AIRS Travel User Manual

Updated 8/18/23

INDEX

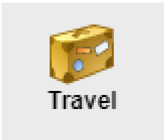
The AIRS Travel System is intended to allow users to submit travel requests and vouchers for OSU employees in a more timely and efficient manner. The AIRS system can only be used for OSU employees who have an active work assignment in the HR system. New OSU employees must have a completed EPAF form and activated their Okey email before they can access AIRS.

LOGGING INTO AIRS

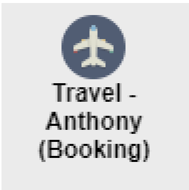
To access AIRS go to airs.okstate.edu and login using your Okey email address and password.

MAIN AIRS MENU

Here are important icons on the Main AIRS Menu:



This Travel icon will allow the user to access travel requests and vouchers (trips) in AIRS.

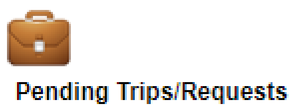


The Travel – Anthony (Booking) icon will allow the user to access the Concur system for booking flights, hotels, rental cars, etc. without requiring a separate login.

The Login Information icon will allow an OSU employee with multiple position numbers to change between position numbers. This may be necessary for users who need to approve requests and trips under different position numbers.

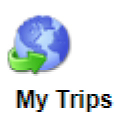
UNDERSTANDING THE ICONS ON THE MAIN TRAVEL MENU

New Trip allows the users to begin a new Out of State or International Travel Request, or begin a new In-state Travel Voucher. In-state travel requests are not a requirement of OSU.

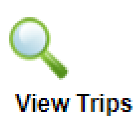


Pending Trips/Requests allows the user to:

- Edit trips that have not been started or have not been submitted
- View the status of requests or trips that have not been completely approved
- Cancel requests or trips that have not been completely approved



My trips allows the user to view or edit any requests or trips in which the user is the traveler



View Trips allows the user to:

- View all requests and trips regardless of approval status
- Access the edit option for trips that have been cancelled or rejected
- Add additional expenses to trips that have already been approved
- Click view to add comments or attachments after a trip has been submitted or approved

Awaiting Approval

Awaiting Approval allows the user to approve a travel request or trip when it is the user's turn to approve

Admin

The Admin Menu provides other options for the user. Below are a few of the options:

User Menu

Delegates
Email Notification
Add User to View Department Requests/Vouchers
Department Head Approval*

- Delegates allows the user to give other employees authority to approve travel on their behalf. This is extremely useful if the user needs to approve travel but may be on personal time or on their own trip.
- When a travel approver sets up a delegate, either the original approver or the delegate may approve the request or trip. AIRS will send a notification email to both the approver and the delegate so either one may approve.
- Please be aware that the traveler must approve their own requests and trips as the traveler. A delegate may not be used to approve on behalf of the traveler's approval.
- AIRS sends email notifications to users when:
  - A user needs to approve a request or trip
  - A request or trip is rejected
  - A request or trip receives final approval
- Email notifications may be turned on or off using the Email Notification feature.
- The option to "Add User to View Department Requests/Vouchers" is only given to department heads. Using this feature, a department head may give a user from another department access to view that department's requests and trips.

Department Head Approval

Check boxes below to require approval of all Requests and/or Vouchers for all Departments beneath you

☐ Requests
☐ Vouchers

- Department heads can require approvals for all requests or trips for departments that fall under that department by using the "Department Head Approval" option.

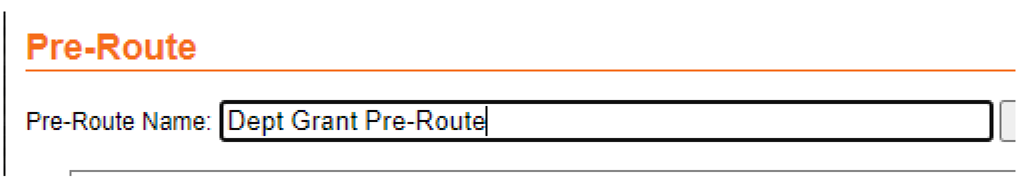
AIRS has a default system approval routing based on the HR system hierarchy. Travel requests have a default approval routing of the traveler, then the department head for the employing department, and finally the next level department head, Dean or VP. AIRS trips have a default approval routing of the traveler, and then only the traveler's employing department head.

A pre-route allows a travel preparer to add approvals between the traveler's approval and the department head's approval. These approvals are optional and are not required by University Accounting.

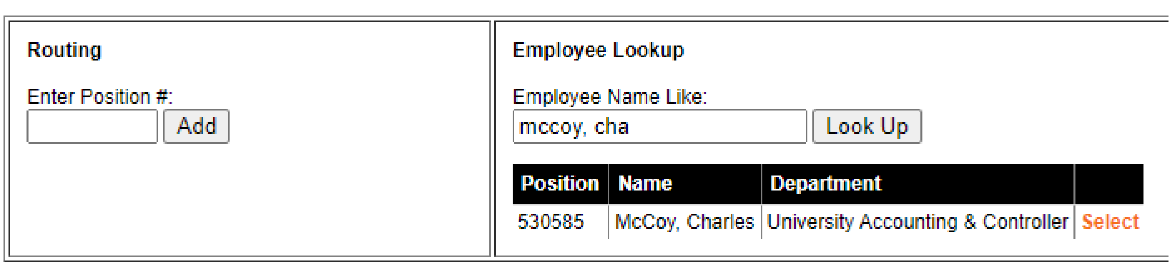
HOW TO CREATE OR EDIT A PRE-ROUTE

1. Click the Pre-routing option on the Main Travel Menu, and then click the icon for Add New Pre-Routing

2. Type a Pre-Route Name into the field at the top of the screen. Pre-routes may use any name to help the user identify the purpose of the pre-route.

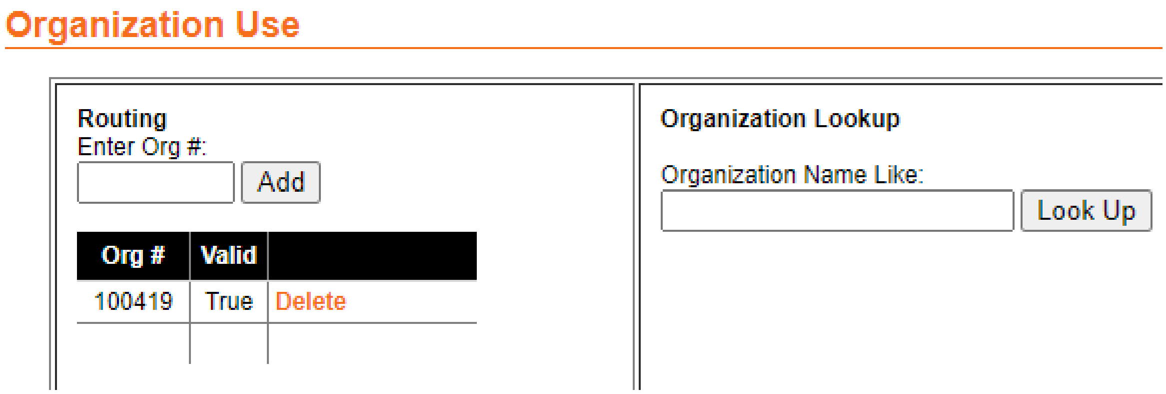


3. Search by the employee's name under Employee Lookup.



4. Then click Select next to the employee's name to add that approver to the Pre-route. Repeat this process until all approvers are listed under the Routing option on the left.

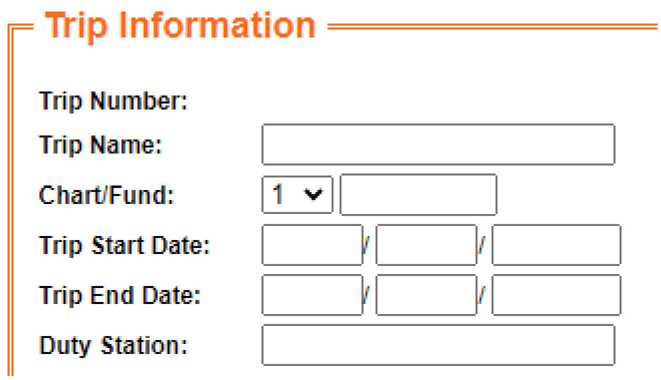
5. Pre-routes default to being used only by the creating department. If other departments need to use the same pre-route, those Organization Codes may be added to the Organization Use option on the bottom left. Org Codes may be entered on the left side, or the name of the Department may be entered on the right to find the correct Department.



6. When all information in the pre-route is complete, click the button for “Save Pre-Route” on the upper right of the screen. You should now see your new pre-route listed on the Pre-Routing screen.
7. Pre-routes may be edited or deleted from this screen as well. Vacant positions should either be removed from pre-routes or have delegates set up for those positions.

CREATING A NEW OUT-OF-STATE OR INTERNATIONAL TRAVEL REQUEST

1. Start by clicking the New Trip icon on the Main Travel Menu



Trip Information

Trip Number:
Trip Name:
Chart/Fund: 1
Trip Start Date: / /
Trip End Date: / /
Duty Station:

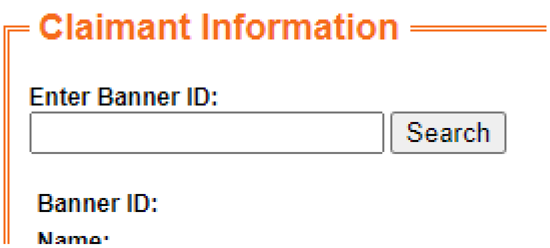
2. Trip Name is anything the user may want to title the trip. It may include the traveler's name, destination city, conference name, or dates.
3. Chart/Fund is the account number used to pay the expenses associated with this travel. Chart/Funds may change between the time the request is entered and time the reimbursement is entered into AIRS.
4. Trip Start Date is the day the traveler will leave to go on the OSU business trip.
5. Trip End Date is the day the traveler expects to return from the business trip.
6. A duty station is the location where an employee's normal job duties take place. For example, Charles McCoy works in 304 Whitehurst on the Stillwater OSU campus. His Duty Station should be "304 Whitehurst, Stillwater, OK."

Travel Type:
In State
Out of State
Out of Country
Mileage Only Trip:
Nature of Official Business:

7. The travel type depends on the overall destination of the trip. Business occurring within Oklahoma's borders are In-State. If you select In-State at this point, AIRS will take you directly to the travel reimbursement since In-State travel requests are not required by OSU. Out of State travel includes destinations outside Oklahoma, but within the 48 contiguous states, plus Alaska

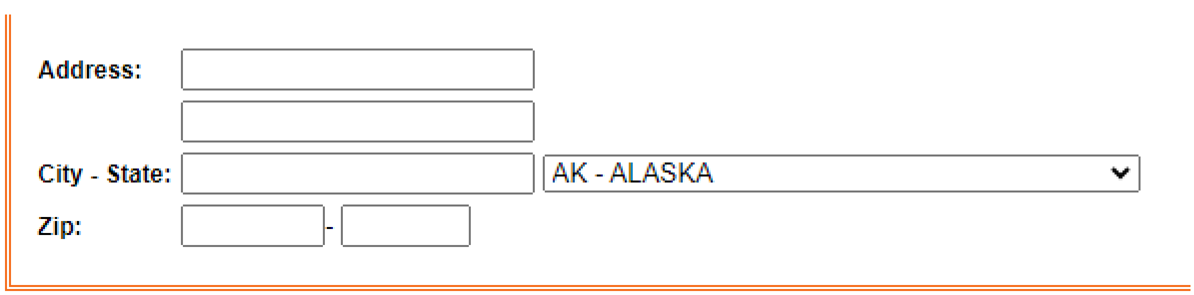
and Hawaii. Any destination outside the 50 United States is considered Out of Country. This includes Puerto Rico even though it is a US territory.

8. A Mileage Only Trip is a reimbursement where the only expenses are related to driving, such as mileage and turnpike tolls. Airfare, lodging, per diem, and registration are not allowable on Mileage Only Trips.
9. The Nature of Official Business is the purpose for going on the business trip. This should include the name of the conference, or the purpose of the meeting. Some common examples include, "Attend ABC conference", "meet with potential donors," or "Recruiting trip." A generic heading, such as "meeting," is unacceptable.



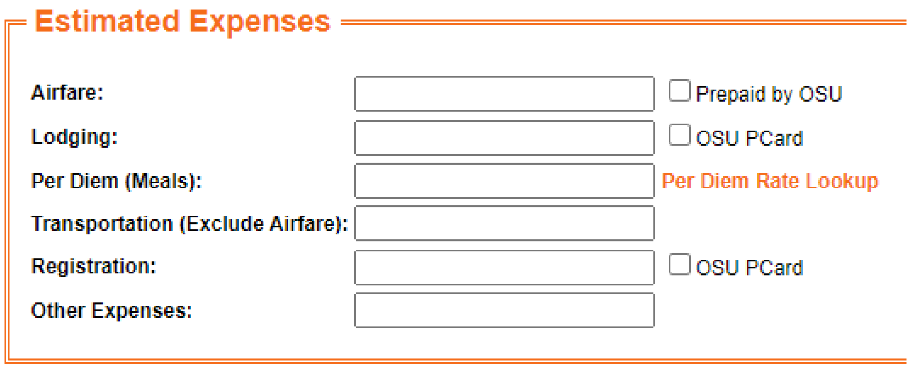
10. The Banner ID of the employee should be entered into the Claimant Information and then click the Search button.
    a. If the correct Banner ID is entered, the employee's Name, Department, Email Address, Position Number, and Vendor File Address will appear on the screen. The Vendor File Address can be changed by checking the box for "Edit Address" under "Address from Vendor File." The Plus Four Zip Code is required. Stillwater campus plus four addresses are found on the [Facilities Management website](), and off-campus addresses are found on the [USPS website]().

    b. If the error "Banner ID not associated with an Employee" appears at the bottom of the screen, then the Banner ID is for someone without an active work assignment in the HR system or the Banner ID was mistyped. Travels for non-employees, newly-hired employees, or former employees must be processed on paper travel forms. First verify the Banner ID was entered correctly before processing paper travel forms.

