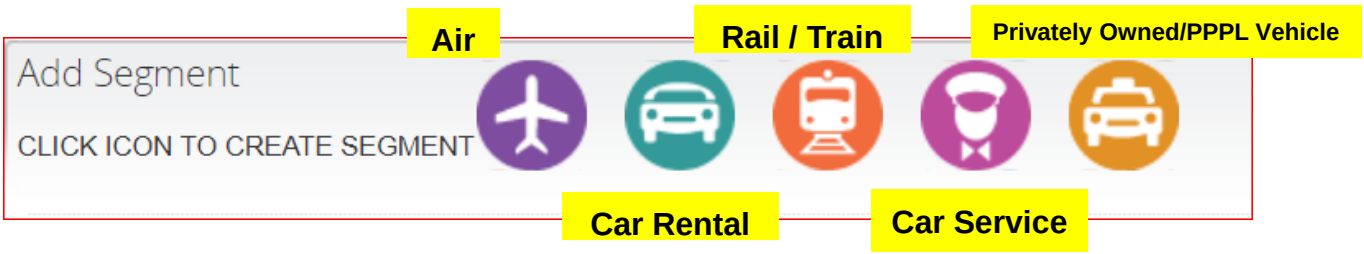
4. After completing the *Request Header*, continue on to the *Segments* tab.
Clicking the *Segments tab* will save your progress automatically; OR you can click the **Save** button near the upper right hand corner of the screen.

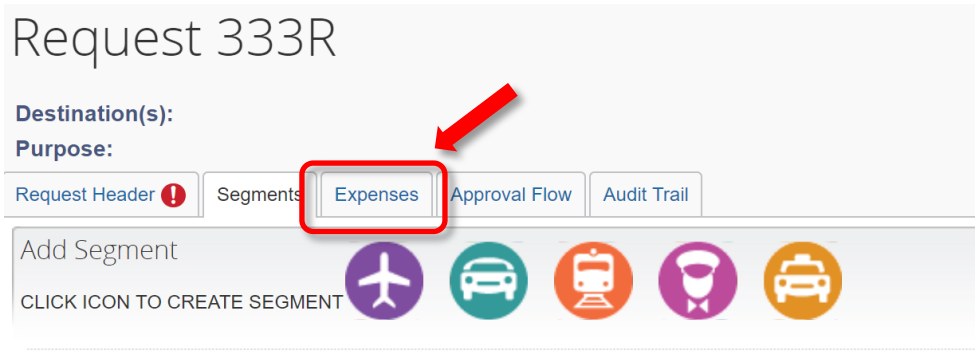


5. The Segments tab is where you will enter all estimated transportation details for your trip.

Note: Be sure to include all anticipated transportation. Each segment type added must include an estimated cost amount.



6. When you are finished adding all of the anticipated Segments, **click** on the *Expenses* tab to add other estimated travel expenses.



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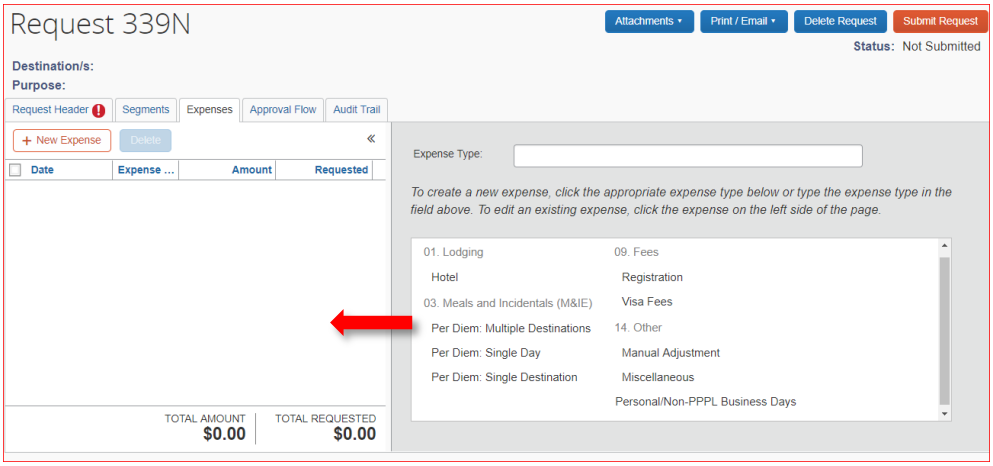
7. Once the Expenses tab is selected, you will see the page divided in two.

