

**Submit the TA, resolve any errors, resubmit
and review approvals**

STEP 1

Ready to Submit?

After all expenses have been entered and supporting documents attached, you're ready to submit for approval.

Travel Authorization

Report: 0000013805 Pending
Jeamia Werner

*Description: IDOA training trip to San Diego
*Business Purpose: Business - Out of State
Comments: Trip to San Diego to attend the national conference of
*Travel From: Indianapolis, IN
*Travel To: San Diego, CA
*Date From: 12/19/2022
*Date To: 12/21/2022 Trip Duration 2 Days

Create A Cash Advance Attachments (2)

Details 10 rows

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Economy class round trip tcl	399,990	USD		
Domestic TR-Mileage	402 West Washington Street	6,910	USD		
Domestic TR-Mileage	402 West Washington Street	6,910	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114,950	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114,950	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		

STEP 2

Submit.

Click Submit.

Travel Authorization

Report: 0000013805 Pending
Jeamia Werner

*Description: IDOA training trip to San Diego
*Business Purpose: Business - Out of State
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*Travel From: Indianapolis, IN
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Domestic TR-Mileage	402 West Washington Street	6,910	USD		
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Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114,950	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32,000	USD		

STEP 3

If any errors exist...

If any errors exist in the details area, an error flag displays next to the Expense Type(s) with the error.

Click the error flag.

The screenshot shows a web application for 'Travel Authorization'. At the top, there's a header with the report number '0000013005', the status 'Pending', and the user 'Jeania Werner'. There are 'Submit' and 'Save' buttons. Below the header, there are several input fields: 'Business Purpose' (Business - Out of State), 'Travel To' (San Diego, CA), 'Date From' (12/19/2022), and 'Date To' (12/21/2022). A comment field contains 'Trip to San Diego to attend the national conference of...'. There are also buttons for 'Create A Cash Advance' and 'Attachments (2)'. Below this is a 'Details' section with a table of expenses. The table has columns for 'Expense Type', 'Description', 'Amount', 'Currency', 'Accounting', and 'Attachments'. There are 10 rows of data. The first row is 'Domestic TR-Airfare' for 'Economy class round trip tici' with an amount of 399.990 USD. The second and third rows are 'Domestic TR-Mileage' for '402 West Washington Street' with an amount of 6.910 USD. The fourth and fifth rows are 'Domestic TR-Lodging/Hotel' for 'San Diego Comfort Inn \$100' with an amount of 114.950 USD. The sixth, seventh, and eighth rows are 'Domestic TR-PerDiem-OutofState' for 'Breakfast, lunch and dinner' with an amount of 32.000 USD. The ninth row is 'Domestic TR-Parking & Tolls' for 'Overnight Parking' with an amount of 9.000 USD. In the fourth and fifth rows, there are red error flags (a right-pointing triangle) in the 'Expense Type' column, which are highlighted by a red box. The 'Attachments' column for each row contains a link icon, a 'Details' button, and '+' and '-' buttons.

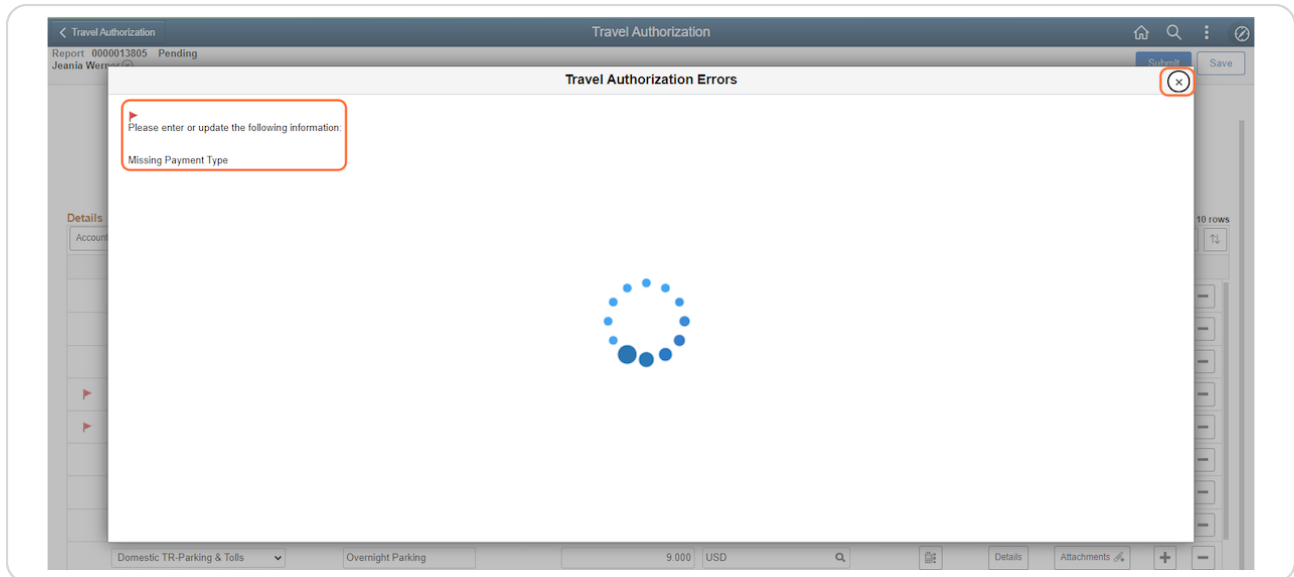
Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Economy class round trip tici	399.990	USD		Attachments [Details] [+]
Domestic TR-Mileage	402 West Washington Street	6.910	USD		Attachments [Details] [+]
Domestic TR-Mileage	402 West Washington Street	6.910	USD		Attachments [Details] [+]
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		Attachments [Details] [+]
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		Attachments [Details] [+]
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		Attachments [Details] [+]
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		Attachments [Details] [+]
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		Attachments [Details] [+]
Domestic TR-Parking & Tolls	Overnight Parking	9.000	USD		Attachments [Details] [+]