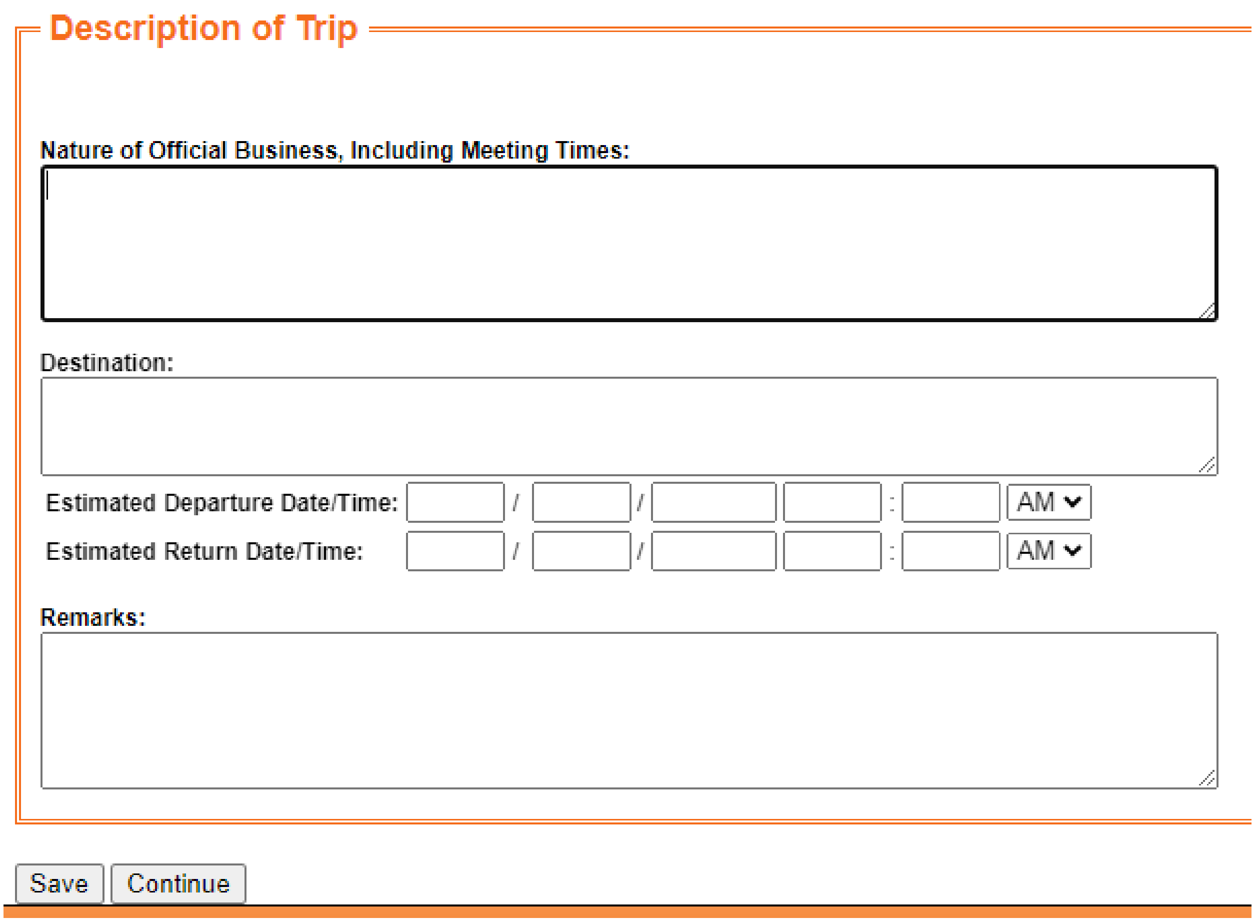


c. If the "vendor file" error appears, enter a valid mailing address for the traveler into the boxes that appear and then click Continue at the bottom. This error typically only appears the first time an employee travels for OSU. The mailing address may be a home address or campus address. If the traveler does not have direct deposit of travel, the reimbursement check will be mailed to the address entered here.

11. Click the Continue button at the bottom.
12. AIRS will now automatically apply a trip number at the top of the next screen.



13. Since the travel request is required prior to the trip for Out-of-State and International Trips, the next section is Estimated Expenses so the travel approvers can properly budget expenses associated with the trip. Any expenses associated with the trip should be included on the travel request. This would include reimbursable expenses, Pcard expenses, and direct bill airfare. These expenses don't have to be exact, but the expenses should be estimated on the high end. If actual expenses are more than $50 over estimated expenses, the travel reimbursement must include an explanation why the actual expenses are higher.



14. Under Description of Trip, the Nature of Official Business will copy over from the previous Trip Information screen. Be sure Meeting Times are included here. These should only be for the meeting or conference times attended.
15. The Destination is location of the meeting, conference, or business location.
16. Estimated Departure and Return Date/Times are the days the traveler expects to leave for the trip and expected date of return.
17. Remarks are optional, but may include any additional information for the trip, such as budgetary limits or personal time taken in conjunction with the trip.
18. When all information is entered here, click Save. This will save the information entered on this screen and will return you to the top of the page. Then scroll down and click Continue when ready to submit.

Routing

Choose Pre-Route:

	ID	Description	Creator
◉	0	No Pre-Route	
○	8844	Dept Grant Pre-Route	charles.e.mccoy@okstate.edu
○	6321	OCSBM org 100379	charles.e.mccoy@okstate.edu
○	5197	Org 100452	charles.e.mccoy@okstate.edu
○	5445	Org Code 100439	charles.e.mccoy@okstate.edu
○	6592	Police Department	charles.e.mccoy@okstate.edu
○	7162	test	charles.e.mccoy@okstate.edu
○	7398	test	charles.e.mccoy@okstate.edu
○	6033	test	charles.e.mccoy@okstate.edu
○	6313	test	charles.e.mccoy@okstate.edu
○	6459	test	charles.e.mccoy@okstate.edu

View Route

Notes/Special Instructions:

Submit Trip Request

19. The last screen shows a list of Pre-routes that have been created for the department. As mentioned earlier, pre-routes are not required by University Accounting, but may be required by certain departments. The default is "No Pre-Route" so choose the appropriate pre-route if necessary.
20. Then click the button for View Route. This will show the user if there are any Vacant positions in the routing, or if there are any delegates for those Vacant positions. The traveler's approval will not show here, but it will show the approvers needed for complete approval. There are 2 important things to remember here:
    a. Do not submit the request or trip if there are Vacant positions in the routing without delegates. Delegates may still approve for Vacant positions so the Vacant positions only need corrected if there are no delegates.
    b. Also an approver can only approve a travel once. For example, if the department head approves as a delegate for a Vacant position in the approval routing, the department head would not be able to approve again for their own approval in the routing.
21. Once the Pre-route is chosen and names in the routing are verified, click "Submit Trip Request" for approval.

HOW TO PROCESS A TRAVEL REIMBURSEMENT

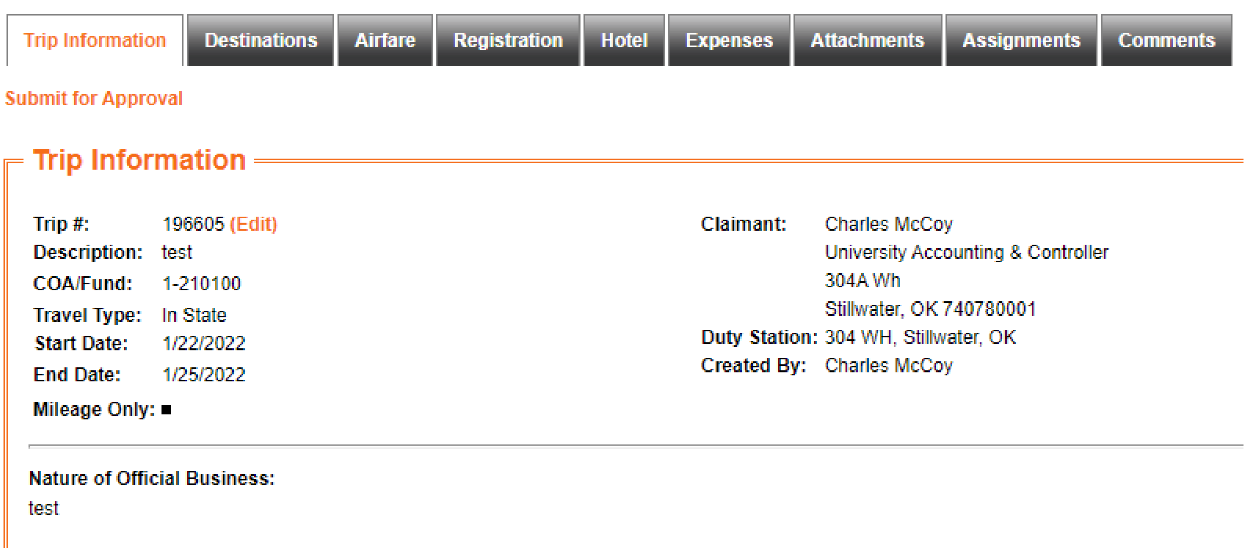
If an in-state travel reimbursement is needed, click New Trip on the Main Travel Menu.

If an out-of-state or out-of-country travel reimbursement is needed, and the travel request is completed, click Pending Trips/Requests on the Main Travel Menu. Click the tab for Pending Trips to find the trip corresponding to the same request trip number. Look for the Edit option next to the trip number and click Edit.

Note that the Select Department drop-down menu defaults to the user's home department. If the traveler is employed in a different department, change the Select Department menu to View All. Then go to the Pending Trips tab and look for the Edit option next to the desired trip.

In-state travel reimbursements in AIRS will require you to enter the Trip Information first. That procedure can be found under the "Travel Request" section above. Since this information is entered at the time of the request for out-of-state and out-of-country trips, it is not required when filling out the reimbursement.

ENTERING TRIP REIMBURSEMENTS IN AIRS


Trip Information | Destinations | Airfare | Registration | Hotel | Expenses | Attachments | Assignments | Comments

Submit for Approval

Trip Information

Trip #: 196605 (Edit)
Description: test
COA/Fund: 1-210100
Travel Type: In State
Start Date: 1/22/2022
End Date: 1/25/2022
Mileage Only: ■

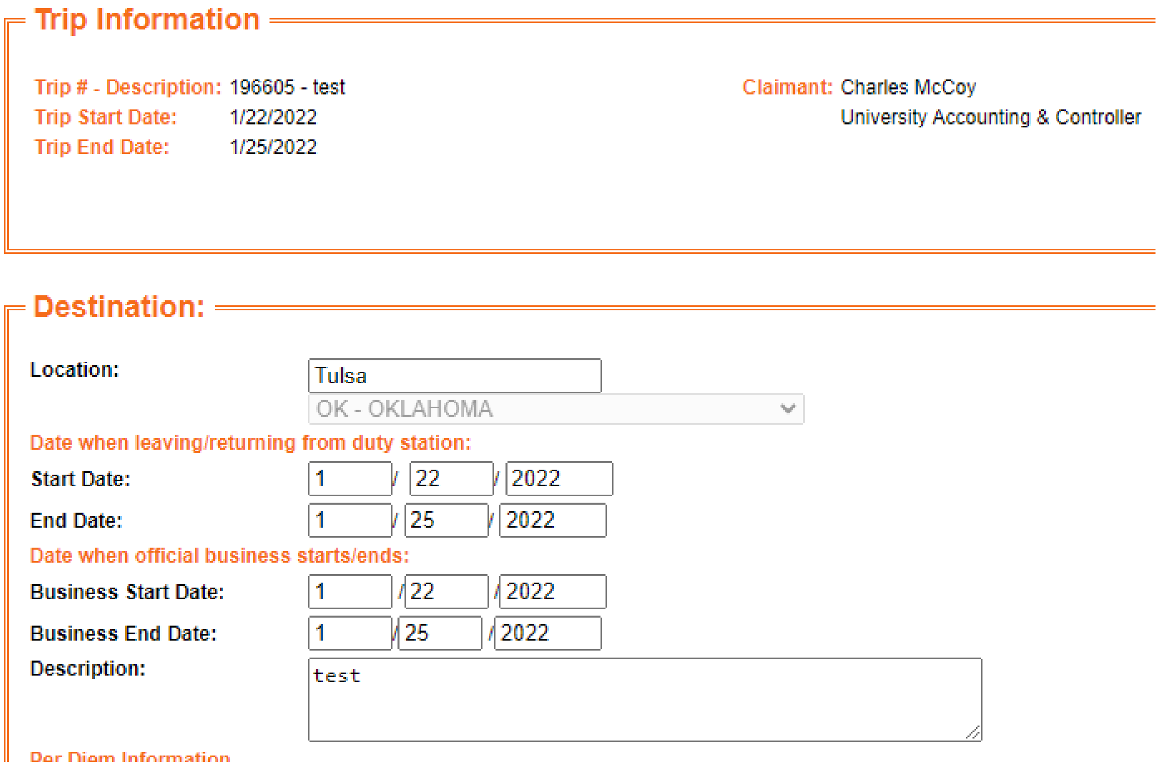
Claimant: Charles McCoy
University Accounting & Controller
304A Wh
Stillwater, OK 740780001
Duty Station: 304 WH, Stillwater, OK
Created By: Charles McCoy

Nature of Official Business:
test

As a best practice when processing travel in AIRS, start with the Trip Information tab on the left and work your way to the right through each tab.

