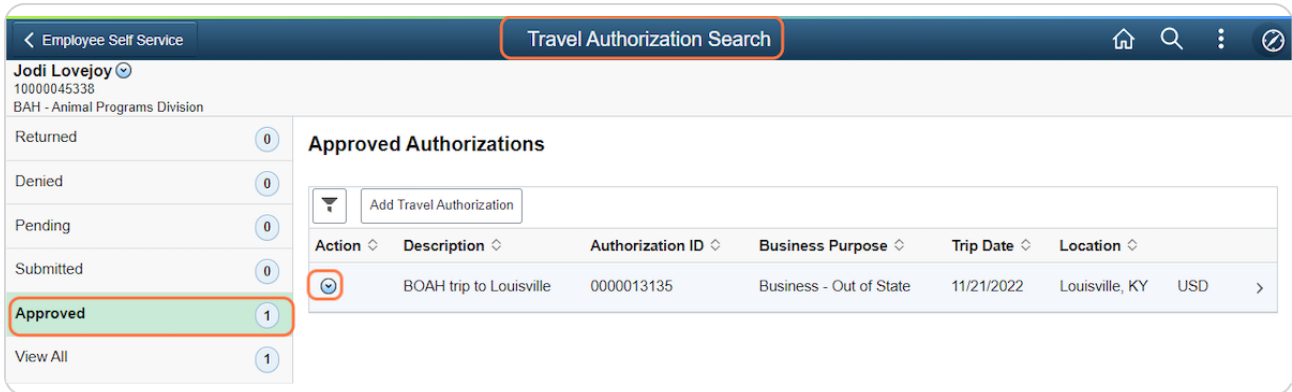


**ER - Copy an approved TA to an ER,
adjust the expense lines and save**

STEP 1

Navigate to the Approved Authorizations tab.

From the Travel Authorization Search page, select the Approved tab.



The screenshot shows the 'Travel Authorization Search' page for user 'Jodi Lovejoy'. The 'Approved' tab is highlighted in green and has a count of 1. The 'Approved Authorizations' table contains one entry: 'BOAH trip to Louisville' with Authorization ID 0000013135, Business Purpose 'Business - Out of State', Trip Date '11/21/2022', and Location 'Louisville, KY USD'. A red box highlights the 'Approved' tab and the first row of the table.

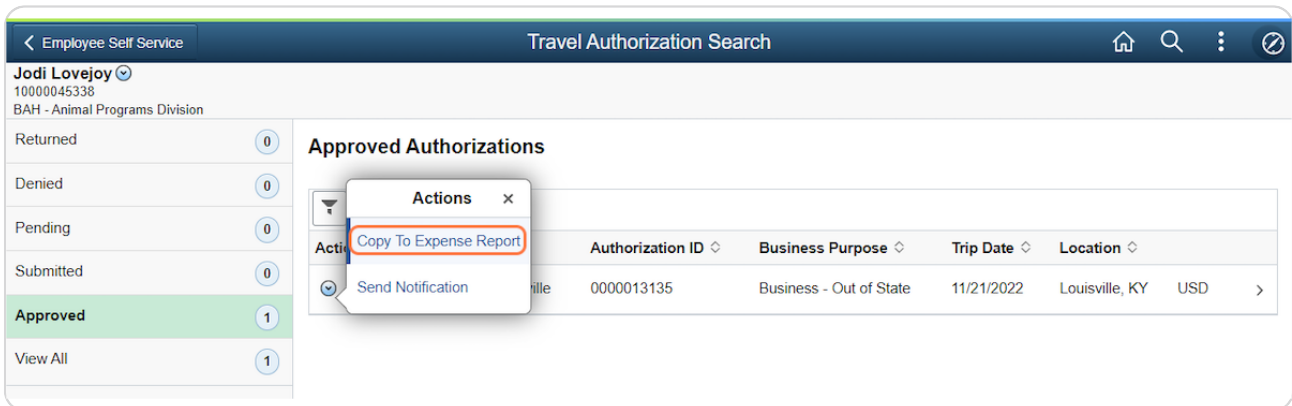
Returned	0
Denied	0
Pending	0
Submitted	0
Approved	1
View All	1

Action	Description	Authorization ID	Business Purpose	Trip Date	Location	
	BOAH trip to Louisville	0000013135	Business - Out of State	11/21/2022	Louisville, KY	USD >

STEP 2

Copy To Expense Report.

Under the Actions column, click the icon for the TA you want to copy and select Copy to Expense Report.



The screenshot shows the 'Travel Authorization Search' page with the 'Approved' tab selected. An 'Actions' dropdown menu is open over the first row of the table, and the 'Copy To Expense Report' option is highlighted with a red box. The 'Send Notification' option is also visible below it.

