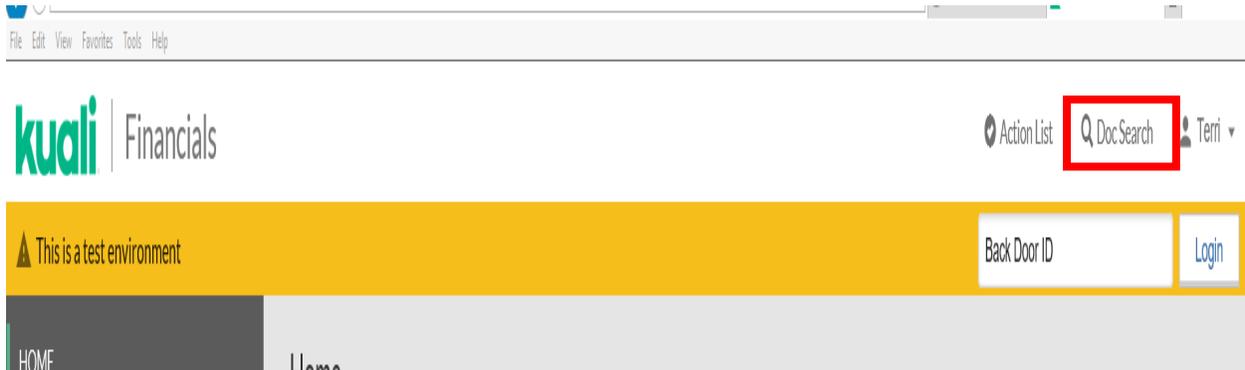


## How to Search for Travel Documents

The Travel Module has security settings in place that will only allow the traveler and the traveler's designated travel arranger(s) to view the travel documents. If you do not have access to the traveler via the travel arranger role, you will not be able to view the travel document.

Start by clicking on the "doc search" button on the top right of Kuali.



Below is the Document Search screen:

In the Document Type section you will enter "TA" to search for Travel Authorizations or "TR" to search for Travel Reimbursements. After you type in the document type click "tab" on your keyboard. That will change your search screen to look like the below:

detailed search    superuser search    clear saved search

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**Document Type:**

**Initiator:**

**Document Id:**

**Application Document Status:**

**Date Created From:**

**Date Created To:**

**Document Description:**

**Organization Document Number:**

**TEM Doc #:**

**Trip Begin From:**

**Trip Begin To:**

**Trip End From:**

**Trip End To:**

**Primary Destination:**

**Trip Type Code:**

**Traveler Type Code:**  All  Customer  Student  Other  Employee  Non-Employee

**First Name:**

**Last Name:**

**Primary Destination Country/State:**

**Object Code:**

**Chart Code:**

**Organization Code:**

**Account Number:**

**Ledger Document Type:**

**Total Amount:**

**Search Result Type:**  Document Specific Data  Workflow Data

**Name this search (optional):**

NOTE: If after clicking “tab” your search field doesn’t change, it is because your compatibility mode is turned on. If you turn it off, then you will be able to tab. If you would like to leave it on, then type “TA” or “TR” in the Document Type and then click on detailed search button at the top right corner of the screen (see red box on previous page).

Any of the fields listed on the search screen are search options. You do not have to enter any additional information, however completing more fields will help narrow the search results. It is highly recommended to use the asterisk on either side of all search criteria you enter. To search for a trip where you only know the destination and department number (organization code) you would fill out the search screen as shown below:

<b>Document Type:</b>	tr <input type="text"/>
<b>Initiator:</b>	<input type="text"/>
<b>Document Id:</b>	<input type="text"/>
<b>Application Document Status:</b>	<div style="border: 1px solid gray; padding: 2px;">         In Process          Awaiting Traveler Review          Awaiting Special Request Review          Awaiting Fiscal Officer Review          Awaiting Organization Review       </div> <input type="text"/>
<b>Date Created From:</b>	<input type="text"/>
<b>Date Created To:</b>	<input type="text"/>
<b>Document Description:</b>	<input type="text"/>
<b>Organization Document Number:</b>	<input type="text"/>
<b>TEM Doc #:</b>	<input type="text"/>
<b>Trip Begin From:</b>	<input type="text"/>
<b>Trip Begin To:</b>	<input type="text"/>
<b>Trip End From:</b>	<input type="text"/>
<b>Trip End To:</b>	<input type="text"/>
<b>Primary Destination:</b>	*pueblo* <input type="text"/>
<b>Trip Type Code:</b>	<input type="text"/>
<b>Traveler Type Code:</b>	<input type="radio"/> All <input type="radio"/> Customer <input type="radio"/> Student <input type="radio"/> Other <input type="radio"/> Employee <input type="radio"/> Non-Employee
<b>First Name:</b>	<input type="text"/>
<b>Last Name:</b>	<input type="text"/>
<b>Primary Destination Country/State:</b>	<input type="text"/>
<b>Object Code:</b>	<input type="text"/>
<b>Chart Code:</b>	<input type="text"/>
<b>Organization Code:</b>	6003
<b>Account Number:</b>	<input type="text"/>
<b>Ledger Document Type:</b>	<input type="text"/>
<b>Total Amount:</b>	<input type="text"/>
<b>Search Result Type:</b>	<input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data
<b>Name this search (optional):</b>	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

After the criteria has been entered, click “search”.