1. On the Trip Information tab, verify the COA/Fund, Start Date, End Date, Claimant's address, and Duty Station. If any of these fields need changed, click Edit by the Trip # to make necessary changes.

DESTINATION TAB



Trip Information

Trip # - Description: 196605 - test
Trip Start Date: 1/22/2022
Trip End Date: 1/25/2022

Claimant: Charles McCoy
University Accounting & Controller

Destination:

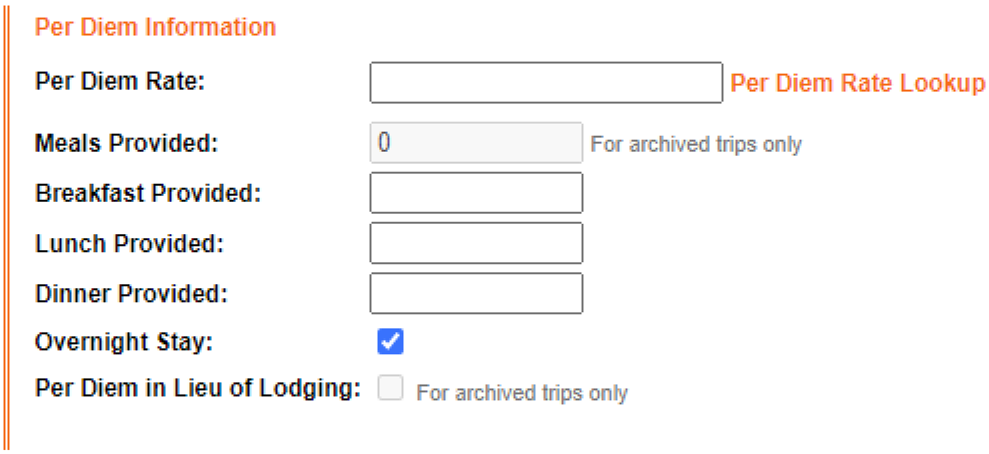
Location: Tulsa
OK - OKLAHOMA

Date when leaving/returning from duty station:
Start Date: 1 / 22 / 2022
End Date: 1 / 25 / 2022

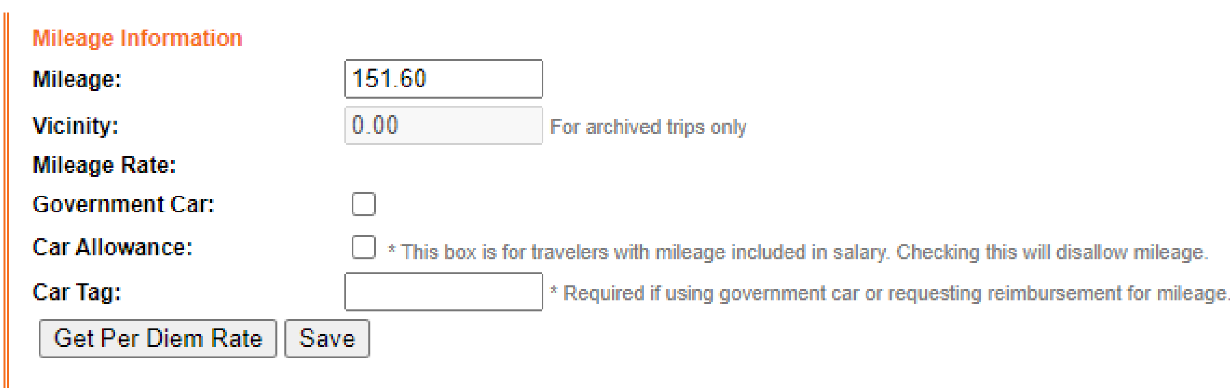
Date when official business starts/ends:
Business Start Date: 1 / 22 / 2022
Business End Date: 1 / 25 / 2022
Description: test

Per Diem Information

2. Go to the Destinations tab and click "Add a Destination."
3. Under the destination, type the name of the city of the first location of business on the trip or overnight stay.
4. Enter the Start Date. This is the date the traveler leaves their home or duty station to begin the trip. If there are multiple destinations on the trip, this should be the date the traveler leaves their home or duty station, or the date the traveler left the previous destination.
5. Enter the End Date. This is the date the traveler returns home from the trip. If there are multiple destinations, this should be the last full day spent at that location, or the date the traveler returns home or to the duty station.
6. The Business Start Date should be the date of the first meeting or business conducted on the trip. This date cannot be prior to the Start Date in step 4 above.
7. The Business End Date should be the date of the last meeting or business conducted, however it cannot be after the End Date in step 5 above. This date may need to be adjusted to match the End Date in step 5.
8. The Description is a required field. It should be the same as the Nature of Official Business.



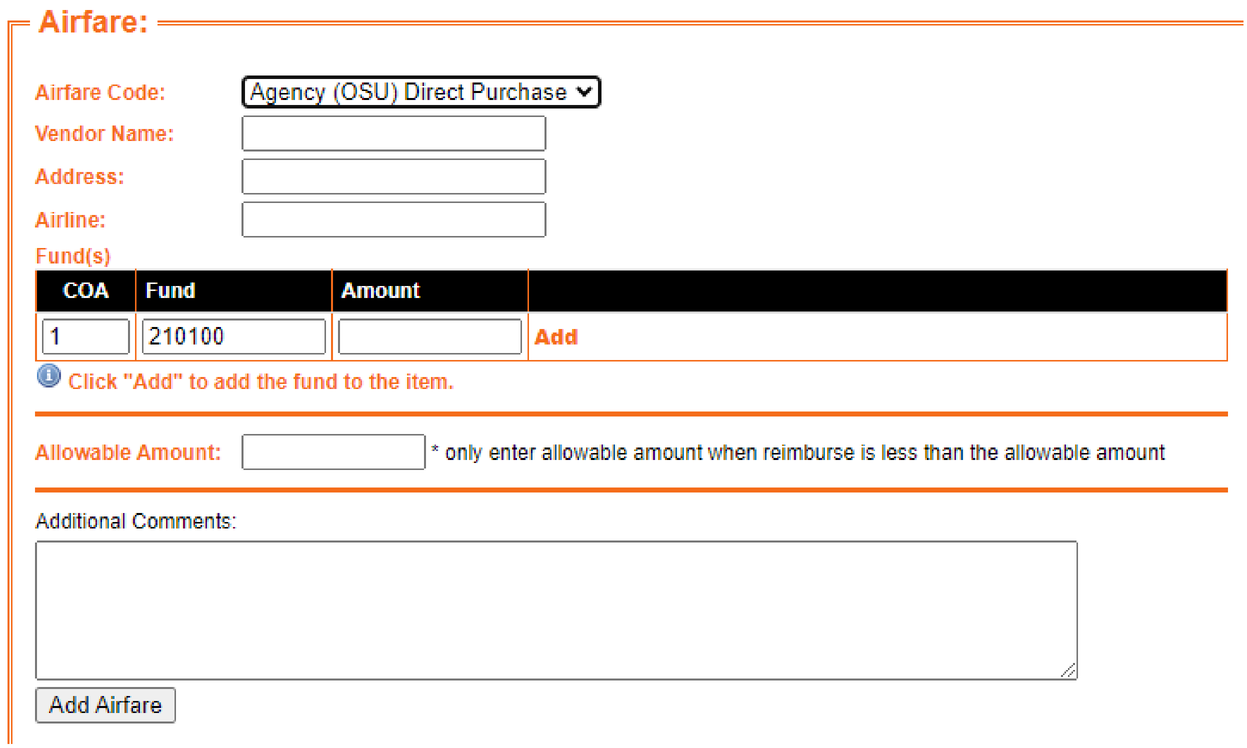
9. The Per Diem Rate field will not appear until the user clicks the "Get Per Diem Rate" button at the bottom of the Destination screen. If AIRS can match up the name of the city and state, it will fill in the correct per diem rate for the user. If a blank box appears as in the example above, the user must manually enter the per diem rate for the destination city. The orange "Per Diem Rate Lookup" link on the right will take the user to the GSA page to find the correct per diem rate.
    a. Be aware that in-state and out-of-state travels will only allow entries of 59, 64, 69, 74 and 79 for the per diem rate. Any other number will create an error in AIRS.
10. Enter the number of Breakfasts, Lunches, and Dinners provided by the conference so that per diem is properly reduced. These meals are only required to be deducted if a registration fee is paid by OSU. Any meals provided by a hotel are NOT required to be deducted.
11. Check the box for Overnight Stay if the traveler had an overnight stay at any location during this trip. If the user does not check the box for Overnight Stay, the per diem for this location will not calculate into the reimbursement.
12. Per Diem in Lieu of Lodging is no longer allowed as of March, 2023.



13. If the traveler uses a personal car for the trip, mileage is allowed. Enter total round-trip mileage into this field.
14. Vicinity miles are no longer allowed.
15. If the traveler uses a government car for the trip (Motor Pool car, departmental vehicle, etc), then check the box for Government Car. Mileage is not allowed for government cars so AIRS will not allow mileage for step 13.

16. If the traveler receives mileage included in their salary, check the box for Car Allowance. A car allowance means the traveler cannot claim mileage in step 13.
17. A car tag number is required for the personal car if the traveler is claiming mileage or for a Motor Pool/Departmental car when using a government car.
18. If the user only has the “Get Per Diem Rate” button at this point, click this button regardless of whether per diem will be claimed. See step 9 above. Once a correct per diem rate appears in the Per Diem Rate field, click the Save button.
19. If there are multiple destinations on this trip, click “Add a Destination” and repeat the steps above.

AIRFARE TAB



Airfare can only be entered for out-of-state and out-of-country trips. The Airfare tab will not allow expenses on in-state trips.

1. The Airfare Code is how the airfare expense was paid.
    a. If airfare was direct billed through Concur, select "Agency (OSU) Direct Purchase." This option will not allow the traveler to be reimbursed for airfare.
    b. If airfare was paid by Pcard, select "OSU Purchasing Card." This option will not allow the traveler to be reimbursed for airfare.
    c. If the traveler paid personally and needs reimbursed, select "Employee Purchase."
2. The Vendor Name should be the name of the company where the expense was purchased, such as Anthony Travel, Expedia, Travelocity, or aa.com, just to name a few.
3. The address can be the physical address or web address. For example, if purchased directly through American Airlines, the user may enter "online" or "aa.com".
4. The Airline is clearly the name of the airline carrier, such as AA, American, Delta, United, etc.
5. The Fund is the account number(s) that will be charged for the airfare expense. This fund or funds in AIRS will only be charged by AIRS if the Airfare Code is selected as "Employee Purchase."
    a. This airfare expense can be split by entering one COA, Fund and Amount, and then clicking Add. Then add a second COA, Fund and Amount, and click Add again. See the example below.

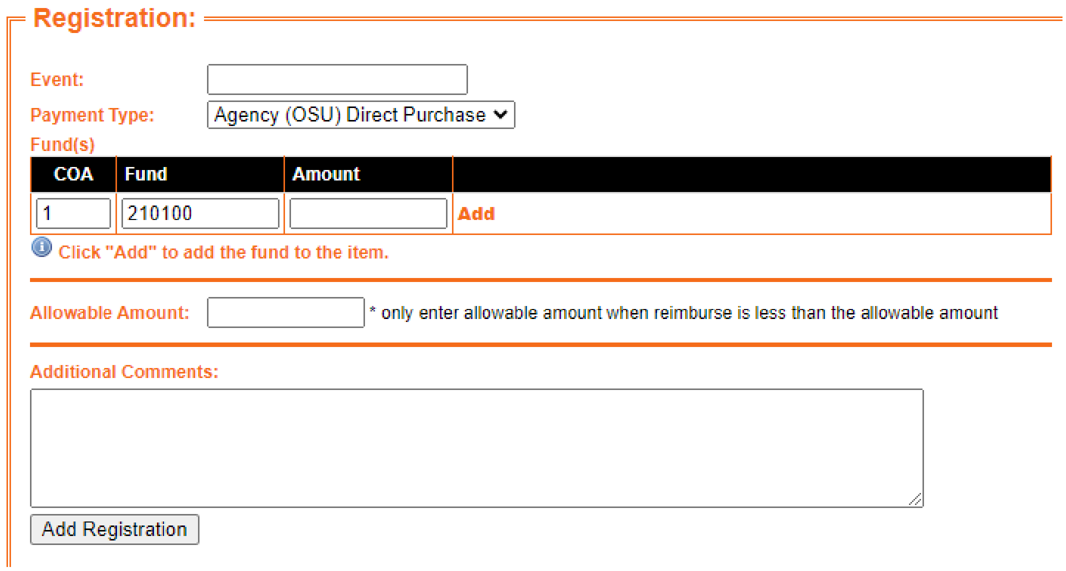
Fund(s)

COA	Fund	Amount		
			Add	
1	210100	150.00	Edit	Delete
1	321000	94.60	Edit	Delete

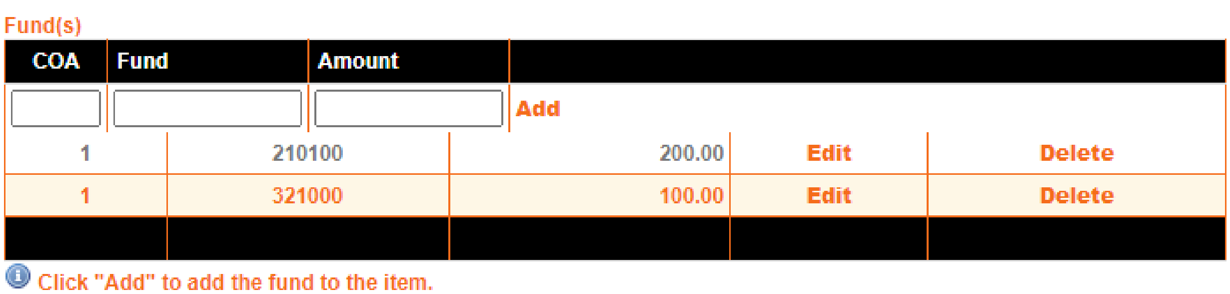
Click "Add" to add the fund to the item.

