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Overview
The electronic Foreign Travel Request system (eFTR) allows department and OGM staff to monitor the status of their foreign travel requests.

Logging In
To log in, use your Net ID and password.

Home Screen
After logging in, click the New Request button to initiate a new travel request or click the My Requests button to view previous requests linked to your name.
Logging Out

If you are working from a computer that may be used by others, you should log out of the eFTR system by clicking on the *Sign Out* link in the upper-right hand corner.

Departmental Staff and Faculty

Overview

When working on a foreign travel request in the eFTR system, you can use the *Basic Information*, *Travel Items* and *Submit* tabs to navigate from between the different sections of the request.

![Figure 3. Tabs for navigating between sections of form.](image)

You can also use the *Save and Go Back* and *Save and Continue* if you wish to save while navigating between sections.

![Figure 4. Buttons for saving while navigating between sections.](image)
**My Requests List Page**

The *My Requests List* page lists all of the previous requests linked to your name, whether you are the request initiator, the traveler or the project director. You may view or edit by clicking on the links to the right of the foreign travel request number.

![My Requests List](image)

**Figure 5. The "My Requests" page.**

**Filtering Your Requests**

If your request list is very long, you can filter the requests in the list by status, destination, start date, and end date by entering data in the appropriate field and pressing the *Go* button. You can change the sort column and sort order by clicking on the little triangles next to each column heading. You can also change the number of requests listed at a time and move to the next set of requests.

**Initiating a Request and Routing to the Traveler**

**Basic Information**

![New Foreign Travel Request](image)

**Figure 6. The "Basic Information" section of the new foreign travel request page.**

The *Basic Information* tab allows you to complete information related to the traveler, project director, trip and Research Foundation award(s) to support the cost of the travel.
Participants

When you entering a portion of the traveler’s or the project director’s name, the system will look for a match. If a single match is found, the e-mail, department and phone number for that person are automatically populated.

If there are multiple matches, the system presents you with an option to pick one person from among the matches.
Trip Information and the Department of State Travel Warning List

Figure 10. Inputs for trip information.

Trip information requires the request initiator to enter the start date, end date and destination of travel. A drop down list is provided for the purpose. Additional fields appear for each purpose selected.

A drop down box is provided to indicate whether the destination country appears on the Department of State’s Travel Warnings list. To make this determination, click on the link Travel.State.Gov.

This conforms with The Research Foundation of SUNY’s policy requiring prior approval from the campus Operations Manager and President for trips to countries appearing on the U.S. Department of State’s Travel Warnings List.

Conference/Workshop Details

Figure 11. Inputs for conference or workshop details.
Collaboration Details

Figure 12. Inputs for collaboration details.

Other Purpose Details

Figure 13. Inputs for other purpose details.

Research Foundation Awards

Figure 14. Inputs for Research Foundation awards.
Travel Items

In compliance with federal export control laws, the Travel Items tab allows the request initiator to document the devices that the traveler will carry with him/her. This conforms with U.S. Export Control laws requiring that all license exemptions/exceptions be documented and records retained for a period of five years. For reference, basic information is displayed on this tab.

![Figure 15. Travel items tab selected with basic information summary.](image)

Devices (Tools of the Trade)

![Figure 16. Inputs for devices or tools of the trade.](image)
Previous Devices for Traveler
When filling out a request for a specific traveler, if you have both been participants in a previous request that has already been submitted to OGM, you’ll be able to see any devices that the traveler has brought on previous travel. Devices listed on the most recent travel request to be submitted to OGM will be automatically added to any new requests for that traveler.

![Previous Devices for Traveler](image)

**Figure 17.** Devices listed in previous foreign travel requests automatically reused in a subsequent request.

Older devices will be available by pressing the *Previous Devices* button.

![Previous Devices for Traveler](image)

**Figure 18.** Dialog box showing all previous devices.
Other Items

Will the traveler be taking any Research Foundation items, technology, or software, other than a Research Foundation-owned laptop, cell phone, PDA, or data storage device identified above? (For example, technical data, drawings, specs, equipment, proprietary data, etc.)?

