

# Polk County Travel Forms

## User Manual

4/1/2015

Polk County BoCC

Information Technology (IT)

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## Accessing the County Travel Forms Application

The County Travel Forms application is located on the Polk Hub in the main page tile. It is also located at the following URL: <http://polkhub.polk-county.net/travelforms/default.aspx>

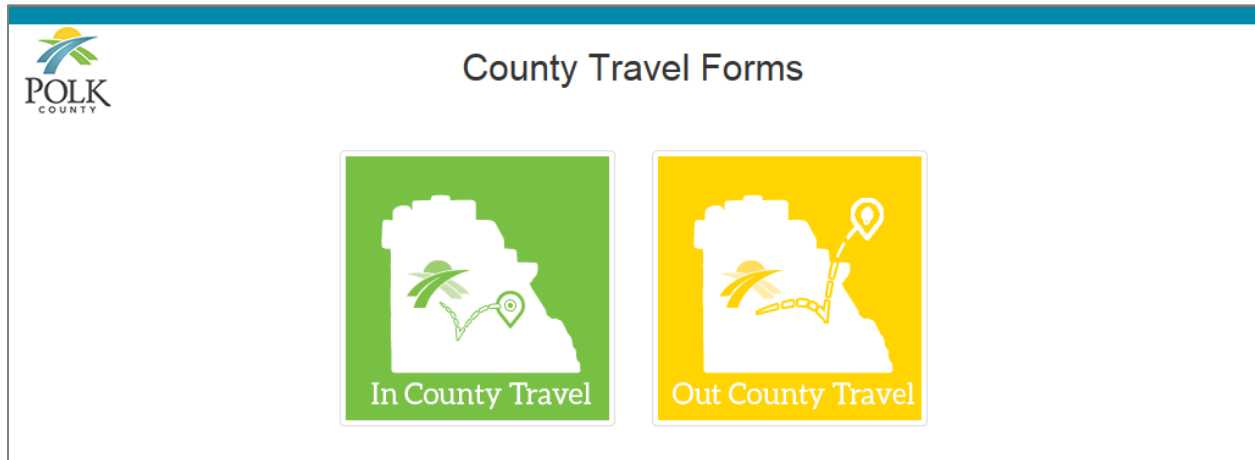


Figure 1 - Travel Form Application

### Login

All BoCC and non-BoCC employees are required to login to use the In-County and Out-of-County travel forms. The purpose is to clearly identify and validate the user and to relocate their active forms.

- **BoCC Employee**
  - Click on the **BoCC Employee** tab
  - Enter your **Network ID** in the text box (ex., it001234)
  - Click the **Login** button
- **Non-BoCC Employee**
  - Click on the **Other User** tab
  - Enter you registered **Username** and **Password**
  - Click the **Login** button

*Note: If you do not have username/password you will need to “register” as a new user and setup your login account ID. This is only for non-BoCC users. Please refer to the section below; “Register a New Account”.*

## Login to Travel Forms

**Tabs**

BoCC Employee    Other User

**Network ID:**

**Login**

\* All BoCC employees will login using their network login ID (Ex: it012345).

Figure 2 - Active BoCC Employee Tab

## Login to Travel Forms

BoCC Employee    Other User

**Username:**

**Password:**

**Login**

All non-BoCC employees (Constitutional) must register with a username and password. Click Register button below to register for first time user.