6. The Allowable Amount field is only used if the traveler is choosing to claim less than allowable. For example, the traveler's flight cost $350.00, but is limited to $200.00 for budgetary reasons. The $200 amount should be entered next to the Fund as entered on step 5 above. Then $350 should be entered into the Allowable Amount field.
7. Additional Comments are an optional field.
8. Click "Add Airfare" when completed.

REGISTRATION TAB



1. In the Event field, enter the name of the event or conference that is charging the registration fee.
2. Select the correct Payment Type from the drop-down menu.
    a. Select "Agency (OSU) Direct Purchase" if the registration fee was paid by requisition in OK Corral. The traveler will not be reimbursed if this is selected.
    b. Select "OSU Purchasing Card" if a Pcard was used to pay the registration fee. The traveler will not be reimbursed if this is selected.
    c. If the employee paid personally and should be reimbursed, select "Employee Purchase."
3. Enter the amount of the registration fee and the Fund used to pay the expense. This expense may be split from multiple funds on this step. See the example below.



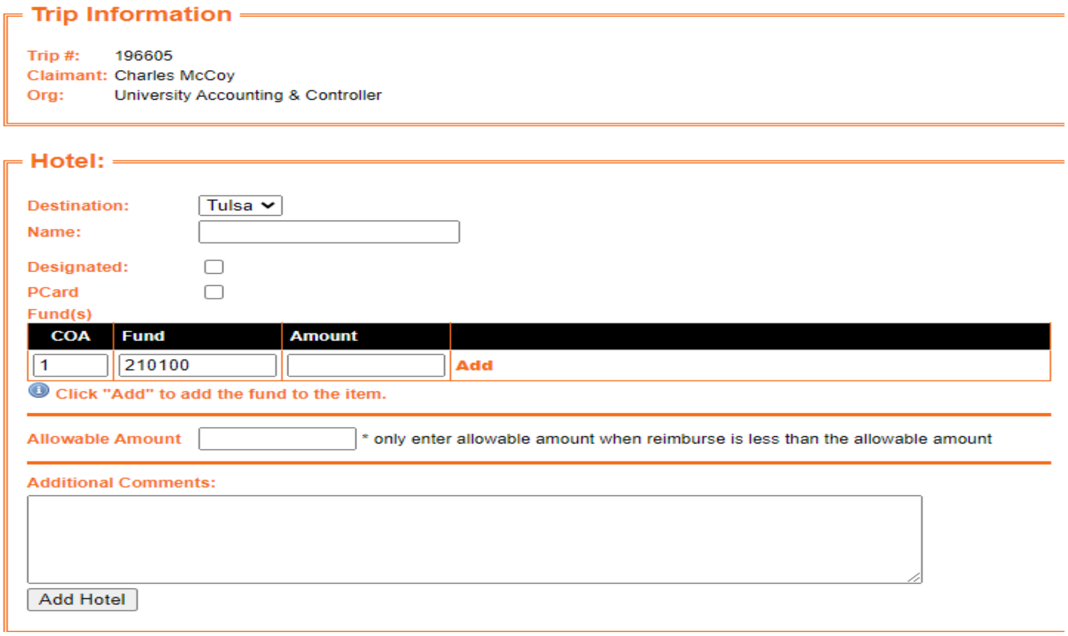
Fund(s)

COA	Fund	Amount		
			Add	
1	210100	200.00	Edit	Delete
1	321000	100.00	Edit	Delete

Click "Add" to add the fund to the item.

4. The Allowable Amount field is only used if the traveler is choosing to claim less than allowable. For example, the traveler's registration fee is $500.00, but is limited to $200.00 for budgetary reasons. The $200 amount should be entered next to the Fund as entered on step 3 above. Then $500 should be entered into the Allowable Amount field.
5. Additional comments are optional.
6. Click the button for "Add Registration" when this is completed.

HOTEL TAB



1. When entering a hotel expense, enter the hotel associated with the city in the Destination drop-down menu. If there are multiple destinations on the trip, enter a separate hotel expense for each destination.
2. Enter the Name of the hotel where the traveler stayed. If a campground was used or an Airbnb, please enter that into the Name field.
3. If the traveler stayed at the designated hotel, check the box for Designated.
4. If a Pcard was used to pay for lodging, check the box for Pcard. If this is checked, AIRS will not reimburse the traveler for lodging.
5. Enter the COA, Fund and Amount that should be used to pay the traveler's reimbursement for lodging. This expense may be split between multiple COAs and/or Funds. See the example below.

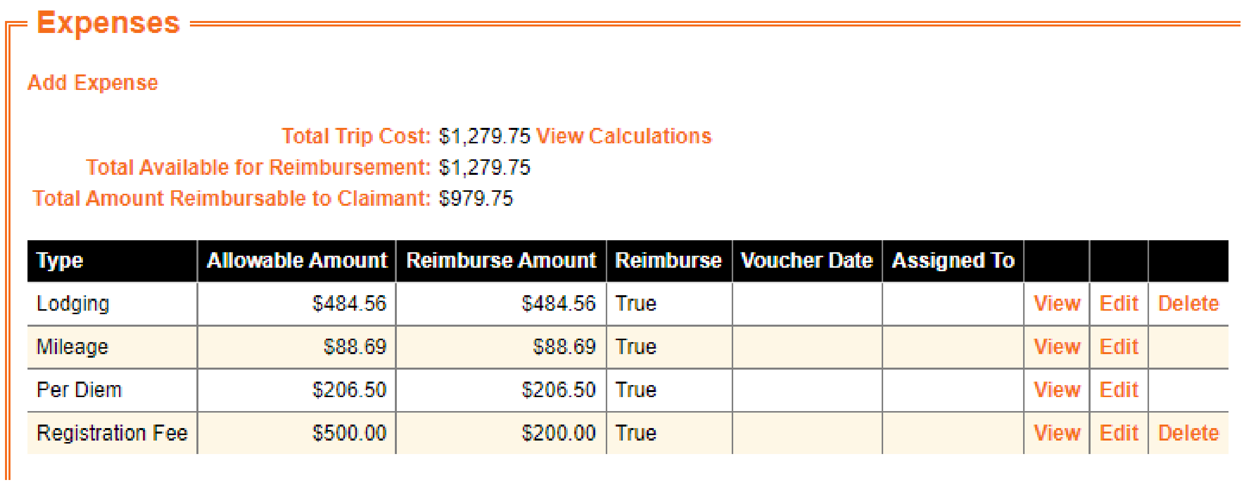
Fund(s)

COA	Fund	Amount		
			Add	
1	210100	299.84	Edit	Delete
1	321000	184.72	Edit	Delete

Click "Add" to add the fund to the item.

6. The Allowable Amount field is only used if the traveler is choosing to claim less than allowable. For example, the traveler's lodging is $500.00, but is limited to $200.00 for budgetary reasons. The $200 amount should be entered next to the Fund as entered on step 5 above. Then $500 should be entered into the Allowable Amount field.
7. Additional Comments are optional.
8. Click the button for "Add Hotel" when completed.

EXPENSES TAB


Expenses

Add Expense

Total Trip Cost: $1,279.75 View Calculations
Total Available for Reimbursement: $1,279.75
Total Amount Reimbursable to Claimant: $979.75

Type	Allowable Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To			
Lodging	$484.56	$484.56	True			View	Edit	Delete
Mileage	$88.69	$88.69	True			View	Edit	
Per Diem	$206.50	$206.50	True			View	Edit	
Registration Fee	$500.00	$200.00	True			View	Edit	Delete

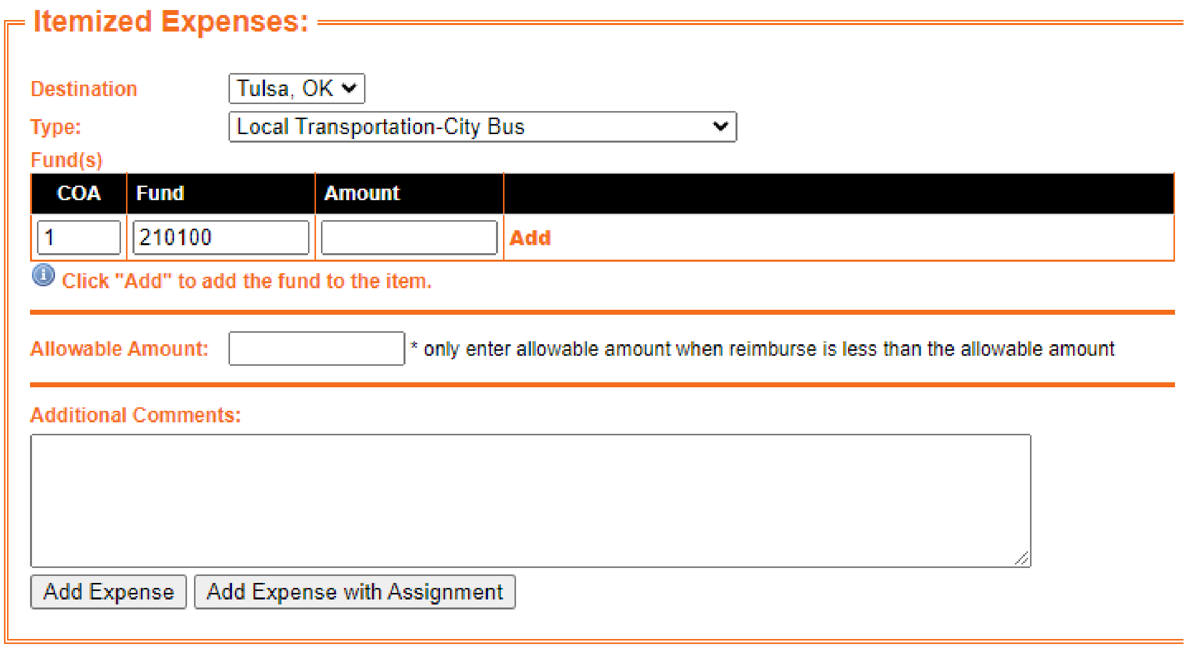
The Expenses tab should show all expenses entered into AIRS so far, plus Mileage and Per Diem, which are automatically calculated in AIRS.

The Expenses tab has multiple purposes: to add miscellaneous and local transportation expenses, to edit or delete reimbursable amounts for all expenses, and to check the total reimbursable amount to the claimant.

The View Calculations page on the Expenses tab does not accurately calculate per diem due to per diem changes enacted by OMES in March 2023.

<u>**ADDING MISCELLANEOUS AND LOCAL TRANSPORTATION EXPENSES**</u>

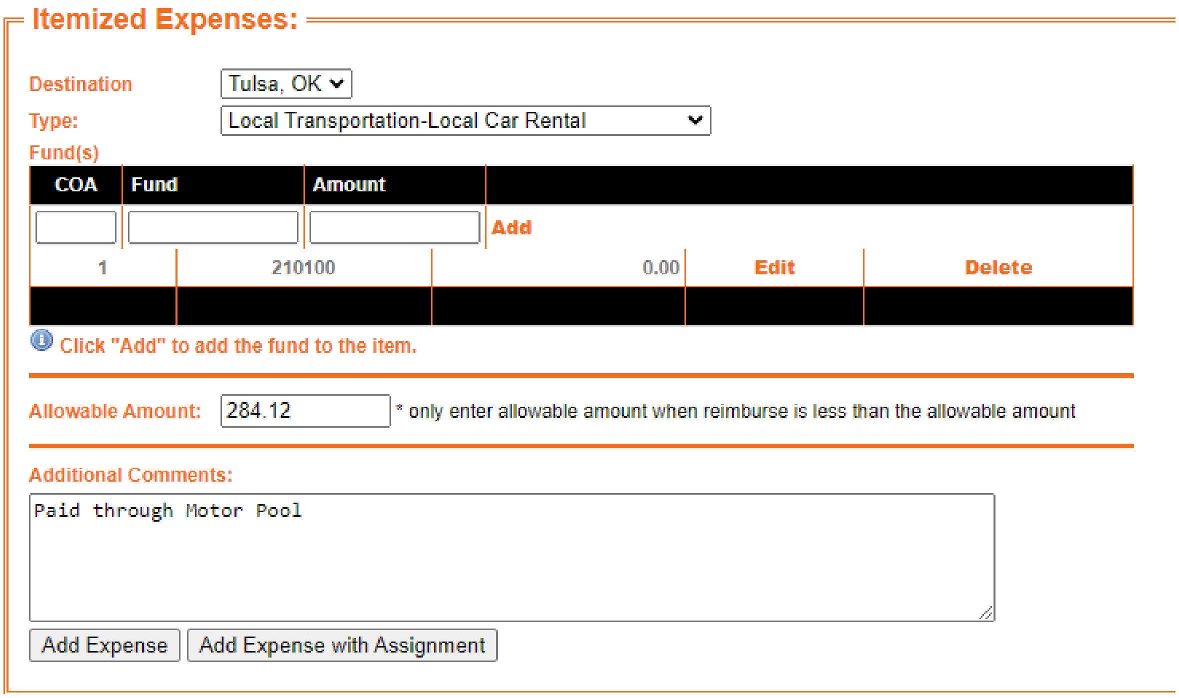
1. Click Add Expense at the top.



