Delegate Training

Before the Trip

After the Trip

Before the Trip

1. Review Travel Website & Pre-Trip Items

Go to www.bsu.edu/travel to review the Ball State University Travel Policy, rates and breakouts, FAQs, conference registration procedures, Egencia information, and to access travel forms. Please review the applicable materials prior to entering travel information in the Banner Travel module.

Gather all pertinent information pertaining to your traveler’s trip (dates, destinations, etc.). Assign yourself as the delegate for your traveler in the Travel & Expense Module; go to the traveler’s profile and verify that the following fields are completed: remittance address, traveler’s e-mail, an approver, and the default funding.

2. Complete Travel Authorization

Complete the Travel Authorization ("TA") and click the 'Traveler Review' button - this sends the TA to the traveler for approval. An e-mail will be sent to the traveler from travelworkflow@bsu.edu indicating that the TA is pending the traveler’s approval. The traveler must then approve the TA, at which point the TA is automatically routed to the traveler’s "approver" as defined in Banner Travel. The approver can then forward the TA to additional approvers. To see the approval chain for your area, contact your administrative coordinator.

3. Approve and Add Approvers

To forward to additional approvers, mark the "Approve and Add Approver" radio button in the Travel Workflow e-mail you receive, and then enter the next approver’s e-mail address (EX: jdoe@bsu.edu) in the "Additional Approver’s Email Address" field. Press "Complete." If the trip is funded (in-part or in-total) by a grant, please forward to the appropriate Grant Specialist in Sponsored Projects Administration. If you are the last approver, enter travel@bsu.edu in the "Additional Approver’s Email Address" field and press "Complete."

Once the Authorization is approved, the traveler, or the traveler’s arranger (dependent on departmental policy), can then access Egencia to book the traveler’s air, hotel, car, or rail.

4. Check Status

You can check the status history of any travel document ("TA" for authorizations, "TR" for expense reports) by opening the document, clicking on "Status History," and clicking on "Workflow Approvals."
After the Trip

1. Gather receipts

Collect all original receipts from the traveler, and access the original Travel Authorization. From the approved TA, click 'Generate Expense Report.' Update the Travel Expense Report ("TR") with actual times/dates and expenses.

2. Complete Expense Report

Complete the TR and click the 'Traveler Review' button - this sends the TR to the traveler for approval. An e-mail will be sent to the traveler from travelworkflow@bsu.edu indicating that the TR is pending the traveler's approval. The traveler must then approve the TR, at which point the TR is automatically routed to the traveler’s "approver" as defined in Banner Travel. The approver can then forward the TR to additional approvers.

3. Approve and Add Approvers

To forward to additional approvers, mark the "Approve and Add Approver" radio button in the Travel Workflow e-mail you receive, and then enter the next approver's e-mail address (EX: jdoe@bsu.edu) in the "Additional Approver’s Email Address" field. Press "Complete." If the trip is funded (in-part or in-total) by a grant, please forward to the appropriate Grant Specialist in Sponsored Projects Administration. If you are the last approver, enter travel@bsu.edu in the "Additional Approver's Email Address" field and press "Complete." To see the approval chain for your area, contact your administrative coordinator.

4. Print Expense Report and Send to Travel

Once the TR has been completed, print the Expense Report by clicking "Print" and then "Detail Report" from the TR. Send this printed TR and the original receipts for that trip to Accounting Office-Travel. The Travel Department is the final approver on all TR’s, and once the TR is fully-approved, the traveler is reimbursed.

5. Check Status

You can check the status history of any travel document ("TA" for authorizations, "TR" for expense reports) by opening the document, clicking on "Status History," and clicking on "Workflow Approvals."