



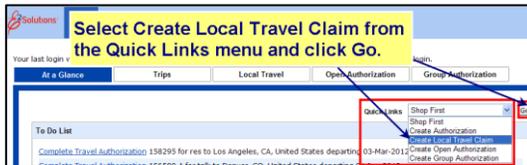
## Creating Local Travel Claims Quick Reference Card

Creating a local travel claim allows you to request reimbursement for local travel.

See **UG50 Creating Local Travel Claims** for more detailed information.

### Getting Started

1. Click **My E2** on the task bar and select **Create Local Travel Claim** from the **Quick Links** list.



### Quick Links menu

2. Click **Go**.

### Completing Basic Information

1. Enter or select the following on the Basic Information page:
  - **Specific Travel Purpose**
  - **Begin Date** and **End Date**
  - **Document Number** (if manual document numbering is enabled)
  - **Type of Travel** (if enabled)
2. Click **Save and Next Step**.

### Completing Expenses

Use the Expenses page to add estimated expenses to your local travel claim.

1. Click the **Add New Expense** link. The **Add New Expense** window appears.

### Add New Expense window

2. Complete the required (\*) fields. The fields vary based on the type of expense you enter. The following fields appear for all expense types:

- **Date of Expense** – The date the expense was incurred.
- **Expense Type** – Select the type of expense from the list. This list is limited to the expense types you are allowed to claim for local travel.

If you selected an expense type of **POV**, select the **Subtype** from the list, enter the **From** and **To** destinations, and enter the **Distance** in miles or kilometers.

- **Pay To** – Select the entity that paid for the expense (and should be repaid), such as traveler, traveler charge card or agency billed.
- **Remark** – Click **Add an Optional Remark** to add comments about this specific expense.
- **Receipt** – Attach a receipt or other documentation to this specific expense. Click **Add Receipt** to select the file and attach it to the expense.

3. Click **Save and New** to add the expense and leave the window open to add other expenses or click **Save and Close** to add the expense and close the window.
4. Click **Next Step**.

### Completing Accounting Information

Use the Accounting page to select the accounts to cover the claimed expenses.

If you do not normally select funding sources for your claims, skip this step, and click **Save and Next Step**. A warning message appears, indicating that expenses are under allocated. Click **Save and Next Step** again to continue.

1. Select accounts to fund the claim using one or more of the following methods.
  - **Select a favorite account.** Click the **Select Account Codes** tab, if necessary.

Select	Source	Description	Account Code	Delete
<input checked="" type="checkbox"/>	Traveler Profile	conference	2005 ADMIN ADMIN 0000 NBC XXXX NA NA NA	Delete
<input type="checkbox"/>	Traveler Profile	site visits 2009	2005 ADMIN ADMIN 1000 ALB CORP FUNCT NA NA NA	Delete
<input checked="" type="checkbox"/>	Traveler Profile	general	2005 ADMIN ADMIN 1000 BOL PGM DEVEL NA NA NA	Delete
<input type="checkbox"/>	Traveler Profile	travel	2005 ADMIN ADMIN 1000 VUT CORP FUNCT NA NA NA	Delete

### Select Account Codes tab on Account Code Selection window

- a. **Select** the check box to the left of the accounts you want to add to the claim.
  - b. Click **Select and Close**.
- **Search for an account using a drill-down search.** Click the **Search Account Codes** tab, if necessary.

### Search Account Codes tab showing Drill-Down Search

- a. Select a value for the first segment from the list and click the **Refine search** link to the right of the value to narrow your search.

- b. Select a value for the next segment from the list. To narrow your search further, click **Refine search** and repeat this step for additional segments.
  - c. Click **Search**. A list of accounts that match your specified segment values appears.
  - d. **Select** the check box to the left of the accounts you want to add to the claim.
  - e. Click **Select and Close**.
- **Search for an account using a segment search.** Click the Search Account Codes tab, if necessary. If the drill-down search appears, click **Search by Segment**.
    - a. Enter the segment values that you want to use as a search filter. Hover text shows the maximum length for each segment.

**Search Account Codes tab showing Search By Segment Search**

- b. Click **Search**. A list of accounts with matching segment values appears.
- c. **Select** the check box to the left of the accounts you want to add to the claim.
- d. Click **Select and Close**.

- **Add a dimensional account code.** Click the Add Account Codes tab, if necessary.
    - a. Enter segment values or click **Search** to select from a list. You can also enter part of a value or description and then click **Search** to limit the list to values and descriptions that start with the entered data.
    - b. Click **Add and Close**.
2. Click **Save and Next Step**.

**Completing the Summary step**

The Summary page displays your local travel claim information.

**Summary page**

1. Review the claim. Click the **Edit Details** link in the section header to return to that step to make changes.
2. Click **Send to Approver**. A Confirm Action box appears.
3. Click **Confirm**.

Release 14.3 – September, 2014

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