

Attaching Documents Electronically in the Travel System

Notes

Tape original receipts to a blank sheet of paper being careful not to cover any printed portion of the receipts. Use a black marker to redact visible Credit Card Numbers, Bank Account Numbers or other Personal Identifiable information. Scan the receipts and save the files to your computer.

Supporting documentation that is submitted with the Application will also be required when the Voucher is submitted. These are two separate documents and in order to calculate the correct reimbursement and clear advances, the expenses will need to be included with the Voucher.

Travel Application for BTA or Advances

Enter the Travel Application and request advance or BTA. Once you submit the Application, you have the opportunity to attach the supporting documentation by clicking **Submit Documentation**. If the documentation is not yet available, you may access this page later from the left menu under **Applications > Advance/BTA Documentation**.

The screenshot displays the 'TRAVEL 2.0' web interface. On the left is a navigation menu with 'Applications' highlighted and a red arrow pointing to it. The main content area shows a red header with 'Application Accepted' in large red text. Below this, it states 'Your application number is: 1600098' and provides instructions for notification and documentation submission. A red box highlights the 'Submit Documentation' button, with a red arrow pointing to it. A 'Return Home' link is visible at the bottom of the main content area.

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Browse for the receipt associated with the requested advance/BTA. **Upload** the receipt (more than one file may be uploaded) and **Save Changes**. The Travel Office will be notified that you have attached a receipt to the Application and will then be able to approve the advance/BTA request.

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Advance/BTA Documentation for Application 1600098

Below is a list of files attached to this application. Please upload files that are in a standard format, e.g. email (.msg), Word, Excel, PDF, TIFF, JPG, etc. are all acceptable. For images, please make sure all information is readable.

Please **DO NOT** upload any documents with visible CREDIT CARD NUMBERS, BANK ACCOUNT NUMBERS, or other sensitive PERSONALLY IDENTIFIABLE INFORMATION. Carefully review each document for this type of information. Use a black marker to redact any such information before scanning it.

Application 1600098
Traveler: Patty Woodruff Conner
2/5/2016 - 2/8/2016
From: Lubbock, TX
To: Dallas, TX

Upload Files

Z:\accounting\scans\Pat...

Filename	Description	Size	Delete
	Prepaid Hotel Receipt		<input type="button" value="Delete"/>

Changes Saved

NOTE REGARDING MS OFFICE FILES - When opening Office files (Word, Excel, etc.) you may receive a warning about the file being corrupt. You may safely ignore this message. The file storage system makes slight modifications to the file but does not do so in such a way as to overwrite important information.

Travel Voucher

You may add all supporting documentation for the trip on the Expenses page of the Voucher in the Travel System **OR** you may add individual documentation that applies to each expense as you enter the expense. The Travel Office will be notified that you have attached receipts to the Voucher and will then be able to process the Travel Voucher once necessary approvals are obtained.

Attaching Documents Electronically in the Travel System

Adding All Supporting Documentation on the Expenses Page:

To submit all your supporting documentation, click **go here** located in the Upload Documentation box at the bottom of the page.

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Expenses

Enter expenses for trip **1600096**. Click on an expense link to enter expenses of that type. When all expenses for this trip have been entered, click the "Next" button to go to the Voucher Worksheet where you will review your expenses and finalize your voucher.

Commercial Air
Hotels and Hotel Tax
Personal Auto Mileage
Parking
Apartment Rental
Food and Entertainment

Meals
Rental Car
Taxi, Shuttle, and Limousine
Registration Fees
Other Expenses*

More Transportation:
Bus-Chartered
Train
Personal Plane Mileage
Bus-Other
Public Transportation

Expenses claimed so far: **\$0.00**

Icon Legend:
✔ You have entered information and allocated the amount for this expense.
✔ You have entered information for this expense but the amount allocated is out of balance.
📄 You have uploaded documentation for this expense.

* Other Expenses: includes gas for rental cars, tips, etc.

Upload Documentation
(Optional) If you would like to submit your documentation electronically, [go here.](#)

Voucher 1600096
Traveler: Patty Woodruff Conner
1/15/2016 - 1/17/2016
From: Lubbock, TX
To: Dallas, TX
[List of Expenses](#)

Browse for the receipts and click **Upload**.

Upload Files

Browse...

