

Copy Trip Information to Another Traveler Attending Same Event

Process: To copy information from a traveler’s trip to another traveler attending the same event.

PROCEDURES

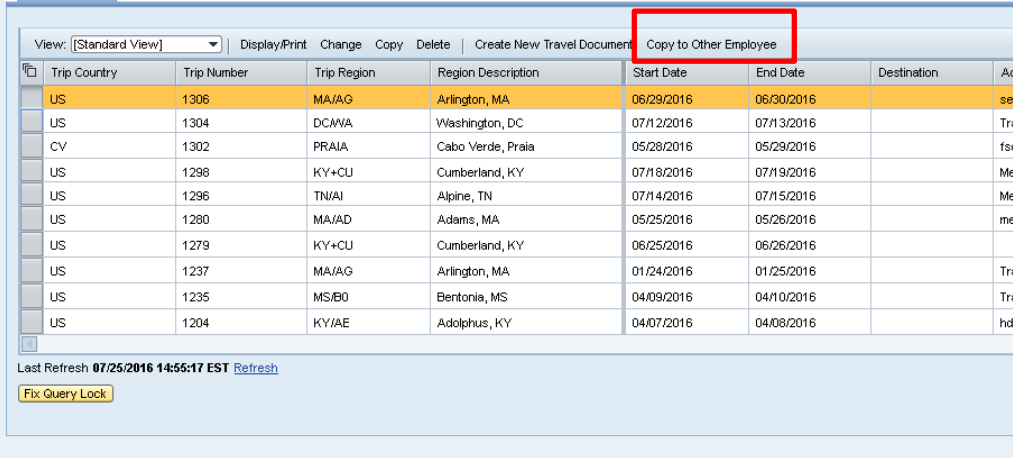
Multiple travelers from the same area often attend the same conference.

Once the trip has been created for a traveler, the trips can be copied to another person attending the same event.

Go to your On Behalf Of Work Center and locate the original trip.

Click on the Trip to highlight it.

Click on Copy to Other Employee.



The screenshot shows a web interface for managing trips. At the top, there is a title 'Trips (232)'. Below it, there are navigation options: 'View: [Standard View]', 'Display/Print', 'Change', 'Copy', 'Delete', 'Create New Travel Document', and 'Copy to Other Employee'. The 'Copy to Other Employee' button is highlighted with a red box. Below the navigation is a table with columns: Trip Country, Trip Number, Trip Region, Region Description, Start Date, End Date, Destination, and Action. The first row is highlighted in yellow and contains the following data: US, 1306, MA/AG, Arlington, MA, 06/29/2016, 06/30/2016, and se. Below the table, there is a 'Last Refresh' timestamp '07/25/2016 14:55:17 EST' and a 'Refresh' button. At the bottom, there is a 'Fix Query Lock' button.

Trip Country	Trip Number	Trip Region	Region Description	Start Date	End Date	Destination	Action
US	1306	MA/AG	Arlington, MA	06/29/2016	06/30/2016		se
US	1304	DC/WA	Washington, DC	07/12/2016	07/13/2016		Tr
CV	1302	PRAIA	Cabo Verde, Praia	05/28/2016	05/29/2016		fs
US	1298	KY+CU	Cumberland, KY	07/18/2016	07/19/2016		Me
US	1296	TN/AI	Alpine, TN	07/14/2016	07/15/2016		Me
US	1280	MA/AD	Adams, MA	05/25/2016	05/26/2016		me
US	1279	KY+CU	Cumberland, KY	06/25/2016	06/26/2016		
US	1237	MA/AG	Arlington, MA	01/24/2016	01/25/2016		Tr
US	1235	MS/B0	Benton, MS	04/09/2016	04/10/2016		Tr
US	1204	KY/AE	Adolphus, KY	04/07/2016	04/08/2016		hd

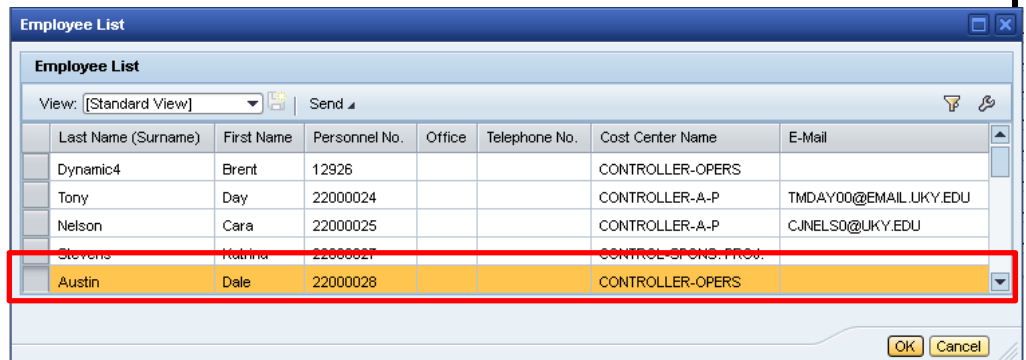
NOTE: In order to copy the trip to another traveler, the other traveler must be established in your Employee List through On Behalf Of.

