

# Travel Requests for External Visitors

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## CONTENTS

Tasks to complete before starting to input as a proxy for an external visitor .....	1
Entering Your Personnel Information .....	2
Entering Travel Requests as a proxy for an External Visitor .....	4
Viewing where travel request's are in workflow .....	6



## **TASKS TO COMPLETE BEFORE STARTING TO INPUT AS A PROXY FOR AN EXTERNAL VISITOR**

To enter Travel requests & Expenses claims as a proxy for an external visitor to the University you will need to ensure the following before you start;

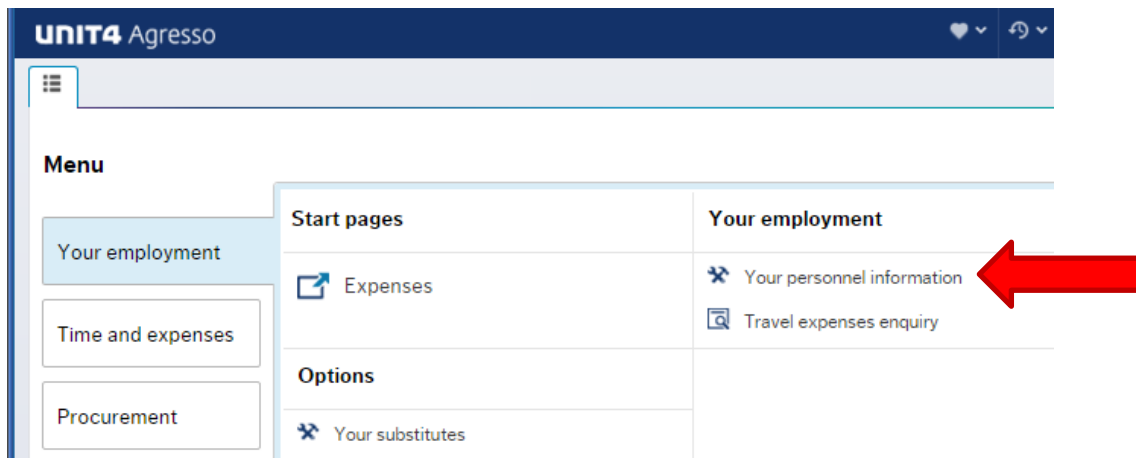
Ensure you have completed the following;

- ☞ Ensure you have entered your email address into your personnel details so that you will get reminders and notification of tasks.
- ☞ Enter your 'line manager' as your proxy(s) line manager rather than your own. This is for their travel approvals.

Details of how to enter information into personnel is detailed in the next section

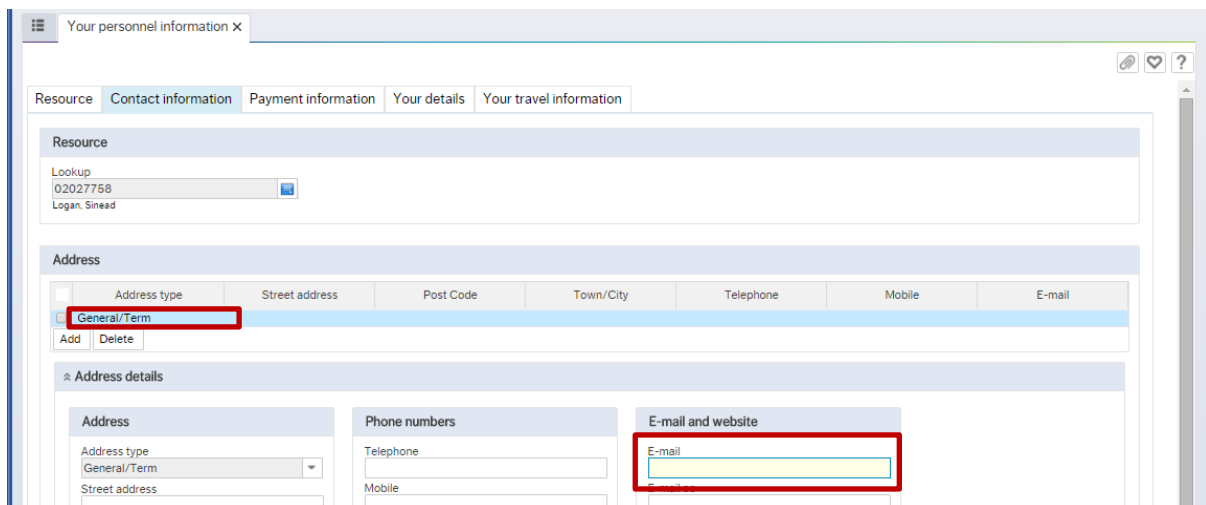
## Entering Your Personnel Information

The menu can be found on the main 'Your Employment' page



### Contact information

To enter your email address go to the contact tab – click on 'General / Term' to open up the address field below and enter email address in the e-mail field. Please note this should always be your email address, if you are a proxy for another user, still enter your email address. Your proxy should enter their email when logging onto their account.



### Payment information

You do not need to enter anything here unless you claim expenses for yourself; as the external visitor will not be able to claim expenses through the system. If they need to process an expenses claim please contact your finance officer.

### **Your details**

Select the line manager as your proxy's line manager. Your proxy will need to do the same on their login.

