

Quick Reference Guide Travel Request Process using smartsheet®

- EGTC now uses smartsheet® for all order and travel requests. It is a nearly paperless process. •

Go to the dashboard located at <https://dynamicview.smartsheet.com/>

- bookmark this link for future use

- Use either Chrome or Firefox since the new view isn't compatible with Internet Explorer.

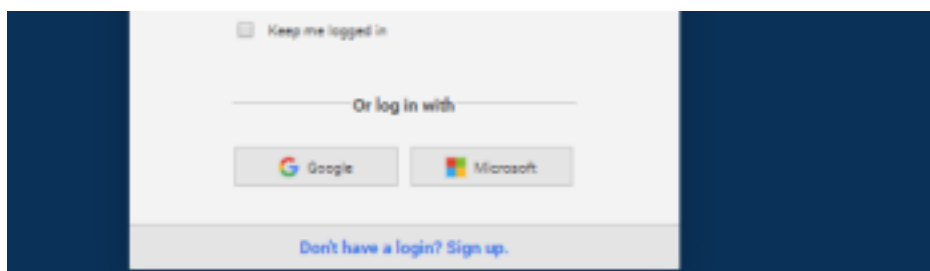


Welcome to Dynamic View

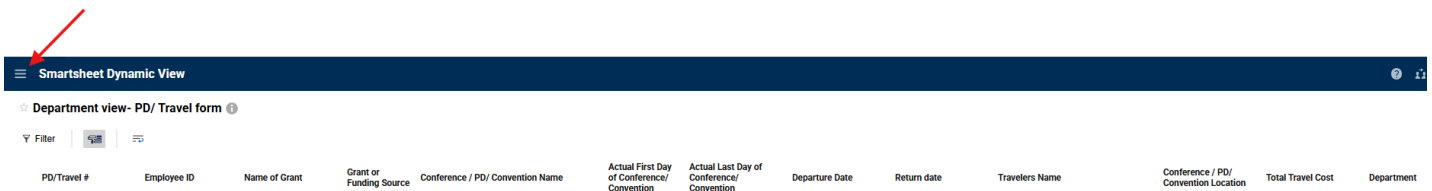
Select or create a view

New View

- The first time you login, select "Don't have a login? Sign up"
 - Log in with "Google." after that.
- Register with your Emily Griffith email ending in @emilygriffith. An email will be sent to you to confirm your login, and then you will be redirected to the dashboard.

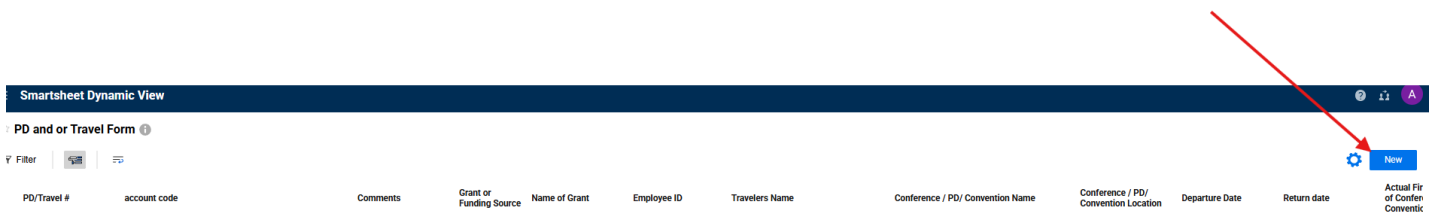


- Select the “PD and/or Travel Form” on the left hand side under the views. If the word "view" is not visible then click the hamburger icon on the top left hand side.



Submitting a travel request

- Select “New” to submit a new request. It is located on the top right corner.



- The form below will appear to the right:

Details

×

Data

Employee ID *

Travelers Name *

Department *

This field will trigger the automation. It will send an approval request based on the department manager. See the Smartsheet quick reference guide for a list of managers.

×

▼

Program *

This field will pull the budget from the program you select. Unless you state the purchase is grant funded on the next field.

×

▼

Grant or Funding Source *

Select Grant from the dropdown if the grant/fund you need to use are not listed.

