

Add TA lines manually - mileage and per diem out-of-State

STEP 1

Add a line and select the Expense Type.

Here, the Header has been completed, a line for Airfare has been completed and we clicked the Add icon at the end of the row to add a new one.

We're going to click the drop-down arrow under Expense Type and select Domestic TR-Mileage.

The screenshot shows the 'Travel Authorization' form. The header section is highlighted with an orange box and contains the following fields:

- *Description: IDOA training trip to San Dieg
- *Business Purpose: Business - Out of State
- Comments: Trip to San Diego to attend the national conference of
- *Travel From: Indianapolis, IN
- *Travel To: San Diego, CA
- *Date From: 12/19/2022
- *Date To: 12/21/2022
- Trip Duration: 2 Days

Below the header is a 'Details' section with a table. The table has the following columns: Expense Type, Description, Amount, Currency, Accounting, and Attachments. The first row is highlighted with an orange box:

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Round trip economy class tic	399.990	USD		
Domestic TR-Mileage			USD		

STEP 2

Enter the Description.

In the Description field, enter the complete address for the start and end points for the mileage being claimed.

The screenshot shows the 'Travel Authorization' form with the same header as in Step 1. The 'Details' section table now has two rows. The second row is highlighted with an orange box:

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Round trip economy class tic	399.990	USD		
Domestic TR-Mileage	Road, Indianapolis, IN 46241j		USD		

STEP j

Review or adjust the Accounting Details and Line Details.

To review or adjust the Accounting Details, click the icon under Accounting.

To review and adjust the Line Details, click Details.

The screenshot shows the 'Travel Authorization Search' interface. At the top, there are search filters for Description, Business Purpose, Comments, Travel From, Travel To, Date From, and Date To. Below these filters, there are buttons for 'Create A Cash Advance' and 'Attachments'. The main section is titled 'Details' and contains a table with columns for Expense Type, Description, Amount, Currency, Accounting, and Attachments. The table has two rows: one for 'Domestic TR-Airfare' and one for 'Domestic TR-Mileage'. The 'Domestic TR-Mileage' row is highlighted, and the 'Details' button in the Accounting column is circled in red. The total amount for the trip is shown as 399.990 USD.

STEP 4

Adjust the Date and select the Payment Type.

The Line Detail pop-up will appear.

The Date will default with the first day of the trip - update it to reflect the event start date.

Select the appropriate Payment Type from the drop-down.

The screenshot shows the 'Travel Authorization Search' interface with the 'Line Detail' pop-up window open. The pop-up window has a 'Cancel' button on the left and a 'Done' button on the right. It contains the following fields: Date (12/19/2022), Expense Type (Domestic TR-Mileage), Description (Mileage from 402 W Washington Street, Indianapolis, IN 46204 to 8550 Stansted Road, Indianapolis, IN 46240), Amount, Currency (USD), Payment Type (Employee Paid), Billing Type (Agency Paid), Originating Location (IND), Travel To (SANDI), Miles, and Transportation ID. The 'Date' and 'Payment Type' fields are circled in red. The background shows the same 'Travel Authorization Search' interface as in the previous screenshot, but with the 'Details' button in the Accounting column circled in red.

STEP 5

Select the Billing Type and review the Originating Location.

Select the appropriate Billing Type from the drop-down based on the Payment Type chosen.

The Originating Location field will be populated from the Header. It can be updated if needed using the Lookup feature.

The screenshot shows a 'Travel Authorization' application window. A modal window titled 'Line Detail' is open, displaying the following information:

- Date:** 12/19/2022
- Expense Type:** Domestic TR-Mileage
- Description:** Mileage from 402 W Washington Street, Indianapolis, IN 46204 to 8550 Stansted Road, Indianapolis, IN 46240
- Amount:** (empty field)
- Currency:** USD
- Payment Type:** Employee
- Billing Type:** Out of State - Billable (highlighted with a red box)
- Originating Location:** IND (highlighted with a red box and a search icon)
- Travel To:** SANDI
- *Miles:** (empty field)
- x** (empty field)
- Transportation ID:** (empty dropdown)

The background application shows a 'Travel Authorization Search' header with 'Report NEXT Pending' and 'Jeania Werner' as the user. The main form area includes fields for 'Description' (IDOA training trip to San Dieg), 'Business Purpose' (Business - Out of State), and 'Comments' (Trip to San Diego to attend the national conference of...). A table below shows 'Expense Type' and 'Description' for 'Domestic TR-Airfare' and 'Domestic TR-Mileage'. The total amount is listed as 399.990 USD.

STEP 6

Review the Travel To field and enter the number of Miles.