The screenshot shows a web interface for 'Your personnel information'. At the top, there is a breadcrumb 'Your personnel information x'. Below it are five tabs: 'Resource', 'Contact information', 'Payment information', 'Your details', and 'Your travel information'. The 'Your details' tab is selected. Under this tab, there are two main sections. The first is 'Line manager', which contains a dropdown menu with the text 'Line manager' and 'Marshall, Helen' below it. The second section is 'Privately owned vehicle', which includes a 'Mileage value note' with the text 'Mileage entered below must be a one way journey of home to work', a 'MILEAGE' label, and a text input field for 'Mileage (home-office)' containing the value '0.00'. Below that is a 'Car registration' label and an empty text input field.

You do not need to enter anything in the privately owned vehicle section unless you are going to claim mileage expenses for yourself.

### **Your travel information**

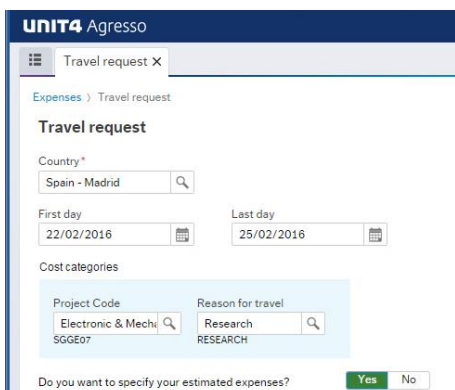
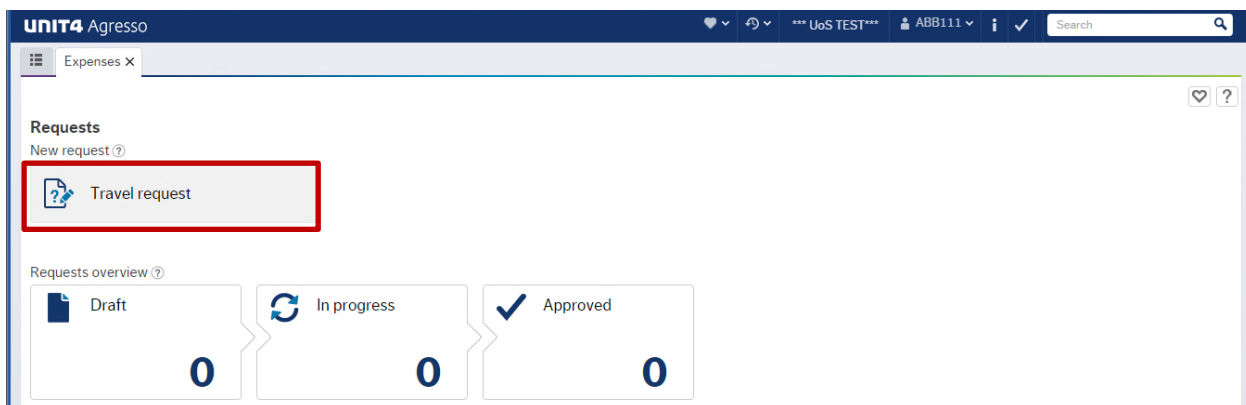
You do not need to enter anything in this section unless you will be travelling yourself.

## ENTERING TRAVEL REQUESTS AS A PROXY FOR AN EXTERNAL VISITOR

### Entering/Making a Travel Request –

This is the same process as completing a request for yourself, however the additional information box needs to be completed differently.

1. From the **Your employment tab** click on **Expenses**.
2. Click on the **Travel request button**.



3. In the Travel request screen you will need to complete the following fields first:

**Country Type** in the country you wish to visit and select the most relevant option.

**First/Last Day** Select the start and end dates for your trip. The calendar to the right of the request details will display your trip period.

**Project Code** Enter the budget (Project) code for your. (if you are unsure of this please contact someone within your school/department or your

finance officer.

**Reason for Travel** Select a reason for your trip from the drop down list.

4. The next section of the request is in relation to cost.
  - a. When completing this section please enter the estimated monetary value for each relevant expense.

BSR (Benchmark Standard Rate) refers to the HMRC benchmarked rate for general expenses based on the country/region however this only applies to staff members not external visitors therefore please leave this section as 0.


5. Add further useful information to the **Additional Information** field.

This is where you will need to state your request is for an external visitor as well as the details of the requirements that need to be confirmed for the external visitor. For example, External Examier – Dr John Smith, 14-15 Sep 1 night hotel near campus with breakfast. Trains from Bristol to arrive by 10am depart after 4pm.

6. Click **Send for approval** to send the request for approval. (The request will be sent to your line manager, then the project approve, finance validation and into the travel office.
7. Once the travel office received the approved request they will look over the details and provide you with options for your external visitor based on the information provided. Once options have been finalised the travel office will confirm all the arrangements and send the inputter all the confirmations required for the external visitor.

## VIEWING WHERE TRAVEL REQUEST'S ARE IN WORKFLOW

### Checking where your travel request is up to in workflow

1. To check where your travel request is in the process, click on the **Time & Expenses tab**.
2. Select **Workflow enquiry – Travel requests**.
3. A list of the travel requests you currently have in progress will show. The **Process step** column will give you the details of which step it is currently at.
4. If you click on the map button  you can view the workflow map. Look for the yellow/orange outlined box for which step and who has the task currently.