×

▼

Name of Grant

If you selected Grant from the dropdown on the field above please type the name of grant/fund that you will use.

Conference / PD/ Convention Name *

Conference / PD/ Convention Location *

Departure Date

This only applies if you are traveling outside of Colorado

MM/dd/yy

Return date

- Fill in the form with the appropriate information. If some fields are not applicable, type N/A or leave blank.
 - Once you have entered all of your information. The save button will appear on the bottom right hand side of your Details sheet.
 - Choose Save at the bottom.
-
- When the data is saved you will need to look for your line request on the dynamic view and click on it to add additional documents to the attachments tab and/or comments tab within your data form.

Details [Close]

Data Attachments (7) Comments (1)

Department *

This field will trigger the automation. It will send an approval request based on the department manager. See the Smartsheet quick reference guide for a list of managers.

Finance & Operations [Clear] [Dropdown]

Program Name *

This field will pull the budget from the program you select. Unless you state the purchase is grant funded on the next field.

Facilities Fee [Clear] [Dropdown]

Grant name or other funding source *

Select grant from the drop down if the grant you need is not listed.

General Fund [Clear] [Dropdown]

- If your travel is being paid by the **Perkins Grant** or by the **Vocational Teachers Council**, select the appropriate grant name from the grant of funding source drop down cell. **If the grant you need is not listed on the dropdown please type the grant name on the cell below titled Name of Grant.**
 - Attach all backup documents in the Attachments tab. These include 2 airfare and hotel quotes. Also include your conference agenda and your hotel's credit card authorization form. If requesting travel paid by the Vocational Teachers Council, also attach the additional forms necessary.
 - Add comments to the data form as needed. Please keep in mind that smartsheet will not notify you if a comment is added to the data form.
 - Check the form by clicking on the relevant row from the dynamic view.
 - By clicking on the row the data form will appear again on the right, then you will be able to see your attachments and any new comments.
- Please check your comments for those requests being funded under a grant. BSO will add the grant account number that needs to be used when requesting a per diem or reimbursement. All other can view the account on the dynamic view home screen

Smartsheet Dynamic View

☆ PD and or Travel Form ⓘ

Filter [Icon] [Icon]

PD/Travel #	account code	Comments	Grant or Funding Source	Name of Grant	Employee ID	Travelers Name	Conference / PD/ Convention Name	Conference / PD/ Convention Location	Departure Date	Return date	Actual First Day of Conference/ Convention	Actual Last Day of Conference/ Convention	Program	Created By	Total Travel Cost	Date Created	Per Di submit date
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- Please refer to your dynamic view to check the status of your request . When your request is approved by your Supervisor, you will see the status change from submit to approve under the Department Head approval column in Dynamic View. The same applies to all other approvals.
- When the travel is approved by ALL required teams, you will receive an email with further instructions.
- Requests will be approved by the Business office twice each week (Tuesday and Thursdays). •

NOTES FROM THE BUSINESS OFFICE:

- Just like the order form, the automation is triggered by the department cell with the exceptions of Deans, VP's, student services and department of finance staff . Please make sure you are entering your own travel/PD request as the automation will route to the submitter's supervisor.
- The program selected from the dropdown in the data sheet will generate the account code that you will need to use to submit your per diem and/or reimbursements through Oracle. The account will be visible in the dynamic view home page. For request being paid under a grant please see the comment section to retrieve the account code.

Reach out to BSO if you need help adding your account code in Oracle for all per Diems or reimbursement requests.

Details

Data

Employee ID *

Travelers Name *

Department *

This field will trigger the automation. It will send an approval request based on the department manager. See the Smartsheet quick reference guide for a list of managers.

Program *

This field will pull the budget from the program you select. Unless you state the purchase is grant funded on the next field.

Grant or Funding Source *

Select Grant from the dropdown if the grant/fund you need to use are not listed.

Name of Grant

If you selected Grant from the dropdown on the field above please type the name of grant/fund that you will use.

Conference / PD/ Convention Name *

Conference / PD/ Convention Location *

Smartsheet Dynamic View

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Filter



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