Indiana University Office of Procurement Services

STANDARD OPERATING PROCEDURE

SOP NO:	SOP-TVL-12						
SUBJECT:	Trip Authorization Importing Options						
SOURCE:	University Travel Management Services						
ORIGINAL DATE OF ISSUE:	11/3/2023						
DATE OF LAST REVISION:	N/A						
DISCLAIMER:	The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Travel Management Services reserves the right to determine on a case-by-case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.						
RATIONALE:	Chrome River has three options for importing your trip authorization into your expense report. These options determine what information is pulled into your expense report. Review the options below to determine when to import your trip authorization to best meet your needs.						
PROCEDURES:	A prompt will appear as soon as you choose to create a new expense report: Expenses For Priscilla Laird Import from Trip Authorization Report Name Pay Me In USD - US Dollars Report Type Select What will be imported from the trip authorization: Report information from the header, including the trip dates and report type. Expense lines, including descriptions and amounts. This is a good ontion if:						

• expe expe	You've separated your m nses are on one Other M nse line.	iscellaneous exp l isc expense line	enses into and estima	separate Other ated taxi expens	Misc tile es are o	es, i.e., _l n anoth	parkii Ier O t
Option 2							
Option 2 informati to make t	A: The next prompt to im on has been entered ma the expense tile panel dis	port a trip auth nually and has b appear.	orization w een saved.	ill happen after t Before adding a	he expe ny expe	ense rep nse tile	oort ł s ma
Expenses For Priscilla Lairo		F			-		
TEST © Converts 👔 0 Attachmen	to		() Create New	AR TRAVEL	TRANSPORTATION		TI
DATE EXPENSE	99	NT PNY ME 🧳 🗉	eWallet All Trips Statements Credit Card	ACOSTION COL	MISCELLANEOUS	TEASE MARSON AND	18689F8
			Personal Accour Offline Authorization Recycle Bin	и			
	You have not added any expenses.		eReceipts				
Scroll dov	wn and you'll see this on	the right-hand p	anel:				
Expenses For Priscilla Laird		<i>₹</i> ⊕	PDF - Images				Delet
omments 🏮 0 Atlachments		0	Expenses F	or Priscilla Laird			
EXPENSE	SPENT	PRYME 🖉 🗖 🛦	Report Name	test			
			Pay Me In	USD - US Dollars			
			Report Type	Employee Travel			
			Travel Type	Domestic			
	You have not added any expenses.		Trip Start Date	08/01/2023			
	+ Add Expense		Trip End Date	08/16/2023			
			Business Purpose	test			
			City / State / Zip	Abbeville, LA - 70511			
			time?	nse Summary			
				,			
		~	Import from Trip Authorization	ADD TRIP AUTHORIZATION REPORT			

Apply Trip Authorization	
9.10.21 PA import test	
Import Line Items from Trip Authorization Report	
Report Summary	
The checkbox is checked by default.	
What will be imported from the trip authorization:	
• Expense lines, including descriptions and amounts.	
This is a good choice if:	
 You've separated your miscellaneous expenses into separate O parking expenses are on one Other Misc expense line and estin Other Misc expense line. You want to edit details of line items instead of entering them f 	Other Misc tiles, i.e., estimated mated taxi expenses are on another from scratch.
Option 2B	
This prompt to import a trip authorization starts out the same as Option report header information has been entered manually and has been save	n 2A. It will happen after the expensived.
Before adding any expense tiles manually, click to make the expense til you'll see this on the right-hand panel:	ile panel disappear. Scroll down and
Trip Authorization Expense Summary	
Import from Trip Authorization	EPORT
Comments (0)	
Once you click "Add Trip Authorization Report," and choose the appropr checkbox. It will look like this:	priate report, you'll uncheck the