Please provide the following for each item:

- **Item:**
- **Brand:**
- **Model:**
- **Serial Number:**
- **ECCN or ITAR Designation:**
- **Other Additional Information:**

![Figure 19. Inputs for other travel items.](image)

Routing to Traveler

To submit the request to the traveler, press the *Submit to Traveler* button on the *Submit* tab.

![Figure 20. The submission section where the request initiator routes the request to the traveler.](image)

For reference, basic information is displayed on this tab.
Certifying a Request and Routing to the Project Director

Travelers will be able to change all parts of the request except for the participants.

Review Basic Information

![Figure 21. The traveler for a request cannot modify the participants.]

Certifications

The traveler must enter his/her name in the traveler certification box to certify that all information is correct and he/she agrees to The Research Foundation of SUNY’s travel policy accessed with the link provided.

![Figure 22. The traveler is always required to provide a general certification of the request.]

If devices (tools of the trade) are identified in the Travel Items tab, export controls certification is required by the traveler.

![Figure 23. Travelers taking devices or tools of the trade are required to provide an export controls certification.]
Routing to Project Director

Upon completion of the certifications, click *Submit to Project Director* button for routing to the project director for review and approval.

*Submitting a Request to OGM*

Review Awards

The project director reviews the Research Foundation award numbers for relatedness of the travel to the research. The project director may change the award number(s) or add an additional award number if appropriate.
Routing to OGM

The project director reviews the traveler’s certifications for appropriateness. To submit to the Office of Grants Management (OGM), press the Approve and Submit to OGM button. The following email notification will be sent to a general OGM mailbox for appropriate action.

To: Office of Grants Management  
cc: [Project Director], [Traveler], [Request Initiator]  
Subject: Travel to [Destination] ([Start] - [End]) by [Traveler]  
To the Office of Grants Management:

A foreign travel request for [Traveler] to go to [Destination] is ready for review by an OGM grants specialist.

You can view the request at http://server/eftr/ForeignTravelRequest.aspx?foreignTravelRequestId=1014.
Copying Existing Requests

If you are a department user, you will have the ability to make copies of existing requests. This is useful if several people are making similar travel arrangements, if a trip is being repeated, or if a request was not approved or was cancelled and you would like to fill out a new request and re-submit with any recommended changes. Start by clicking on the **Copy this Request** link in the **Basic Information** section when viewing a request.

![Figure 28. When viewing requests, there is a link to copy the request.](image)

The eFTR system will automatically populate a new request with all of the information from the previous request, except for any certification the traveler performed. You can then treat the form as though you had just typed in all of the information for the first time.

**Administration**

Non-departmental staff can approve, route, and reject foreign travel requests through the eFTR system.
Home Page

Figure 29. Home page for administrators.
Travel Request Decisions List Page

Administrators at the OGM, at the Office of the President, and at the Operations Manager’s office all use the same list page for pending and previous travel request decisions.

Figure 30. Travel request decision list page.

All requests that have been routed to your office will be listed on this page. There will be a View link for each request. Any requests that are ready for your office to review will also have a Review link.
OGM Administrators

Overview

Requests to travel to countries that are on the U.S. Department of State’s Travel Warning List will require approval by the President of the University and by the Operations Manager. OGM must verify that the country is or is not on the list. OGM will obtain approvals for these requests by routing these requests to the Office of the President and the Operations Manager.

In addition, OGM administrators can make corrections to the start and end dates for the requested travel if the awards specified by department will not allow travel during the specified dates.
**Research Foundation Award Disposition and Modifications**

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Project Number</th>
<th>Task Number</th>
<th>Award Number</th>
<th>Disposition</th>
<th>Updated By</th>
<th>Updated At</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF</td>
<td>1234500</td>
<td>1</td>
<td>12345</td>
<td>Approve</td>
<td>jscarola</td>
<td>10/10/2011 14:53</td>
</tr>
<tr>
<td>NIH</td>
<td>5678999</td>
<td>3</td>
<td>89089</td>
<td>Reject</td>
<td>sammann</td>
<td>10/19/2011 15:08</td>
</tr>
</tbody>
</table>

