

Ordering Instructions

Statewide Contract – TRAVEL18

Ordering Requirements- N/A

Special Instructions- N/A

Approvals Required – Prior internal agency approval is required for all business-related travel.

Agency and/or Vendor Contact Information:

Elizabeth Perdue – Assistant Purchasing Director
WVSASP - Purchasing Division
304-356-2425
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National Travel
Jill Robinson
304-357-0830/800-262-4054
Email: Jillr@nationaltravel.com

See the **List of Buyer Assignments** located at the Purchasing Division website (Agency Resource Center) for the centralized buyer assigned to this contract.

Type of Delivery Order – None

How to submit the completed order to the Vendor

For Agencies using the wvOASIS E-Travel Management System:

1. Follow instruction on the attached Quick Reference Guide to login to MyApps and use the E-Travel Management Systems link to the online booking tool.

For Agencies **NOT** using the wvOASIS E-Travel Management System:

1. Email pcard_travel@wvsao.gov for instruction on accessing and creating a user ID in the open booking tool (\$7.00 fee) or
2. Call vendor (National Travel) at 304-357-0801 and ask to speak to a 'state' agent (\$28.00 fee).

POLITICAL SUBDIVISIONS: Contact vendor to confirm that contract pricing is available.



E-Travel Management System Quick Start Guide to the Expense Tool (ESS)

Login

- ✓ Login to **myApps V2** using your email and password credentials
- ✓ Select the **Employee Self Service (ESS)** icon
- ✓ Select **"My Info"** tab on the left
- ✓ Select **"My Travel"** tab from the top right

Create an Expense Report (TRER)

- ✓ Click on **Create New Expense Report** button.
- ✓ Complete/update the **General Information** tab (Trip Name, Purpose of Trip, Destination, Travel Start and End Date, and Travel Type)
- ✓ Complete/update the **Trip Details** tab (Transaction Date, Expense Type, Authorized Expenses, and Payment Method)
- ✓ For Per Diem related expenses (meals and lodging) add a trip detail line and refer to the **Complete the Per Diem Page** instructions.
- ✓ For Mileage related expenses add a trip detail line and refer to the **Complete the Mileage Page** instructions.
- ✓ **Save/Submit** Travel Expense Report Document

****NOTE:** All expenses paid by **P-Card** must have associated **Transaction ID Number** on the Trip Details.

****NOTE:** When creating a TRER with an approved TRAUTH, use the Create Expense Report Icon associated with the TRAUTH

Create a Travel Authorization (TRAUTH) (No Online Booking)

- ✓ Click on **Create Travel Authorization** button.
- ✓ Complete the **General Information** tab (Trip Name, Purpose of Trip, Destination(or Multi-Segment Trip), Travel Start Date, Travel End Date, and Travel Type)

- ✓ Complete the **Trip Details** page (Transaction Date, Expense Type, Authorized Expenses, and Payment Method)
- ✓ For Per Diem related expenses (meals and lodging) add a trip detail line and refer to the **Complete the Per Diem Page** instructions.
- ✓ For Mileage related expenses add a trip detail line and refer to the **Complete the Mileage Page** instructions.
- ✓ **Save/Submit** the Travel Authorization

****NOTE:** Request advances for Meals or Mileage, by entering an amount in the **Requested Advances** field.

Create a Travel Authorization (TRAUTH) (With Online Booking)

Select Itinerary

- ✓ Click on **Book a Trip** button to access booking tool.
- ✓ Follow the **How to Create and Book a Trip** instructions.

Complete Travel Authorization

- ✓ Click on **Modify** button for Draft TRAUTH created by the booking tool.
- ✓ Complete the **Trip Details** page (Transaction Date, Expense Type, Authorized Expenses, and Payment Method) and refer to **Create a Travel Authorization (no online booking) instructions**.
- ✓ **Save/Submit** the Travel Authorization.

****NOTE:** You must edit any **Lodging** expense by clicking the **Generate Per Diem Lines** icon and enter the room rate in the **Claimed Amount** field. After the room rate has been entered, you will have to click **Calculate Per Diem** and then **Back to Trip Details**.

Purchase Itinerary

- ✓ Follow instructions for Purchasing the Trip from the **Quick Start Guide to the Booking Tool**.

Upload Receipts

- ✓ Select the appropriate expense type on Trip Details.
- ✓ Click **Browse** button (Under the **Attach a Receipt** icon)

- ✓ Select the appropriate receipt from your desktop folders, ensuring it is legible.
- ✓ Click **Open** or **Double click**

****NOTE:** receipts can be any file type but must be smaller than 2MB. Legibility should be verified before submission.

Complete the Mileage Page

- ✓ Select the **Mileage** expense type from the grid on the **Trip Details** page
- ✓ Click the **Mileage** icon
- ✓ Enter the **Date** and **Start and End Location**
- ✓ Click **Calculate Mileage**

****NOTE:** Start and End Locations can be entered as City, ST or the Physical Address of a location for a more precise calculation.

****NOTE:** Round Trip indicator can only be used when no other mileage took place.

****NOTE:** If the **Mileage** distance field is more than the **Calculated Mileage** field an explanation must be provided.

