UMass Lowell Online Travel Registry
Proxy Registration Instructions (registering travel on behalf of someone else)

Questions? Please contact Rebecca Spanos, Payment Card & Travel Specialist, at rebecca_spanos@uml.edu

1. Navigate to https://travelregistry.umasscs.net and click on Lowell on the left:

2. Select the Register Now button for Proxy Domestic Travel if the traveler is traveling within the U.S. or the Register Now button for Proxy International Travel if the traveler is traveling outside the U.S.
3. At the login screen, select the first option: “I have a UMass username and password (all students, faculty and staff)” and then click Submit.

4. Enter your UMass Lowell email as your Username, your corresponding password and select your campus (Lowell) from the drop down list. Then click Login.
5. You will now be asked to lookup the person whom you would like to register travel on behalf of. Select Lowell in the Campus Filter Dropdown, type the traveler’s name or email in the Keywords field and click Search.
   a. **PLEASE DO NOT** enter information in the “GUID” field or change the “Directory to Search.”

6. Select the “Register” button for the appropriate person on the right-hand side
7. You will now be taken to the Proxy Registration Form  
   a. The **FIRST TIME** that travel is registered for a traveler (either by the individual or by a Proxy), the traveler profile must be created. It can be edited layer by you or the traveler.
      i. For Campus Affiliation: please select UMass Lowell  
      ii. For Department: please type “L-” to navigate to the UMass Lowell list of Departments  
      iii. For Employee ID Number: this is the traveler’s HR Employee ID which may be found on their paycheck  

![Image of Proxy Registration Form]

b. In the Itinerary Section, begin by entering the departure to and from the specific location, selecting the location and clicking the **“Add to Itinerary” button** for each leg of the traveler’s trip
   i. **Please note**: you can start typing a location’s name in the “Find Location” box for quicker searching  
   ii. If you cannot find their destination on the list, enter the city name only in the “Find Location” box and hit enter. The registry will search the database and pull up the location. If the location is still not found, email rebecca_spanos@uml.edu and ask for the location to be added to the list.

![Image of Itinerary Section]

c. For the “Lowell Pre-Travel Authorization” section, please answer the following questions:
i. For **Domestic Travel:**
   1. Purpose of Trip
   2. Trip Details (i.e. Conference name, research description, etc...)
   3. Speed Type and/or Funding Source
   4. Estimated Cost
   5. Employee Status
   6. Contact Number While Traveling
   7. How many approvals are needed for this trip? (at least one approval is required)

ii. For **International Travel:**
   1. Purpose of Trip
   2. Trip Details (i.e. Conference name, research description, etc...)
   3. UMass Lowell Business (i.e. specific individuals/organizations you intend to visit)
   4. Speed Type and/or Funding Source
   5. Estimated Cost
   6. Employee Status
   7. Contact Number While Traveling
   8. International Travel with University-Issued Electronic Equipment
   9. International Travel with University equipment or materials
   10. How many approvals are needed for this trip? (at least two approvals are required as all International Travel **MUST** be approved by the Office of Institutional Compliance)

**d.** If you are registering for a **FACULTY** person whose profile is already in the system, you will also see a section for “Lowell Request for Professional Absence.”

   i. Please answer the following questions:
      1. The following arrangements have been made to fulfill my teaching commitments
      2. Class coverage arrangements not detailed above
      3. Schedule detail arrangements
      4. Compensatory time

   ii. If you are registering a Faculty person for the first time, you will not see this section during the initial registration. You will still be able to complete this questionnaire on their behalf: directions are included below in #11.
Once you have completed all sections, click Update and you will receive a confirmation email. The email will contain the 5-digit Registration ID which you will need to complete the registration process.

University of Massachusetts – Proxy Copy Travel Registration
You have proxy registered the following registration. The registrant has been notified and a copy of that email is below:

Rebecca Spanos

Thank you for registering your travel. The following is the itinerary that we have on file for you:

Registration ID: 18383

Paris, France: From: 10/01/2017 To: 10/04/2017

Purpose of Trip: *Other (please explain below)
Trip Details: This is a test
UMass Lowell Business: This is a test
Funding Sources and / or Speed Type: This is a test
Estimated Cost: This is a test
Employee Status: Faculty
Contact Number While Traveling): This is a test
International Travel with University-Issued Electronic Equipment: I am NOT traveling with UML-Issued Electronic Devices
International Travel with University equipment or materials: I am NOT taking equipment with me or shipping it separately for use internationally
Number of Approvals Needed (International Travel): 2

Arrangements made to fulfill teaching commitments: Other (please explain below)
Class coverage arrangements not detailed above: This is a test
Schedule Detail Arrangements: This is a test
Compensatory Time: This is a test

8. Once you have received the confirmation email, please return to the Home Page, click on “Registrants” and click on “Search”
9. Enter the traveler’s name in the “Registration Name” field and click Search

10. From the Search Results, click on the link in the Program column next to the appropriate registration ID number. You are also looking for a registration with a status of PENDING as this is a registration that has not yet received any approval(s).
11. You will now be taken to the Registration Homepage. If you are completing a registration for a Faculty person and did not see the “Request for Professional Absence” during the registration process, click on Questionnaires and then Lowell Request for Professional Absence to answer these questions.

12. If the traveler for whom you are registering is traveling Internationally and needs to complete the Annual Certification to Travel with UML Issued Electronic Devices and/or the Request to Ship/Carry Equipment/Materials Out of the U.S., please direct them to the Office of Institutional Compliance website. Both forms are now AdobeSign forms and may be completed online. If you have indicated that the traveler needs to submit one or both of these forms on the Pre-Travel Authorization, OIC will not approve the trip until the form(s) have been received.
   a. The links to these forms may also be found under the Materials tab
   b. Once the forms have been completed and approved by OIC, they will be marked as received
13. Once all Questionnaires and OIC Forms are completed, please click on the **Approvals** tab and then click **Generate Approval Request For This Application** in the lower, right-hand corner.

14. In the Directory Lookup, select **Lowell** in the Campus Filter dropdown then enter the name or email address of the person who will be approving travel in the Keywords field and click Search.

15. From the Search Results, select the radio button for the appropriate person and click Next.
16. On the next page, enter any optional comments to the approver and click Send. You will receive a confirmation email that you request for approval has been sent.
17. If more than one approval is needed for this registration, repeat steps 13 – 16 for each additional approver. **Please Note:** International Travel requires at least **TWO** approvals as all registrations **MUST** be sent to the Office of Institutional Compliance. When requesting approval, please type “Travel” into the Directory Search and select International_Travel@uml.edu.

18. Copies of Pre-Travel Authorizations are no longer required for submission with Travel Expense Reports. All Registrations are assigned a 5-digit Registration ID which may be found in the Registrants Search Results as detailed in steps 8 – 10:
a. When submitting an expense report in PeopleSoft, please enter the Registration ID in the Terra Dotta ID Field

19. **Extra Notes**: your administrative privileges include the ability to:

a. Review the overall status of the registration in the **Overview Tab**
b. Add any optional comments about the registration in the **Comments Tab**
c. Edit the itinerary under the **Itinerary Tab**
d. Edit the questionnaire (Pre-Travel Authorization Form and Request for Professional Absence) responses under the **Questionnaire Tab**
e. View when the necessary forms for International Travel have been marked as received under the **Materials Tab**
f. View when the travel approval request(s) have been received under **Approvals Tab**. You may re-send approval requests if necessary.