Travel Form Instructions for MagnusMart

Overview:

When traveling for CSU, there are two parts to the documentation. Travel Authorization before the trip and Travel Reimbursement afterward. The traveler should first get approval for the trip. This is done by completing a **Travel Authorization form** (Standard, Grant, or International) in MagnusMart. After the trip is complete, receipts are scanned and a **Travel Approval and Expense Report Form** (on the MagnusMart website) is completed showing actual expenses incurred. This form is saved and attached to the **Travel and Expense Payment Request** in MagnusMart along with the receipts.

Note to those whose travel needs approval by someone other than their immediate supervisor:

There are some on campus whose travel must be approved by another person besides their immediate supervisor (e.g. faculty who need both the chair and dean's approval or an employee whose approval is granted by a higher level person to whom they do not directly report) In situations like these, go to step 18 and follow the instructions provided.



Standard Have Autonzation			Available Actions: Add an	d go to Cart	× 🔤 🤇
Standard Travel Authorization	Please complete this Travel	Authorization For	Instructions m for Travel purposes related to L	odging, Transportation	. Moals. etc.
MAGMUSHUNI	Traveler Inform	nation			
Enter Vendor	ar Vendar Search		Enter the traveler's the first name and appear that you ca	name here. Once y part of the last name in click on to select th	ou have typed in a selection sho leir name.
Traveler Information		7	Estimate	d Costs	
Employee ID#		Estimated Cos	it (Transportation, Lodging, Meals	Registration & Other)	
Employee Name Traveler a Student?		Description		Price	Quantity
Business Purpose					
Departure Date					
Return Date					
Destination					
		1			
Fill in the blanks above with the appropriate information	85				1
requested.		Enter the category	description for the such as transportation,	1	Total
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AND AND THE REAL	š			3	Total ice configuration to
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nformation to be added to th					

7	Assign your cart to a Requester from your area. If there is any information they should know regarding account codes, write that information in the notes section before you complete the cart assignment.	Assign Cart
8	If you are a Requester, select "Proceed to Checkout". Enter your "Ship To" information (if requested) and chart fields (a.k.a. account codes), and select "Submit Requisition".	Proceed to Checkout Submit Requisition
9	Note the Purchase Requisition number. This will be needed after the travel is complete.	
10	At Completion of the Travel: After travel is concluded, complete the Travel Approval and Expense Report. Go to "My CSU", Click on MagnusMart, click on MagnusMart Information.	For Faculty & Staff Administrative Systems + Computing Resources + Computing Resources + Employee Self Service + rAst + Health & Safety + Human Resources + RegularRest + Rest +
11	Click on Travel Approval and Expense Report Form	PURCHASING PURCHASING

12	This will open a fillable PDF form that is similar to the bottom portion of the old namer travel forms. Fill it out and save the	TRAVE. Hinter	exiterise consert fo	S (To be comp reagn currency	TRAVER leter after to to LD clotter	APPROVAL / ravel to comp to	MD DAPONN Astedi	NEPCHT Al Nume Netination		- 160	-	
	form. Scan all receipts into one or more	Types .	Toor! Departy Retuin	Travel Famil	Datasia Datas	- A	harmotion	inded.	-	Amant	laber	
	PDF documentsand attach the form and					-						
	your receipts to the Travel Expense											
	Payment Request.	Marine major my finat have	ranian pro	reasts pt days bits tel treas 1.5 M a d baselt a real ge	Separations & de Sea Tribulo della	n de releven is an Iné releven is a	part to 20% of P	1.00.4. Your	nel in Preside Presidenti (1	ed w/hated	or occlassions, one for mole	
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13	Login to MagnusMart.											
	Open a Travel and Expense Payment Request. Follow the annotations below to complete this form.											

ravel and Expense Pa	syment Request		Available Actions: Add and go to Cart	Close in
MAGNUSMART	Enter Traveler(F Enter Vendor	ayee) in the field below:	or Vendor Search	Enter the traveler's name it should come up as a selection after typing the firm name and part of the last
Travel	Enter "Purchasin If it is a new ven	g Dept" as the vendor above if yo for, fill out the section below.	ou cannot find a vendor in the search or if it is a n	name. aw vendor to be added.
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		EXPENS	E DETAILS	
Type of Travel		Please	e select V Use the drop down to select "Grant" if your travel is gran	t "Standard" for regular travel, t funded, or "International" if you
Travel Authorization ID		-	Authorization form selected	This should match the Travel
Advance Issued?		/		in a sub- of board the first of sec.
Receipt Attachments and	Supporting Documen	taion	approval form.	ion unuber inclu me naverbie-
Internal Attachments	Attach scanned receipts and the Trave	Use only if a cash advan and enter the amount res	ce was given. Place a check mark in the box ceived before traveling.	
Business Purpose Product Description	Approval and Expense Report Form	Enter the pur Purpose of Trip	pose for the trip Trip Total	-
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254 stanicters remaining Payment Method	Description of trip	340 characters remaining	expand Litear	ntal amount to be imbursed to the traveler
If special payment instruction	s select 'ATTN: Special pa	yment instructions" in the bax below	fro at	om the Travel Approval d Expense Report
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14	When the form is complete, scroll to the top and select "Add and Go to Cart" then select the "Go" button.	Add and go to Cart 🗸 Go
15	If you are a Shopper, assign your cart to a Requester from your area. If there is any information they should know regarding account codes, write that information in the notes section before you complete the cart assignment.	Assign Cart
16	If you are a Requester, select Proceed to Checkout, add your account codes, and Submit your cart.	Proceed to Checkout
17	Your Travel Expense and Payment Request has been submitted into the workflow for approval. Your reimbursement check will be mailed to your address of record.	
	For those using a paper	Travel Request form
18	Use the paper Travel Approval and Expense Report form and complete the Travel Approval section at the top and the Travel Expenses section at the bottom.	
19	Once approval signatures have been applied, scan the Travel Approval and Expense Report form, receipts, and any other supporting material.	
20	In MagnusMart, open a Payment Request Form (<u>not</u> a Travel and Expense Payment Request form) and complete it with the traveler's name as the vendor and amount to be reimbursed as the Invoice Total.	Payment Request Form

21	Attach the scanned Travel Approval and Expense Report form, receipts, and any supporting documents to the Internal Attachments.	Internal Attachments Add Attachments
22	When the form is complete, scroll to the top and select "Add and Go to Cart" then select the "Go" button.	Add and go to Cart 🗸 Go
23	If you are a Shopper, assign your cart to a Requester from your area. If there is any information they should know regarding account codes, write that information in the notes section before you complete the cart assignment.	Assign Cart
24	If you are a Requester, select Proceed to Checkout, add your account codes, and Submit your cart.	Proceed to Checkout
25	Your Payment Request Form has been submitted into the workflow. Your reimbursement check will be mailed to your address of record.	