Complete the Per Diem Page

- ✓ Select a Per Diem related Expense Type (Meals or Lodging)
- ✓ Click **Generate Per Diem Lines** icon
- ✓ Click **Calculate Per Diem**
- ✓ Click **Back to Trip Details**

****NOTE:** **Claimed Amount** must be entered for Actual Meals or Lodging expense Types.

Completing Documents by Proxy

Proxy in ESS

- ✓ Select **Employee Proxy** from drop down list before beginning. Proceed with all previous instructions.

Proxy in Booking Tool

- ✓ Click **Book a Trip** and navigate to booking tool.
- ✓ Scroll over **Traveler** field (top of page) and select desired user or click on user **Select Another User**
- ✓ Enter the search criteria for desired traveler.
- ✓ **Select** the desired traveler and Proceed with all previous instructions



E-Travel Management System
Quick Start Guide to the Booking Tool
Booking your Air, Hotel, and Rental Car

Login

- ✓ Go to the www.wvsao.gov screen and click **MyApps**.
- ✓ Select the **myApps V2** option and sign in using your email and password credentials
- ✓ Select the **Employee Self Service (ESS)** widget
- ✓ Select **"My Info"** tab
- ✓ Select **"My Travel"** activity folder
- ✓ Click on **Book a Trip** icon from the Book a Trip widget.

Update your Travel Preferences

- ✓ Click on **Book a Trip** icon - you will be taken to the booking tool.
- ✓ Click the **Travel Preferences** tab - your Air, Car, and Hotel Travel Preferences display.
- ✓ Update your default travel preference information if necessary.

How to Create and Book a Trip

- ✓ Click the **Book a Trip** button.
- ✓ Select **Round Trip, One Way or Multiple Cities**.
- ✓ Enter the airport codes or city names for your travel. Enter both the departure and destination information.
- ✓ Select the dates and time preferences for your travel.
- ✓ Click in the checkbox to include a car and/or hotel in this search. Note: Car and/or Hotel search criteria can be customized by un-checking the **Based on Air Search Criteria** box.
- ✓ Click on **Search By Price** or **Search By Schedule**.
- ✓ Select your Itinerary Preference: **Suggested Itinerary** or **Custom Built Itinerary**.
- ✓ Click **Search**.
- ✓ Select desired flight options and **Add to Cart**.
- ✓ Select Rental Car Company and **Add to Cart**.

- ✓ Click **Show Rates** under the desired hotel.
- ✓ Select Room rate type and **Add to Cart**.
- ✓ Review the provided itinerary.
- ✓ Enter the name of your trip in the left pane in the Trip Name Box.
- ✓ Click **Save Research**.
- ✓ Click the **Authorization Request** Button.
- ✓ You will receive a message that your Draft TRAUTH has been created in ESS. Close message
- ✓ Follow the instructions for **Creating a Travel Authorization (TRAUTH)**(With Online Booking)

Purchase the Trip

- ✓ When your trip is approved, you will be sent an email.
- ✓ Navigate to the **Approved Authorizations** tab in **ESS** and click the View button next to the TRAUTH. Click the **Purchase Trip** link within the document. - it will take you the associated itinerary in the booking tool.
- ✓ Click on the **Purchase** button and follow the onscreen instructions.

Modify Airfare Itinerary

****NOTE:** Airfare itineraries can only be modified up until they are ticketed. After ticketing, contact National Travel for necessary changes.

- ✓ From the **Book a Trip** widget, click the **Book a Trip** icon.
- ✓ Click the **Trip List** tab in the right pane.
- ✓ Click the **Modify** link next to the trip you wish to modify and make as necessary.

How to Cancel a Trip

Contact your agency Travel Administrator for your procedure when cancelling a trip.

Quick Reference

Air Information	Explanation
From	Enter the city or airport code for the departure.
To	Enter the city or airport code for the return. Type the first three characters of a City or Airport code. A list of corresponding locations will be displayed in a drop-down list. Only one location can be selected.
Departure date	Enter the departure date or click the calendar icon and select the date.
Return date	Enter the return date or click the calendar icon and select the date.
Time	Click the drop-down to select the departure/return time preferences.
Car Information	Explanation
Include car	Check this box if car needs to be included in this trip.
Match car to flights	Check this box if the car location/dates will be based on the air search criteria.
Pick-up Location	This will auto-populate with the arrival city from the air search. The user has the ability to change the city if necessary.
Pick-up date	Enter date the car needs to be picked up.
Drop-off date	Enter date the car will be dropped off.
Time	Click the drop-down and select the approximate time for pick-up/drop-off.
Hotel Information	Explanation
Include Hotel	Check this box if a hotel needs to be booked for this trip.
Find hotel within xx miles	Click on the number to display a drop-down that allows you to change the number of miles for the system to search for your hotel.
Search for hotel by	Airport/Custom Location – allows the user to search for the hotel by the airport they're flying into. Address – Allows the user to enter an address for the hotel needed.
Airport	This will enter the airport code from the air search. The code can be changed by the user.
Hotel Name	Enter the name of the hotel.
Check-In & Check-Out Date	Enter the dates you need to check into and out of the hotel.