Upload

Attaching Documents Electronically in the Travel System

Once the document is uploaded, you will be required to choose an Expense from the drop down box. For one file containing documentation for the entire trip, use "Other" and enter "All Receipts" in the Description Box. Multiple files may be uploaded if needed. When uploading multiple files, select a category for each file that best fits the documents contained in the file and add an appropriate description. Click **Save and Continue** to proceed.

The screenshot shows the 'All Supporting Documentation for Trip 1600096' page. It includes a sidebar with navigation options like Applications, Voucher, Reports, Admin, and Help. The main content area displays instructions for uploading files and a table for managing attachments. A red box highlights the 'Upload Files' section, and another red box highlights the 'Expense' and 'Description' columns of the table. A red arrow points from the 'Upload Files' section to the 'Expense' dropdown menu, and another red arrow points from the 'Description' input field to the 'Save and Continue >>' button. A third red arrow points from the 'Save and Continue >>' button to the 'Save and Continue >>' button.

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All Supporting Documentation for Trip 1600096

Below is a list of files attached to this voucher. This includes files you may have attached after entering an expense. Please upload files that are in a standard format, e.g. email (.msg), Word, Excel, PDF, TIFF, JPG, etc. are all acceptable. For images, please make sure all information is readable.

All files must be categorized as an expense type. If a file contains information regarding more than one expense, simply make a reasonable selection. For example, valet parking may be included on a lodging receipt. In this case, categorizing the receipt as Lodging would be a reasonable choice.

Please **DO NOT** upload any documents with visible CREDIT CARD NUMBERS, BANK ACCOUNT NUMBERS, or other sensitive PERSONALLY IDENTIFIABLE INFORMATION. Carefully review each document for this type of information. Use a black marker to redact any such information before scanning it.

Voucher 1600096
Traveler: Patty Woodruff Conner
1/15/2016 - 1/17/2016
From: Lubbock, TX
To: Dallas, TX
[List of Expenses](#)

Upload Files

Z:\accounting\scans\Patty Browse...
Upload

Filename	Expense	Description	Size	Delete
160121155817_0001.pdf	Other	All Receipts	3097K	Delete

Save and Continue >>

NOTE REGARDING MS OFFICE FILES - When opening Office files (Word, Excel, etc.) you may receive a warning about the file being corrupt. You may safely ignore this message. The file storage system makes slight modifications to the file but does not do so in such a way as to overwrite important information.

Attaching Documents Electronically in the Travel System

Adding Supporting Documentation to Each Expense:

As you add Expenses in the Travel Voucher, you have the opportunity to attach supporting documentation. The Travel Office will be notified that you have attached receipts to the Voucher and will then be able to process the Travel Voucher once approvals are obtained.

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Airfare and Agency Fee - Documentation

Below is a list of files attached to this voucher for this expense. Please upload files that are in a standard format, e.g. email (.msg), Word, Excel, PDF, TIFF, JPG, etc, are all acceptable. For images, please make sure all information is readable.

Please **DO NOT** upload any documents with visible CREDIT CARD NUMBERS, BANK ACCOUNT NUMBERS, or other sensitive PERSONALLY IDENTIFIABLE INFORMATION. Carefully review each document for this type of information. Use a black marker to redact any such information before scanning it.

Voucher 1600096
Traveler: Patty Woodruff Conner
1/15/2016 - 1/17/2016
From: Lubbock, TX
To: Dallas, TX
[List of Expenses](#)

Upload Files

Browse...
Upload

Once the document is uploaded, a Description Box can be populated if needed. Multiple files may be submitted if necessary. Click **Next** to continue.

Filename	Description	Size	Delete
BTA TEST DOCUMENT airfare.docx	Airfare Receipt	13K	Delete
BTA TEST DOCUMENT.docx		13K	Delete

Next >>

Once the Travel Voucher is submitted, the traveler will be required to certify that all of the original receipts associated with the trip were submitted to the Preparer for processing. Original receipts must be retained until the travel voucher has been approved by the Travel Office and then the receipts may be destroyed.

Electronic Documentation: I certify that I have submitted all of the original expense receipts associated with this trip to the Travel Preparer for processing. Original receipts must be retained until the travel voucher has been approved by the Travel Office and then the receipts may be destroyed.

Electronically Sign This Voucher