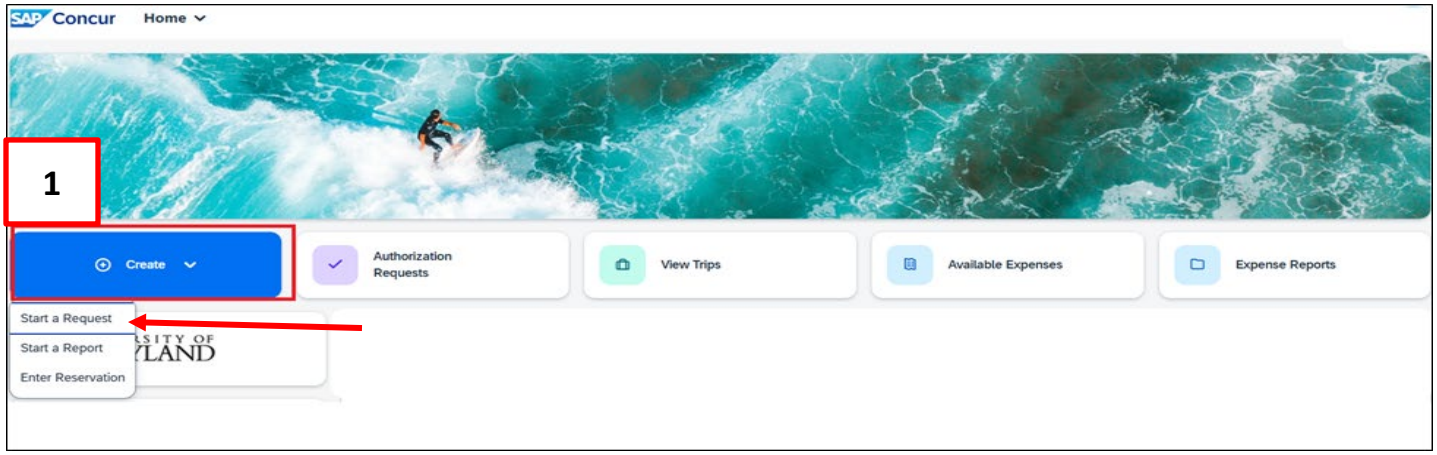
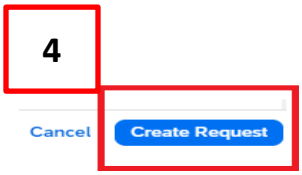
How employees can create a travel request

This aid is for Single Employees. Travel requests for Non-employees will be on another aid. Requests use estimated expenses. Actual costs will be added later when completing the expense report.

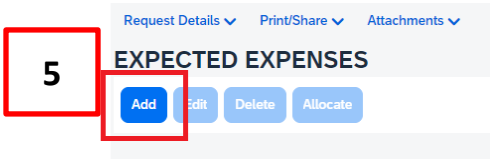


1. Click the **Create** button near the top of the page. This opens a dropdown.
2. Click the **Start a Request** selection.
    - Make sure the **Request Type** is correct
3. This action will open a panel. Complete these required fields:
    - **Trip Name/Purpose** - (Ex. ASSA Conf. April 2022)
    - **Business Travel Start Date**
    - **Business Travel End Date**
    - **Trip Purpose**
    - **Final Destination City**
    - **Final Destination Country** (auto fills when you choose City)
    - **Traveler Type**
    - **Trip Type**
    - **Will this trip include personal travel?**
    - **Personal Travel Dates** (if applicable)
    - **Detailed Business Purpose**
    - **UMD Campus Visit** - if travel is for a campus visit
    - **No Cost Trip**? (if applicable)
    - **Guest traveler name** (if applicable)
    - **Worktag number (previously KFS Account Number)** - Search function is defaulted to Text but it can be switched to Code to search by numerical digits

4. Click **Create Request** at the bottom right

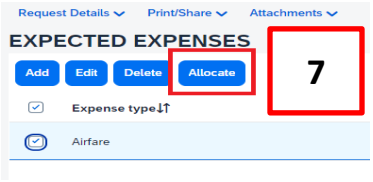


5. Under **Expected Expenses,** click **Add.**
   - **Expense Type list** - search for and select an expected expense for the trip (Ex. Airfare)
   - After you choose an expense:
     - **Amount** - Estimate cost for the expense
     - Click **Save**

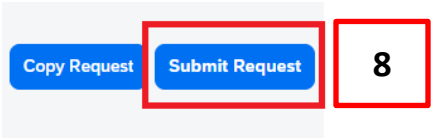


6. Repeat **Step 6** for each expected trip expense

7. Optional step - Use the **Allocate** button to split an expected expense to multiple Worktag Numbers



8. After adding all the expected expenses for this trip, click **Submit Request** in the upper right corner.



9. Review the confirmation/acceptance statement and click **Accept & Continue**
   - This request has now entered workflow for approvals