

OVERNIGHT TRAVEL REQUESTS - SKYWARD

For more information, go to the Travel link on the Purchasing Department’s website--
<https://purchasing.jordandistrict.org/> for [Travel Policy and FAQs](#) (which includes an informative travel preparation flow chart) and [Travel Request form and Skyward instructions](#).

Contents

Entering a Travel Request (Initiator)	2
Step 1: Select Employee.....	3
Step 2: General.....	3
Step 3: Notes.....	6
Step 4: Attachments.....	6
Step 5: Choose Next Task – Send Request to TRAVEL BUYER.....	7
Edit a Travel Request (Initiator, Approver, Travel Buyer)	8
View a Travel Request (Initiator, Traveler)	9
Travel Request Report (Initiator, Approver, Travel Buyer)	11
Approving a Travel Request (Approver)	13

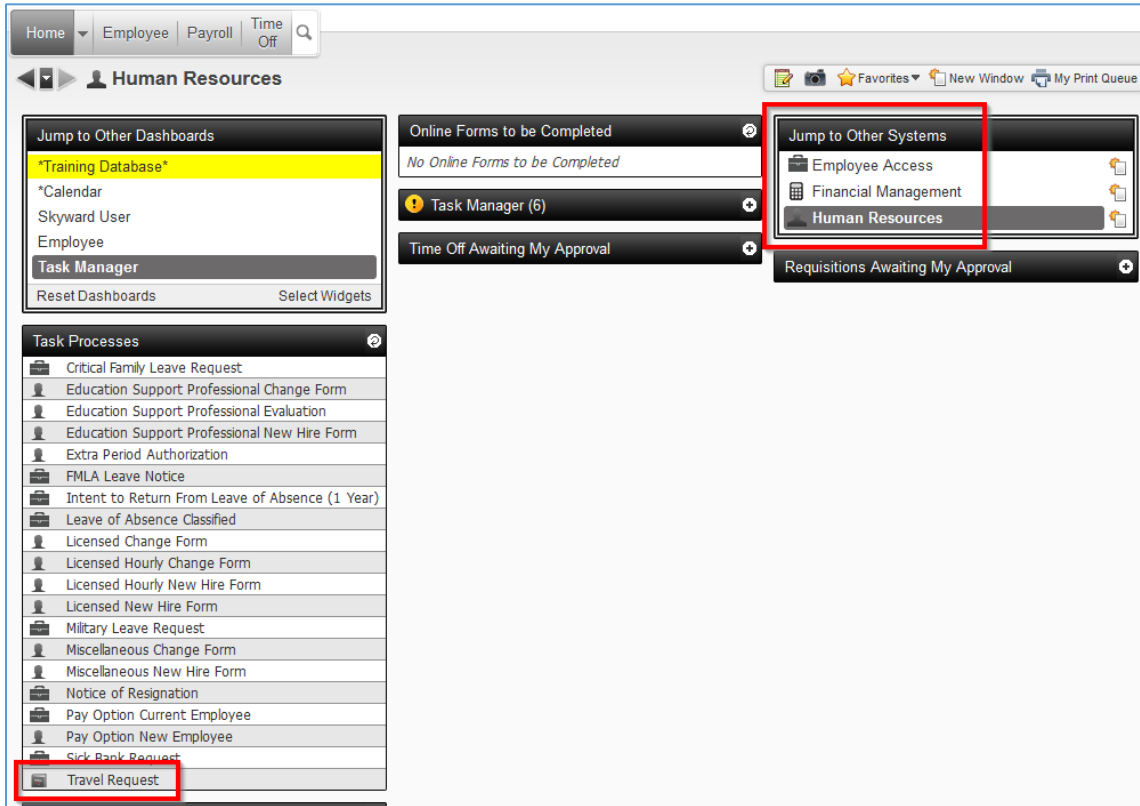
Terminology

Term	Definition
Initiator	The employee who enters a Travel Request in Skyward
Org Chart	An organization chart is setup in the system for approvals. When an initiator submits a travel request it is sent to the Travel Buyer in Purchasing Department. The Travel Buyer will then submit it for approval by the next person in the org chart (example: Initiator – Travel Buyer – Department Director/Principal – AOS – Superintendent/Business Administrator)
Travel Buyer	All travel requests are routed to the Travel Buyer, who is an employee in Purchasing Department. They enter travel cost estimates and submits the request to the 1 st approver. After all approval levels are complete, the Travel Buyer purchases the approved travel expenses.

ENTERING A TRAVEL REQUEST (INITIATOR)

Note: The department paying for the travel should be the department initiating the request process.

Log into Skyward Finance System. Select either **Employee Access** or **Human Resources** under 'Jump to Other Systems'. Select **Travel Request** under 'Task Processes'.



A step-by-step guide is provided at the top of each step. The instruction number corresponds to the process list on the right side.

Step 1: Select Employee

Enter the TRAVELER's Skyward **name key** in the **Employee** search field. Select the employee's name. Select **Next** to continue.

TM Process: Travel Request

1. Select Employee

On step 1, select the employee in the "Employee" field. On step 2, click the "Open" button and complete the Travel Request form and "Save". On step 3, add any notes you want the travel buyer or the approvers to see. On step 4, add any attachments. On step 5, click the "Travel Request Estimates" button.

Employee: CLOONEY, GEORGE

CLOONGE000 [CLOONEY, GEORGE]
Employee Type: Classified Contracted
Building: TEACHING AND LEARNING
Check Location: TEACHING AND LEARNING

Travel Request Entry

1. **Select Employee**
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 1 of 5

[Next](#)

Process History

[Save and Finish Later](#)

[Reassign Task](#)

Step 2: General

Select **Open** to begin entering the travel request form.