Note: On the right side you will see a list of available expenses to select from. The left side will populate with each expense you enter and save to the request .



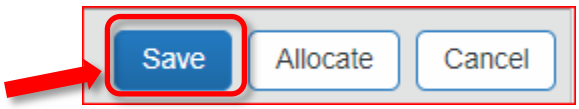
8. Click on any of the expense types listed on the right hand side.

Note: The expenses identified in the Travel Request are to provide an estimate of your trip, not an actual amount. Actual expenses will be compiled when filling out the Expense Report.

Note: For detailed information on each expense type, please refer to the Expense Type Breakdown Training Guide.

9. For each expense type selected, complete all required fields.

10. Once all the fields are filled out, **click** the *Save button* on the lower right hand side.



11. After clicking Save, the expenses will appear on the left half of the screen.

12. Continue adding all relevant expenses for the trip.

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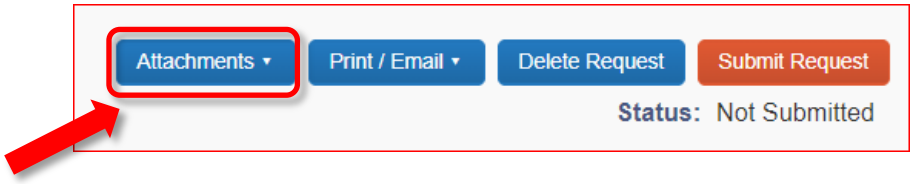
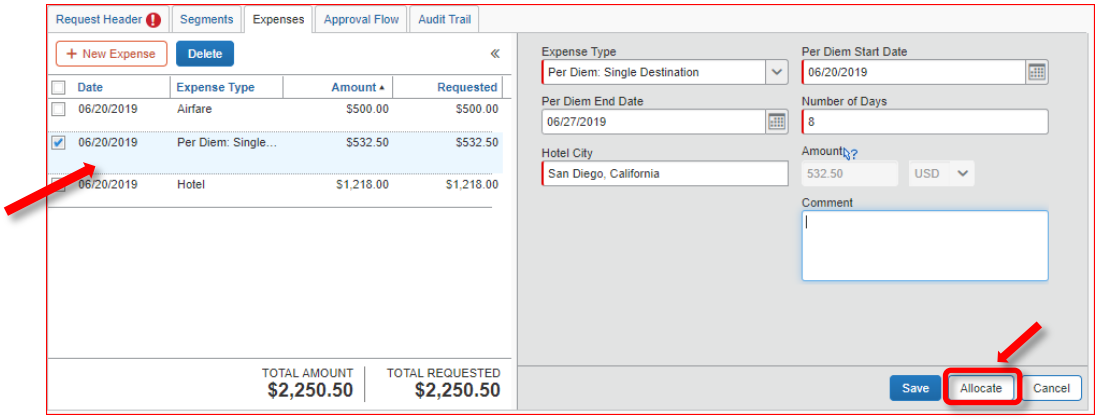
13. Once you have finished adding all estimated travel expenses, attach any relevant agendas / documentation for the trip by **clicking** *Attachments*.