Copy Trip Information to Another Traveler Attending Same Event

Your previously established Employee List will pop-up.

Click on the traveler attending the same event to highlight the name.

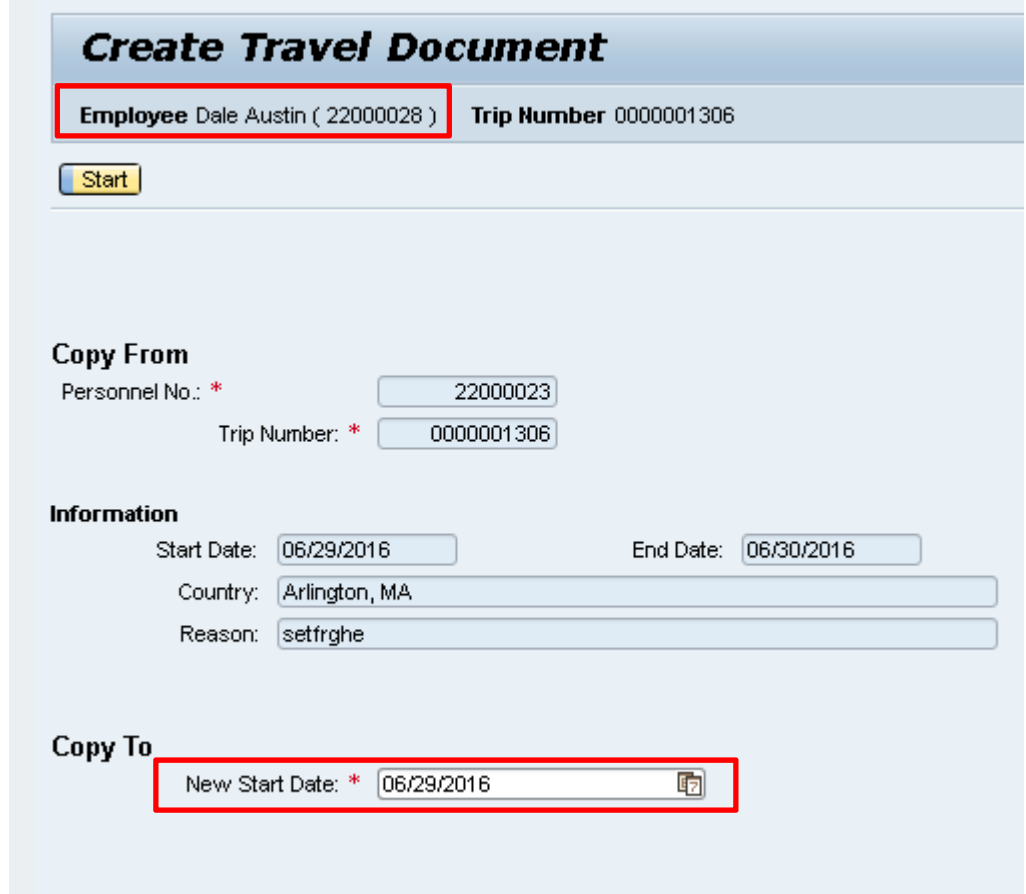
Click on OK.



Verify the Employee listed in the header is the correct traveler.

Verify the New Start Date field.

Click Start.



Copy Trip Information to Another Traveler Attending Same Event

Many of the General Data fields will be copied from the original trip.

Verify all information is correct and adjust any fields necessary for the current traveler.

Complete the Trip Attributes section of the General Data.

Click on Enter Receipts.