The Travel To field will be populated from the Header; it can be updated if needed using the Lookup feature.

Enter the number of miles calculated as the shortest distance from an on-line mapping source.

The screenshot shows the 'Travel Authorization' interface with a 'Line Detail' dialog box open. The dialog box contains the following information:

- Date: 12/19/2022
- Expense Type: Domestic TR-Mileage
- Description: Mileage from 402 W Washington Street, Indianapolis, IN 46204 to 8550 Stansted Road, Indianapolis, IN 46240
- Amount: (empty)
- Currency: USD
- Payment Type: Employee Paid
- *Billing Type: Out of State-Billable
- Originating Location: IND
- Travel To: SANDI
- *Miles: 14.1
- Transportation ID: (empty)

STEP 7

Select the Transportation ID.

From the Transportation ID drop-down, select IDOA.

The screenshot shows the 'Travel Authorization' interface with the 'Line Detail' dialog box open. The dialog box contains the following information:

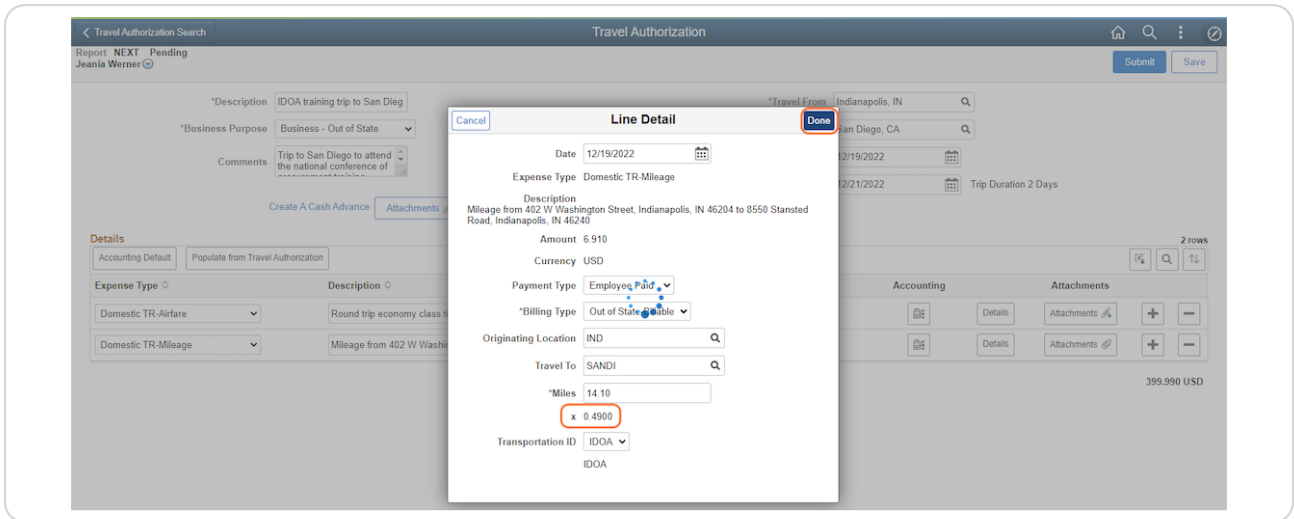
- Date: 12/19/2022
- Expense Type: Domestic TR-Mileage
- Description: Mileage from 402 W Washington Street, Indianapolis, IN 46204 to 8550 Stansted Road, Indianapolis, IN 46240
- Amount: (empty)
- Currency: USD
- Payment Type: Employee Paid
- *Billing Type: Out of State-Billable
- Originating Location: IND
- Travel To: SANDI
- *Miles: 14.10
- Transportation ID: IDOA

STEP 8

Click Done on the Line Detail pop-up.

Notice that the current State mileage reimbursement rate has defaulted.

When you're satisfied, click Done on the Line Detail pop-up.



