

TRAVEL APPLICATION

Request

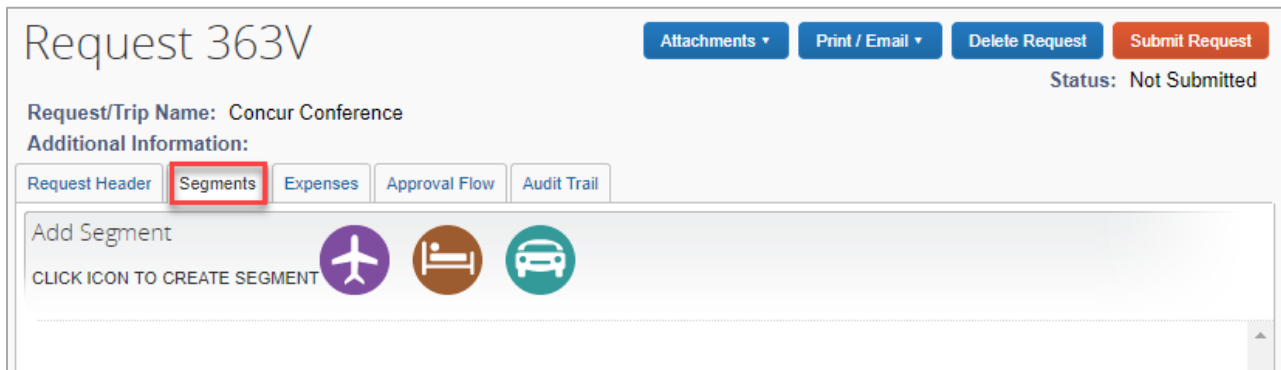
HELPFUL HINTS

- Travel requests (pre-trip authorization) that include airfare, hotel, and car rental are entered on the segments tab.

PROCEDURE

Segments

The segments tab contains the travel-based sections of air ticket, hotel reservation, and car rental.



To create a segment, click on the corresponding icon. The appropriate segment fields appear.



AIR TICKET

The fields with | (red left border) indicate the information is required.

The default is set to round trip. This can be changed to one way. Enter the following **required** information:

- Amount: enter the estimated amount the air ticket will cost
- From: indicate the city the traveler is flying from
- To: indicate the city the traveler is flying to
- Outbound Date: the date will transfer over from the Request Header
- Return Date: the date will transfer over from the Request Header

Optional: enter the following information:

- [Outbound] Depart at (toggles to Arrive at)
- [Outbound] Comment
- [Return] Comment
- [Return] Depart at (toggles to Arrive at)

Once all information is entered to the air ticket segment, click on **Save**.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request.

HOTEL RESERVATION

The fields with | (red left border) indicate the information is required.

The screenshot shows a 'Hotel Reservation' form. At the top, there is an 'Amount' field with a red border and a 'USD' dropdown. Below this are two sections: 'Check-In' and 'Check-Out'. The 'Check-In' section has a 'City' field with a red border, a 'Date' field with a calendar icon and the value '05/28/2018', and an 'At' dropdown. The 'Check-Out' section has a 'Date' field with a calendar icon and the value '05/31/2018', and an 'At' dropdown. A 'Detail' field is located between the two date sections. At the bottom, there is a 'Comment' field. In the bottom right corner, there are 'Save' and 'Cancel' buttons.

Enter the following **required** information:

- Amount: enter the estimated total amount the hotel reservation will cost. Enter the total amount – not the daily rate.
- City: indicate the city of the hotel

Optional: enter the following information:

- [Check-In] Date – transfers over from the Request Header
- [Check-In] Time
- [Check-In] Detail
- [Check-Out] Date – transfers over from the Request Header
- [Check-Out] Time
- [Check-Out] Comment

Once all the information is entered to the hotel reservation segment, click on **Save**.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request (below the submit request button).

CAR RENTAL

The fields with | (red left border) indicate the information is required.

The fields with | (red left border) indicate the information is required.

