

New Coordinator Training

Session One

PREPARING FOR TRAVEL

Introduction

- Travel Authorization Creation
- Making Travel Arrangements
- Completing Travel Authorization

Travel Authorization Creation

- Getting Started
- JList Requirements
- Getting a Trip Number

JList Requirements

- Traveler must be in JList
 - Active with current dates on site
- To add traveler JList info.
 - Contact Sue Ewing at ext. 7687
- To change traveler info in JList
 - Send email to jris@jlab.org

GETTING TRIP NUMBER

- Choose Traveler's Name
- Enter Purpose
- Enter Dates of Travel
- Enter destination
- Trip Number will be issued
- Enter estimated costs –
 - For domestic, single destination airfare; hotel or car go to www.tripmanager.com/xe
 - All other domestic & all foreign, contact travel agent.

SUBMIT TA TO TRAVEL

- Complete TA and click SUBMIT
- Authorized Proj/Org approvers notified ‘TA awaiting approval is in their queue’
- Once approved – status changes to SUBMITTED
- You and Travels@jlab.org receives notification
- You can now commit funds and make travel arrangements.

MAKE TRAVEL ARRANGEMENTS

- Contact CI TRAVEL
 - CITravel.com
 - Under Corporate – Create Travel Request
 - Trip Manager
 - www.tripmanager.com/xen
 - Call Lisa Gelhaar ext. 7269

Summary

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

Where to Get More Information

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