

6/8/2015

Session One
PREPARING FOR TRAVEL

New Coordinator Training

Introduction

- Create new Travel Authorization
- Reserve Travel Arrangements
- Completing Travel Authorization
- Complete Travel Arrangements

Travel Authorization Creation

- Getting Started
- JList Requirements
- Getting a Trip Number

JList Requirements

- Traveler must be active in JList
- Visitors are added when they register in JRIS.
- Employees are added by HR upon being hired.
- Inquires about Jlist?
 - Contact Sue Ewing (ext 7687)
 - Send email to iris@jlab.org

GETTING TRIP NUMBER

- Choose Traveler's Name
- Enter Purpose
- Enter Dates of Travel
- Enter destination
- Select a conference when purpose
- Enter estimated costs –
 - For domestic, single destination airfare; hotel or car go to <https://concursolutions.com>
 - All other domestic & all foreign, contact travel agent at jlab-travel@clazumano.com

Note: Reservations in concur should be placed on hold until the TA is released.

SUBMIT TA TO TRAVEL

- Complete TA and click SUBMIT
- Authorized Proj/Org approvers notified 'TA awaiting approval is in their queue'
- Once approved – TA sent to TS for review and release
- Once released– status changes to SUBMITTED
- You (as preparer) receive notification
- You can now commit funds and make travel arrangements.

MAKE TRAVEL ARRANGEMENTS

- Contact CI Azumano
 - Return to Concur (**concursolutions.com**) to
 - "Purchase" ticket on hold
 - Reserve a hotel (outside Newport News)
 - Reserve a rental car
- Email Veronica at jlab-travel@ciazumano.com

Summary

- Created a Travel Authorization
- Got a Trip Number
- Submitted TA for approvals
- Make Travel Arrangements

Where to Get More Information

- Second Training session
 - Expense Report Preparation
- Review Admin Manual
 - Links from travel webpage
- Ask other Travel Coordinators for help
- Call: Carol (x7519)
Sasi (x7437),