TM Process: Travel Request

Employee: CLOONEY, GEORGE

2. General

On step 1, select the employee in the "Employee" field. On step 2, click the "Open" button and complete the Travel Request form and "Save". On step 3, add any notes you want the travel buyer or the approvers to see. On step 4, add any attachments. On step 5, click the "Travel Request Estimates" button.

Custom Forms

Custom Profile	Travel Request	Travel Request	<input type="button" value="Open"/>
----------------	----------------	----------------	-------------------------------------

Travel Request Entry

1. Select Employee
2. **General**
3. Notes
4. Attachments
5. Choose Next Task

See example on next page. The information you enter must be current and correct. Fields with an asterisk (*) are required so have all your information before you begin entering a travel request.

Name on DL (Driver License): TRAVELER'S name exactly as shown on the TRAVELER'S driver license. TSA and airlines will not make exceptions for passengers whose airline ticket does not match their driver license.

Employee Phone: TRAVELER'S phone number that the airlines can call if flight has changes or cancellations.

Date Submitted: Current date.

Location: Department or school submitting the travel request.

Employee's Gender: Gender as shown on birth certificate.

Employee's Birth Date: Exactly as shown on driver license.

Conference Title: Be specific.

Conference Location: City and state.

Sponsoring Organization: Make sure the spelling is correct so TRAVEL BUYER can find it.

Others Attending: Name(s) of other attendee(s). Enter NA if traveling alone.

Conference Start Date: Accurate date so TRAVEL BUYER can schedule correct flights and hotels.

Conference End Date: Accurate date so TRAVEL BUYER can schedule correct flights and hotels.

Purpose: What TRAVELER will gain by attending the conference/convention, etc.

Benefit to JSD: How conference will contribute to Jordan School District.

Budget Director: Director or principal that will pay for the trip.

ACCOUNTING CODE (Fund, Loc, Program, Function, Object): Account out of which the trip will be paid. Do not guess the accounting code. Verify with the administrative assistant or director of the department/school.

Note: Not all grant money is allocated for travel.

- **Fund:** XX
- **Loc:** XX
- **Program:** XXXX
- **Function:** XXX
- **Object:** Always enter 583 for overnight travel.

Departure Date: Date TRAVELER needs to leave to attend the conference or event.

Departure Time: This defaults to midnight. If TRAVELER doesn't want to leave at midnight, PLEASE enter a requested departure time.

Return Date: Last day of conference or event.

Return Time: This defaults to midnight. If TRAVELER doesn't want to leave at midnight, PLEASE enter a requested return (leave) time. Enter a time so that travel arrangements do not conflict with the conference.

Frequent Flyer: Optional

Prepaid Expenses: Enter amounts if known and approximate amounts if unknown. Receipts are not required.

Postpaid Expenses: Receipts are required for all postpaid expenses, except per diem.

Comments: Information that the TRAVEL BUYER and Accounting Department should know, and/or information that will be needed for an audit. Comments will show on the travel request and on the Travel Request Report.

Examples of comments are:

- Registrations have been paid
- Need x amount of days at hotel
- Land trust funds being used so only air, hotel and conference may be included
- Travel dates differ from conference dates as [employee name] will be staying longer to attend post conference meetings

ACTUAL Expenses: Completed by TRAVEL BUYER.

If any information is missing or incorrect, the TRAVEL BUYER will return the request to the INITIATOR with a note requesting corrections. The process will be stopped until the requested changes are completed.

After all information is entered, select **Save**.

Travel Request

Name: **CLOONEY, GEORGE** Employee Type: **Classified Cont** Building Code: **049**

* Name on DL: Employee Phone: * Date Submitted:

* Location: Employee's Gender: Employee's Birth Date:

* Conference Title: * Conference Location:

* Sponsoring Organization: * Others Attending:

* Conference Start Date: * Conference End Date:

* Purpose: * Benefit to JSD:

Maximum characters: 100, Remaining characters: 86

* Budget Director: * Fund: * Loc: * Program: * Function: * Object:

* Departure Date: * Departure Time:

* Return Date: * Return Time: Frequent Flyer:

Prepaid Expenses

* Registration Amount:	<input type="text" value="\$250.00"/>	* Registration Other Amount:	<input type="text" value="\$189.00"/>	Registration:	<input type="text" value="\$439.00"/>
* Air Fare Amount:	<input type="text" value="\$320.00"/>	* Shuttle Amount:	<input type="text" value="\$24.00"/>	Travel:	<input type="text" value="\$344.00"/>
* Lodging # of Nights:	<input type="text" value="3"/>	* Lodging Nightly Rate:	<input type="text" value="\$169.00"/>	Lodging:	<input type="text" value="\$573.00"/>
* Lodging Nightly Tax/Fee:	<input type="text" value="\$22.00"/>			Prepaid Expense Total:	<input type="text" value="\$1,356.00"/>

Postpaid Expenses

* Travel Day # of Days:	<input type="text" value="2"/>	Travel Day Rate:	<input type="text" value="35.00"/>		
* Non-travel Day # of Days:	<input type="text" value="2"/>	Non-travel Day Rate:	<input type="text" value="53.00"/>	Per Diem:	<input type="text" value="\$176.00"/>
* Auto Mileage:	<input type="text" value="0"/>	Auto Mileage Rate:	<input type="text" value="0.5850"/>	Mileage:	<input type="text" value="\$0.00"/>
* Ground Transportation:	<input type="text" value="\$0.00"/>	* Baggage Fee:	<input type="text" value="\$50.00"/>		
* Auto Rental and Parking:	<input type="text" value="\$0.00"/>	* SLC Airport Parking:	<input type="text" value="\$40.00"/>		
* Auto Air Fare Equivalent:	<input type="text" value="\$0.00"/>	* Other Reimbursement:	<input type="text" value="\$0.00"/>	Other Expenses:	<input type="text" value="\$90.00"/>
				Postpaid Expense Total:	<input type="text" value="\$266.00"/>

Employee's Email:

Comments:

Maximum characters: 999, Remaining characters: 148

Total Travel Cost:

Actual Expenses Actual Registration: Actual Travel: Actual Lodging: Actual Expense Total:

Select **Next** to continue to the next step.