2. Choose the correct Destination associated with the expense from the Destination drop-down menu.
3. Choose the correct expense Type from the drop-down menu.
4. Enter the COA, Fund and Amount that should be used to pay the traveler's reimbursement for lodging. This expense may be split between multiple COAs and/or Funds.
5. The Allowable Amount field is only used if the traveler is choosing to claim less than allowable. For example, the traveler's rental car is $500.00, but is limited to $200.00 for budgetary reasons. The $200 amount should be entered next to the Fund as entered on step 4 above. Then $500 should be entered into the Allowable Amount field.
6. Additional Comments are optional.
7. Click Add Expense when information on this page is complete.

ADDING A MISC OR LOCAL TRANSPORTATION EXPENSE PAID BY PCARD

When AIRS was created, most miscellaneous and local transportation expenses were not allowed on Pcards. Therefore, if a miscellaneous or local transportation expense is entered into an AIRS trip, the traveler would be reimbursed for the expense. Here is a procedure for entering Miscellaneous and Local Transportation expenses paid by Pcard without reimbursing the traveler:



Itemized Expenses:

Destination: Tulsa, OK

Type: Local Transportation-Local Car Rental

Fund(s)

COA	Fund	Amount		
			Add	
1	210100	0.00	Edit	Delete

Click "Add" to add the fund to the item.

Allowable Amount: 284.12 * only enter allowable amount when reimburse is less than the allowable amount

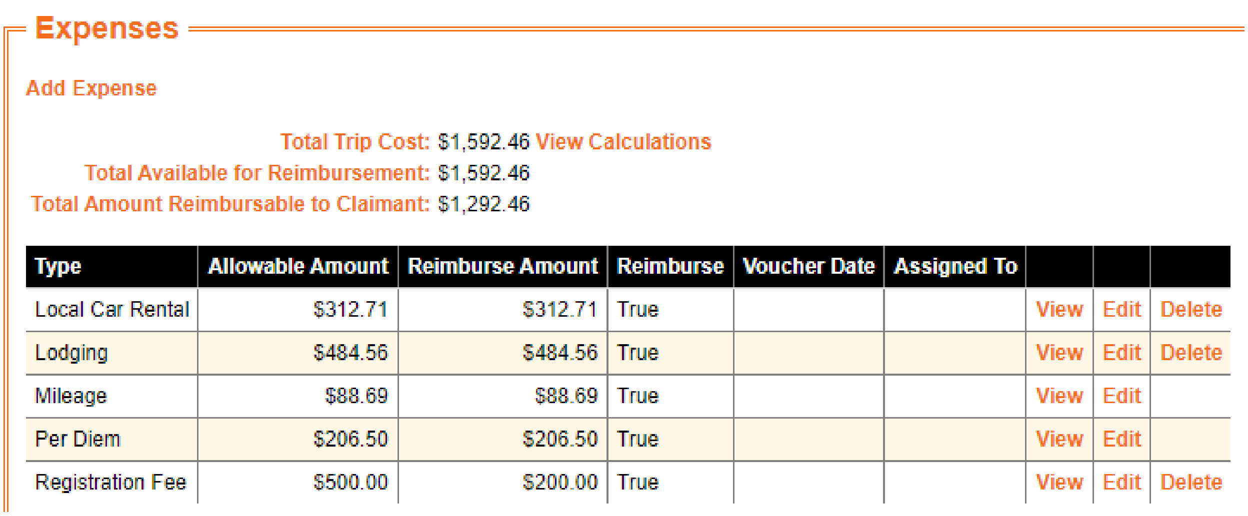
Additional Comments:

Paid through Motor Pool

Add Expense | Add Expense with Assignment

1. Select the correct Destination and expense Type from the drop-down menus.
2. Enter 0.00 for the amount under the Fund(s) section so the traveler will not be reimbursed.
3. Enter the amount of the expense in the Allowable Amount section.
4. Explain how the expense was paid in the Additional Comments section.
5. Click Add Expense.
6. Attach the appropriate receipts to document this expense.

DELETING AN EXPENSE FROM AIRS



Expenses

Add Expense

Total Trip Cost: $1,592.46 View Calculations

Total Available for Reimbursement: $1,592.46

Total Amount Reimbursable to Claimant: $1,292.46

Type	Allowable Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To			
Local Car Rental	$312.71	$312.71	True			View	Edit	Delete
Lodging	$484.56	$484.56	True			View	Edit	Delete
Mileage	$88.69	$88.69	True			View	Edit	
Per Diem	$206.50	$206.50	True			View	Edit	
Registration Fee	$500.00	$200.00	True			View	Edit	Delete

1. Find the expense that needs to be removed from the list of Expenses and click Delete next to that expense.

Itemized Expenses:

Destination Point:
Expense Type: Local Car Rental
Allowable Amount: $312.71

Fund(s)

COA	Fund	Amount
1	210100	312.71

Delete Cancel

* Clicking Delete will remove the expense.

2. Click the Delete button next to the expense to remove the selected expense from the list on the Expenses tab.

EDITING AN EXPENSE IN AIRS

Expenses can be edited if an amount is keyed incorrectly or is partially unallowable. Calculated expenses, such as mileage and per diem, can only be decreased and not increased. Expense types, COA, and Funds can also be edited.

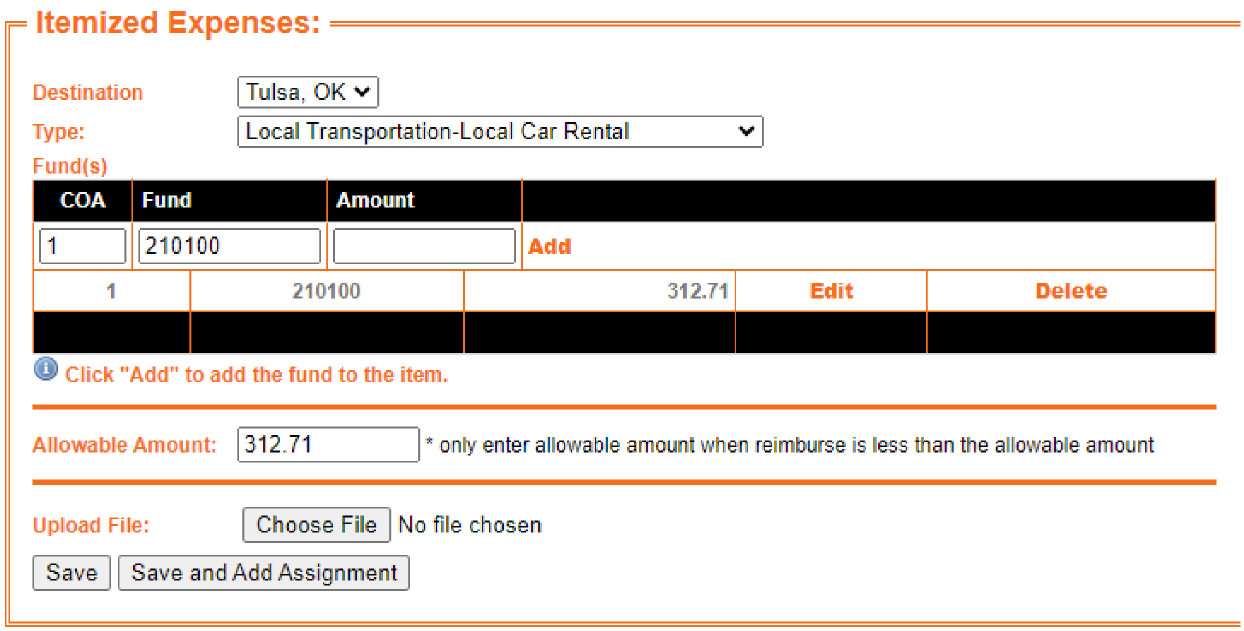
Expenses

Add Expense

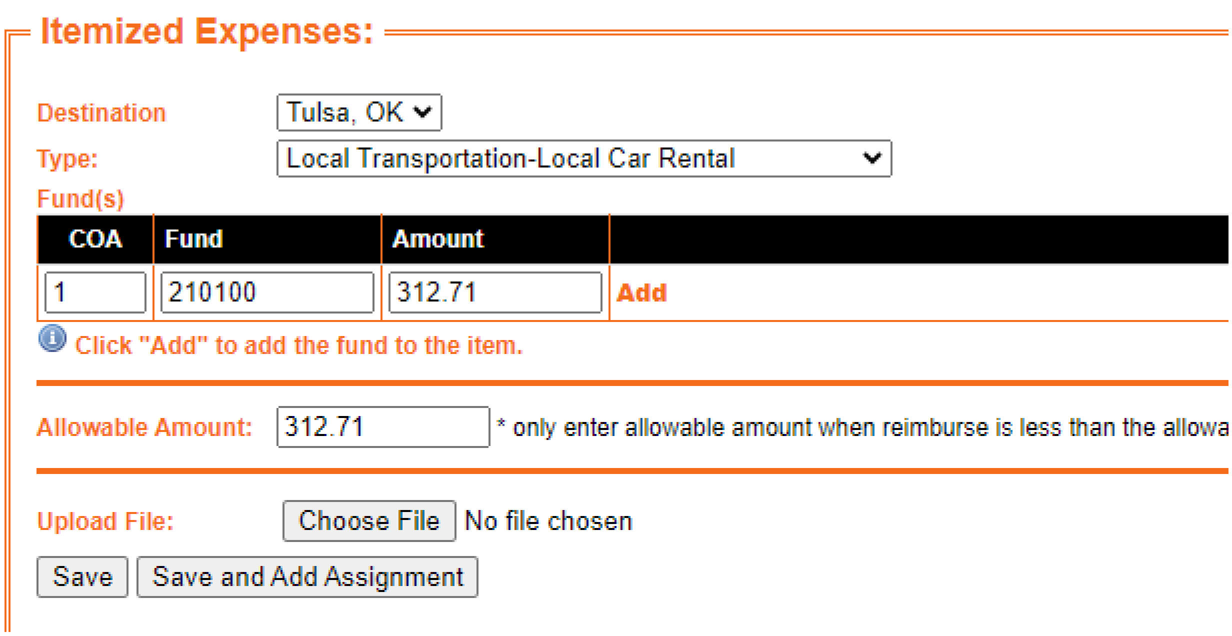
Total Trip Cost: $1,592.46 View Calculations
Total Available for Reimbursement: $1,592.46
Total Amount Reimbursable to Claimant: $1,292.46

Type	Allowable Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To			
Local Car Rental	$312.71	$312.71	True			View	Edit	Delete
Lodging	$484.56	$484.56	True			View	Edit	Delete
Mileage	$88.69	$88.69	True			View	Edit	
Per Diem	$206.50	$206.50	True			View	Edit	
Registration Fee	$500.00	$200.00	True			View	Edit	Delete

1. Click Edit next to the expense that should be corrected.



2. Here the amount can be changed by clicking Edit under the Fund(s) heading.



3. The expense Type, COA, Fund, or Amount can be changed here. Type in the correct COA, Fund, or Amount and then click Add.
4. Once all information is correct on this screen, click Save. In the example below, notice the rental car has been changed from 312.71 to 321.71.

Expenses

Add Expense

Total Trip Cost: $1,601.46 View Calculations
Total Available for Reimbursement: $1,601.46
Total Amount Reimbursable to Claimant: $1,301.46

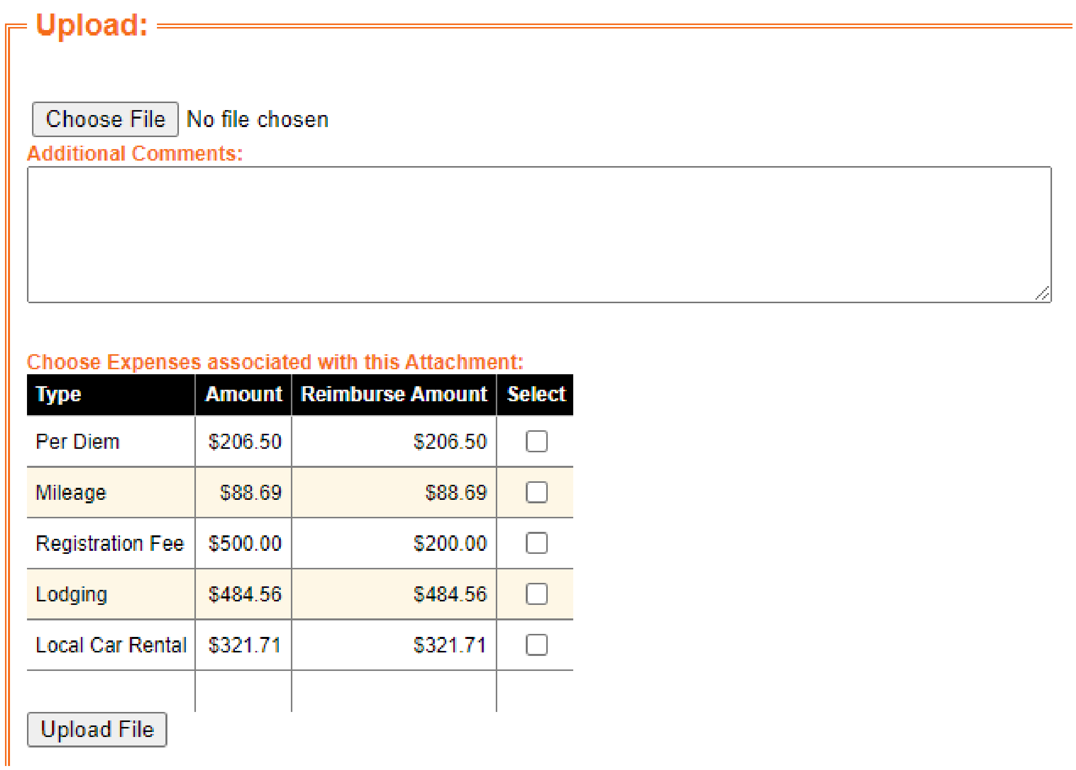
Type	Allowable Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To			
Local Car Rental	$321.71	$321.71	True			View	Edit	Delete
Lodging	$484.56	$484.56	True			View	Edit	Delete
Mileage	$88.69	$88.69	True			View	Edit	
Per Diem	$206.50	$206.50	True			View	Edit	
Registration Fee	$500.00	$200.00	True			View	Edit	Delete

ATTACHMENTS TAB

All receipts, conference itinerary documentation, and designated hotel information must be scanned and attached to the AIRS trip on the Attachments tab. All pages and receipts may be scanned into one file or multiple attachments may be used. Expenses paid by Pcard or direct bill must be attached.