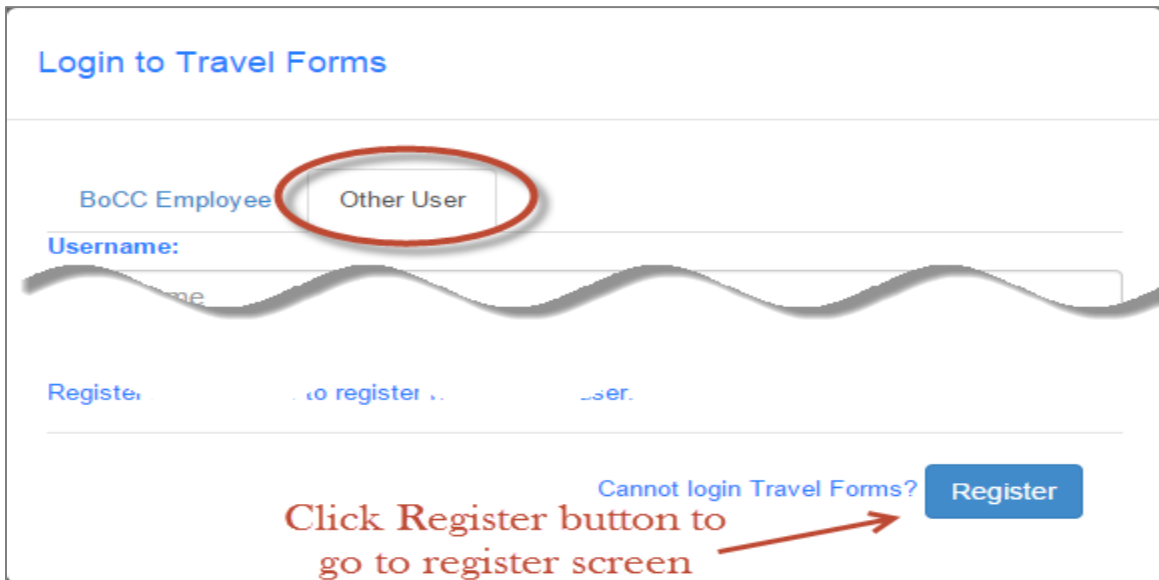
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Cannot login Travel Forms? **Register**

Figure 3 - Active Other User Tab

## Register a New Account

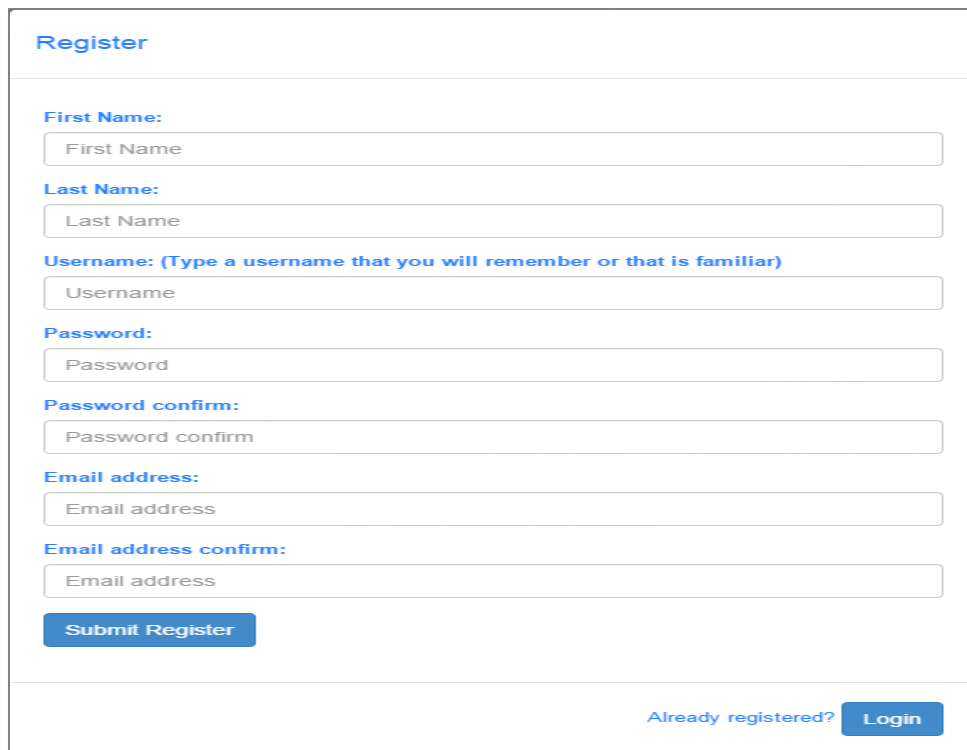
To create an account, click on the **Other User** tab, then click the **Register** button located at the bottom of the dialog box.



The screenshot shows a web interface titled "Login to Travel Forms". At the top, there are two tabs: "BoCC Employee" and "Other User". The "Other User" tab is highlighted with a red circle. Below the tabs is a "Username:" label and a text input field. At the bottom of the dialog, there is a "Register" button. A red arrow points from the text "Click Register button to go to register screen" to the "Register" button. There is also a link "Cannot login Travel Forms?" next to the "Register" button.

