



Travel Requests

Detailed information can be found on the Travel Website > Travel Training.

- 1) When entering more than one chartfield in addition to by percentage, can this also be divided by amount?**

When setting up the chartfield, it can only be divided by percentage on the Travel Request (TR); however, adjustments can be made by amount for each expense line when creating the Expense Report (ER).

- 2) Can the HR Supervisor see all expense details when approving?**

Yes, if all expense estimates have been entered prior to submitting to the supervisor, the supervisor can view the details before approving.

- 3) Will I need written approval from the Vice President (VP) to finalize my Travel Request (TR) if it has not been fully approved prior to the travel start date?**

Yes. Archivum Travel will automatically convert this to a Post Travel Authorization (PTA TR) Travel Request. The system will prompt the user to upload the additional signed approval from the area Vice President (VP) or VP designee.

- 4) If the Vice President (VP) requests edits to the reason/preventative action on the Post Travel Authorization (PTA), can the Travel Request (TR) be sent back?**

If changes need to be made to the reason and preventative action, then the TR will need to be deleted and recreated.

- 5) The Travel Request (TR) was sent back for a revision, but the submitter has not received the task. How should this be handled?**

The system may take up to one and a half minutes when a task is sent back to appear to the user. Please allow this time to receive the task. If it has been longer, please send an e-mail to travelhelp@usf.edu.

- 6) Do all Travel Requests (TR's) submitted in Archivum create an encumbrance in FAST?**

No. An encumbrance in FAST is only created for Traveler Paid expenses on the TR. The PCard charges are reconciled in the PCard module and posted directly to the ledger.

- 7) What happens if the dates and location on my Travel Request (TR) change?**

Any change to the scope of an approved trip, such as adding travel days or destinations, which incur additional cost, is a scope change, which requires authorization by canceling the original TR and submission and approval of a new TR. If a traveler changes the scope of a trip after the

travel start date, incurring additional cost, submittal of a Post Travel Authorization Travel Request (PTA TR) and a separate Expense Report (ER) is required for the incremental expenses.

- 8) I was informed a Travel Request (TR) or an Expense Report (ER) needed my approval; however, I did not receive any notification.**

Please check your Outlook junk folder as the notifications may have routed to your Outlook junk folder in Outlook. You may choose to mark e-mail notifications coming from Archivum as not junk. Once you work the task by clicking on the link in your e-mail, the notifications will be routed to your inbox.

- 9) Will the traveler receive an e-mail notification once the Travel Request (TR) is fully approved?**

Yes, the traveler will be notified by email.

- 10) I have an approved Travel Request (TR); however, the request is no longer required as the conference has been cancelled. How do I cancel the TR in Archivum?**

In Archivum Travel, access the TR from My Travel Dashboard. Click Travel Information, and search for the TR by using available search features. Click on More Info (magnifier) on the right side of the line associated with this TR. The Travel Details will appear below to reveal Cancel Travel Request.

▼ Travel Details

 [Cancel Travel Request](#)

- 11) Is there an option to print a Travel Request (TR)?**

No, there is no option to print a TR. This is not required to be included in the Expense Report (ER) receipt package.

- 12) Do I need a Travel Request (TR) for a virtual conference?**

A virtual conference generally does not require travel; therefore, a TR is not submitted. The virtual conference fee should be paid using a PCard and reconciled in the PCard module.

Travel Expense Reports

Detailed information can be found on the Travel Website > Travel Training.

13) How do I pull in PCard charges reconciled to the Travel Request (TR) into an Archivum Travel Expense Report (ER)?

PCard charges are associated with a TR using the Appian TR tab in the FAST PCard reconciliation module and entering the Archivum TR number next to the charge you want to associate. When you select the correct request, the PCard charges reconciled in PCard to this TR number will be automatically pulled into the ER.

14) How do I add PCard charges to the Expense Report (ER) after it has been submitted to Travel?

Contact the submitter or Travelhelp@usf.edu and request the ER be returned to the department. In the PCard reconciliation module, enter the Archivum Travel Request (TR) number to the charge via the Appian TR tab and click Refresh. There is no way to manually enter a PCard charge to an ER directly from Archivum Travel. You must go through the PCard module.

15) When will an Expense Report (ER) in Archivum not have a corresponding FAST ER number?

