



THE OHIO STATE UNIVERSITY

Travel Process with Workday

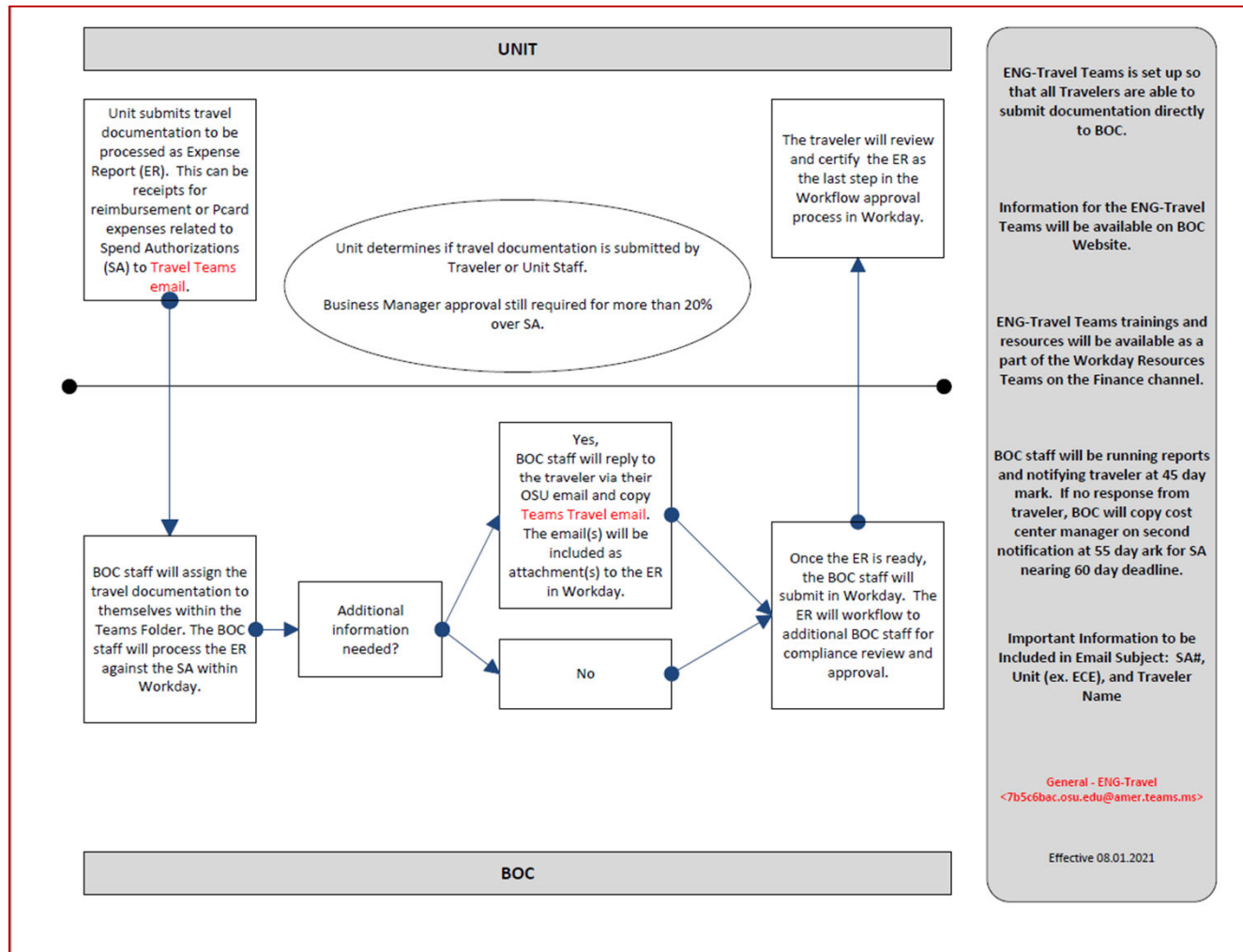
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Kelly Moore, BOC Procurement / Travel Manager

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Expense Report Workflow





Who, What, When?

Who	What	When
Unit	Gathers documentation and submits to BOC via Microsoft Teams email. Important information to be included: Traveler Name, SA#, and Unit	After traveler returns from trip. Documentation to be submitted within 60 days of return date.
BOC	Staff reviews submitted documentation for policy compliance and missing information. Staff contacts Traveler with any questions. Staff run reports for 60 day rule and contact travelers at 45 day mark.	Once received via Microsoft Teams email.
Traveler* <small>*Not applicable to guest travelers.</small>	Reviews ER for accuracy and approves / certifies in Workday.	After ER has been submitted via Workday.



Suggestions for Success

- **Work with your department business manager and fiscal staff from the beginning.**
- **Plan ahead.**
- **Use the University Travel Agency and on-line booking tool (contracted vendors; CTP and rental car agencies).**
- **Read the Travel policy.**
- **Keep your receipts.**
- **Submit Expense Reports promptly.**
- **When in doubt, ask questions.**



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Helpful Links

Workday

<https://www.myworkday.com/osu/login.html>

Purchasing & Pcard Policies

<https://busfin.osu.edu/buy-schedule-travel/pcard>

Travel Resources

<https://busfin.osu.edu/buy-schedule-travel/travel>

BOC Website

<https://voc.engineering.osu.edu/>



- **Contact Information**

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