TM Process: Travel Request

Employee:

2. General

On step 1, select the employee in the "Employee" field. On step 2, click the "Open" button and complete the Travel Request form and "Save". On step 3, add any notes you want the travel buyer or the approvers to see. On step 4, add any attachments. On step 5, click the "Travel Request Estimates" button.

Custom Forms

Custom Profile	Travel Request	Travel Request	<input type="button" value="Open"/>
----------------	----------------	----------------	-------------------------------------

Travel Request Entry

- Select Employee
- General
- Notes
- Attachments
- Choose Next Task

Step 2 of 5

Process History

Step 3: Notes

Select **Add**. Notes should include instructions specific to the TRAVEL BUYER, i.e., hotel preference, flight preferences (i.e., seating), or airline times or preferences. Notes do not appear on the Travel Request Report. **Save** the note, then select **Next** to continue.

TM Process: Travel Request
Employee: CLOONGEO000 CLOONEY, GEORGE

3. Notes

There are no records to display; check your filter settings.

Task
Information
Process Description: Travel Request
Task Summary: Travel Request Entry
Task Instructions: On step 1, select the employee in the "Employee" field. On step 2, click the "Open" button and complete the Travel Request form and "Save". On step 3, add any notes you want the travel buyer or the approvers to see. On step 4, add any attachments. On step 5, click the "Travel Request Estimates" button.

Notes
* Your Notes: George prefers an isle seat.
Previous Notes:

0 records displayed

Travel Request Entry

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 3 of 5

Previous Next

Process History

Save and Finish Later
Reassign Task

Step 4: Attachments

Select **Add** to attach any documentation that the TRAVEL BUYER will need, i.e., conference flyer, specific hotels the conference is using. Save the attachment, then select **Next** to continue.

TM Process: Travel Request
Employee: CLOONGEO000 CLOONEY, GEORGE

4. Attachments

Description	Step	Inputted File	Date Modified
There are no records to display; check your filter settings.			

Attachments
* File Name: Browse... Ocean's Eleven Conference.pdf
* Description: Ocean's Eleven Conference

0 records displayed

Travel Request Entry

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 4 of 5

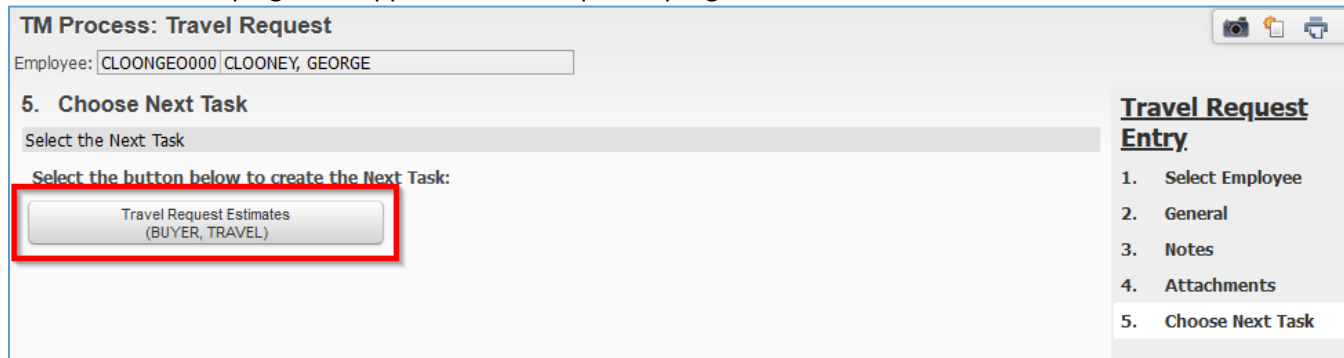
Previous Next

Process History

Save and Finish Later
Reassign Task

Step 5: Choose Next Task – Send Request to TRAVEL BUYER

Once you have completed steps 1-4, select **Travel Request Estimates** to send your request to the TRAVEL BUYER (Stephanie Nicholson) in the Purchasing Department. Emails will be sent to the INITIATOR, the TRAVELER and TRAVEL BUYER keeping them apprised of the request's progress.



TM Process: Travel Request

Employee: CLOONGE0000 CLOONEY, GEORGE

5. Choose Next Task

Select the Next Task

Select the button below to create the Next Task:

Travel Request Estimates
(BUYER, TRAVEL)

Travel Request Entry

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

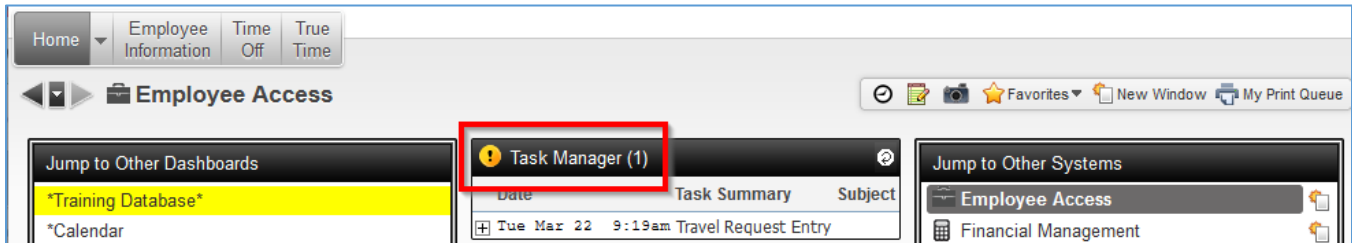
The TRAVEL BUYER may return the request because they have questions or want corrections made. An email will be sent to the INITIATOR and TRAVELER. To edit a travel request see 'Edit a Travel Request' below.