STEP 4

The Travel Authorization Errors pop-up.

Read the Travel Authorization Errors pop-up message.

Click the x in the upper right hand corner of the message to close it.

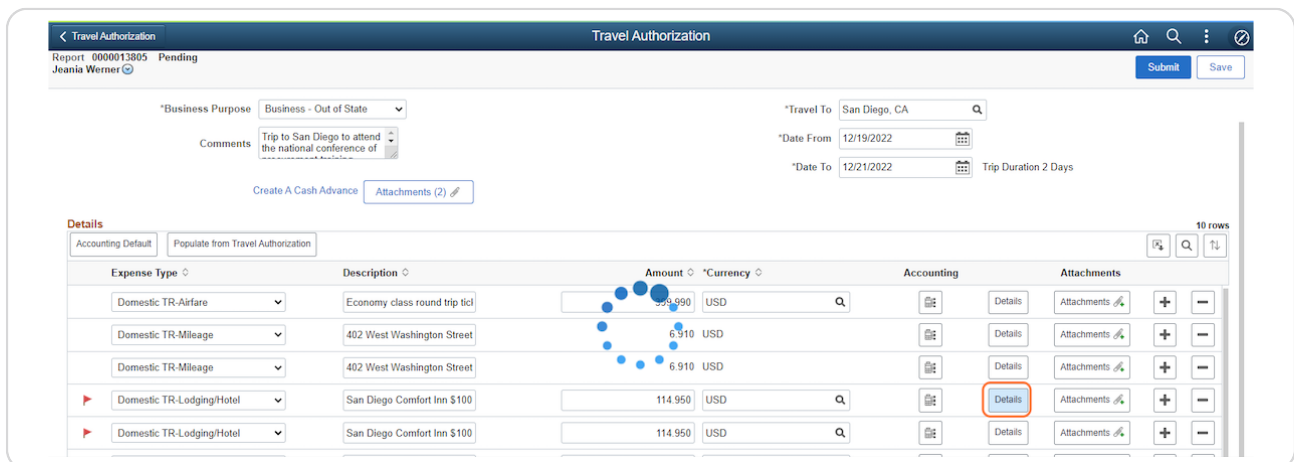


STEP 5

Add or update information as needed.

You'll need to add or update the information related to the error message(s).

Here, we need to click Details.



STEP 6

Clear the errors on the Line Detail pop-up.

Make the required updates and click Done on the Line Detail pop-up.

Travel Authorization

Report 0000013805 Pending
Jeamia Werner

*Business Purpose Business - Out of State

Comments Trip to San Diego to attend the national conference of

*Travel To San Diego, CA

*Date From 12/19/2022

*Date To 12/21/2022 Trip Duration 2 Days

Line Detail

Cancel Done

Date 12/20/2022

Expense Type Domestic TR-Lodging/Hotel

Description San Diego Comfort Inn \$100.00 + \$14.95 taxes

Amount 114.950

Currency USD

Payment Type Agency Paid

*Billing Type Agency Paid

Originating Location IND

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Economy class round	399.990	USD		
Domestic TR-Mileage	402 West Washingto	6.910	USD		
Domestic TR-Mileage	402 West Washingto	6.910	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort In	114.950	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort In	114.950	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner	32.000	USD		
Domestic TR-Parking & Tolls	Overnight Parking	9.000	USD		

STEP 7

Click Save.

