

Adding an Itinerary to Claim Travel Allowances Once Report Header is Created

Use this procedure when you have completed a “Report Header” but need to update the report to include Travel Allowances.

The “Claim Travel Allowance” section of the “Report Header” is only available when the Report Header is being created. The radio button will automatically be set to “Yes, I want to claim Travel Allowance.” If you do not need to claim mileage, meals – per diem, or lodging, you will need to click “No, I do not want to claim Travel Allowance.”

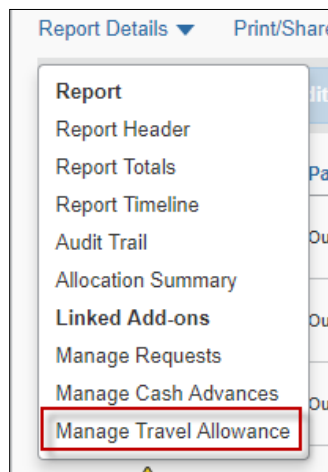
Claim Travel Allowance

Will you claim Travel Allowance (Meals - Per Diem and/or Lodging) for this trip?

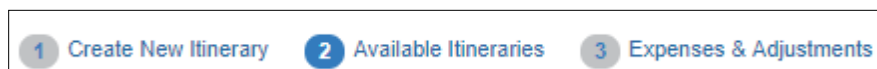
Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

You cannot update the “Claim Travel Allowance” once the Report Header is completed, so you will need to add the trip itinerary by selecting “Manage Travel Allowances” from the “Report Details” dropdown menu on the “Manage Expenses” screen.



Select an available itinerary from the “Available Itineraries” tab, or click the “Create New Itinerary” tab to enter a new itinerary. These options will display at the top of your screen.



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If you need to create a new itinerary, click the “Create New Itinerary” tab, and use the “New Itinerary Stop” panel to add your departure city, arrival city and the dates of travel.

New Itinerary Stop

Departure City

Date Time

Arrival City

Date Time

[Save](#)

If this is a multi-destination trip, you add additional itinerary stops. Once a stop is entered, click **Save**. Saved itinerary stops will populate on the left side of the screen.

Itinerary Info

Itinerary Name Selection

[Add Stop](#)
[Delete Rows](#)

	Departure City ▲	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Knoxville, Tennessee 02/20/2019 04:00 PM	Nashville, Tennessee 02/20/2019 06:30 PM	DAVIDSON COUNTY, US-TN, US
<input type="checkbox"/>	Nashville, Tennessee 02/22/2019 12:00 PM	Chicago, Illinois 02/22/2019 05:00 PM	COOK COUNTY, US-IL, US

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If you need to select an itinerary that has already been created, you can choose an available itinerary from the “Available Itineraries” section at the bottom of the screen. Single-click the itinerary to highlight it and click “Assign.” Once your itinerary stops have been added, click “Done.”

Available Itineraries

Current Itineraries
▼
Delete
Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Jonathan Test				
Knoxville, Tennessee	01/07/2019 08:00 AM	Orlando, Florida	01/07/2019 04:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	01/09/2019 08:00 AM	Knoxville, Tennessee	01/09/2019 06:00 PM	KNOX COUNTY, US-TN, US

Done

When the itinerary stops have been added, you can add Travel Allowances to the Expense Report.