If the TRAVEL BUYER has no questions or corrections, then they will submit the request for approval (see section titled 'Approving a Travel Request'). Emails will be sent to the INITIATOR, the TRAVELER and TRAVEL BUYER keeping them apprised of the request's progress. The approval process is based on an organization chart in the system.

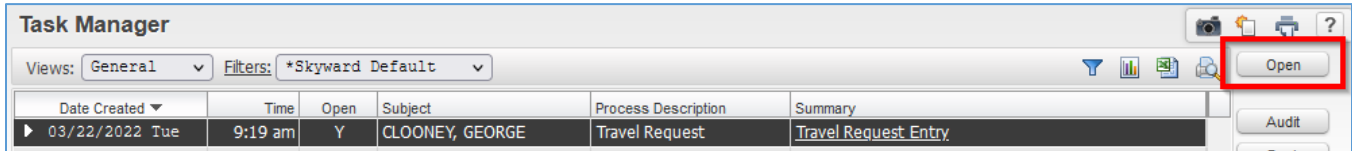
Once all of the approvals are completed (see section titled 'Approving a Travel Request'), the request will be sent to the TRAVEL BUYER for booking. Once the booking has taken place the TRAVEL BUYER will close the request and emails will be sent to the INITIATOR and TRAVELER.

EDIT A TRAVEL REQUEST (INITIATOR, APPROVER, TRAVEL BUYER)

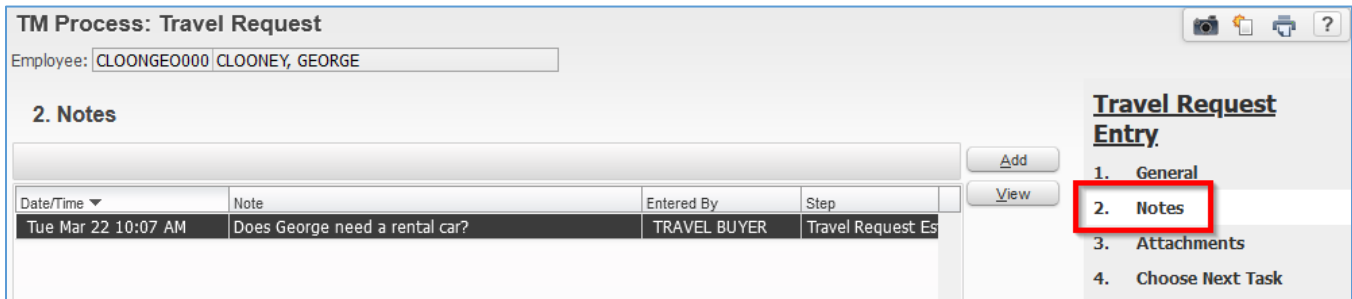
The TRAVEL BUYER may return a request to the INITIATOR because they have questions or want corrections made. An email will be sent to the INITIATOR, the TRAVELER and TRAVEL BUYER. To edit a request, select Task Manager.



Highlight the Travel Request and select Open.

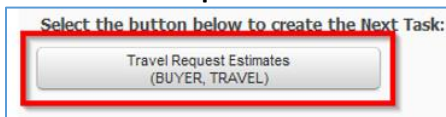


The TRAVEL BUYER's note can be viewed by selecting **2. Notes**.



A note may be added, or select **1. General** and **Open** to make changes to the request.

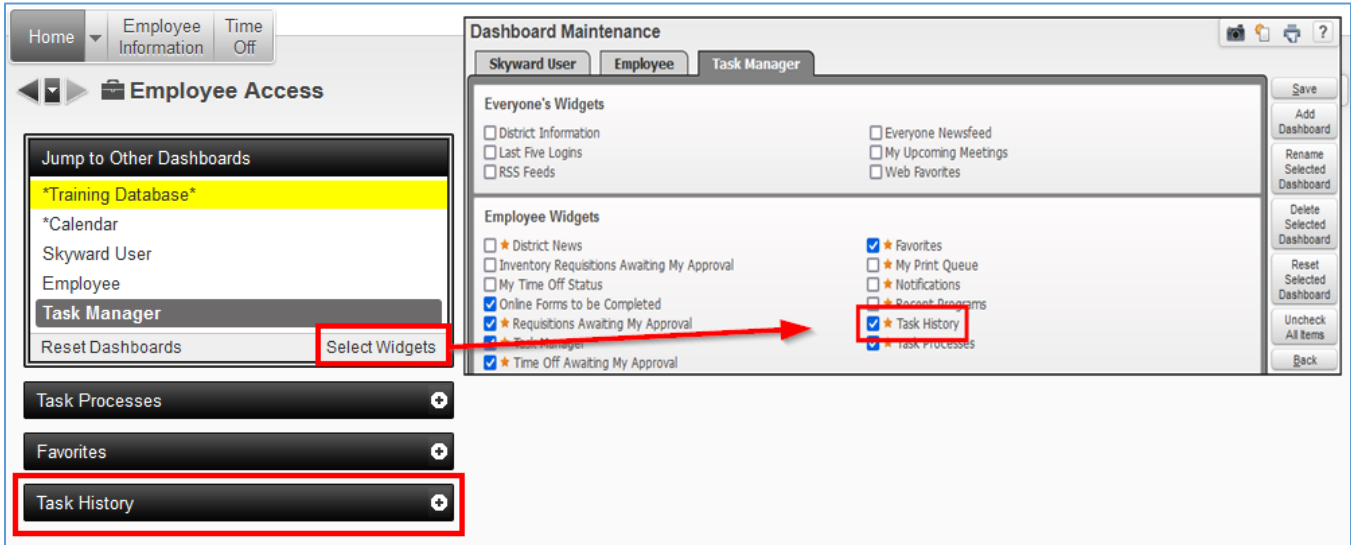
After changes are made and to return the request back to the TRAVEL BUYER, select **4. Choose Next Step**, then select **Travel Request Estimates**.