If the ER has only expenses with payment type PCard Payment, there will be no corresponding FAST ER since the PCard charges are reconciled in the PCard module and posted to the General Ledger. Only ER's with a reimbursement to the traveler will have a FAST ER number.

16) Why does the Expense Report (ER) require the last four digits of the credit card?

When credit card is selected for a traveler paid expense, the system prompts for the last four digits of the credit card number used in order to validate the expense was not paid using a USF PCard.

17) If I am creating an Expense Report (ER) for a non-employee, how can I verify their mailing address to confirm it is accurate?

If a non-employee record is selected to create an ER, the mailing address of the traveler will be displayed when selecting traveler profile. The department should verify the address is accurate. If the address is incorrect, submit a Travel Help Desk ticket **as soon as possible** to update the address on the traveler's profile.

18) The Expense Report (ER) coversheet was sent to the traveler via DocuSign; however, the traveler has not received it. What steps does the traveler need to take to sign the document?

The system may take up to 36 minutes for the DocuSign to route to the traveler. If the traveler has not received the e-mail, they should check their Outlook junk folder. If the traveler did not receive the e-mail and 36 minutes have passed since it was sent to them, the traveler can log in to DocuSign directly and then may direct the document back to the submitter.

19) When the traveler is only seeking reimbursement for meals, what should I upload as the receipt package?

If the traveler chooses to only be reimbursed for meals, please ensure their decision to waive reimbursement is documented in the Expense Report (ER). A documented statement from the traveler must be uploaded, which clearly indicates the traveler chose to only be reimbursed for meals. Additionally, documentation to support an overnight stay, such as lodging or airfare, must be included.

20) How do I save my work when creating an Expense Report (ER)?

The Save Draft button is located on the bottom right corner for all pages prior to the Travel Request (TR) or ER number being generated.

For all subsequent pages, the Save Draft button is located on the top left corner.

21) I have a traveler who paid for a personal item using their PCard. Can we reduce the reimbursement on the Expense Report (ER) by adding a negative line?

Negative lines cannot be added to make adjustments for expenses paid by PCard. The traveler will need to repay USF with a check or money order and should be deposited with the Cashier's Office. The FAST Deposit form is located on the UCO website > forms page. Direct link: <https://www.usf.edu/business-finance/controller/about/cashierforms.aspx>. The upper right hand section of the form (with the exception of deposit number) as well as the lower (non-accounts receivable payments) section should be filled in **completely**. The **complete chartfield string** of the original expense line on the ER, including the GL account, and **two signatures for preparer and reviewer must be provided**. A screen shot from Finance Mart showing the journal posting for the deposit should be included in the ER Receipt Package. You may email the Travel Help Desk (TravelHelp@usf.edu) for a complete copy of repayment instructions.

22) When I enter the start time and end time of the trip on the Expense Report (ER), does the system automatically calculate the meals for the first and last day of the trip?

No. The applicable meal allowance must be individually selected on the first and last days of the trip.

23) I am preparing an Expense Report (ER) paid from a project that requires a supervisor signature on the ER as per Office of Sponsored Research requirements. Can the supervisor sign using DocuSign?

Yes. Once the ER is routed to the supervisor for approval, if the supervisor signature is required, they will automatically be prompted to sign via DocuSign. Submitters should not send the ER Coversheets to the supervisors outside of the workflow.

24) When entering more than one chartfield in addition to by percentage, can this also be divided by amount?

When setting up the chartfield, it can only be divided by percentage on the Travel Request (TR); however, adjustments can be made by amount for each expense line when creating the Expense Report (ER).

25) What should I do if I need to add an additional expense after my Expense Report (ER) has been approved for payment?

In order to claim additional expenses to an approved ER, an addendum to the original ER must be submitted in Archivum Travel. The addendum is submitted as a Post Travel Authorization Travel Request (PTA TR). The original ER number must be referenced in the comments section.

26) How do I submit an addendum to an Expense Report (ER)?

To submit an addendum, create a Post Travel Authorization Travel Request (PTA TR). Include the reason for the addendum and reference the original ER number in the comments section. After the PTA TR is fully approved, you will be able to create an ER to process the expenses. Remember to mention this is an addendum in the comments section of the ER.

Note: Addendum PTA's do not require the VP signature and when prompted for the VP print and sign, the approved TR from the original submission may be uploaded.

27) I need to make a correction on the Expense Report (ER) and it is in the supervisor's tasks. How do I get this back?