Enter the following **required** information:

- Amount: enter the estimated total amount the car rental will cost. Enter the total amount – not the daily rate.
- Pick-up City: indicate the city where the vehicle will be picked up
- Drop-off City: indicate the city where the vehicle will be dropped off

Optional: enter the following information:

- [Pick-up] Date – transfers over from the Request Header
- [Pick-up] Time
- [Pick-up] Detail
- [Drop-off] Date – transfers over from the Request Header
- [Drop-off] Time
- [Drop-off] Comment

Once all the information is entered to the car rental segment, click on **Save**.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request (below the submit request button).

ALLOCATE, DELETE OR MODIFY A SEGMENT

A segment can be allocated, deleted or modified on an un-submitted travel request. Click on **Delete** to remove the segment or **Modify** to update the segment.

Request 3CGJ

Request/Trip Name: Boston, MA
Reason/Business Purpose: HR meeting at Boston College

Status: Not Submitted
Amount: \$700.00

Request Header | Segments | Expenses | Approval Flow | Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Air Ticket Round Trip One Way Amount: \$700.00

Outbound
From: Lincoln Municipal (Airport - LNK), Lincoln, Nebraska
To: Logan Intl (Airport - BOS), Boston, Massachusetts
Date: Monday, October 1, 2018
Comment: Stopping in Minneapolis on 10/1 for a conference; then traveling to Washington DC on 10/2 for a meeting.

Return
Date: Wednesday, October 3, 2018
Comment:

Allocate Delete Modify

To allocate segments, click on the **Allocate** button.

i Tip: segments are allocated together. Other expenses can be individually allocated.

Select the checkbox next to the expenses and click on **Allocate Selected Expenses**.

Allocations for Request : Boston, MA

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group

<input checked="" type="checkbox"/>	Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	10/01/2018	Airfare		\$700.00
<input checked="" type="checkbox"/>	10/01/2018	Lodging		\$400.00

Allocations

Allocate By: | Add New Allocation Delete Selected Allocations

Save Cancel

Click on **Add New Allocation**.

REQUESTS: AIRFARE, LODGING, AND CAR RENTAL

Updated September 25, 2018

Allocations for Request : Boston, MA

Request List

Date	Expense Type	Group	Amount
10/01/2018	Airfare		\$700.00
10/01/2018	Lodging		\$400.00

Allocations

Total:\$1,100.00 Allocated:\$1,100.00(100%) Remaining:\$0.00(0%)

Allocate By: **Add New Allocation** Delete Selected Allocations

Percentage	* Cost Object T...	* Cost Object	Code
100	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...

Save Cancel

Tip: the allocation can be by percentage or amount

Allocations

Total:\$1,100.00 Allocated:\$1,100.00(100%) Remaining:\$0.00(0%)

Allocate By: **Percentage** | Add New Allocation | Delete Selected Allocations

Amount

Percentage	* Cost Object T...	* Cost Object	Code
50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...
50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...

Enter the Cost Center or WBS for each allocation and click on **Save**.

Allocations

Total:\$1,100.00 Allocated:\$1,100.00(100%) Remaining:\$0.00(0%)

Allocate By: Add New Allocation | Delete Selected Allocations

Percentage	* Cost Object T...	* Cost Object	Code
50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...
50	(CC) Cost Center	(2101010005) ...	(UNS005) Sand...

Save Cancel

On the expenses tab, the allocation will be indicated by a icon. Hover over the icon to display the allocation.

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
10/01/2018	Airfare	\$700.00	\$700.00
10/01/2018	Lodging	\$400.00	\$400.00

Expense Type: To create a new expense above. To edit an existing expense, click on the expense type.

Allocations

Percentage	Cost Object Type	Cost Object	Code
50	(CC) Cost Center	(5107110100) E...	(UNS005) Sand...
50	(CC) Cost Center	(2101010005) E...	(UNS005) Sand...

1. Transportation
Fuel/Gas
State/Private/Rent Plane
Taxi/Shuttle/Train/...