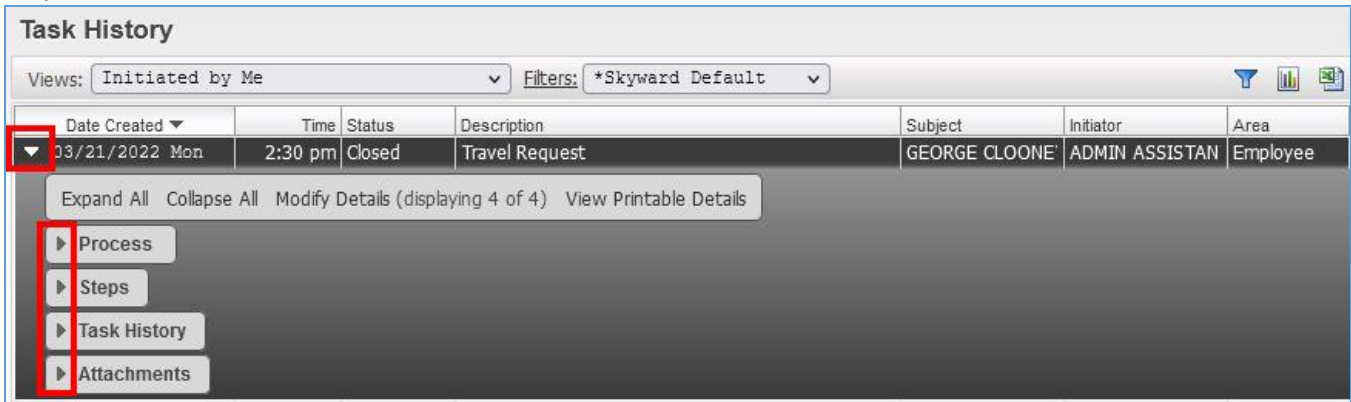
Once all of the approvals are completed, the request is sent back to the TRAVEL BUYER for booking. Once the booking has taken place the Travel Request will be closed and emails will be sent to the INITIATOR, the TRAVELER and TRAVEL BUYER.

VIEW A TRAVEL REQUEST (INITIATOR, TRAVELER)

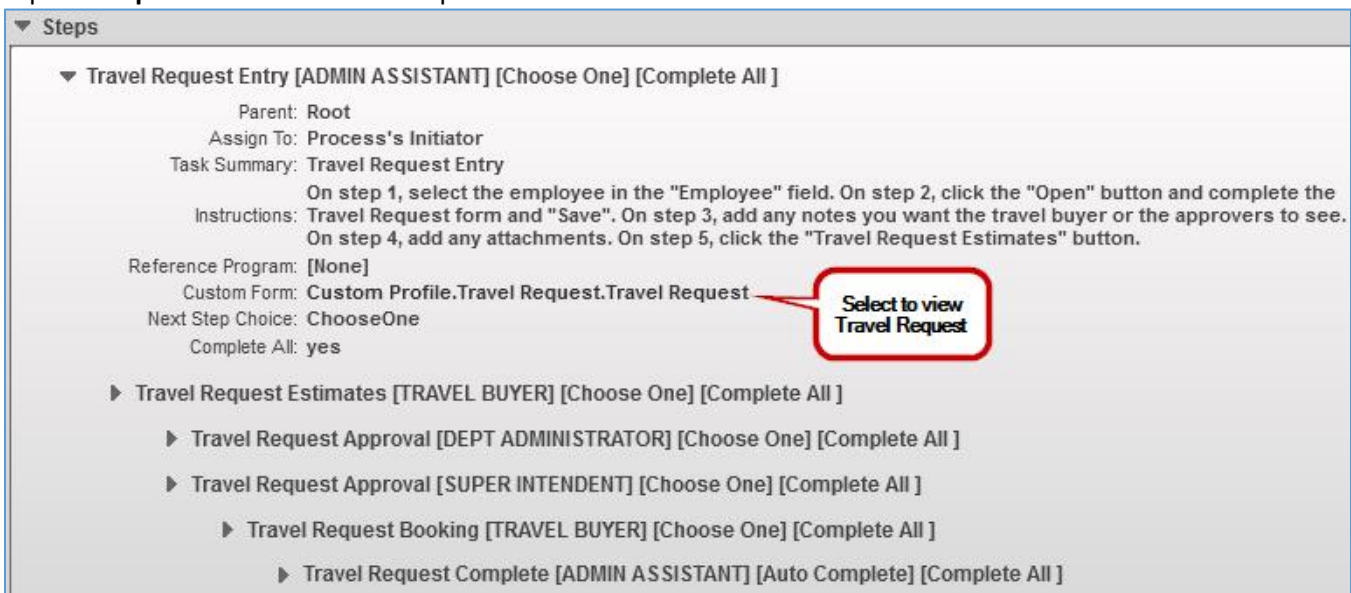
The INITIATOR and TRAVELER can view all of their travel requests by selecting Task History. If Task History is not an option on the Dashboard, it can be added by selecting **Select Widgets**.