Click on Withdraw Expense Report beside the red X, which is located under Expense Report Details or ask the Supervisor to decline approval, which will automatically return the ER to the submitter.

28) The Airline issued a voucher. When do I include this on the Expense Report (ER)?

An airfare voucher is held and submitted on an ER at the time it is used on future travel or when it expires. If the airfare voucher is used on future travel, a new Travel Request and ER are created. If the airfare voucher expires, an ER is created using the original TR. If the original TR has been used to process other expenses, a PTA TR and ER will need to be created to expense the expired airfare voucher.

29) What should I do if the Expense Report (ER) appears to be stuck in the system and does not have a task for the next approver?

Open a Travel Help Desk ticket and provide the ER number. Travel will determine if there is no task and coordinate with IT for a solution.

30) What do I do if an Expense Report (ER) is sitting too long in a person's task without an approval?

Contact the person listed in the task and ask them to approve or deny the ER so it will advance in the workflow.

31) The Expense Report (ER) Request History indicates the traveler has not signed the report. Can Travel send it again?

No. You will need to contact the traveler to find their notification email and proceed with signing the report or login directly to DocuSign to sign the report.

32) Does the \$175 maximum lodging expense paid with state funds for events organized or sponsored in full or part by USF apply to all business travelers for USF?

This applies to USF employees only.

33) Can mileage be submitted in coordination with the semester months?

No. Mileage may be submitted monthly or quarterly. (Q1 = Jan – Mar, Q2 = Apr – Jun, Q3 = Jul – Aug, Q4 = Oct – Dec)

34) How long do I have to submit an Expense Report (ER) for a terminated employee?

An ER must be received in the Travel Department within 30 days from the termination date or it will not be processed.

Travel Expense - PCard Charge Reconciliation

Detailed information can be found on the Travel Website > Travel Training or by visiting the Procurement Website > PCard.

35) Should PCard charges be reflected in the Expense Report (ER) if there is no traveler reimbursement due?

Yes, an ER must be submitted even if all expenses were on PCard. When charges are associated with the correct Archivum Travel Request (TR) number on the Appian TR tab in PCard, they will automatically flow into the ER.

36) Once a PCard charge is reconciled in the PCard module, can the Travel Request (TR) number be changed or removed?

Yes, the TR number can be changed by accessing **closed** charge(s) in the PCard module and removing the TR number AND the employee identification. You must first click "Save" on the reconcile statement page and then add the correct employee ID and TR number. For more details, please view the video on PCard reconciliation training for travel charges.

<https://www.usf.edu/business-finance/purchasing/staff-procedures/usf-pcard/pur-pcard-travel.aspx>

37) Can a PCard charge be split, when reconciling in PCard module to assign to different Travel Request (TR) numbers?

Yes, the option to split the charge is available when reconciling the charge in the PCard module.

38) Why can't I assign a Travel Request (TR) number to my charge for PCard DSO Reimbursement?

Charges for PCard DSO Reimbursement are reimbursed directly through the balance sheet by the DSO's and therefore are not included on the Archivum Expense Report (ER) or assigned an Appian TR number.

Rental Car

Detailed information can be found on the Travel Website > Rental Car Contract.

39) If the traveler has an accident when using a rental car, do I contact the Travel Department?

No. Follow the instructions provided on the rental car agreement.

40) When having trouble making a reservation, do I contact the Travel Department?

No. Questions or assistance with receipt corrections, vehicle availability, or Electronic/Central billing should be directed to the AVIS/Budget Service Contact: Raylene Clegg @ floridahelp@avisbudget.com or call 800-525-7521. Please copy the Contract Administrator, Cyd Metcalfe @ Cynthia.metcalfe@dms.fl.gov, on all communications with the Service Rep.

Archivum Travel Application

Detailed information can be found on the Travel Website > Archivum Travel or Travel Training.

41) Where can I find training on Archivum Travel?

Training video/instructional tutorials are posted on the Travel website. Follow this link <http://www.usf.edu/business-finance/controller/payment-services/archivum.aspx> to access the video tutorials and other available resources.

42) Who can I contact regarding Archivum Travel?

All questions and suggestions related to Archivum Travel can be directed to the Travel Helpdesk travelhelp@usf.edu

43) Does Archivum Travel support all browsers and operating systems?