If scanning multiple attachments into one file, AIRS has a file size limit of 10 MB per file. If the file is over 10 MB, AIRS will give an error message when the user attempts to attach the file. The receipts and pages will need to be split into multiple files.

Do not use special characters in the file name. AIRS does not like apostrophes or number signs. If a file is attached that includes an apostrophe or number sign, the file will not open. As a best practice, limit file names to letters, numbers, and spaces.



Upload:

Choose File No file chosen

Additional Comments:

Choose Expenses associated with this Attachment:

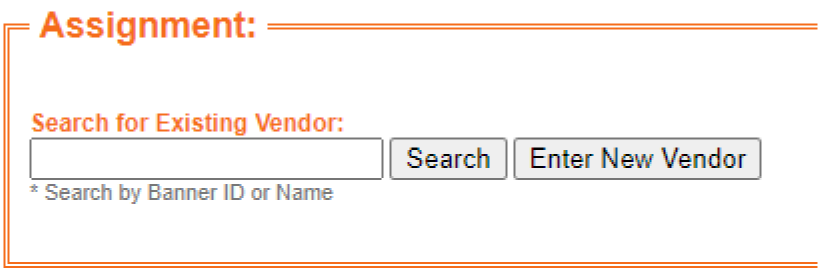
Type	Amount	Reimburse Amount	Select
Per Diem	$206.50	$206.50	☐
Mileage	$88.69	$88.69	☐
Registration Fee	$500.00	$200.00	☐
Lodging	$484.56	$484.56	☐
Local Car Rental	$321.71	$321.71	☐

Upload File

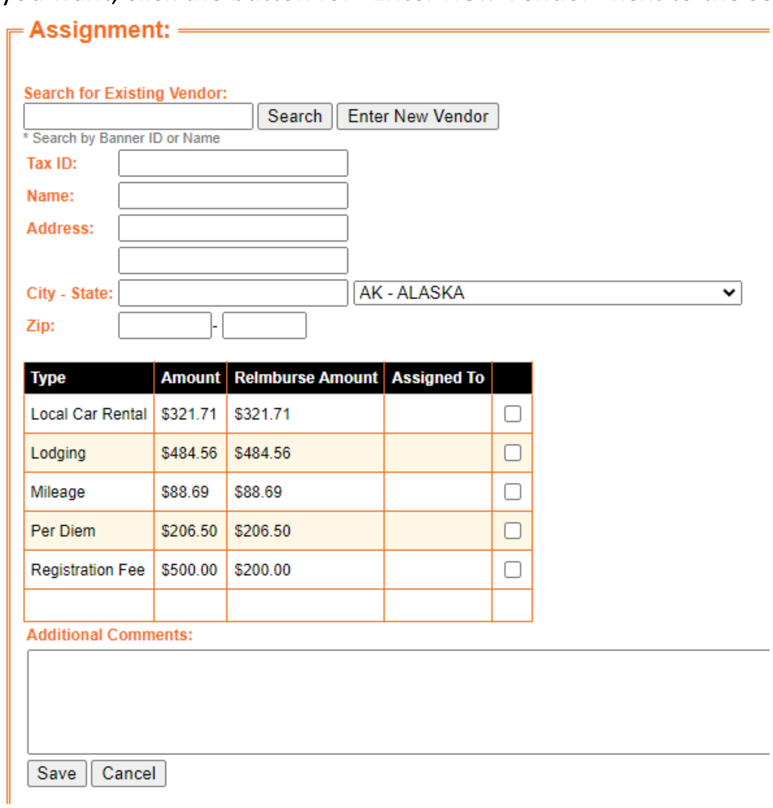
1. After saving the file to the user's computer, select Choose File and then select the correct file of receipts and documentation.
2. Additional Comments are optional.
3. Now Choose Expenses associated with this Attachment. Check the box next to each expense that is associated with the selected file. If everything is included in one attachment, check all boxes. Any miscellaneous or local transportation expense under $25 does not require a receipt.
4. Click the button for "Upload File."
5. Repeat this process if the trip has multiple files to attach.

ASSIGNMENTS TAB

Assignments may be necessary when the traveler's expenses are paid by another person. For example, if Tom went on a business trip, and Fred paid Tom's hotel, then the hotel bill would be in Tom's name so it would need to be put on Tom's travel reimbursement. Tom could then assign the lodging reimbursement back to Fred so that Fred receives the reimbursement.



1. When an assignment is needed on a travel reimbursement, start by clicking Add Assignment on the Assignments tab.
2. Now search for the vendor that should be reimbursed instead of the traveler. The user should search by Banner ID or Name. The search box is case sensitive so enter A******** instead of a********, or if searching by name, search for Smith instead of smith.
3. When you find the payee you want, click Select next to their name. If you cannot find the payee you want, click the button for "Enter New Vendor" next to the search box.



Assignment:

Search for Existing Vendor: Search | Enter New Vendor

* Search by Banner ID or Name

Tax ID:

Name:

Address:

City - State: AK - ALASKA

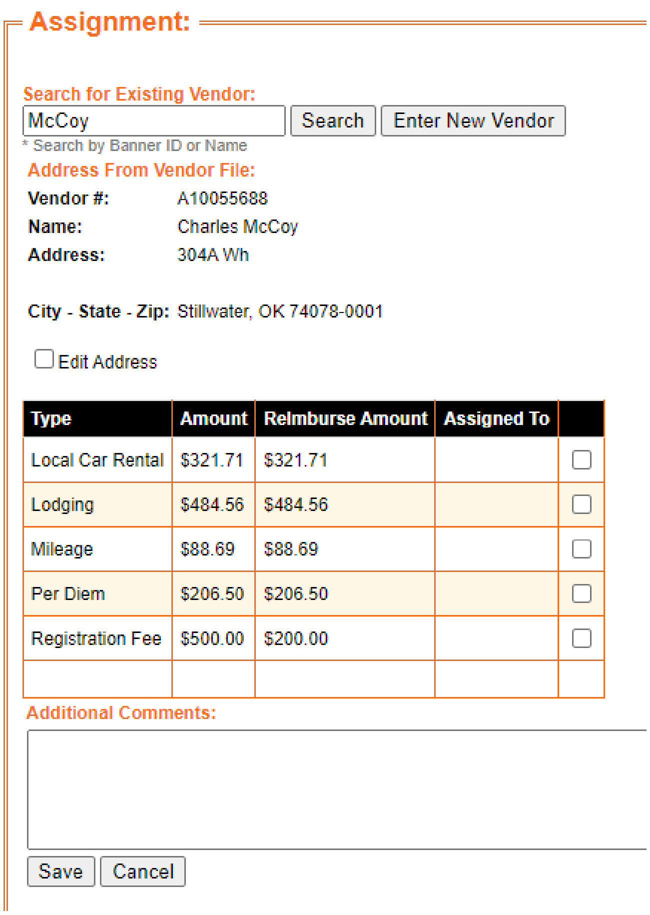
Zip: -

Type	Amount	Reimburse Amount	Assigned To	
Local Car Rental	$321.71	$321.71		
Lodging	$484.56	$484.56		
Mileage	$88.69	$88.69		
Per Diem	$206.50	$206.50		
Registration Fee	$500.00	$200.00		

Additional Comments:

Save | Cancel

4. If a new vendor must be set up, the screen should look like the screen above. Enter the Tax ID (SSN for an individual or FEI for a business, organization, hotel, etc.). Then enter the Name, Mailing Address, City, State, and Zip Code including the Plus 4 zip code.
5. Now check the box next to each expense that should be reimbursed to the assignee. Any expenses that are not checked will pay to the traveler.
6. Additional Comments are optional.
7. Click Save.


Assignment:

Search for Existing Vendor:

McCoy | Search | Enter New Vendor

* Search by Banner ID or Name

Address From Vendor File:

Vendor #: A10055688

Name: Charles McCoy

Address: 304A Wh

City - State - Zip: Stillwater, OK 74078-0001

Edit Address

Type	Amount	Reimburse Amount	Assigned To	
Local Car Rental	$321.71	$321.71		
Lodging	$484.56	$484.56		
Mileage	$88.69	$88.69		
Per Diem	$206.50	$206.50		
Registration Fee	$500.00	$200.00		

Additional Comments:

Save | Cancel

8. If the user can find the vendor during a search, the screen should appear like the screen above.
9. First verify the assignee's address is correct. If the address is not correct, check the box for Edit Address and make necessary changes.
10. Now check the box next to each expense that should be reimbursed to the assignee. Any expenses that are not checked will pay to the traveler.
11. Additional Comments are optional.
12. Click Save.

Expenses

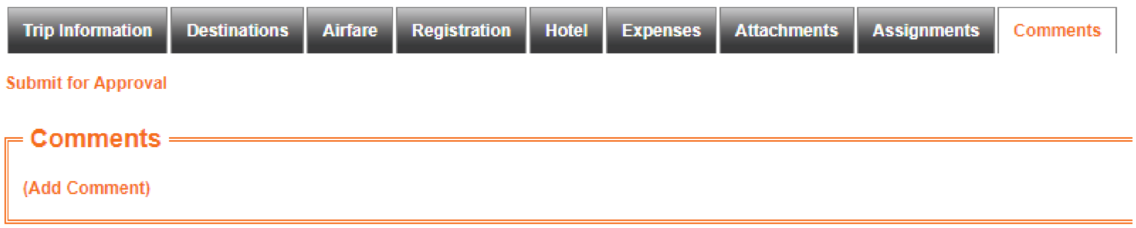
Add Expense

Total Trip Cost: $1,601.46 View Calculations
Total Available for Reimbursement: $1,601.46
Total Amount Reimbursable to Claimant: $1,301.46

Type	Allowable Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To			
Local Car Rental	$321.71	$321.71	True			View	Edit	Delete
Lodging	$484.56	$484.56	True		Holiday Inn Tulsa City Center	View	Edit	Delete
Mileage	$88.69	$88.69	True			View	Edit	
Per Diem	$206.50	$206.50	True			View	Edit	
Registration Fee	$500.00	$200.00	True			View	Edit	Delete

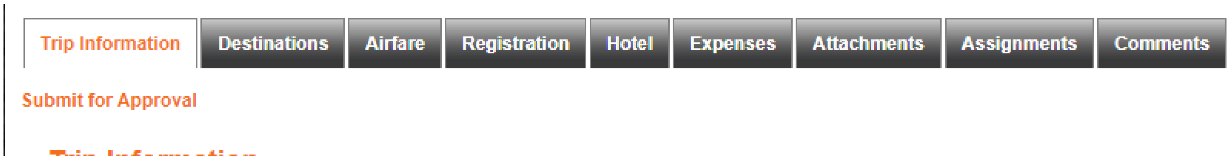
13. Assignments can be verified on the Expenses tab. See the example above. The lodging expense has been assigned to the Holiday Inn Tulsa City Center so the payment will be made to the Holiday Inn Tulsa City Center, while the traveler of the trip will receive reimbursement for the other expenses on the trip.

COMMENTS TAB

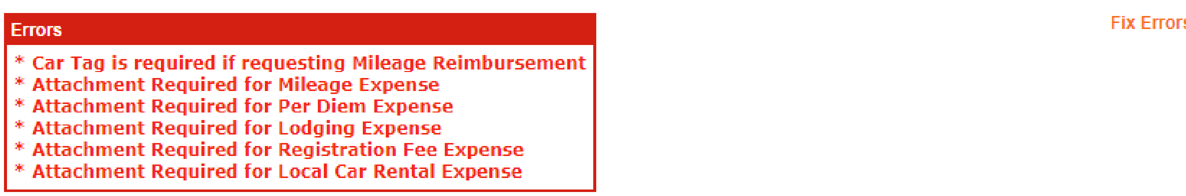


1. Comments related to the trip should be entered on the Comments tab. Comments should include:
    a. Reasons why expenses are not claimed or limited
    b. Reasons why the actual reimbursable expenses are more than $50 over the estimated amount on the travel request
    c. Cross-referencing names and trip numbers if expenses were paid by another traveler
    d. Justifying the need for a rental car and providing a breakdown of the number of business miles and personal miles on the rental car. The Car Rental Justification sheet may be used in lieu of this comment.
    e. Description of the business purpose for expenses that don’t have a clear purpose
    f. List of expenses that are paid by Pcard
    g. Description of unusual circumstances related to the trip, such as illness, injuries, flight delays, inclement weather, etc.
2. <u>Comments CANNOT be deleted out of AIRS.</u> If a comment is incorrect, another comment will need to be added correcting the prior comment.