Expand the request by clicking on the drop-down on the left. Expand All or expand each area by clicking on its drop-down arrow.



Expand **Steps** to view each of the steps.

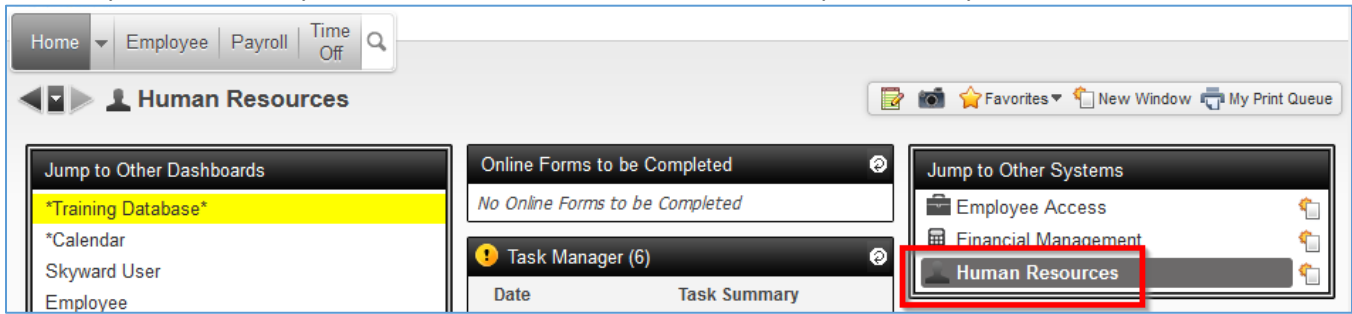


Expand **Task History** to view a history of the request.

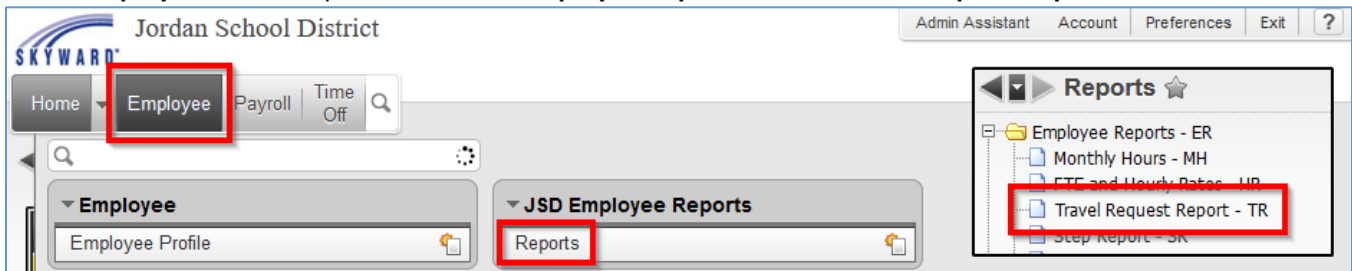
▼ Task History					
Date/Time	Task Summary	Status	Assignee	OC	Notes
03/22/22 2:10 pm	Travel Request Entry	Completed	ADMIN ASSISTANT		George prefers an isle seat.
03/22/22 2:10 pm	Travel Request Estimates	Completed	TRAVEL BUYER		
03/22/22 2:10 pm	Travel Request Approval	Completed	DEPT ADMINISTRATOR	Y	
03/22/22 2:15 pm	Travel Request Approval	Completed	SUPER INTENDENT	Y	
03/22/22 2:18 pm	Travel Request Booking	Completed	TRAVEL BUYER		
03/22/22 2:18 pm	Travel Request Complete	Auto Completed (Travel Request Complete)	ADMIN ASSISTANT		
Revision History:					
#3					
03/22/22 12:18 pm	Travel Request Estimates	Completed	TRAVEL BUYER		
03/22/22 12:20 pm	Travel Request Approval	Returned to a previous task	DEPT ADMINISTRATOR	Y	Update ... on Travel Request Entry.
03/22/22 12:20 pm	Travel Request Approval	Cancelled	SUPER INTENDENT	Y	
#2					
03/22/22 12:12 pm	Travel Request Approval	Returned to a previous task	DEPT ADMINISTRATOR	Y	What are the updated request estimates?
03/22/22 12:12 pm	Travel Request Approval	Cancelled	SUPER INTENDENT	Y	
#1					
03/22/22 11:26 am	Travel Request Estimates	Returned to a previous task	TRAVEL BUYER		Does George need a rental car?

TRAVEL REQUEST REPORT (INITIATOR, APPROVER, TRAVEL BUYER)

In the Skyward Finance System, select **Human Resources** under 'Jump to Other Systems'.



Select **Employee**. Select Reports under **JSD Employee Reports**. Select **Travel Request Report**.



Enter the TRAVELER's Skyward **name key** in the **Employee** search field. Enter the departure start and end dates that you want included on your report. Select **Print**.

The screenshot shows the 'Travel Request Report' form. The 'Employee' section has a search field with the value 'CLOONGE0000' and a dropdown menu showing 'CLOONEY, GEORGE'. Below this, the 'Departure Date Range' section has two date fields: 'Start Date: 08/12/2022' and 'End Date: 08/14/2022'. Both date fields have calendar icons next to them.