Figure 4 – Other User Tab

Fill in all of the required fields on the register screen and then click the **Submit Register** button to complete your account setup.



The screenshot shows a "Register" form with the following fields and buttons:

- First Name:** Input field with placeholder "First Name"
- Last Name:** Input field with placeholder "Last Name"
- Username:** Input field with placeholder "Username" and a note: "(Type a username that you will remember or that is familiar)"
- Password:** Input field with placeholder "Password"
- Password confirm:** Input field with placeholder "Password confirm"
- Email address:** Input field with placeholder "Email address"
- Email address confirm:** Input field with placeholder "Email address"
- Submit Register** button
- Already registered?** link
- Login** button

Figure 5 - Register Screen

## Logout

It is recommended that you always log-out of the application when you are no longer using the travel form application. This will safeguard your forms and information. To logout, just simply click on the **Logout** button located at the top of the form.



## Navigation

After you have logged-in the navigation panel appears at the top of a form and the navigation changes accordingly when you are on In-County or Out-of-County forms. The screenshots below show an example of a user that is logged-in.

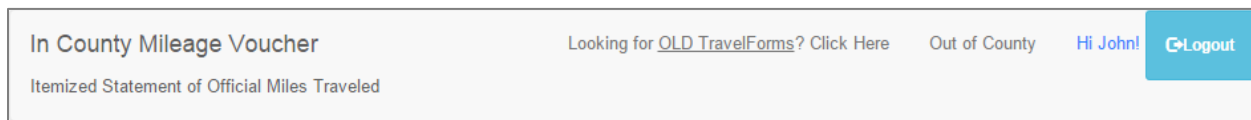


Figure 6 - In-County Navigation Menu

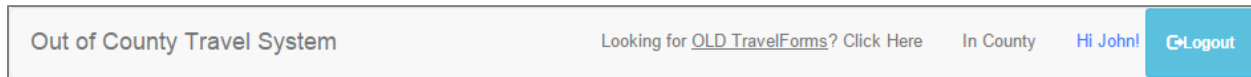


Figure 7 - Out-of-County Navigation Menu

# In-County form

## Adding a New Voucher

To add a new voucher, click on the check-box located to the left of the “NEW Travel Voucher?” link area.

**Start new Voucher, make sure this Check-box is checked**

NEW Travel Voucher?

Employee ID: johndoe

Voucher: 2

Traveler\*: Traveler Name

Preparer\*: Preparer

Division\*: Division Name

From Date\*: Date required

Payroll Box #: Payroll Box

To Date\*: Date required

Work City\*: Your Work City

Default Fund: (optional) Fund

Home to Work City Mileage\*: 0.0

Default Cost Center: (optional) Cost Center

Home City\*: Your Home City

Vendor #: Vendor Number

Mileage Rate:

- Current County Rate of 0.575
- Previous County Rate of 0.56
- Current State Rate of 0.445
- Previous State Rate of 0.45

**Click this button to save all text boxes above**

Save Voucher Master Data

\*: are required fields

Figure 8 - Voucher

## View Existing Vouchers

To view existing vouchers, make sure the “NEW Travel Voucher?” check-box at the top of the form is unchecked. This will enable a drop-down box that allows you to select your previous vouchers.

**View Existing Voucher, make sure this check-box is unchecked/clear**

NEW Travel Voucher?

Employee ID: johndoe

Voucher: John Doe - 3/2/2015

Traveler\*: John Doe

Preparer\*: John Doe

Division\*: IT

From Date\*: 03/02/2015

Payroll Box #: 46

To Date\*: 03/03/2015

Work City\*: Bartow

Default Fund: (optional) 22222

Home to Work City Mileage\*: 21.0

Default Cost Center: (optional) 22222222

Home City\*: Lakeland

Vendor #: Vendor Number

Mileage Rate:

- Current County Rate of 0.575
- Previous County Rate of 0.56
- Current State Rate of 0.445
- Previous State Rate of 0.45