Employee Data: Austin (22000028) Trip Number: 0000001306 Trip Template: Overnight Trip

Previous Step **Enter Receipts** Save Draft

Calendar of Trips Attachments (0)

General Data

Start Date: * 06/29/2016 06:00 Departure from First Workplace
End Date: 06/30/2016 22:00 Arrival at First Workplace

Destination

Country: USA Region: MA/AG Arlington, MA
Specific Destination:
Additional Destinations: No destinations entered

Additional Information

Type of Trip: Out-of-State Travel
Applicable Per Diem Rate: Federal Rate
Purpose of Trip: * 02-Development/Donor Relations
Additional Trip Information: * setfrghe
Comment:
Cost Assignment: 2 Assignments: 50.00 % WBS Element 3048111824 (WHEN THE WELL RUNS DRY), Funds Cent

Per Diems for Meals

Per Diem Reimbursement for Meals: No. of Deductions: 0 Enter Deductions for Meals

Mileage

Total Distance: 0 Mile Enter Mileage Details

Trip Attributes

Trip is Subject to Pay Only Amount: Amount: 0.00
Trip Includes Amounts Paid by 3rd Party:
Trip Includes Personal Travel: No Yes

Airfare Purchased Through

UK Travel AAA:
UK Travel Avant:
UK Travel Concur:
Other:

Previous Step **Enter Receipts** Save Draft

Copy Trip Information to Another Traveler Attending Same Event

The receipt information from the original trip will copy to the new trip.

Adjust all expense amounts, Expense Paid By fields, and receipt information to reflect the correct information for the current traveler. Add new receipts and delete unnecessary receipts as necessary.

Click on Save Draft.

Click on Review.

The screenshot shows a software interface for managing travel documents. At the top, there is a header bar with the following information: Employee: Joe Austin (22000020), Trip Number: 0001306, Trip Template: Overnight Trip, Start Date: 06/29/2016, End Date: 06/30/2016. Below the header, there are three buttons: 'Previous Trip', 'Review', and 'Save Draft'. The 'Review' and 'Save Draft' buttons are highlighted with a red box. Below the buttons is a section titled 'Receipts in This Travel Document'. This section contains a table with the following columns: No., Status, Expense Type, Estimated Amount, Expense Amount, Expense Date, and Expense Paid By. The table has two rows of data: Row 1: No. 001, Status (green checkmark), Expense Type: Airfare, Estimated Amount: 0.00, Expense Amount: 758.63, Expense Date: 06/29/2016, Expense Paid By: Paid by ProCard. Row 2: No. 002, Status (green checkmark), Expense Type: Lodging, Estimated Amount: 0.00, Expense Amount: 125.32, Expense Date: 06/29/2016, Expense Paid By: Paid by Employee. Below the table is a section titled 'Receipts Total in This Travel Document' with the following summary: Actual Expense Total: 883.95, Estimated Total Cost: 0.00, Total Difference: 883.95.

No.	Status	Expense Type	Estimated Amount	Expense Amount	Expense Date	Expense Paid By
001	✔	Airfare	0.00	758.63	06/29/2016	Paid by ProCard
002	✔	Lodging	0.00	125.32	06/29/2016	Paid by Employee

Receipts Total in This Travel Document
Actual Expense Total: 883.95 Estimated Total Cost: 0.00 Total Difference: 883.95

NOTE: The Trip Number in the Header Bar will continue to display the previous trip number as a reference throughout the completion of the new trip. This trip will be assigned a new number when Save Draft is clicked.

Copy Trip Information to Another Traveler Attending Same Event

Review the Summary and the Travel Document for the trip and add Attachments to support the expenses for the current traveler.

When the travel document is complete and ready for approval. Click on the radial button for Save and Send for Approval.

Click on the Save and Send for Approval button.

Navigation: Previous Step | **Save and Send for Approval**

Attachments: Attachments (0)

Final Action

Save and Close I only want to save my travel document and send it later

Save and Send for Approval I want to save my travel document and send it now for further processing

I certify that the expenses included in this reimbursement request are accurate, in compliance with the University's Policy on Reimbursement of Travel Expenses, E-5-1, and incurred in the If charged to sponsored project(s), I further certify that all travel charges provide direct benefit to the project(s) in accordance with Costing Guidelines for Sponsored Projects, Appendix. None of the expenses are personal or unallowable. No expenses are claimed that have been or will be reimbursed from another source, were provided free of charge or were covered by other funding.

Summary

Meals per Diem	118.00 USD
Reimbursable Receipts	125.32 USD
Paid by UK/3rd Party	758.63 USD
Total Travel Expenses	1,001.95 USD
Paid by UK/3rd Party	- 758.63 USD
Reimbursable Amount	243.32 USD
Amount to be Paid	243.32 USD

Cost Assignment

121.66 USD Company Code UK00 (University of Kentucky), Business Area 0201 (UKRF), WBS Element 3048111824 (WHEN THE WELL RUNS DRY), Funds Center 1013600285 (CS-1013600285)
121.66 USD Company Code UK00 (University of Kentucky), Business Area 0101 (UK w/o component units), Cost Center 1012013090 (CONTROL-SPONS. PROJ.), Funds Center 1012013090

Display Travel Document

Navigation: Previous Step | **Save and Send for Approval**