

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

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

Solutions	Select	Create L	ocal Travel	Claim	from		
Your last login v At a Gla	the Qu	rick Links	s menu and o	Click C	GO.	login. Group Authorization	
					QuickLinks	Shop First	
To Do Lis	a e Travel Authori	tation 158295 for res t	to Los Angeles, CA, United St	ates departing	03-Mar-2012	Shop First Create Authorization Create Local Travel Claim Create Open Authorization Create Open Authorization	

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.

Expense Type:*	Select Expense Type	-
Amount:*		
Allount.		
Description:		
Pay To:*		•
Remark:	Add an Optional Remark	
Receipt:	Add Receipt	
Si	ze Limit: 2 Megabytes - Allowed Ty	pes: PDF

Add New Expense window

 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.

elect A	ccount Codes Se	earch Account Codes		
elect	Source	Description	Account Code	Delete
~	Traveler Profile	conference	2005.ADMN.ADMN.0000.NBC.XXXXX.NA.NA.NA	Delete
	Traveler Profile	site visits 2009	2005.ADMIN.ADMIN.1000.ALB.CORP FUNCT.NA.NA.NA	Delete
×	Traveler Profile	general	2005.ADMIN.ADMIN.1000.BOL.PGM DEVEL.NA.NA.NA	Delete
	Traveler Profile	jtravel	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 drilldown search. Click the Search Account Codes tab, if necessary.

Account Code Selection	Û
Select Account Codes Search Account Codes	
Drill-Down Search	
BFY: 2005 Keffe search	
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Search Account Codes tab showing Drill-Down Search

 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.

elect Account Codes	Search Account Codes
Search By Segment	
BFY:	
FUND:	
PROGRAM:	
DEPARTMENT:	
COUNTRY:	
ADMIN ACTIVITY:	
PRODUCT LINE:	
COMPACT GOAL:	
OUTCOME TARG:	

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.

Traveler Name: SUSAN SA	NDERS	Local Claim ID: LT-005910	3 Claim Sta	tus: Voucher	Revised
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Basic Information - Edit I	Details				
Specific Travel Purpose: Begin Date: End Date: Document Number:	IT training 01-Dec-2011 01-Dec-2011 6L2011120159103	300			
xpenses - <u>Edit Details</u>					
Traveler: 93.50 Amount: 93.50					
Date Type	Amount	Description	Pay To	Alert	ts Show
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01-Dec-2011 Parking	15.00	Parking fee	Traveler	0,	Show
01-Dec-2011 Registration fee	50.00	Conference fee	Traveler	ω,	Show
01-Dec-2011 Voucher Transactio	on Fee 6.00	Voucher Transaction Fee	Traveler		
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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**.

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