**Make sure to click this button to save changes**

Save Voucher Master Data

\*: are required fields

Figure 9 - Existing Vouchers

## The Main Screen

**In County Mileage Voucher**

Itemized Statement of Official Miles Traveled

Looking for [OLD TravelForms](#)? Click Here

Out of County Hi John! Logout

Unchecked to view Existing Vouchers →  **NEW Travel Voucher?**

Employee ID:

**Lookup Payroll Box Numer** → **Traveler\*:**

**Division\*:**

**Payroll Box #:**

**Work City\*:**

**Home to Work City Mileage\*:**

**Home City\*:**

**Voucher:**  Delete Voucher

**Preparer\*:**

**From Date\*:**  📅

**To Date\*:**  📅

**Default Fund: (optional)**

**Default Cost Center: (optional)**

**Vendor #:**

**Mileage Rate:**

Current County Rate of 0.575   
  Previous County Rate of 0.56  
 Current State Rate of 0.445   
  Previous State Rate of 0.45

Save Voucher Master Data

\*: are required fields

Add new trips for this voucher

Add New Record

DATE	ACTIVITY	LOCATION		NET MILES	AMOUNT
		FROM	TO		
No records to display.					

FUND	COST CENTER	NET MILES	TOLLS	OTHERS	AMOUNT
No records to display.					
		0			\$0.00

Print

Figure 10 - Main Screen

## Table Details

Table Details allows you to quickly view details of each trip that you have entered. To view the details, simply click on the **+/-** icon to expand or collapse the view.



**Add New Record**

**Expand All** →

DATE	ACTIVITY	LOCATION		NET MILES	AMOUNT	Edit	Delete
		FROM	TO				
03/02/2015	training	Tampa	Bartow	46.6	\$26.80	Edit	Delete

**Collapse** →

**Trip details when you expand** →

TIME		ODOMETER		DOT MILES	MILEAGE ADJUSTMENT	TOLLS	OTHERS	FUND	COST CENTER	ACCOUNT	PROJECT	TASK	EXP ORG
DEPARTED	ARRIVED	BEGIN	END										
		0	0	46.6		\$0.00	\$0.00	22222	222222222				

**Expand** →

03/02/2015	training	Bartow	Tampa	46.6	\$26.80	Edit	Delete
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Figure 11 - Table Details

## Table Summary

The Table Summary provides a quick view of your total mileages, tolls, others, and amounts that are calculated.

FUND	COST CENTER	NET MILES	TOLLS	OTHERS	AMOUNT
22222	222222222	46.6			\$26.80
22222	222222222	46.6			\$26.80
<b>Total Row</b> →		93.2	\$0.00	\$0.00	\$53.60

Figure 12 - Table Summary

## Add New Trip

The information provided on the previous screens allows the auto-calculation when traveling from your home or other areas such as your working city. Also, the new travel form can auto-calculate round-trips.

**Add New Record**

EmpID: johndoe      Traveler: John Doe      Home to Work City Mileage: 0      Mileage Rate: 0.575

Date:       Time Departed:       From location:

Time Arrived:        From Home       To Home

Activity:

Check this box to add a return trip automatically  
**When this box is checked, it will automatically add a return trip on the same day**

Odometer Start:       Odometer End:

-OR-

DOT/Internet miles:       Mileage Adjustment:

Net Miles:       Tolls:

Others:       Amount:

Fund:       Cost Center:

Account:       Project:

Task:       Exp Org:

**Save changes** →        → **Discard any changes**

**These amounts will automatically calculate based on information you provide**

**Check one of these boxes if you travel from/to Home**

**This automatically populates information from the main screen**

Figure 13 - New Trip

## Edit Existing Trip

**Edit Record**

EmpID: johndoe      Traveler: John Doe      Home to Work City Mileage: 21      Mileage Rate: 0.575

Date: 03/02/2015      Time Departed: 12:00 AM      From location: Tampa  
Time Arrived: 12:00 AM       From Home

Activity: training      To location: Bartow  
 To Home

Odometer Start: 0.0      Fund: 22222  
Odometer End: 0.0      Cost Center: 22222222

-OR-

DOT/Internet miles: 46.6      Account:      Project:      Task:      Exp Org:      Amount: 26.7950

Mileage Adjustment: 0.0      Tolls: 0.00      Others: 0.00

Net Miles: 46.6

Save changes      Discard changes

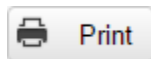
Save      Cancel

**Make any modification and use the two(2) buttons at the bottom of the form to save/cancel changes**

Figure 14 - Edit Record

## Print Voucher

When you have completed filling out your voucher, use the **Print** button located at the bottom of the form to export it to PDF. In the PDF viewer, you can either save it to your computer or send it to a printer.



