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.
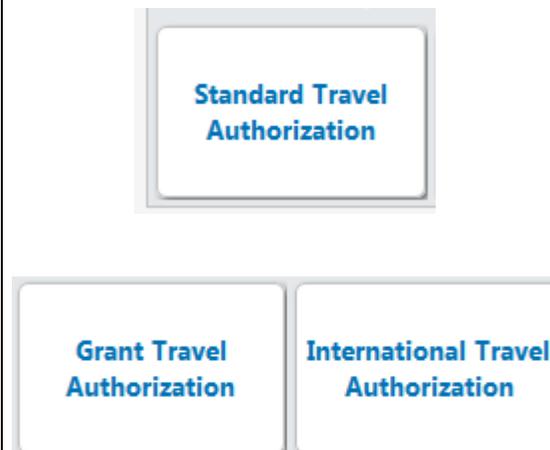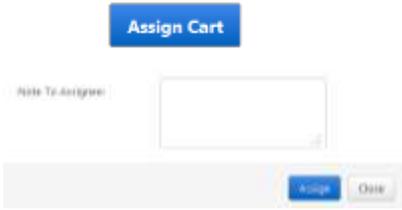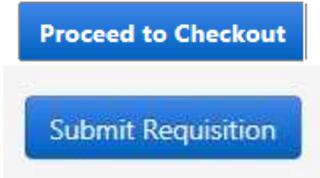
1	Go to MyCSU -> **Select** MagnusMart from the blue "For Faculty & Staff" menu. **Select** Login from the dropdown to open the login page. **Login** using your Single Sign On user name and password.	
2	**Authorization before you travel—Complete a Travel Authorization form in MagnusMart.** Scroll down the Home page to see the Travel & Expenses heading. Below it are the Standard Travel Authorization forms. For routine travel within the United States, use the Standard Travel form. If any part of your travel will be funded by a grant, complete the Grant Travel form. If you are traveling internationally, use	

	the International Travel Authorization form. All three forms look the same and have the same data. The difference is in their routing for approval.	
3		
4	Follow the annotations above for the information to be added to the form.	
5	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
6	Rename the cart in a way that will make it easy to find in the future such as the location and date you are traveling.	

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.	
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".	
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.	
11	Click on Travel Approval and Expense Report Form	

12	This will open a fillable PDF form that is similar to the bottom portion of the old paper travel forms. Fill it out and save the form. Scan all receipts into one or more PDF documentsand attach the form and your receipts to the Travel Expense Payment Request.	
13	Login to MagnusMart. **Open** a Travel and Expense Payment Request. Follow the annotations below to complete this form.	

Travel and Expense Payment Request

Available Actions: Add and go to Cart ⌄ [Go] [Close] 🖨

MAGNUSMART

Travel and Expense Payment Request

Instructions

Enter Traveler(Payee) in the field below:

Enter Vendor

or
Vendor Search

Enter "Purchasing Dept" as the vendor above if you cannot find a vendor in the search or if it is a new vendor to be added. If it is a new vendor, fill out the section below.

Enter the traveler's name. It should come up as a selection after typing the first name and part of the last name.

"New Traveler Information"

If new vendor, enter name and address here:

500 characters remaining

expand | cle

If applicable, Suggested

EXPENSE DETAILS

Type of Travel   Please select... ⌄

Travel Authorization ID

Advance Issued?

Advance Amount(s)

Use the drop down to select "Standard" for regular travel, "Grant" if your travel is grant funded, or "International" if you are traveling internationally. This should match the Travel Authorization form selected.

Enter the purchase requisition number from the travel pre-approval form.

Receipt Attachments and Supporting Documentaion

Internal Attachments

[Add Attachments]

Attach scanned receipts and the Travel Approval and Expense Report Form.

Use only if a cash advance was given. Place a check mark in the box and enter the amount received before traveling.

Business Purpose

Enter the purpose for the trip

Product Description   **Purpose of Trip**   **Trip Total**

254 characters remaining   240 characters remaining   expand | clear

Description of trip

Total amount to be reimbursed to the traveler from the Travel Approval and Expense Report Form.

Payment Method

If special payment instructions, select "ATTN: Special payment instructions" in the box below

⌄

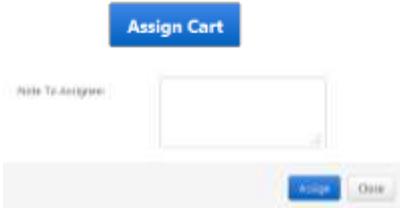Describe special payment instructions (selection must be made above)
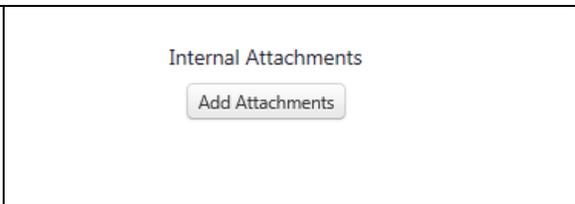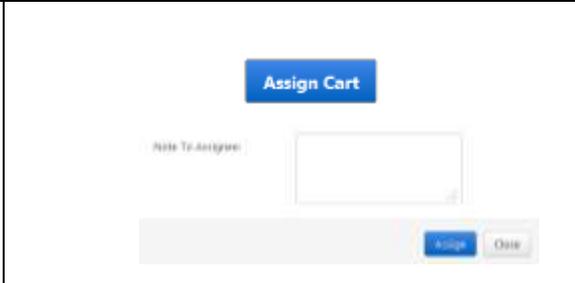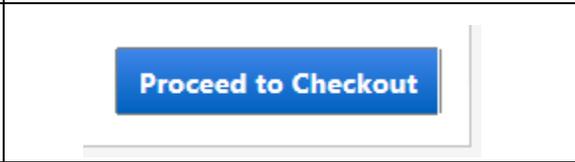
200 characters remaining   expand | clear

EXPENSE DETAILS Total: 0.00

                              Total   0.00
                              See configuration for this form

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 Note To Assignee: Assign Close
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** (not 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 Note To Assignee: Assign Close
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.	