

Copy Trip Information to New Dates for the Same Traveler

Process: To copy information from a previous trip to new dates for the same traveler when the traveler make repetitive trips to the same destination.

PROCEDURES

Travelers may make repetitive trips to the same destinations throughout the course of a year.

A trip can be copied to new dates to assist with the processing of travel documents.

Go to your Traveler Work Center or On Behalf of Work Center and locate the original trip.

Click on the Trip to highlight it.

Click on Copy

Details of: Mary Fister-Tucker

Unlock

Trips (229)

View: [Standard View] | Display/Print | Change | **Copy** | Delete | Create New Travel Document | Copy to Other Employee

Trip Country	Trip Number	Trip Region	Region Description	Start Date	End Date	Destination	Additional Trip Information
US	1158	DC/WA	Washington, DC	03/09/2016	03/10/2016		Training
US	1157	DC/WA	Washington, DC	02/18/2015	02/19/2015		Training
US	1129	DC/WA	Washington, DC	03/31/2016	03/31/2016		Meeting
US	1128	DC/WA	Washington, DC	04/05/2016	04/06/2016		Meetings
US	1117	NY/AE	Addison, NY	01/30/2015	01/30/2015		Meetings
US	1115	KY/OA	Oak Level, KY	10/01/2015	10/31/2015	Various-See attached	Coverage around KY
US	1114	TN/CD	Campaign, TN	03/27/2016	03/28/2016		Training
US	1099	CA/AH	Alameda, CA	07/25/2015	07/26/2015	California	Meetings
US	1084	DC/WA	Washington, DC	01/28/2015	01/29/2015		Meeting
US	1083	KY/BD	Bandana, KY	02/01/2016	02/28/2016		Training

Last Refresh: 07/20/2016 08:51:19 EST Refresh

Fix Query Lock

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Enter the start date of the new trip in the New Start Date field.

Click on Start.

Create Travel Document

Employee Mary Fister-Tucker (22000023) Trip Number 0000001158

Start

Copy From

Personnel No.: * 22000023

Trip Number: * 0000001158

Information

Start Date: 03/09/2016 End Date: 03/10/2016

Country: Washington, DC

Reason: Training

Copy To

New Start Date: *

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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 trip.

Complete the Trip Attributes section of the General Data.

Click on Enter Receipts.

Employee: Mary Fisher, Tucker (22900023) Trip Number: 0000001158 Trip Template: Overnight Trip

Previous Step **Enter Receipts** Save Draft

Calendar of Trips Attachments (0)

General Data

Start Date: * 07/12/2016 05:00 Departure from First Workplace
End Date: 07/13/2016 23:00 Arrival at First Workplace

Destination

Country: USA Region: DC/VA Washington, DC
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: * 00-Collaboration/Meeting
Additional Trip Information: * Training
Comment:
Cost Assignment: 100.00 % WBS Element 304811824 (WHEN THE WELL RUNS DRY), Funds Center 1013600285

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:

Copy Trip Information to New Dates for the Same Traveler

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 information from the current trip. Add new receipts and delete unnecessary receipts as necessary.

Click on Save Draft.

Click on Review.

The screenshot displays a web application interface for managing travel documents. At the top, a header bar contains the following information: Employee: Mary Fisher-Tucker (220000023), Trip Number: 0000001158, Trip Template: Overnight Trip, Start Date: 07/12/2016, and End Date: 07/13/2016. Below the header, there are three buttons: 'Previous Step', 'Review', and 'Save Draft'. The 'Review' button is highlighted with a red box. The main section is titled 'Receipts in This Travel Document' and contains a table with columns: No., Status, Expense Type, Estimated Amount, Expense Amount, and Expense Date. The table lists three receipts: 001 (Airfare, 589.63), 002 (Lodging, 257.45), and 003 (Baggage, 60.00). Below the table, a summary box shows: Actual Expense Total: 907.08, Estimated Total Cost: 0.00, Total Difference: 907.08. At the bottom, there are three buttons: 'Previous Step', 'Review', and 'Save Draft'.

No.	Status	Expense Type	Estimated Amount	Expense Amount	Expense Date
001	<input checked="" type="checkbox"/>	Airfare	0.00	589.63	07/12/2016
002	<input checked="" type="checkbox"/>	Lodging	0.00	257.45	07/12/2016
003	<input checked="" type="checkbox"/>	Baggage	0.00	60.00	07/12/2016

Receipts Total in This Travel Document
Actual Expense Total: 907.08 Estimated Total Cost: 0.00 Total Difference: 907.08

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 New Dates for the Same Traveler

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

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.

Previous Step Save and Send for Approval

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 full for a 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 A. 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	128.00 USD
Reimbursable Receipts	317.45 USD
Paid by UK/3rd Party	589.63 USD
Total Travel Expenses	1,035.08 USD
Paid by UK/3rd Party	- 589.63 USD
Reimbursable Amount	445.45 USD
Amount to be Paid	445.45 USD

Cost Assignment

445.45 USD Company Code UK00 (University of Kentucky), Business Area 0201 (UKRF), WBS Element 3048111824 (WHEN THE WELL RUNS DRY), Funds Center 1013600285 (C)

Display Travel Document

Previous Step Save and Send for Approval