TRS Document Upload Guide

Travelers and delegates may upload documentation to Authorizations and Reimbursements within the Travel Request System (TRS). Travel Approvers must review receipts/documentation to ensure accuracy and Policy compliance before taking action on a document. Receipts must be uploaded and attached to the Reimbursement Voucher in order to receive a reimbursement from the Travel Office.

Instructions

Documentation may be uploaded individually by category (multiple files) or collectively in a single upload (one file). *Note: Original documentation should be retained by traveler/delegate until reimbursement is received.*

Please order documentation as follows:

- Primary transportation (airfare, train, Enterprise receipt, etc.)
- Secondary transportation (taxi, shuttle bus, etc.)
- Itemized lodging bills (in date order when multiple locations are visited)
- Conference registration fees
- Miscellaneous

Please follow the guidance below to prepare documents before attempting to upload.

- File may not exceed 5MB in size and the following formats are acceptable:
- .gif, .jpg, .bmp, .pdf, .docx, .xlsx.
- Maximum file name length is 100 characters.
- File names may not contain any special characters (!, ?, -, /).
- The underscore character (_) must be used between each word in the file name.
- File names should identify the attachment. For example, a hotel receipt for a single location trip could be Hotel.pdf. A trip that includes multiple locations should list the lodging name, location and date(s) Marriot_NYC_1152016.pdf.

Please do not upload any document that contains sensitive data. **Social Security Numbers (SSN) and/or complete credit/debit card numbers must be removed prior to upload.** The last four digits of the credit card number may continue to be present. Please double check that documents prepared for upload do not contain sensitive data. Do not upload a W-9 form as it may include a SSN.

Steps for Traveler/Delegate

1. Prepare documents as described above.
2. On the Trip Summary screen select "Click here to upload receipts/documentation." *Note: If documents were previously added select "Manage Uploads" to add additional documents or delete existing documents.*

Receipts / Documentation

Click here to upload receipts / documentation

3. Review the upload instructions and then select "Choose File" under the *Add file* section. Select the file from your computer.
4. Place a check in the box, noting that you have not attached any sensitive data. Then click "Upload File."

Add file
Choose File | VRS.pdf
☑ Traveler/delegate understands that sensitive data should not be uploaded to TRS and agrees that George Mason University is not responsible if uploaded files contain sensitive data.
Upload File

5. The uploaded file will be displayed as shown below. Click "Delete this file" to delete the file otherwise continue to attach documentation as noted above.

Current receipts/documentation for trip: hstrange-February-2017-Delete

✕ Delete this file   Intl_Per_Diem_Test.pdf

6. When all files have been attached, select "Continue."

Select *"continue"* when finished managing the uploads.

back   reset   main menu   continue
←   ⤒   ⌂   →

7. Click "Submit for Approval," review the travel document then select "Continue". Add Preparer Comments as necessary and then click "Yes" to begin the approval process.
8. User may check on document approval status and view document attachments by accessing the "View Document Status" option from the TRS Main Menu.

Steps for Approvers

1. Login to Workflow to access the travel document.
2. In Workflow select "Click here to view supporting documentation…," a new window will open with the attachments. Click each attachment to open and view the item. When finished viewing attachments, close the new window and return to Workflow.
3. Take action on the document (approve or return for corrections w/comments) and then click "Complete" on the bottom menu.

Authorized Approver: Geraldene Kirchner-Nickle

TRS Trip Name: wftest01-April-2017-Sudan

Click here to view supporting trip documentation/receipts in a new browser tab.