Yes, Archivum Travel supports all browsers and operating systems. If you encounter any issues with using a particular browser, please contact IT Tech Support help@usf.edu

44) If an Alternate User Assignment is set up in FAST, will the transaction route to the alternate user in Archivum?

Yes, the transaction will route to the alternate user once the setup in FAST is completed.

45) If an approver set up an alternate user in the system; why are some transactions still showing a task for the approver?

If the alternate user was set up after the transaction was routed as a task for the approver, the transaction will need to be approved by the approver or reassigned to the alternate user. You will need to contact travelhelp@usf.edu if a reassignment is needed.

46) How do I delete my tasks listed as Create Expense Report or Create Travel Request and have no more information?

Archivum Travel saves the task as soon as you click on the action; however, if you did not click on the button Save as Draft on the bottom, right hand corner of the page no further information will be saved. To delete this task, you can simply click on it and click cancel.

47) I am the new supervisor; do I need to request access to Archivum or the FAST system to be able to approve travel transactions for the employees reporting to me?

No, if you are listed as the supervisor for the employee in GEMS, you do not need any further set up to be able to approve transactions in Archivum.

48) I am the Principal Investigator (PI) for my grant in FAST; do I need to request special access to Archivum to be able to approve travel transactions for travel on my grant as Project Manager?

No, if you are listed as a PI in the Grant module in FAST, you do not need to request any further access to be able to approve transactions in Archivum.

49) How can I set up an individual who is not an employee for travel reimbursement in Archivum?

In order for a non-employee to request reimbursement for travel related expenses, the updated Non-Employee Profile Creation Request form must be completed. This form is located on USF's Travel Department website and the completed form must be submitted to the Travel Helpdesk at TravelHelp@usf.edu. It takes a minimum of 2 business days for the profile to be available in Archivum.

To access the updated form go to:

<https://www.usf.edu/business-finance/controller/documents/travelnonempprofile.pdf>

Note: The updated form includes a notice specific to new protections of personal data, which meets the “European Union General Data Protection Regulation” (EU GDPR). Old versions of the form will not be accepted.

50) I need to submit or to view travel for a large number of travelers. What should I do?

Become a Travel Coordinator. Submit the form titled FAST Access Request for Travel found on the Travel Website > Travel > Travel Forms.

51) What do I enter for Activity ID number when entering a Project chartfield?

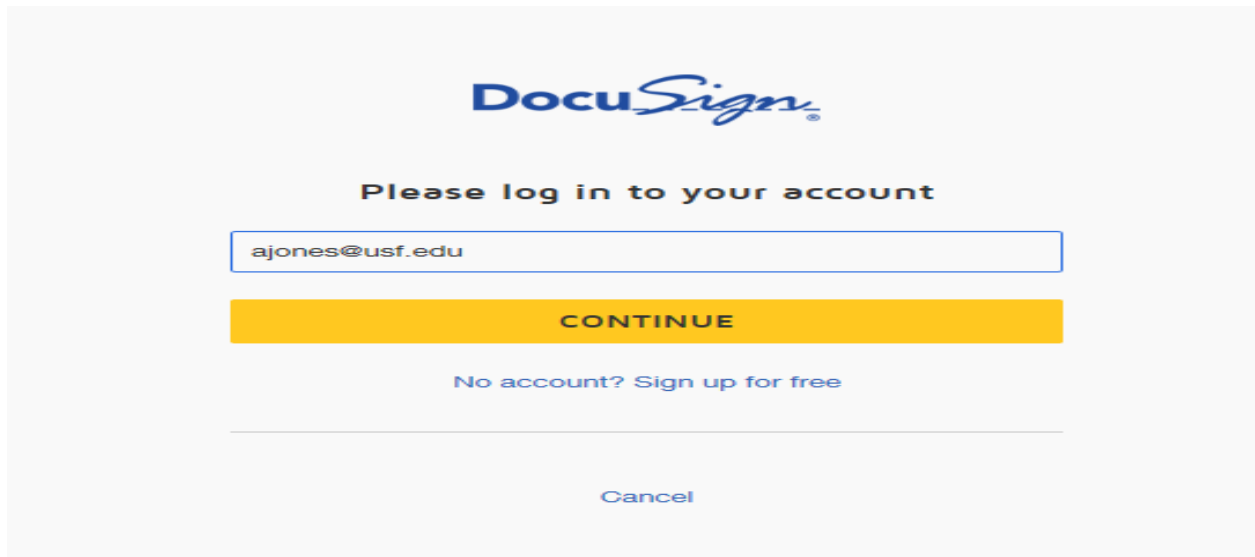
The Activity ID number is related to the Project number being used. Contact your Grant Financial Administrator to get the appropriate Activity ID number.