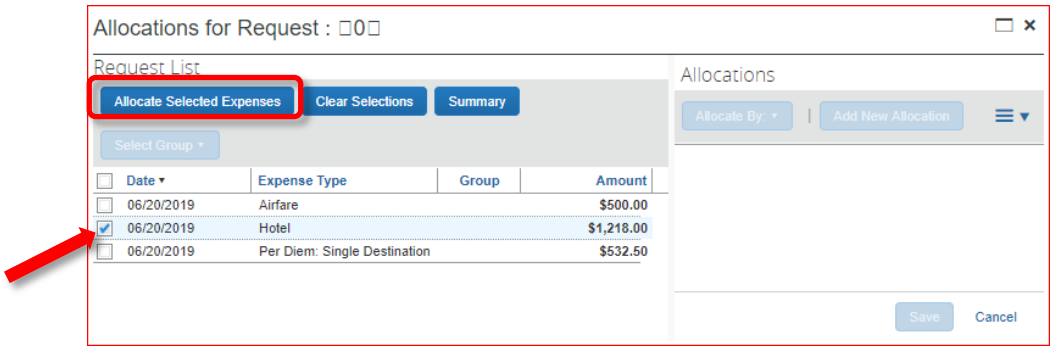
Note: Required attachments (based on trip type) include but not limited to: Conference / meeting agenda, FTMS form, visitors agreement, relocation letter, airfare cost comparison, registration forms, etc.

14. If your trip is being supported by multiple cost centers, **select** an expense that has been added to the Request (on the left half side) and **click** the *Allocate* button.

If your trip is supported by only one cost center – skip to step 17.



15. A popup screen for Allocations for Request will appear. **Select** the expense types that need to be allocated. Then **click** the *Allocate Selected Expenses* button.



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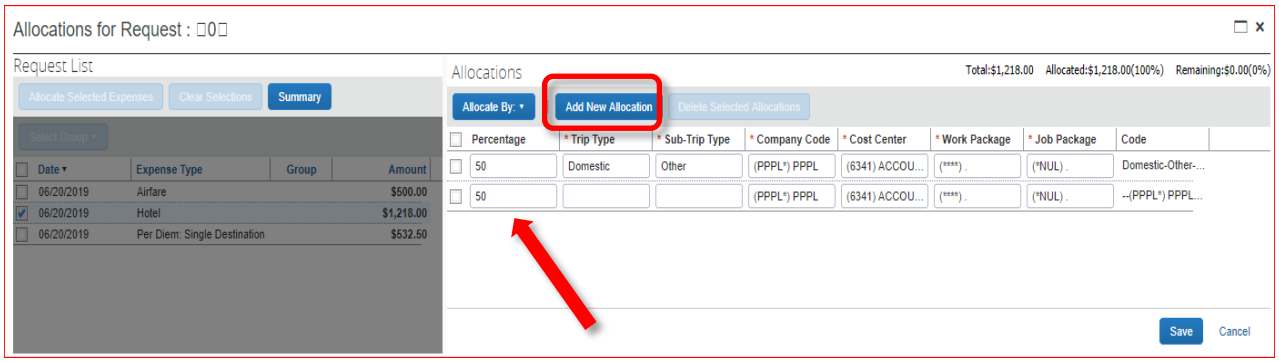
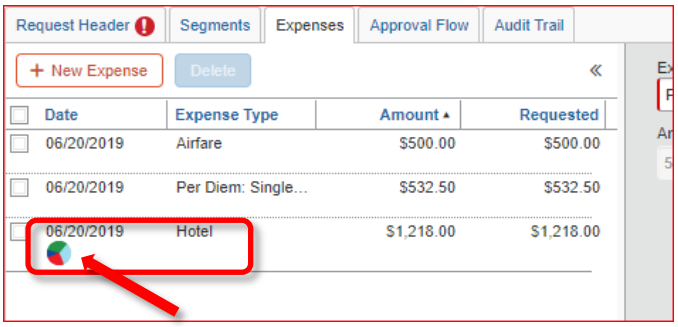
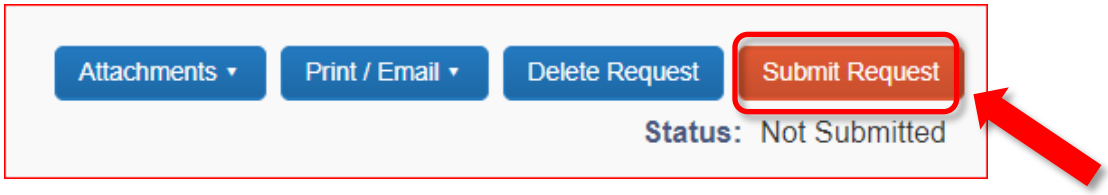
16. The cost center that was entered on the Request Header will appear with 100% allocation. **Click** on *Add New Allocation* to add a new cost center, and adjust the appropriate percentage of the allocations.