**Figure 32. OGM Grants Specialists can approve or reject Research Foundation funding sources.**

To approve the request, you must approve at least one award number or add a new award number. To reject the request, you must reject all of the award numbers. If the destination is on the Travel Warning List, the eFTR system will route it to the Office of the President after OGM approval.
Office of the President

Routing to the Operations Manager

An email request will be sent from the Office of Grants Management to the Office of the President for approval of travel to a country appearing on the State Department’s travel warnings list. This approval is in compliance with The Research Foundation of SUNY’s international travel policy. As a user authorized to record the President’s decision, you will be able to route requests to the Operations Manager.

Operations Manager

Final Approval or Rejection

An email request will be sent from the Office of Grants Management to the Operations Manager in the Office of the Vice President for Research for approval of travel to a
country appearing on the State Department’s travel warnings list. This approval is in compliance with The Research Foundation of SUNY’s international travel policy. As a user authorized to record the Operations Manager’s decision, you will be able to enter final approval of the request.

**System Administration**

![System Administration Interface](image)

*Figure 35. Home page for system administrators.*

**User List**
Figure 36. System administrators can change user’s roles.

To adjust the specific roles in the Foreign Travel Request System for any person, click on the Edit Roles link in the row for that person.

Figure 37. Specific roles are selected in a dialog box.
### Foreign Travel Request Work Flow

#### Electronic Foreign Travel Request Submission

<table>
<thead>
<tr>
<th>Department</th>
<th>Office of Grants Management</th>
<th>Office of the President</th>
<th>Operations Manager's Office</th>
<th>Other Offices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit Request</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification E-Mail to OGM</td>
<td>Approve, Reject, or Add P/T/A.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Closed (Approved)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification E-Mail to Department</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Closed (Rejected)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Destination on Warning List?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification E-Mail to the Office of the President</td>
<td>Approve?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification E-Mail to the Operations Manager's Office</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notification E-Mail to Research Foundation Central Office</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 38.** Basic foreign travel request workflow; actions with dashed borders are performed by the system.
# Quick Guide

**Figure 39. Basic Information.**

### eFTR Test System

#### New Foreign Travel Request

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Travel Details</th>
<th>Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution: Stony Brook University</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Traveler Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name: Annona Dwan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:Dwan.Anonna@seas.gatech.edu">Dwan.Anonna@seas.gatech.edu</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department: Computer Science</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone: 432-8787</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Director Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name: Mary Clarke</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:Clarke.Mary@seas.gatech.edu">Clarke.Mary@seas.gatech.edu</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department: Computer Science</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone: 432-8787</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trip Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date: 12/04/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date: 12/05/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Destination: United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose: Conference/Workshop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the destination currently on the U.S. Department of State’s Travel Warning List? Yes No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A current listing of countries on the U.S. Department of State’s Travel Warning List can be found at Travel.State.Gov. SB1 Presidential approval will be obtained by the Office of Grants Management for travel to countries appearing on the State Department's Current Travel Warnings list in accordance with Research Foundation requirements.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conference/Workshop Details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title: Search Algorithm Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web Page: <a href="http://www.google.com">www.google.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship to Research on Award (examples)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presenting paper at conference related to research field.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dow will be discussing new search algorithm introduced at Stony Brook.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Research Foundation Award(s) | | |
| Will the travel be paid for using Research Foundation funds? Yes | | |
| Sponsor | Project Number Task Number Award Number | |
| NDA | 31111111 | 111 | 11111111 | |
| NIH | 22222222 | 222 | 22222222 | |

*Federal dollars require use of American air carriers.*

<table>
<thead>
<tr>
<th>Save</th>
<th>Save and Continue</th>
<th>Submit Travel</th>
<th></th>
</tr>
</thead>
</table>

*After submitting, review and resubmit if necessary or contact appropriate person for travel instructions.*
Figure 40. Travel Items
The traveler must always provide this certification.

If the traveler is bringing "tools of the trade", this certification is required, too.

Figure 41. Certification.