




TravelWayne




Using a Trip Itinerary to populate the Travel Allowance Itinerary

Using a Trip Itinerary to populate the Travel Allowance Itinerary

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...

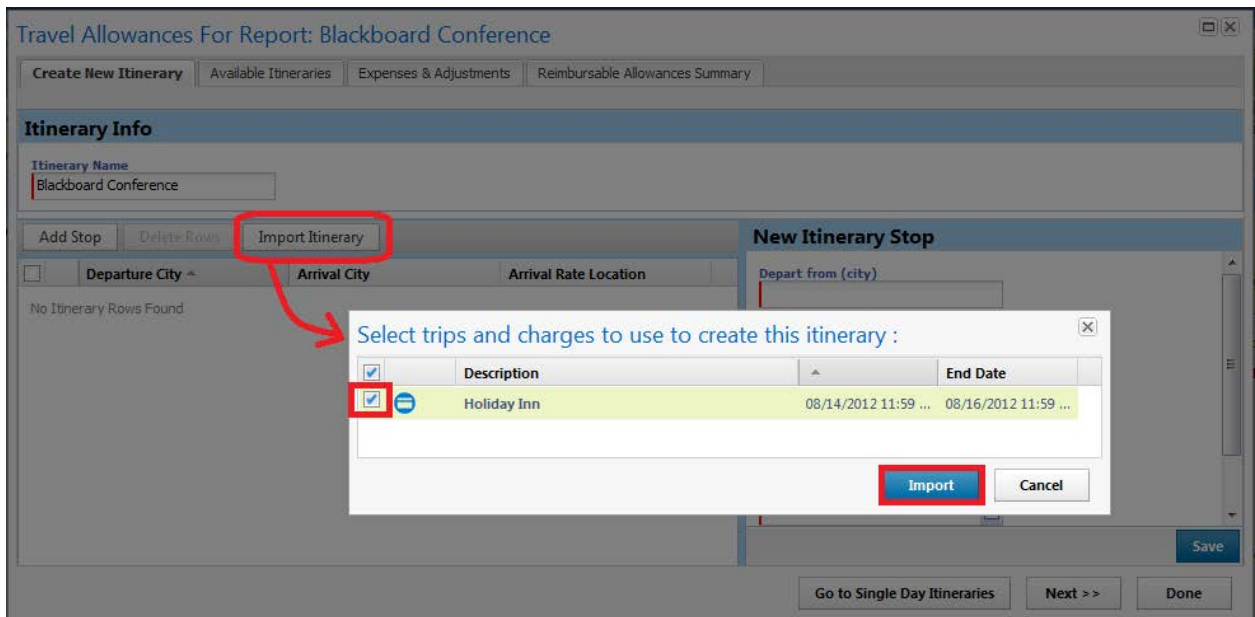
Once the traveler has return from their trip and ready to create an Expense Report from a "Travel Request" Click the Green Arrow 

| Active Work | | | | | | |
|---|-------------------|---------------------|--------------------------|--------------|---|--|
| New Travel Request  View Travel Requests  | | | | | | |
| Travel Requests (10) | | Expense Reports (1) | | | | |
| Travel Request Name | Travel Request ID | Status | Travel Request Dates | Total | Expense Report? | |
| Blackboard Conference | 36MN | Approved | 09/19/2012 09/22/2012 | USD 1,580.00 |  | |

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

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

2. Select and import the desired information.



The screenshot shows the 'Travel Allowances For Report: Blackboard Conference' interface. The 'Import Itinerary' button is highlighted with a red box and a red arrow pointing to a dialog box. The dialog box is titled 'Select trips and charges to use to create this itinerary:' and contains a table with columns for 'Description' and 'End Date'. A row for 'Holiday Inn' is highlighted in yellow and has a checkmark in the first column. The 'Import' button in the dialog is also highlighted with a red box.

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.

Travel Allowances For Report: Blackboard Conference

Create New Itinerary | Available Itineraries | Expenses & Adjustments

Itinerary Info

Itinerary Name
Blackboard Conference

Add Stop | Delete Rows | Import Itinerary

| <input type="checkbox"/> | Departure City ^ | Arrival City | Arrival Rate Location |
|--|------------------|--------------|-----------------------|
| <input checked="" type="checkbox"/> | | Atlanta, GA | 08/14/2012 11:59 PM |
| Itinerary row is missing one or more required fields. Select this row, enter the missing data, and save. Otherwise, you may delete this row. | | | |
| <input type="checkbox"/> | | Atlanta, GA | 08/16/2012 11:59 PM |
| Itinerary row is missing one or more required fields. Select this row, enter the missing data, and save. Otherwise, you may delete this row. | | | |

Edit Itinerary Stop

Depart from (city) (Required field)

Date (Required field)

Time (Required field)

Arrive in (city)

Date

Save

Go to Single Day Itineraries | Next >> | Cancel

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**.

Travel Allowances For Report: Blackboard Conference

Edit Itinerary | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary

Itinerary Info

Itinerary Name
Blackboard Conference

Add Stop | Delete Rows | Import Itinerary

| <input type="checkbox"/> | Departure City ^ | Arrival City | Arrival Rate Location |
|-------------------------------------|---|---|--------------------------|
| <input type="checkbox"/> | Detroit, Michigan 08/14/2012 7:00 PM | Atlanta, Georgia 08/14/2012 11:59 PM | FULTON COUNTY, US-GA, US |
| <input checked="" type="checkbox"/> | Atlanta, GA 08/16/2012 11:59 PM | | |

Itinerary row is missing one or more required fields. Select this row, enter the missing data, and save. Otherwise, you may delete this row.

Edit Itinerary Stop

Date
08/16/2012

Time
11:59 PM

Arrive in (city) (Required field)

Date (Required field)

Time (Required field)

Save

Go to Single Day Itineraries | Next >> | Done

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

Travel Allowances For Report: Blackboard Conference

Create New Itinerary | Available Itineraries | **Expenses & Adjustments** | Reimbursable Allowances Summary

Show dates from to Go

| Exclude All <input type="checkbox"/> | Date/Location ^ | Breakfast Provided | Lunch Provided | Dinner Provided | Allowance |
|--|--------------------------------|-------------------------------------|--------------------------|--------------------------|-----------|
| <input type="checkbox"/> | 08/14/2012 Atlanta, Georgia | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$47.00 |
| <input type="checkbox"/> | 08/15/2012 Atlanta, Georgia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$56.00 |
| <input type="checkbox"/> | 08/16/2012 Atlanta, Georgia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$56.00 |
| <input type="checkbox"/> | 08/17/2012 Atlanta, Georgia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$56.00 |

Update Expenses | Cancel

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 | | | | |
|--|------------|--|--|---|
| + New Expense + Quick Expenses Import Details ▾ Receipts ▾ Print / Email | | | | |
| Expenses Delete Copy View ▾ << | | | | |
| <input type="checkbox"/> | Date ▲ | Expense | Amount | Requested |
| <i>Adding New Expense</i> | | | | |
| <input type="checkbox"/> | 08/14/2012 | Fixed Meals Atlanta, Georgia | \$47.00 | \$47.00 |
| <input type="checkbox"/> | 08/15/2012 | Fixed Meals Atlanta, Georgia | \$56.00 | \$56.00 |
| <input type="checkbox"/> | 08/16/2012 | Fixed Meals Atlanta, Georgia | \$56.00 | \$56.00 |
| <input type="checkbox"/> | 08/17/2012 | Fixed Meals Atlanta, Georgia | \$56.00 | \$56.00 |
| | | | TOTAL AMOUNT \$215.00 | TOTAL REQUESTED \$215.00 |

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