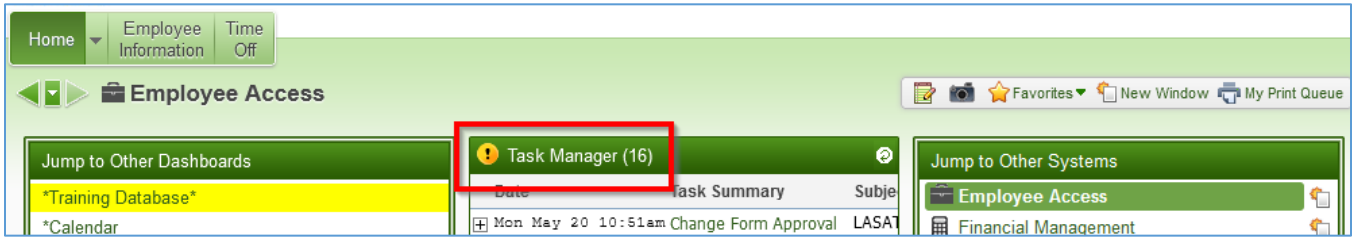
Below is an example of the **Travel Request Report**. The details of the request are displayed. 'Approval History' displays a historical record of the approval process. The **request is complete when the INITIATOR receives an email saying so. When an NPO or Check Request is submitted for other expenses accrued during travel, this report should be attached to the NPO or Check Request.**

trvlRequestRpt.p 01-4		Jordan School District		03/22/22	
05.20.02.00.01 *TrnDB*		Travel Request Report - Jordan School District			
Name on DL: George Clooney		Date Submitted: 06/09/22			
Location: Accounting Department		Employee's Gender: F			
Conference Title: Ocean's Eleven		Conference Location: Las Vegas, Nevada			
Sponsoring Organization: Bellagio		Others Attending: Brad Pitt, Julia Roberts, Matt Damon +7			
Conference Start Date: 08/12/2022		Conference End Date: 08/14/2022			
Budget Director: Carl Reiner		Account Number: 10 E 555 5555 5555 555			
Departure Date/Time: 08/11/2022 08:00 AM		Frequent Flyer:			
Return Date/Time: 08/14/2022 05:00 PM		Benefit to JSD: Financial Windfall			
Purpose: Financial Gain					
Comments: Information for auditing purposes only. This information will appear on the Travel Request Report					
Expenses					
				<u>Estimated</u>	<u>Actual</u>
Prepaid Expenses	Registration Amount: \$250.00	Registration Other Amount: \$189.00	Registration:	\$439.00	\$0.00
	Air Fare Amount: \$320.00	Shuttle Amount: \$24.00	Travel:	\$344.00	\$0.00
	Lodging # of Nights: 3	Lodging Nightly Rate: \$169.00	Lodging:	\$573.00	\$0.00
		Lodging Nightly Tax/Pee: \$22.00	Prepaid Total:	\$1,356.00	\$0.00
Postpaid Expenses	Travel Day # of Days: 2	Travel Day Rate: \$31.00	Per Diem:	\$156.00	
	Non-travel Day # of Days: 2	Non-travel Day Rate: \$47.00	Mileage:	\$0.00	
	Auto Mileage: 0	Auto Mileage Rate: \$0.5850	Other Expenses:	\$150.00	
	Ground Transportation: \$0.00	Baggage Fee: \$50.00	Postpaid Total:	\$306.00	
	Auto Rental and Parking: \$60.00	SLC Airport Parking: \$40.00			
	Auto Air Fare Equivalent: \$0.00	Other Reimbursement: \$0.00			
				Total Travel Cost:	\$1,662.00
Approval History					
<u>Date/Time</u>	<u>Task Step</u>	<u>Status</u>	<u>Approver</u>	<u>Notes</u>	
03/22/22 2:10 pm	Travel Request Entry	Completed	ADMIN ASSISTANT	George prefers an isle seat.	
03/22/22 2:10 pm	Travel Request Estimates	Completed	TRAVEL BUYER		
03/22/22 2:10 pm	Travel Request Approval	Completed	DEPT ADMINISTRATOR		
03/22/22 2:15 pm	Travel Request Approval	Completed	SUPER INTENDENT		
03/22/22 2:18 pm	Travel Request Booking	Completed	TRAVEL BUYER		

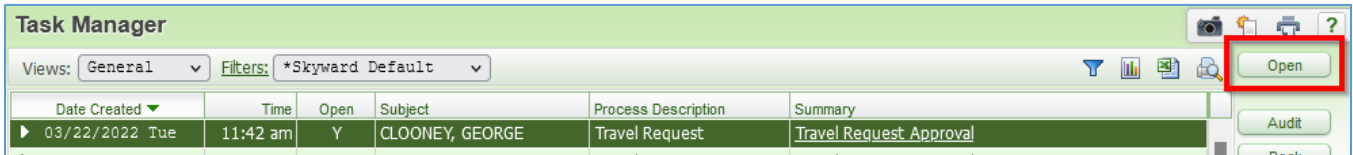
APPROVING A TRAVEL REQUEST (APPROVER)

Log into Skyward Finance System. Select either **Employee Access** under 'Jump to Other Systems'.

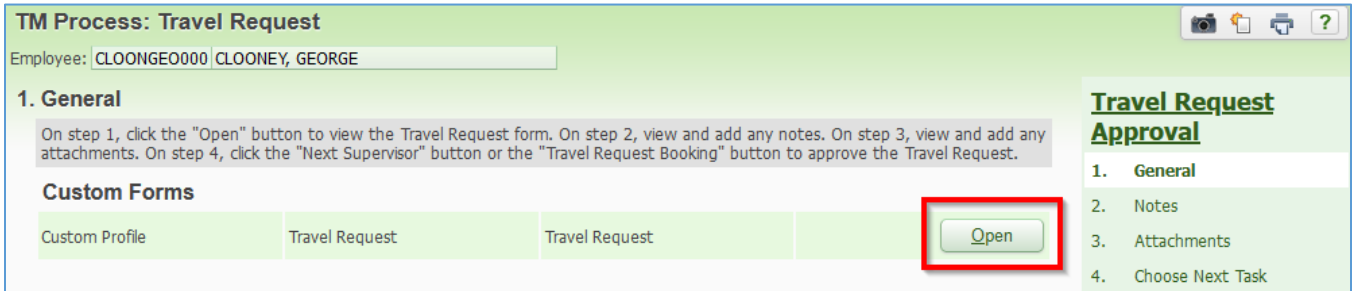
The APPROVER selects **Task Manager**.