6 items retrieved, displaying all items.

Document Id	Status	Document Description	Organization Document Number	Document Status	TEM Doc #	Object Code	Account Number	Ledger Document Type	Total Amount	Route Log
6222582	FINAL	Zimmerer, Suzanne Debra 06/10/2015 PUEB	T-242	Department Approved	T-242	6001	1356620	TRCA	481.89	
6218699	FINAL	Dove, Steven 06/10/2015 PUEBLO	T-244	Department Approved	T-244	6005	1356620	TRCA	346.63	
6218241	FINAL	Pollman, Jennifer Leigh 06/10/2015 PUEB	T-243	Department Approved	T-243	6005	1356620	TRCA	282.94	
6218076	DISAPPROVED	Zimmerer, Suzanne Debra 06/10/2015 PUEB	T-242	Disapproved - Fiscal Officer	T-242	6001	1356620		481.89	
6199075	FINAL	Ryan, David Patrick 06/10/2015 PUEBLO	T-325	Department Approved	T-325	6001	1356620	TRCA	209.66	
6112315	FINAL	Zimmerer, Suzanne Debra 06/01/2015 PUEB	T-165	Department Approved	T-165	6005	1356620	TRCA	351.88	

When you find the document you want, click on the underlined document number. The document will open in a new window.

If you receive the below error message, you do not have access to the traveler via the travel arranger role, and you will not be able to view the travel document.

Document Search  detailed search superuser search clear saved searches Searches 

\* required field

**Warnings for this Section:**

- 1 rows were filtered for security purposes.

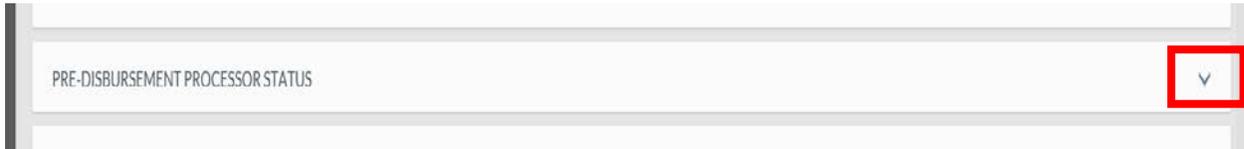
Document Type:	<input type="text"/>	  
Initiator:	<input type="text"/>	  
Document Id:	6218241	
Date Created From:	<input type="text"/>	 
Date Created To:	<input type="text"/>	 
Name this search (optional):	<input type="text"/>	
<span>search</span> <span>clear</span> <span>cancel</span>		

No values match this search.

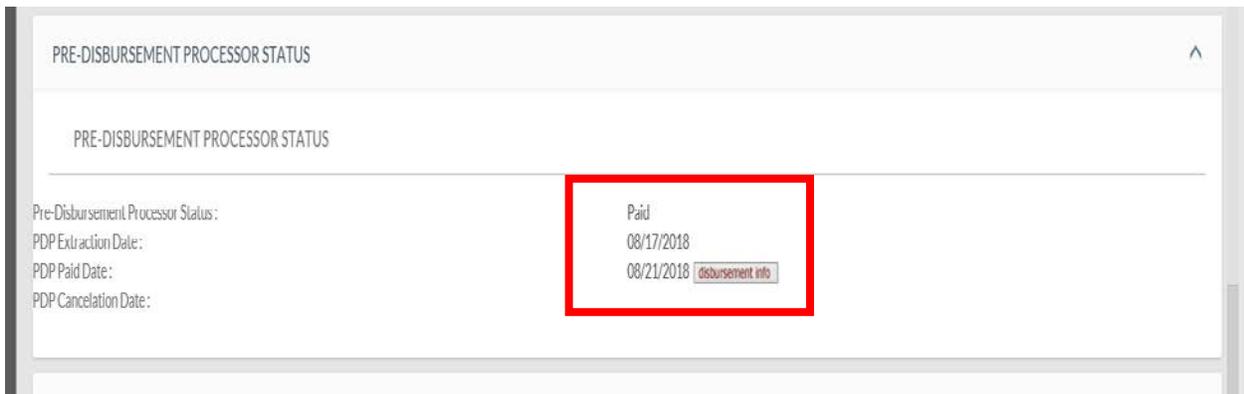
## How to See if the Traveler has been Paid

This option will only be shown on the Travel Authorization when there is a Travel Advance, or the Travel Reimbursement. Also, before a traveler can be paid the document must be final regardless of the due date.

Once you open your travel document, scroll toward the bottom of your document and click down arrow next to "Pre-Disbursement Processor Status".



Once you click the arrow, the below screen will appear:



The PDP Extraction Date is the date the payment was pulled from Kualu. The PDP Paid Date is the date the payment information was sent to the bank. The processing of the payment could take up to 3 days to show in the traveler's bank account.