TravelWayne

Using a Trip Itinerary to populate the Travel Allowance Itinerary

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If a Traveler uses the Travel/Booking tool and/or the Travel Card, instead of creating the itinerary manually, you can have Expense create an itinerary based on information imported from The Travel/Booking tool or based on certain imported company card data.

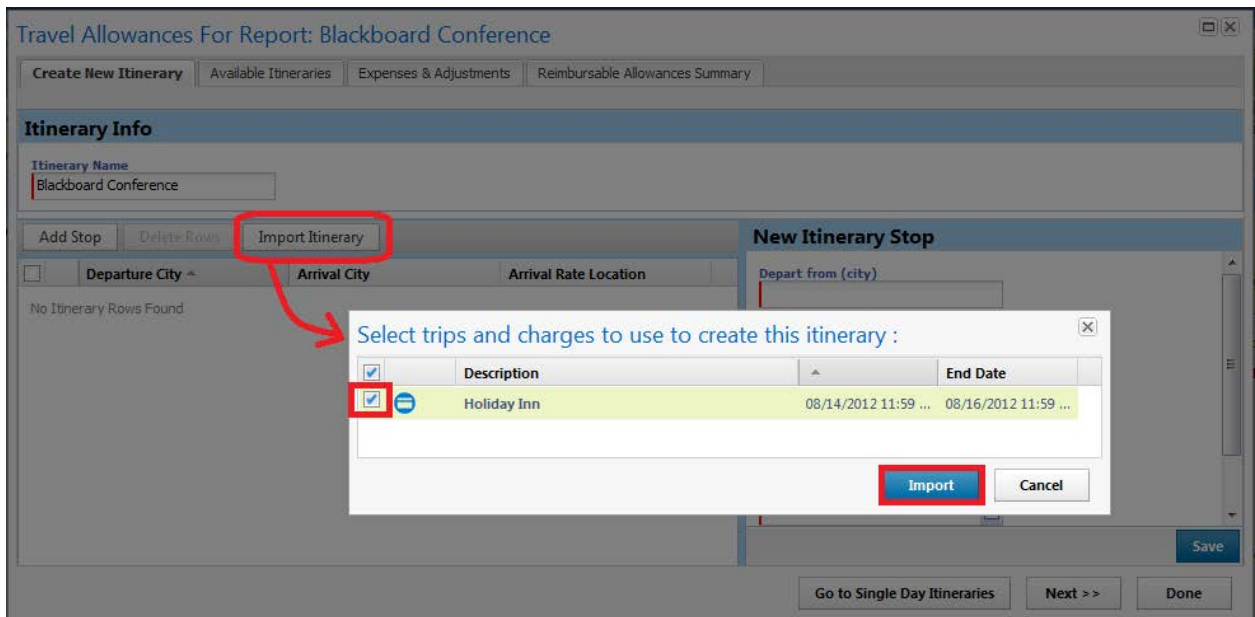## How to…

Once the traveler has return from their trip and ready to create an Expense Report from a

"**Travel Request**" Click the Green Arrow

1. Click **Import Itinerary** on the **Create New Itinerary** page. A list of Travel itineraries and company card data will appears.

   NOTE: Expense prompts you for any information that is required but not provided by the imported itinerary.

2. Select and import the desired information.

3. Edit the itinerary as needed by clicking the box

   NOTE: Expense prompts you for any information that is required but not provided by the imported itinerary.

Note the following about importing:

- o Expense collects *airfare* and *hotel* information from the imported Travel itinerary **and/or** imported company card data.
    - Expense uses the airfare information *first* (before the hotel information) to generate the itinerary rows (stops) **if** the airfare is ticketed.
    - If there are additional days identified in the hotel data, then Expense generates additional rows on the itinerary for those days.
    - For airfare, Expense uses the dates, times, and locations shown in the Travel itinerary.
    - For hotel, Expense uses (in this order) e-receipt information, company card "level 3" information, then hotel booking information shown on the Travel itinerary. Expense collects the location and checkin/checkout dates. The time must be provided by the user.
    - Expense will not create another row for the same date if one already exists for that date.
- o Expense collects *train* information from the Travel itinerary. If the imported itinerary shows train travel, Expense generates the itinerary rows (stops) based on the dates, times, and locations shown in the Travel itinerary

4. Click **Save**

    - The saved stop information appears on the left side of the page.

5. Edit the itinerary as needed by clicking the box and enter the information that is required but not provided by the imported itinerary.

6. Click **Save** and then **Next.**

7. **Expenses & Adjustments** page appears.

In the sample below

- The amounts were reduced for the first and last day because the traveler does not receive breakfast on the depart date or dinner on the return date depending on the arrival time. See chart WSU Travel Policy APPM 7.0 located on the TravelWayne website: travel.wayne.edu

8. Click **Update Expenses.** The system then creates the appropriate expenses for each day, which appear on the user's expense report page.

   Note the following about the system-created expenses:
   - Meals expenses are assigned the expense type of Fixed Meals

Blackboard Conference

	Date ▲	Expense	Amount	Requested
	⊕ New Expense	⊕ Quick Expenses	Import	Details ▾	Receipts ▾	Print / Email

Expenses   Delete   Copy   View ▾   «

	Date ▲	Expense	Amount	Requested
Adding New Expense				
☐	08/14/2012	**Fixed Meals** Atlanta, Georgia	$47.00	$47.00
☐	08/15/2012	**Fixed Meals** Atlanta, Georgia	$56.00	$56.00
☐	08/16/2012	**Fixed Meals** Atlanta, Georgia	$56.00	$56.00
☐	08/17/2012	**Fixed Meals** Atlanta, Georgia	$56.00	$56.00

TOTAL AMOUNT	TOTAL REQUESTED
$215.00	**$215.00**

Now the traveler is ready to add any other reimbursable expenses!!!!