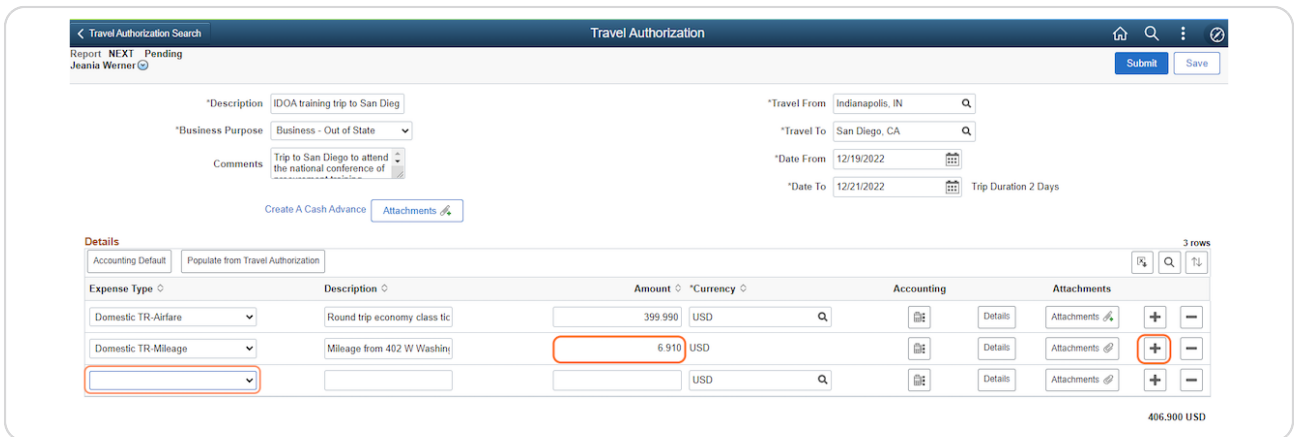
STEP 9

Add a line and select the Expense Type.

Notice that the Amount has prepopulated based on the miles and the reimbursement rate.

We clicked the Add icon at the end of the row to add a new one.

We're going to click the drop-down arrow under Expense Type and select Domestic TR-PerDiem-OutofState.



STEP 10

Enter the Description and the Amount.

In the Description field, enter any meals provided or enter a comment if no meals were provided.

Enter the Amount.

Travel Authorization Search

Report NEXT Pending
Jeamia Werner

*Description: IDOA training trip to San Dieg
*Business Purpose: Business - Out of State
Comments: Trip to San Diego to attend the national conference of
*Travel From: Indianapolis, IN
*Travel To: San Diego, CA
*Date From: 12/19/2022
*Date To: 12/21/2022 Trip Duration 2 Days

Details

Expense Type	Description	Amount	*Currency	Accounting	Attachments
Domestic TR-Airfare	Round trip economy class tic	399.990	USD		
Domestic TR-Mileage	Mileage from 402 W Washin	6.910	USD		
Domestic TR-PerDiem-OutofState	d dinner. No meals provided	32.000	USD		

438.900 USD

STEP 11

Review or adjust the Accounting Details and Line Details.

To review or adjust the Accounting Details, click the icon under Accounting.

To review and adjust the Line Details, click Details.

Travel Authorization Search

Report NEXT Pending
Jeamia Werner

*Description: IDOA training trip to San Dieg
*Business Purpose: Business - Out of State
Comments: Trip to San Diego to attend the national conference of
*Travel From: Indianapolis, IN
*Travel To: San Diego, CA
*Date From: 12/19/2022
*Date To: 12/21/2022 Trip Duration 2 Days

Details

Expense Type	Description	Amount	*Currency	Accounting	Attachments
Domestic TR-Airfare	Round trip economy class tic	399.990	USD		
Domestic TR-Mileage	Mileage from 402 W Washin	6.910	USD		
Domestic TR-PerDiem-OutofState	breakfast, lunch and dinner	32.000	USD		

438.900 USD

Complete the Line Detail pop-up.

- The Date will default with the first day of the trip - update it to reflect the expense date.
- Select the appropriate Payment Type from the drop-down.
- Select the appropriate Billing Type from the drop-down based on the Payment Type chosen.
- The Originating Location field will be populated from the Header. When you're satisfied, click Done on the Line Detail pop-up.
- Continue to add expense lines with the required information and click Save often to avoid losing information.

The screenshot displays a 'Travel Authorization' interface. A 'Line Detail' pop-up window is open, showing the following information:

- Date:** 12/19/2022
- Expense Type:** Domestic TR-PerDiem-OutofState
- Description:** breakfast, lunch and dinner. No meals provided
- Amount:** 32,000
- Currency:** USD
- Payment Type:** Employee Paid
- Billing Type:** Out of State-Billable
- Originating Location:** IND

The background interface shows a travel authorization form with the following details:

- Description:** IDOA training trip to San Diego
- Business Purpose:** Business - Out of State
- Comments:** Trip to San Diego to attend the national conference of...
- Travel From:** Indianapolis, IN
- Travel To:** San Diego, CA
- Start Date:** 12/19/2022
- End Date:** 12/21/2022
- Trip Duration:** 2 Days
- Expense Type:** Domestic TR-PerDiem-OutofState
- Description:** breakfast, lunch and dinner
- Amount:** 32,000
- Currency:** USD
- Payment Type:** Employee Paid
- Billing Type:** Out of State-Billable
- Originating Location:** IND