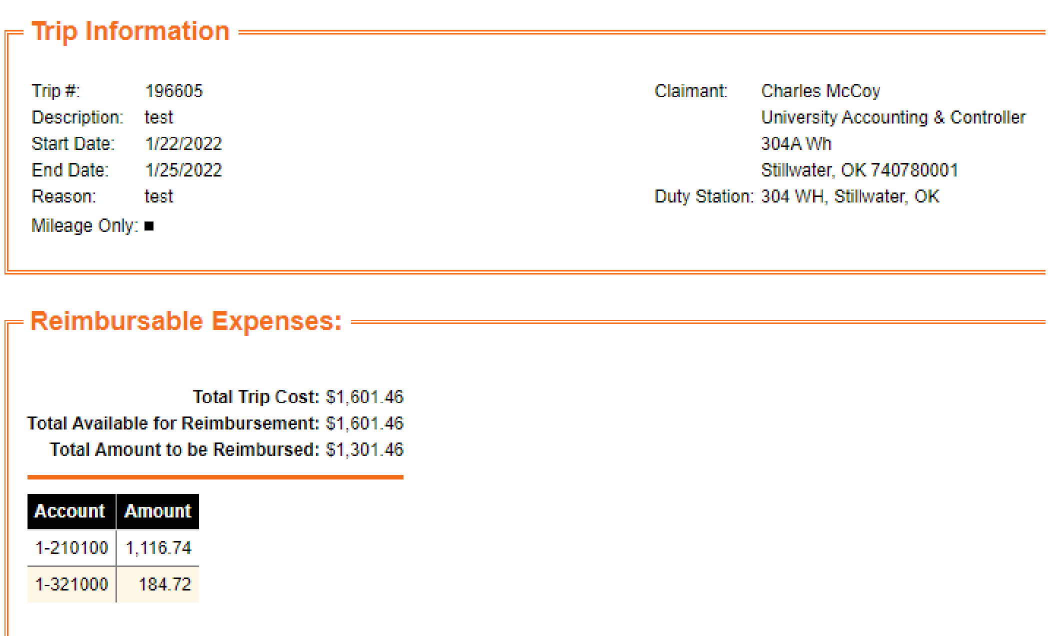
SUBMITTING A TRIP VOUCHER



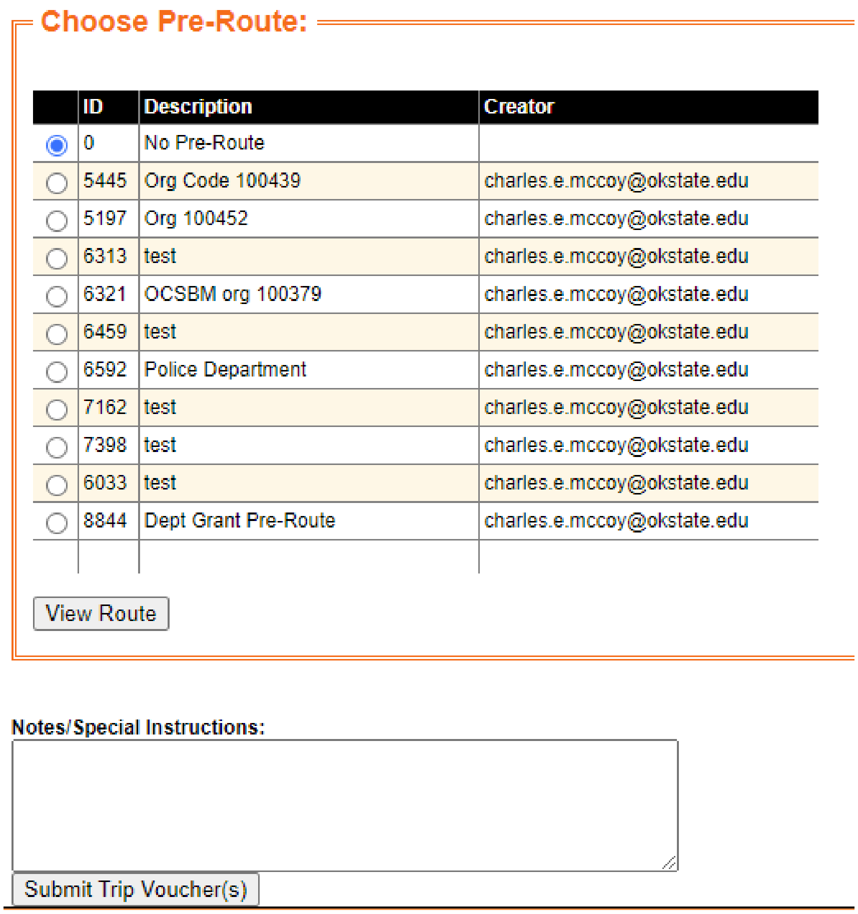
Regardless of which tab the user is on, the option to Submit for Approval is right below the Trip Information tab. Once all expenses have been entered, all comments have been added, and all receipts and other documentation is attached, the user should click Submit for Approval.



The next screen will provide a list of errors on the trip. Click Fix Errors to the right of the list to return to the trip. If there are no errors, then the trip is ready to be submitted.



The final screen before submittal will show a breakdown of the fund code split among all reimbursable expenses. Verify this is correct.



Choose Pre-Route:

	ID	Description	Creator
(selected)	0	No Pre-Route	
	5445	Org Code 100439	charles.e.mccoy@okstate.edu
	5197	Org 100452	charles.e.mccoy@okstate.edu
	6313	test	charles.e.mccoy@okstate.edu
	6321	OCSBM org 100379	charles.e.mccoy@okstate.edu
	6459	test	charles.e.mccoy@okstate.edu
	6592	Police Department	charles.e.mccoy@okstate.edu
	7162	test	charles.e.mccoy@okstate.edu
	7398	test	charles.e.mccoy@okstate.edu
	6033	test	charles.e.mccoy@okstate.edu
	8844	Dept Grant Pre-Route	charles.e.mccoy@okstate.edu

View Route

Notes/Special Instructions:

Submit Trip Voucher(s)

1. A The last screen shows a list of Pre-routes that have been created for the department. As mentioned earlier, pre-routes are not required by University Accounting, but may be required by certain departments. The default is “No Pre-Route” so choose the appropriate pre-route if necessary.
2. Then click the button for View Route. This will show the user if there are any Vacant positions in the routing, or if there are any delegates for those Vacant positions. The traveler’s approval will not show here, but it will show the approvers needed for complete approval. There are 2 important things to remember here:
    a. Do not submit the request or trip if there are Vacant positions in the routing without delegates. Delegates may still approve for Vacant positions so the Vacant positions only need corrected if there are no delegates.
    b. Also an approver can only approve a travel once. For example, if the department head approves as a delegate for a Vacant position in the approval routing, the department head would not be able to approve again for their own approval in the routing.
3. Notes/Special Instructions is optional.
4. Click Submit Trip Voucher(s) to submit the trip for approval.

APPROVAL TAB

Once a trip is submitted in AIRS, a new Approval tab will appear in AIRS. This allows the user to see which approvers have signed off, and which approvals are still pending.

Approvals

Approved By	Via Delegate	Time	Action
		8/16/2023 4:19:47 PM	Submit Voucher
		8/16/2023 4:30:46 PM	Approve Voucher - Claimant

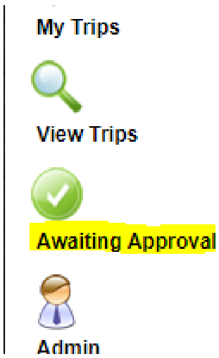
Pending Approvals

Name	Position Number	Delegates
Grants		
Accounting		

The Approval tab will look like the screen above. Names and position numbers have been redacted for this example.

APPROVING A REQUEST OR TRIP IN AIRS

When a request or trip is submitted, AIRS will send an automated email to the OSU email address for the approver and their delegate if a delegate is set up for the approver. The email will include a link to take the approver to the Awaiting Approval screen.



If the approver did not receive the email, they can still go to Awaiting Approval on the Main Travel Menu.

Vouchers Awaiting Claimant Approval

Trip Number	Type	Description	Status	
196605	In State	test	Pending Claimant Signature	Process

Any trips or requests that need to be approved by the user will be listed here. The approver will need to click Process on the right side.

Trip Information

Trip #: 196605
Claimant: Charles McCoy
Nature of Official Business:
test

Start Date: 1/22/2022
End Date: 1/25/2022

View Detailed Trip Information

Destinations

Location: Tulsa, OK
Start: 1/22/2022 12:00:00 AM
End: 1/25/2022 12:00:00 AM

Total Miles: 151.60
Per Diem Rate: $59.00
Meals Provided: 0

Expenses

Total Trip Cost: $1,601.46 View Calculations
Total Available for Reimbursement: $1,601.46
Total Amount Reimbursable to Claimant: $1,301.46

Type	Amount	Reimburse Amount	Reimburse	Voucher Date	Assigned To	Rejected
Mileage	$88.69	$88.69	True			
Per Diem	$206.50	$206.50	True			
Registration Fee	$500.00	$200.00	True			
Local Car Rental	$321.71	$321.71	True			
Lodging	$484.56	$484.56	True		Holiday Inn Tulsa City Center	

The approver will be able to see a summary of the trip.

Approval

☐ I, Charles McCoy , by signing here do under penalty of perjury, declare that the information contained in this document and any attachments are true and correct to the best of my knowledge and belief. I also certify that no frequent travel miles earned from any official state transportation have been used for personal transportation purposes.

☐ I hereby assign this claim to and authorize the State Treasurer to issue a warrant in payment to said assignee.

Choose One:

○ Approve
○ Reject

Notes:

Save Cancel

To approve the trip, the claimant will need to carefully read and check the box next to each statement in the Approval box. Then the approver should mark the box next to either Approve or Reject. If Approve is selected, the approver should then add optional Notes if necessary and click Save. If Reject is selected, the approver will be required to add a reason in the Notes for rejection and then click Save.

If the claimant approves the trip, the next approver will receive an email from AIRS with a link to the Awaiting Approval screen. The approver should follow the same steps as mentioned above. The only difference between the claimant's approval and approver's approval is that the approver will not have to check the box next to the statements in the Approval box.

If the trip is rejected, the trip submitter and the traveler should receive an email from AIRS notifying them of the rejection and the reason for the rejection.

CANCELLING A REQUEST OR TRIP

Cancelling a request or trip in AIRS has the same end result as having a trip rejected. Cancelling a trip will only remove the trip from the approval routing. It does not delete the trip from AIRS. Cancelling a request or trip is usually easier than asking someone else to reject a request or trip.

Sometimes travelers attend events at no cost to OSU, which requires a travel request based on OSU Travel Policy. The preparer may fill out a zero cost travel request and submit for approval. However, since there will not be a reimbursement, the user may Cancel the trip so it is no longer listed under Pending Trips.

1. The user should go to Pending Trips/Request to find the request or trip to Cancel. The user will only have access to cancel a request or trip if either (1) the user created the trip in AIRS or (2) the user is in the same home department as the traveler.
2. The user should go to the Pending Requests tab if a request needs canceled, or the Pending Trips tab if a trip needs canceled. If the traveler is employed by a different department, but the user created the trip, the user must change the Select Department drop-down menu to View All.

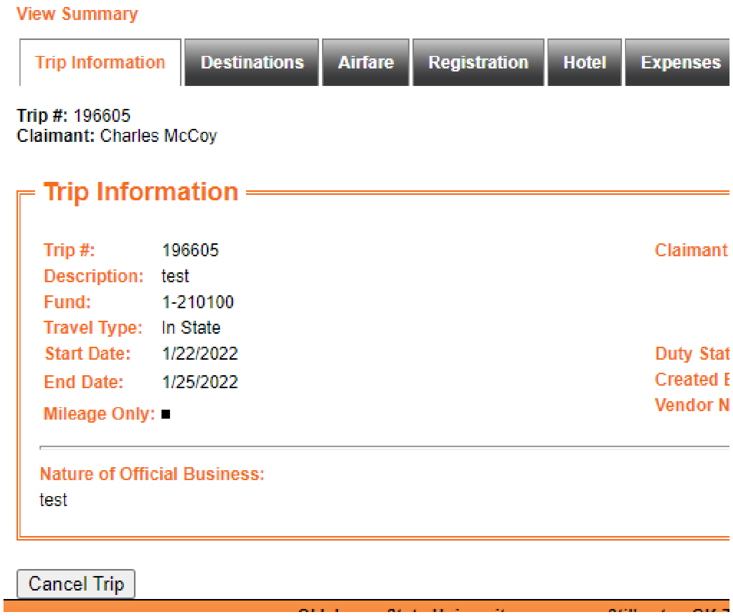
Select Department: 100419 - University Accounting & Controller

Pending Requests | Pending Trips

Pending Trips

#	Description	Claimant	COA-Fund	Status			
210301	test	Charles McCoy	1-210100	*Request Pending*	View	Edit	
196610	test	Charles McCoy	1-210100	Submit For Approval	View	Edit	Cancel
196605	test	Charles McCoy	1-210100	*Pending Claimant Signature*	View		Cancel

3. The user should find the correct request or trip number, and then click Cancel next to it.

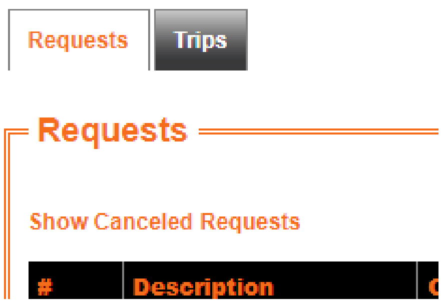


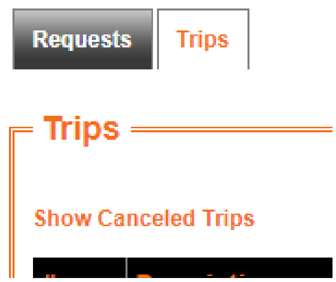
4. The next screen will show the trip with a button to “Cancel Trip” at the bottom. Clicking this button will cancel the trip.