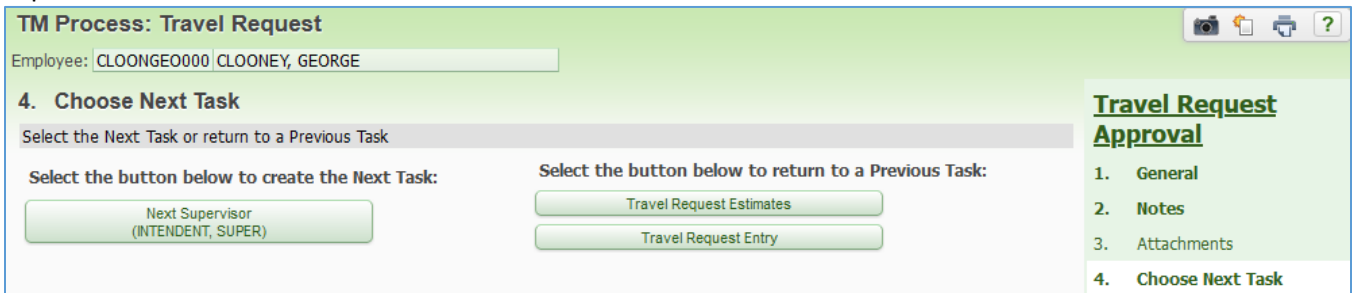
Select the request and select **Open**.



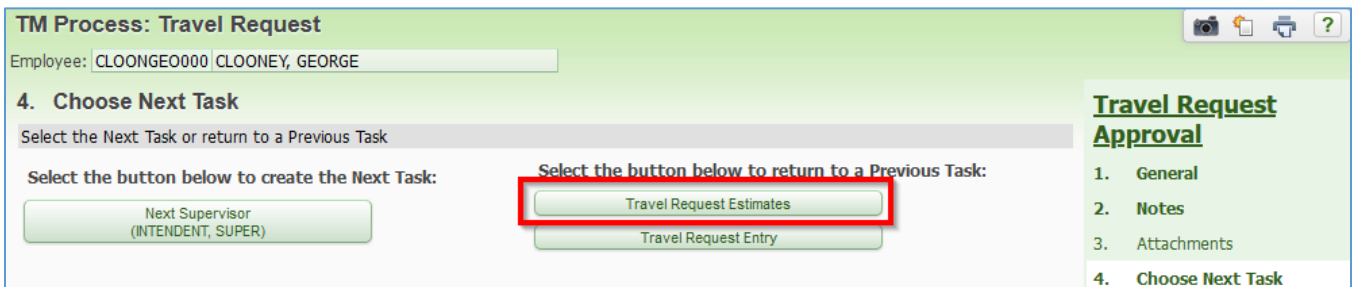
Select **Open** to view and make any necessary changes to the request.



At **4. Choose Next Task** the Approver has 3 options: Travel Request Estimates, Travel Request Entry and Next Supervisor.



Option 1: Selecting **Travel Request Estimates** requires a note (2. Notes) and will send the request back to the TRAVEL BUYER.



Option 2: Selecting **Travel Request Entry** requires a note (2.Notes) and will send the request back to the INITIATOR.

The screenshot shows a web interface titled "TM Process: Travel Request" for employee "CLOONGE0000 | CLOONEY, GEORGE". The main heading is "4. Choose Next Task" with the instruction "Select the Next Task or return to a Previous Task". There are two columns of buttons. The left column is labeled "Select the button below to create the Next Task:" and contains a button "Next Supervisor (INTENDENT, SUPER)". The right column is labeled "Select the button below to return to a Previous Task:" and contains two buttons: "Travel Request Estimates" and "Travel Request Entry". The "Travel Request Entry" button is highlighted with a red rectangular box. On the right side, there is a sidebar titled "Travel Request Approval" with a list: 1. General, 2. Notes, 3. Attachments, 4. Choose Next Task.

Option 3: Selecting **Next Supervisor** will approve the request and forward it to the next APPROVER or FINAL APPROVER.

This screenshot is identical to the one above, showing the "4. Choose Next Task" step. In this instance, the "Next Supervisor (INTENDENT, SUPER)" button in the left column is highlighted with a red rectangular box. The "Travel Request Entry" button in the right column is no longer highlighted.

The FINAL APPROVER also has 3 options. See above for Travel Request Estimates or Travel Request Entry. Selecting **Travel Request Booking** will approve the request and forward it to the TRAVEL BUYER.

This screenshot shows the "4. Choose Next Task" step with a purple background. The "Travel Request Booking (BUYER, TRAVEL)" button in the left column is highlighted with a red rectangular box. The "Travel Request Estimates" and "Travel Request Entry" buttons in the right column are visible but not highlighted. The sidebar on the right is titled "Travel Request Approval" and lists: 1. General, 2. Notes, 3. Attachments, 4. Choose Next Task.

Once all of the approvals are completed, the request is sent back to the TRAVEL BUYER for booking. Once the booking has taken place the TRAVEL BUYER closes the request and emails will be sent to the INITIATOR, the TRAVELER and TRAVEL BUYER.