Viewing and Searching for Travel

How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. This document provides step-by-step instructions for viewing and searching travel disclosures using the My Travel section in the Disclosures module. It explains how to navigate the travel table, filter results by year, purpose, or destination and download travel data for reporting.

View and Search for Travel

1. From the menu on the left, click **Disclosures**. *The Disclosures module opens.*

    a. You can also navigate here by clicking **Disclosures** on the Insight home page.

2. In the same menu on the left, click **My Travel**. *The My Travel section opens with travel from the current year appearing automatically.*

    a. If needed, click **Close Panel** in the panel on the right to close the side menu and provide more space to view the travel table.

3. To view past travel, click the **row with the desired year**. *Entries from that year display in an expanded section.*

4. At the top of the page, use the **search fields** to narrow results. Enter specific criteria into the fields provided (i.e., Outside Entity, Purpose, Destination, Duration), then click **Search**.

5. To download these search results, navigate to the top right of the screen and click **Download**. *PDF and Excel options appear in a dropdown menu.*

6. Select your preferred document type (PDF or Excel). *The results are downloaded to your device as a file or spreadsheet.*

7. To reset the search and view all travel again, click the **X** in each search field then click **Search**. *The unfiltered travel list displays.*

Additional Resources

- Visit the Project Insight SharePoint page for additional training materials and project updates.