# Out-of-County form

## Add New Voucher

To add a new voucher, click on the check-box located to the left of the “NEW Travel Voucher?” link area. To start a new voucher, simply type in the required trip destination information.

Out of County Travel System      Looking for [OLD TravelForms?](#) Click Here      In County      Hi it004208!      Logout

Home       NEW Travel Voucher?

Employee ID:       Trip Destination Info (City, State)\*: *Required*

Division\*: *Required*       Preparer\*: *Required*       From Date\*: *Required*

Payroll Box #:       To Date\*: *Required*

Mileage Rate:  Current County Rate of 0.575     Previous County Rate of 0.56  
 Current State Rate of 0.445     Previous State Rate of 0.45

\*: are required fields.

[High Rate Locations](#) | [Advance Voucher](#) | [DOT Mileage Website](#)

Figure 15 - Out-of-County Main Screen

## Delete Existing Voucher

Out of County Travel System      Looking for [OLD TravelForms?](#) Click Here      In County      Hi John!      Logout

Home       NEW Travel Voucher?

Employee ID:       Trip Destination Info (City, State)\*:

Division\*:       Preparer\*:       From Date\*:

Payroll Box #:       To Date\*:

Mileage Rate:  Current County Rate of 0.575     Previous County Rate of 0.56  
 Current State Rate of 0.445     Previous State Rate of 0.45

\*: are required fields.

[High Rate Locations](#) | [Advance Voucher](#) | [DOT Mileage Website](#)

## View Existing Vouchers

To view existing vouchers, be sure the check-box is unchecked **“NEW Travel Voucher?”** to toggle between a new form and existing form. Select your voucher in the drop-down box to switch to different vouchers.

The screenshot shows the 'Out of County Travel System' interface. At the top, there is a navigation bar with 'Looking for OLD TravelForms? Click Here', 'In County', 'Hi John!', and a 'Logout' button. Below this is a 'Home' section. The main form area includes fields for 'Employee ID:' (johndoe), 'Division\*:' (IT), 'Payroll Box #:' (46), 'Preparer\*:' (John Doe), 'From Date\*:' (04/15/2013), and 'To Date\*:' (04/19/2013). A 'Trip Destination Info (City, State)\*:' dropdown menu is set to 'Ektron Software Training in Nashua, New Hampshire on 4/15/2013', with a 'Delete Trip' button next to it. A 'Mileage Rate:' section has four radio button options: 'Current County Rate of 0.575', 'Previous County Rate of 0.56', 'Current State Rate of 0.445', and 'Previous State Rate of 0.45'. At the bottom, there are three buttons: 'Travel Worksheet(s)', 'Travel Request', and 'Travel Voucher'. A red box highlights the 'NEW Travel Voucher?' checkbox, which is unchecked. Red arrows and text annotations point to the dropdown menu and the three buttons, explaining their functions. A footer contains links for 'High Rate Locations', 'Advance Voucher', and 'DOT Mileage Website'.

Figure 16 - Existing Vouchers

## Travel Worksheet

### Add New Traveler

The screenshot shows the 'Travel Worksheet' interface. At the top, there are buttons for 'Back to Main', 'Add New Traveler', and 'Delete This Traveler'. The main form area includes fields for 'Trip Info: Ektron Software Training in Nashua, New Hampshire on 4/15/2013', 'Traveler:' (John Doe), 'Departure Date\*:' (4/15/2013), and 'Payroll Box\*:' (46). Below these are fields for 'Traveler\*:', 'Rate\*:', 'County\*:', and 'Dist\* (Dept\*:')'. A red speech bubble points to the 'Add New Traveler' button, stating 'Click Add New Travel button to start new worksheet'. Another red speech bubble points to the 'Save Form' button, stating 'Click Save Form button to save changes'. At the bottom, there are 'Save Form' and 'Print' buttons. A footer contains links for 'High Rate Locations', 'Advance Voucher', and 'DOT Mileage Website'.

