

# Faculty / Staff Travel Procedure - Aug 2022

## 1. All SDC Faculty / Staff need to create a Global Travel - Traveler Profile

- a. Allows for easier travel coordination by SDC Admin: Traveler Profile includes this info for travel agent to book itinerary
  - i. Name as matches passport / driver's license
  - ii. Seat preferences assigned
  - iii. Mileage plan entered so miles applied to each itinerary
- b. Link to Global Travel - Traveler Profile  
[https://www.globaltrav.com/corporate/business\\_traveler\\_profile/](https://www.globaltrav.com/corporate/business_traveler_profile/)
- c. Email [sdc.admin@wsu.edu](mailto:sdc.admin@wsu.edu) when this has been completed; we will keep a list so that we can communicate appropriately with the Global travel agent when booking airfare

## 2. Approval for ALL Faculty / Staff Business Travel is required prior to Admin Staff purchasing Airfare or processing Conference Registration

- a. Approval is obtained by creating a Spend Authorization (SA) in Workday
  - i. SA is a pre-travel budget & requires all estimated expenses as a separate line item
    1. Airfare
    2. Conference Registration (If Applicable)
    3. Lodging
    4. Rental Car, Taxis etc. Listed as "Other Transportation"
    5. Per Diem Meals
- b. SA approval process routes automatically in Workday to SDC Admin, Director and Admin Manager for each approval level, so start this process early
- c. Link to SA Instructions:  
<https://confluence.esg.wsu.edu/display/WKB/Create+Spend+Authorization>
- d. Email Wes Underhill or Kate Barnes if you cannot get errors in system to go away, please include screenshots of error messages

## 3. Airfare - purchased on the SDC Central Travel Account, so there is no expense to the traveler

## 4. Conference Registration Fees - paid on SDC Admin Purchase Card, so there is no expense to the traveler

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## 5. Business Travel expense reimbursement

- a. Within 5 business days of returning from Business Travel, create an Expense Report (ER) in Workday
  - i. Receipts are required for all expenses other than per diem meals
- b. Link to ER Instructions:  
<https://confluence.esg.wsu.edu/display/WKB/Create+Expense+Report>
- c. Email Wes Underhill or Kate Barnes if you cannot get errors in system to go away, please include screenshots of error messages
- d. Travel reimbursement usually take two weeks from the time the ER has had the final SDC approval; these times can vary depending on the # of ERs in the WSU Travel Workday queue
  - i. If you have not received your reimbursement within two weeks of the ER being submitted, email [sdc.admin@wsu.edu](mailto:sdc.admin@wsu.edu) so we can research the issue

**Note: Please discuss student led trips with Admin Manager prior to creating a spend authorization, each trip will likely require a few adjustments to the process.**

**Tips: If you start a SA or ER and press “save for later” as you got stuck along the way; DO NOT create a new SA or ER... this causes multiple problems**

Search for the one you created by one of two methods

1. Write down SA or ER # when you press “save for later” and when ready to continue with process, type into search field, edit & continue (KB demo)
2. Use Find Spend Authorization or Find Expense Report search tool in Workday (KB demo)