17. Once you have made all appropriate allocations, **click** *Save*. You will now see an indicator on the expense(s) that are being supported by multiple cost centers.



18. Review all added expenses for the trip request, and click Submit Request when you are ready to submit for approval.



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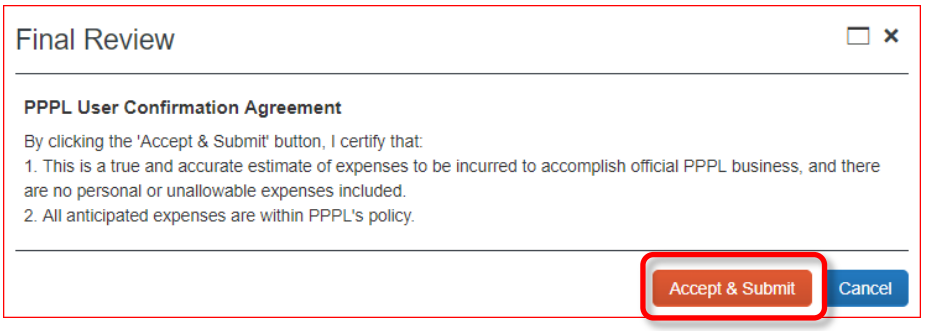
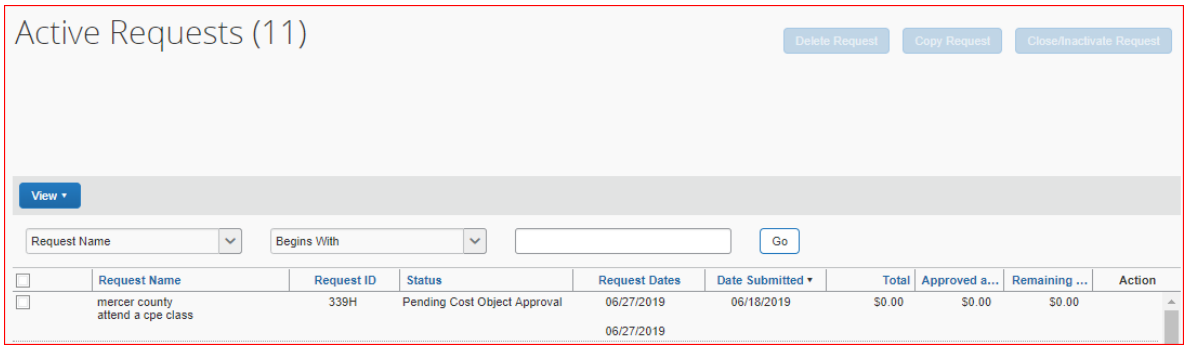
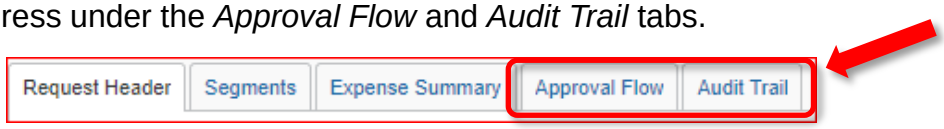
19. Read the popup containing PPPL User Confirmation and then **click** *Accept & Submit* to certify.



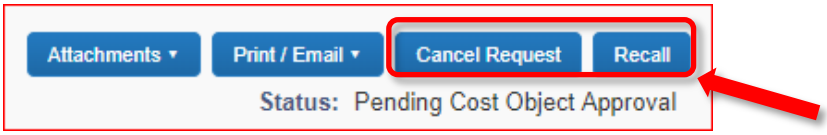
20. Your request will now be visible in the *Active Request* page.



21. By clicking on your request, you can review your request as well as check on the approval progress under the *Approval Flow* and *Audit Trail* tabs.



22. You can also cancel or recall your request by clicking the appropriate buttons in the upper right hand corner.



Note: Recalling your request is useful if you need to make changes to the request. Cancelling your request will remove your request fully from the system, and you will need to create a brand new request if you wish to resubmit your request. Note that doing either action will cause your approval process to reset.