After all errors have been cleared, click Save.

Travel Authorization

Report 0000013805 Pending
Jeamia Werner

*Business Purpose Business - Out of State

Comments Trip to San Diego to attend the national conference of

*Travel To San Diego, CA

*Date From 12/19/2022

*Date To 12/21/2022 Trip Duration 2 Days

Save

Details

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Airfare	Economy class round trip tic	399.990	USD		
Domestic TR-Mileage	402 West Washington Street	6.910	USD		
Domestic TR-Mileage	402 West Washington Street	6.910	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-Parking & Tolls	Overnight Parking	9.000	USD		

STEP 8

Click Submit.

After the errors have been corrected, the error flags will be removed.

Click Submit.

The screenshot shows the 'Travel Authorization' form. At the top right, the 'Submit' button is highlighted with a red border. The form contains the following information:

- Report: 000013805 Pending
- Author: Jeania Werner
- *Description: IDOA training trip to San Dieg
- *Business Purpose: Business - Out of State
- Comments: Trip to San Diego to attend the national conference of
- *Travel From: Indianapolis, IN
- *Travel To: San Diego, CA
- *Date From: 12/19/2022
- *Date To: 12/21/2022
- Trip Duration: 2 Days

Below the form is a table with the following columns: Expense Type, Description, Amount, Currency, Accounting, and Attachments. The table contains 10 rows of expense data.

Expense Type	Description	Amount	Currency	Accounting	Attachments
Domestic TR-Mileage	402 West Washington Street	6.91	USD		
Domestic TR-Mileage	402 West Washington Street	310	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		
Domestic TR-Lodging/Hotel	San Diego Comfort Inn \$100	114.950	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-PerDiem-OutofState	Breakfast, lunch and dinner.	32.000	USD		
Domestic TR-Parking & Tolls	Overnight Parking	9.000	USD		

STEP 9

The page will update.

A message saying, "Submission in Process" will be displayed to the right of the report number.

Under the Header information on the right hand side, the Approvals hyperlink will appear. If you click it, the Approval Status pop-up will appear.

The screenshot shows the 'Travel Authorization' form after submission. The report number '000013805' is now followed by 'Submission in Process'. The 'Approvals' button is highlighted with a red border. The form contains the following information:

- Report: 000013805 Submission in Process
- Author: Jeania Werner
- Description: IDOA training trip to San Dieg
- Business Purpose: Business - Out of State
- Comments: Trip to San Diego to attend the national conference of
- Billing Type: (empty)
- Travel From: Indianapolis, IN
- Travel To: San Diego, CA
- Date From: 12/19/2022
- Date To: 12/21/2022
- Trip Duration: 2 Days

The 'Approvals' button is located below the 'Date To' field.

STEP 10

The Approval Status pop-up.

Under Approval Status, you'll see the required approval steps and the status on each one.

The screenshot displays the 'Approval Status' pop-up window for a travel authorization request. The pop-up contains the following information:

- ID:** 0000013805
- Status:** Submitted for Approval
- Approval Status Table:**

Status/ Employee/ Profile	Date Time/ Comments
Submitted Jeania Werner Employee	11/16/2022 2:14:13PM
Pending Approval (Pooled) Fiscal Approver - Travel Auth	
Not Routed (Pooled) Todd Carr HR Supervisor	
Not Routed (Pooled) Agency Travel Dept - Travel	
Not Routed (Pooled) Dept of Administration	

The background shows a list of expenses for a trip to San Diego, including Domestic TR-Airfare, Domestic TR-Mileage, Domestic TR-Lodging/Hotel, and Domestic TR-PerDiem-OutofState.

STEP 11

The icons to the left of each step.

These will give you a quick update: a checkmark means that step is completed, an hourglass means that step is in progress, and an exclamation point means that step hasn't been started yet.

The screenshot displays the 'Approval Status' pop-up window, highlighting the icons used to indicate the status of each approval step:

- Submitted:** A checkmark icon indicates the step is completed.
- Pending Approval (Pooled):** An hourglass icon indicates the step is in progress.
- Not Routed (Pooled):** An exclamation point icon indicates the step hasn't been started yet.

The background shows the same list of expenses as in Step 10.