DocuSign

Detailed DocuSign instructions can be found on the Travel Website > Travel Training.

52) I did not receive an e-mail notification to sign the coversheet in DocuSign, is there another way I can access and sign the coversheet for my travel transaction?

Yes. Visit <http://docusign.com> and click Log in near the upper right corner. Enter your USF primary e-mail address and click continue. You will be directed to your USF Single – SignOn page. Once in the DocuSign application, select manage and you should see the document waiting for signature.

A screenshot of the DocuSign login interface. At the top is the DocuSign logo. Below it, the text "Please log in to your account" is centered. A text input field contains the email address "ajones@usf.edu". Below the input field is a large yellow button labeled "CONTINUE". Underneath the button, the text "No account? Sign up for free" is displayed in a smaller font. At the bottom of the form, there is a "Cancel" link.

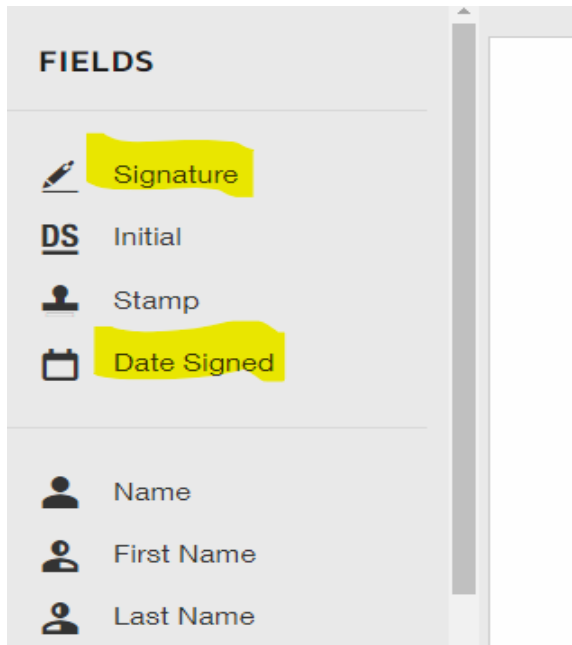
53) The department informed me the coversheet for my Expense Report (ER) was sent to me via DocuSign, but I did not receive an e-mail notification.

First, please check your Outlook Junk folder to see if it was misdirected there. Secondly, DocuSign notifications are sent to the travelers official USF e-mail address (EX: jdoe@usf.edu). Please ensure you are checking the correct mailbox for the notifications. If you need to update your official USF e-mail address, visit MyUSF and click on Manage My NetID to follow the steps required.



54) How do I utilize DocuSign to provide the appropriate signature for my transaction document?

The appropriate signature is selected by dragging the **signature** (not **name** or **initial**) to the location on the document where the signature is required. Then drag the **date signed** to validate the date signed.



55) I did not receive the DocuSign e-mail and I cannot find the document by directly logging into DocuSign. What should I do next?

If the document isn't visible upon logging into DocuSign, please use the Alternate Signing Method Security Code Access by clicking on the following link.

<https://support.docusign.com/en/articles/Alternative-Signing-Method-Security-Code-Access>

56) How do I decline to sign in DocuSign?

If you do not agree to information contained on the coversheet, you may decline to sign the document. To complete this action, click on Other Actions and select **Decline to Sign**. **Do not use any other options available under Other Actions.** You will need to provide a reason for declining the document. Then, click **Decline to Sign**.

Note: The process may take up to 36 minutes for the submitter to receive the document in Archivum Travel.

Power BI Reporting

Detailed instructions can be found on the Travel Website > Travel Training > Archivum Travel Reporting.

57) How can I view a listing or report of all of my open Travel Requests (TR) or Expense Reports (ER)?

Travel Coordinators have access to reporting on TR's through Power BI reporting. Instructions on these reports can be found on the Travel Website under Travel Training > Archivum Travel Reporting.

58) How do I get access to Power BI reporting?

Travel Coordinators have access to Power BI reporting. Submit Part D of the form titled FAST Access Request for Travel, found on the Travel Website > Travel > Travel Forms.