Figure 17 - Add New Traveler

### Delete Existing Traveler

Use the **Delete This Traveler** button to delete the currently selected traveler’s worksheet.

Travel Worksheet

Back to Main Add New Traveler Delete This Traveler

Trip Info: Ektron Software Training in Nashua, New Hampshire on 4/15/2013 Mileage Rate: 0.575

Traveler: John Doe **Select John Doe**

Fund\*: 22222 **Click Delete This Traveler button to delete John Doe's Travel Worksheet**

Traveler Title\*: Return Date\*: Cost Center\*:

Figure 18 - Delete Existing Traveler

## Switch Travelers' Worksheet

Travel Worksheet

Back to Main Add New Traveler Delete This Traveler

Trip Info: Ektron Software Training in Nashua, New Hampshire on 4/15/2013 Mileage Rate: 0.575

Traveler: John Doe **Use this drop-down to select different traveler's worksheet**

Fund\*: 22222 Payroll Box\*: 46

Traveler Title\*: Return Date\*: Cost Center\*: Distance\*: Per Diem Rate\*:

**Click Save Form button to save changes**

Save Form Print

[High Rate Locations](#) | [Advance Voucher](#) | [DOT Mileage Website](#)

Figure 19 - Switch Traveler's

## Travel Request

This Travel Request form automatically populates information from the Travel Worksheet. It is important that you always start with a Travel Worksheet first.

# Travel Request

[Back to Main](#)

**Trip Information:**

Ektron Software Training in Nashua, New Hampshire on 4/15/2013

**Departure Date:**

4/15/2013

**Division/Dept.:**

IT

**Return Date:**

4/19/2013

**PayrollBox:**

46

**Mileage Rate:**

0.575

TRAVELER	TRAVELER TITLE	FUND	COSTCENTER	ESTIMATED COST OF TRIP	ADVANCED REQUESTED
John Doe	Programmer	22222	222222222	\$500.46	\$0.00

**Name/Type of Meeting:**

**Purpose of Trip:**

[Save Form](#)

[Print](#)

[High Rate Locations](#) | [Advance Voucher](#) | [DOT Mileage Website](#)

**Figure 20 - Travel Request**

# Travel Voucher

## Add New Traveler

Travel Voucher

Back to Main | Add New Traveler | Delete This Traveler

Today's date: 3/23/2015

Attended\*: Training Ektron class

Location\*: Nashua, NH

Fund\*: 22222

Cost Center\*: 222222222

Pay To\*: John Doe

Project: [ ]

Task: [ ]

Exp Org: [ ]

Mileage Rate: 0.575

Account: 5340010

Trip Desc: Ektron Software Training in Nashua, New Hampshire on 4/15/2013

Travel | Meals | Expenses

Save Form | Print

High Rate Locations | Advance Voucher | DOT Mileage Website

Figure 21 - Add New Traveler

## Delete Existing Traveler

Travel Voucher

Back to Main | Add New Traveler | Delete This Traveler

Today's date: 3/23/2015

Attended\*: Training Ektron class

Departure\*: 4/15/2013

Return\*: 4/19/2013

Fund\*: 222222222

Pay To\*: John Doe

Select John Doe

Click Delete This Traveler button will delete John Doe's Travel Voucher

Figure 22 - Delete Existing Traveler

## View Existing Traveler

Travel Voucher

Back to Main   Add New Traveler   Delete This Traveler

Today's date: 3/23/2015   Attended\*:

Departure\*: 4/15/2013    Fund\*: 22222

Pay To\*: John Doe    Return\*: 4/19/2013    Cost Center\*: 222222222

Use this drop-down to select different traveler's voucher

Click Save Form button to save changes

Save Form   Print

[High Rate Locations](#) | [Advance Voucher](#) | [DOT Mileage Website](#)

Figure 23 - Existing Traveler

## Print Voucher

When you have completed filling out your voucher, use the **Print** button located at the bottom of the form to export it to PDF. In the PDF viewer, you can either save it to your computer or send it to a printer.