Ap	oply Tri	ip Autho	orization						
9	9.2. <mark>21</mark> P/	A w/o hote	şl						
] Import	t Line Item	ns from Trip	Authorizatio	on Report				
R	eport s	Summar	у						
What v	will be im	ported fron	n the trip aut	horization:					
• This is		g ntion if [.]							
•	Trip da You've report expens expens	tes are diffe combined a on one Oth es are inclu e report	erent from da all estimated I er Misc expe Ided on one (ates on trip au expenses with nse tile, i.e., t Dther Misc exp	thorization hout a dedi he sum of b pense line a	cated ex both estin and will r	pense tile mated par need to be	in the trip king and o separate	p authorizatio estimated tax ed on the
•	You pre purcha	efer to ente se dates.	er details of li	ne items from	scratch ins	tead edi	ting detail	s like actu	ual amounts a
• Option The thi you clic Submit	You pre purcha 3 ird option ck the firs t Confirmation	efer to ente se dates. h to import f st Submit bu	er details of li your trip auth utton and bet	ne items from norization into fore you confil	scratch ins o your expe rm submiss	tead edi nse repo ion. You	ting detail ort will app 'll see this	s like actu bear imme :	ual amounts a ediately after
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Click "Trip Authorizati	on" and import the appropriate report as you normally would.
What will be imported	d from the trip authorization:
Nothing	
This is a good option i	f:
You like to stYour trip aut	art with a clean slate and add your expenses manually. horization contained the incorrect dates or report type by mistake.
Option 4	
The fourth option to i sometimes might be h authorization, but to	mport your trip authorization into your expense report requires 2 import spots helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option.
The fourth option to i sometimes might be h authorization, but to Initially you will want	mport your trip authorization into your expense report requires 2 import spots nelpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.
The fourth option to i sometimes might be h authorization, but to Initially you will want	mport your trip authorization into your expense report requires 2 import spots helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.
The fourth option to i sometimes might be h authorization, but to Initially you will want Expenses Fo	mport your trip authorization into your expense report requires 2 import spots helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.
The fourth option to i sometimes might be l authorization, but to Initially you will want Expenses Fo	mport your trip authorization into your expense report requires 2 import spots helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.
The fourth option to i sometimes might be h authorization, but to Initially you will want Expenses Fo Import from Trip Authorization Report Name	mport your trip authorization into your expense report requires 2 import spots helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.
The fourth option to i sometimes might be h authorization, but to Initially you will want Expenses Fo Import from Trip Authorization Report Name Pay Me In	mport your trip authorization into your expense report requires 2 import spots, helpful, depending on your need. If you want header fields imported from a trip enter expenses from scratch, this is a good option. to select to import a trip authorization.

reconcile charges		•
Report Summary		
From Date	04/14/2023	
To Date	04/16/2023	
Business Purpose		
Expense Summary		
	REMAINING (USD)	SPENT (USD)
Hotel	118.60	0.00
Total	118.60	0.00
Allocations		
6046300-FIT BL-RSAD USER FEES		2,000.00
	Imp	port
What will be imported from the trip author	ization initially:	
Header details of report		
This is a good option if:		
The report type and travel type areYou want header level details enter	e correct. red from the trip authorization.	
The next step of this import option is to edi fields that may be needed. Once completed the page.	t details on header level, if needed, I, select to unaptly the trip authoriza	and add in any ition towards th

	Report Name should include trav	veler name, destination and Trip dates		
	Report Type	Student Travel		
	Travel Type	Domestic		
	Trip Start Date	04/14/2023		
	Trip End Date	04/16/2023		
	Business Purpose	1]
	Enter trip destination	5		-
	City / State / Zip	Edwardsville, IL - 62025		
	Does trip include personal time?			
	The purpose of a students travel	impacts how funds should be accounted for. Please select from th	ne list to confirm the purpose of the travel.	
	Primary purpose of the travel was for	Select 🔻		
	Student Address and Student Cit	ty, State, Zip are limited to 55 characters each.		
	Student Address: Street Number and Name			
	Student Address: City, State - Zip			
	Trip Authorization Report Applied	I		
	× reconcile charges			
	Hotel		118.60 0.	D0
	Total		118.60 0.	DO
	What will import no • Nothing This is a good option • You want t	ow: n if: o enter report expenses form scratch in	istead of editing them.	
	Once into the repor	t, you can reattach the expense report a	as done in option 2B or option 3.	
DEFINITIONS:	Trip Authorization – domestically and/or	 Report type generated to estimate trip r internationally 	expenses to gain authorization for tr	avel,
CROSS REFERENCE:				