EDITING A CANCELLED OR REJECTED REQUEST OR TRIP

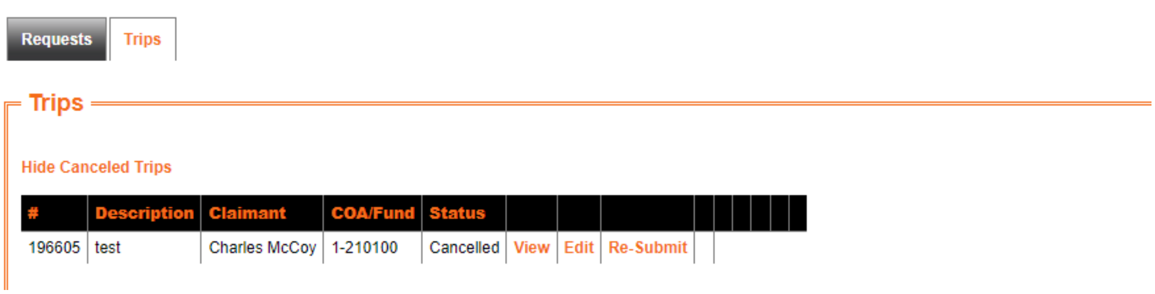
Trip Information does not need to be re-entered into a cancelled or rejected trip. Only the needed changes should be made to the trip. Here are the steps to find the trip and make changes:

1. Cancelled or rejected trips are found under View Trips on the Main Travel Menu.





2. The default setting in AIRS is to hide cancelled or rejected requests/trips under View Trips. If the user needs to edit a cancelled or rejected request, click “Show Canceled Requests” under the Requests tab. If the user needs to edit a cancelled or rejected trip, click the Trips tab and click “Show Canceled Trips.”
    a. Realize that once the user clicks “Show Canceled Trips,” AIRS will take the user back to the Requests tab so the Trips tab will need clicked again.
3. Cancelled and Rejected trips should now appear on the list with the Edit option. The requests and trips should both appear in numerical order by trip number so the user may need to go through multiple pages to find the correct trip number. The alternative is to use the search fields above.



4. Click Edit to make changes to the desired cancelled or rejected trip.
5. Once changes are complete, the request or trip may be resubmitted.

COMBINING MULTIPLE MILEAGE-ONLY TRIPS

Some travelers' business trips are statewide and single day trips by nature. These travelers may combine multiple mileage and turnpike toll reimbursements into one trip instead of processing one AIRS trip for each day of mileage. Most departments submit a month of travel on one travel voucher.

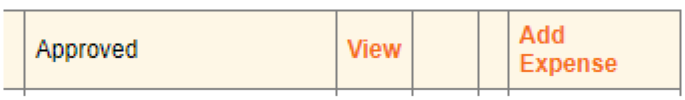
When combining mileage trips on one trip in AIRS, the dates of the combined trips cannot cross fiscal years or cross dates with different mileage rates.

1. Fill out a Travel Addendum form from the Travel website listing each trip's date, starting location, destination, and mileage claimed. Departments may create their own addendum form if they so choose, but it should contain this information. Mileage claimed must be documented by mileage printouts from websites, such as Google Maps or Mapquest. If the destination doesn't have an exact physical address, odometer readings for the start and end of the trip will be accepted. This documentation must be attached to the trip in AIRS.
2. Next fill out an in-state trip in AIRS. Enter both the Start Date and End Date of the trip as the first actual travel day for the period being claimed. Check the box for Mileage Only trip.
3. Enter only one destination, but the destination mileage should match the total mileage as appearing on the addendum form created on step 1.
4. Let AIRS calculate the mileage and enter turnpike tolls as a miscellaneous expense if necessary.
5. Attach the addendum form and mileage documentation.
6. Submit the trip for approval.

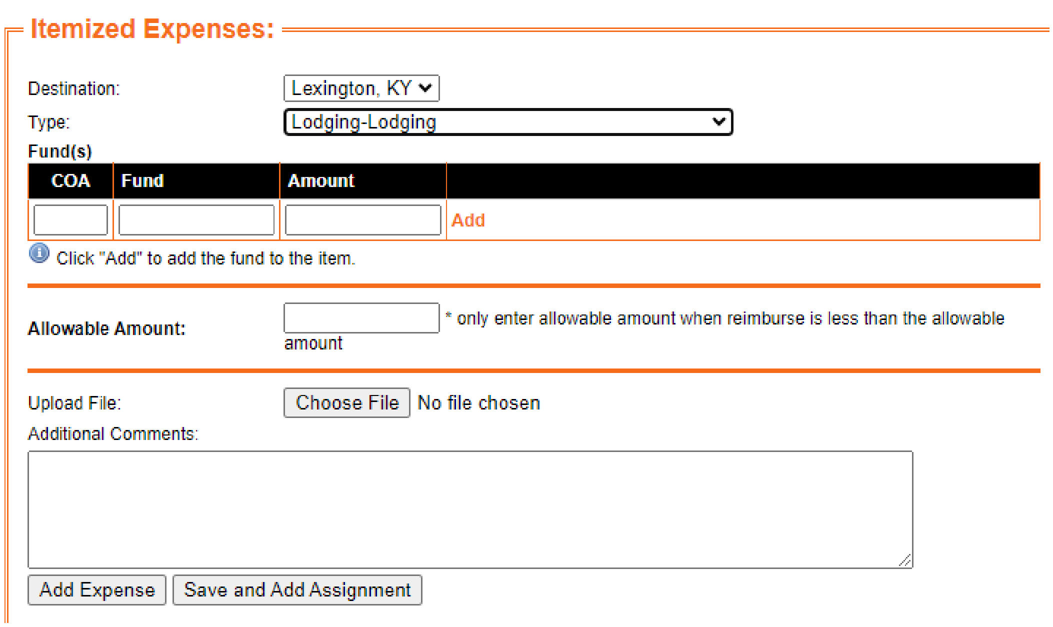
ADDING ADDITIONAL EXPENSES TO AN APPROVED TRIP

When a travel reimbursement is submitted, it's possible not all expenses are added to the trip. Sometimes a traveler may lose a receipt, forget to include a receipt, or may need to request a copy of a receipt from the vendor. If a reimbursement has already been submitted and approved, the travel preparer may add Additional Expenses to the trip and submit the Additional Expenses for reimbursement. When Additional Expenses are approved by University Accounting, only the Additional Expenses will pay to the traveler since the original expenses already paid.

Another need for Additional Expenses may occur when a preparer incorrectly enters the pay type into an expense. For example, a traveler pays their registration out-of-pocket, but the preparer enters "OSU Purchasing Card" into the pay type. The traveler would not be reimbursed in this situation. To correct this, the preparer should go to Add Additional Expenses and add the registration expense as a reimbursable expense. When approved by University Accounting, the registration fee should pay to the traveler.



1. Go to View Trips and click the Trips tab
2. Search by trip number (optional)
3. Find the desired trip number with Approved status
4. Click Add Expense next to this trip



5. Select the correct Destination and Expense Type from the drop-down menus
    a. Notice the Type drop-down menu includes all expenses including Mileage, Lodging, Per Diem, Airfare, Miscellaneous and Local Transportation.
6. Enter the COA, Fund and Reimbursable Amount into the Fund(s) field and click Add.
7. Click “Choose File” and select the attachment for the additional expense. The newly uploaded file cannot have the same exact file name as a previously attached file.
8. Additional Comments are optional
9. Click “Add Expense” to add the additional expense to the trip. Click “Save and Add Assignment” if the expense should be paid to another payee other than the traveler on this trip.
10. Select a pre-route if necessary and submit the additional expenses for approval.

OTHER IMPORTANT AIRS INFORMATION

- A single traveler cannot have multiple trips that cross dates in AIRS. AIRS will give an error message when the user tries to submit a trip for a traveler that already has a submitted trip for those dates.
- Never have AIRS open in multiple browser windows at the same time. The user should only have one AIRS trip open at a time. If AIRS is open in multiple windows, it may cause issues, such as duplicating expenses, changing amounts, adding expenses to approved trips, or resubmitting approved trips.
- An approver can only approve a trip once. For example, a department head may approve as a delegate for another approver, but then will not be able to approve for themselves as the department head approval. Make sure the pre-route will not require a single approver to approve multiple times.
- Always click the View Route button before submitting a request or trip. Make sure all Vacant positions have a delegate set up before submittal.
- AIRS is only for current active OSU employees. Once an employee is off payroll, their travel cannot be processed in AIRS. For example, a travel request is processed for a TA grad student in April, but their trip is in June. Since the TA is on payroll in April, the request can be processed in AIRS. However, the TA may be off payroll for the summer, so the student returns from the trip in June. This reimbursement cannot be processed if the TA is not an active employee over the summer. The reimbursement must be processed on a paper travel voucher.
- When a trip is submitted, be sure to comment on any expenses that are allowable but not being claimed. For example a traveler takes a four day business trip, but no lodging is entered into AIRS. A comment should be added explaining why or at least stating lodging is not being claimed.
- If a trip creator terminates employment with OSU or the department and someone else needs to take ownership to complete that trip, send an email to travel@okstate.edu. The Travel Section of University Accounting can make this change.
- Vacant positions in the pre-route must be fixed by the departmental user. These Vacant positions should be removed from the pre-route. Vacant positions in the automated system routing can only be fixed by an HR partner.
- Plus 4 zip codes are required for traveler addresses. Off-campus plus 4 zip codes are found on the USPS website, and on-campus plus 4 zip codes are found on the Facilities Management website. If a plus 4 zip code cannot be found, then 0001 may be used.
- Attach all receipts associated with the trip to AIRS regardless of payment method. If the receipt was paid by Pcard, clearly write Pcard at the top of the receipt before scanning and attaching the receipt.
- The file names for attachments in AIRS should not include special characters, such as apostrophes and number signs. File names including these characters cannot be opened once attached to the trip.
- Attachments in AIRS are limited to 10 MB per file. If the file size is larger than 10 MB, please scan into multiple attachments to reduce file size.

- A single trip in AIRS cannot have multiple attachments with the same file name.
- All documentation should be scanned and attached. Do not include links to documents since the links to necessary documents will eventually disappear. Also, do not copy and paste receipts into Word or Excel because it would allow these receipts to be altered.
- If a trip is Awaiting Accounting Approval and the submitting department sees a comment stating that an AP address is being added or updated, this is something University Accounting handles on their end. Nothing is needed from the department at this point. An AP address add/update will typically take 2 to 3 business days.

COMMON AIRS ERROR MESSAGES

* Employee does not exist in the vendor file. An email will be sent to Accounting to set up the vendor. The voucher cannot be created until the vendor is set up.

Continue

- This error means a valid mailing address must be set up for the traveler. Enter an address in the boxes that appear and then click the Continue button. Typically this error only appears on a traveler's first trip in AIRS.

* Banner ID not associated with an Employee

Continue

- This error can mean the Banner ID that was entered is incorrect so verify the Banner ID is correct. It could also mean the Banner ID is for a person without an active work assignment in the HR system. If the person does not have an active work assignment, the travel must be processed on paper forms. Another possibility is that the person is a new hire that has not activated their Okey email yet. Once their Okey is activated, this error should disappear.

* Business Start and End dates must be within Destination Dates

- When entering a destination, the Business Start and End Dates must fall within the Start and End Date of the destination. Double check the dates entered.

* Invalid Destination dates - conflicts with other destination dates for this trip

- For trips with multiple destinations, the End Date of one destination cannot cross dates with the Start Date of the next destination. For example if one destination ends on March 5th, the next destination cannot begin on March 5th. The next destination must start on March 6th. Verify the dates of both destinations.

* Invalid Per Diem Rate

- For in-state and out-of-state trips, AIRS will only accept 59, 64, 69, 74 and 79 for allowable per diem rates. Any agreed-upon rates should be entered using the allowable per diem rate and the total should be manually adjusted on the Expenses tab as needed.

* Invalid Description for Destination

- Each destination has a required text field titled Description. Most likely this text box was left blank. This box should contain the purpose of business so ensure something is typed into this field.

* Car Tag is required if requesting Mileage Reimbursement

- The destination includes mileage, but the car tag number was not entered into the destination. Edit the destination and enter the traveler's car tag number.

* Attachment Required for Mileage Expense

- This error could apply to any expense type other than mileage. First verify the receipt or other documentation was attached to the trip. If not, add the attachment. While uploading the file, ensure the check box next to the expense type is checked so AIRS will read it as attached. If the attachment was already added, then most likely the check box was not checked by the expense type with the missing attachment. To fix this go to the Attachments tab and click Edit next to the file name. The list of expenses on the trip should appear with check boxes next to them. Check the box next to the expense with the missing attachment and click Save. This error should no longer appear.

* Not an active employee

If the traveler is not an active employee, this travel must be processed on paper forms or must wait until the traveler becomes an active employee again.

An error has occurred in the Travel application. A notification has been sent to the system administration.

- This error is a generic error message. Send an email to travel@okstate.edu stating this error was received and include precisely what was clicked when this error appeared.