Returned	0
Denied	0
Pending	0
Submitted	0
Approved	1
View All	1

Action	Description	Authorization ID	Business Purpose	Trip Date	Location	
	BOAH trip to Louisville	0000013135	Business - Out of State	11/21/2022	Louisville, KY	USD >

Actions

- Copy To Expense Report
- Send Notification

STEP 3

The Expense Entry page will open.

It'll bring forward the expense lines, dates, amounts and other details from the approved TA.

The screenshot displays the 'Expense Entry' page for a travel authorization. The top navigation bar includes 'Travel Authorization Search' and 'Expense Entry'. The main header shows 'BOAH trip to Louisville' and 'Jodi Lovejoy'. The total amount is 406,370 USD. The page is divided into two main sections: a list of expense items on the left and detailed information on the right.

Expense Items List:

Date	Expense Type	Description	Amount	Unit
Wednesday, November 23, 2022				
	Domestic TR-PerDiem-OutofState	breakfast lunch and dinner	32.000	USD
Tuesday, November 22, 2022				
	Domestic TR-Lodging/Hotel	Louisville holiday inn express	110.260	USD
	Domestic TR-PerDiem-OutofState	breakfast lunch and dinner	32.000	USD
	Domestic TR-Rental Car	economy class rental	29.950	USD
Monday, November 21, 2022				
	Domestic TR-PerDiem-OutofState	breakfast lunch and dinner	32.000	USD
	Domestic TR-Rental Car	economy class rental	29.950	USD

Domestic TR-Lodging/Hotel - 10/23/2022 Details:

- Date: 10/23/2022
- Expense Type: Domestic TR-Lodging/Hotel
- Description: Louisville holiday inn express
- Payment: Agency Paid
- Amount: 110.260 USD
- Billing Type: Agency Paid
- Originating Location: Indianapolis, IN
- Expense Location: Louisville, KY
- Accounting: 1
- Receipt Split: [Button]

Additional Information:

- Attach Receipt: [Button]

STEP 4

Update the expense lines as needed.

Verify, update and add the required information (including the required receipts and documentation) on each expense line added. You can also add or remove lines if needed.

The screenshot displays the 'Expense Entry' interface for a travel authorization search. The top navigation bar includes 'Travel Authorization Search', 'Expense Entry', and utility icons. The header shows the trip details: 'BOAH trip to Louisville', user 'Jodi Lovejoy', and buttons for 'Save' and 'Review and Submit'. The 'Total (8 Items) 406.370 USD' is displayed at the top left.

The main content is divided into two panels. The left panel shows a list of expense items grouped by date:

- Sunday, October 23, 2022**
 - Domestic TR-Lodging/Hotel: Louisville holiday inn express, 110.260 USD
 - Domestic TR-PerDiem-OutofState: breakfast lunch and dinner, 32.000 USD
 - Domestic TR-Rental Car: economy class rental, 29.950 USD
- Saturday, October 22, 2022**
 - Domestic TR-Lodging/Hotel: Louisville holiday inn express, 110.260 USD
 - Domestic TR-PerDiem-OutofState: breakfast lunch and dinner, 32.000 USD
 - Domestic TR-Rental Car: economy class rental, 29.950 USD
- Friday, October 21, 2022**
 - Domestic TR-PerDiem-OutofState: breakfast lunch and dinner, 32.000 USD

The right panel provides a detailed view for the selected 'Domestic TR-Rental Car - 10/21/2022' expense line. It includes the following fields:

- Date:** 10/21/2022
- Expense Type:** Domestic TR-Rental Car
- Description:** economy class rental
- Payment Details:** Agency Paid, Amount: 29.950 USD
- Merchant:** Preferred, Preferred Merchant: Enterprise Rentals
- Additional Information:** Billing Type: Agency Paid, Originating Location: Indianapolis, IN, Expense Location: Louisville, KY
- Attach Receipt:** A button with a document icon and a right-pointing arrow, highlighted with a red box.

STEP 5

Save.

Click Save. See the Review, Submit and find the status guide for the remaining steps.

The screenshot displays the 'Expense Entry' interface for a travel authorization search. The top navigation bar includes a search icon, a home icon, a notification bell with a red indicator, and a refresh icon. The main header shows the search criteria: 'BOAH trip to Louisville' and the user 'Jodi Lovejoy'. A 'Save' button is highlighted with a red box, and a 'Review and Submit' button is also visible. The total amount is 406,370 USD.

Expense List:

Item	Amount	Unit
Louisville holiday inn express	110,260	USD
Domestic TR-PerDiem-OutofState	32,000	USD
breakfast lunch and dinner		
Domestic TR-Rental Car	29,950	USD
economy class rental		
Saturday, October 22, 2022		
Domestic TR-Lodging/Hotel	110,260	USD
Louisville holiday inn express		
Domestic TR-PerDiem-OutofState	32,000	USD
breakfast lunch and dinner		
Domestic TR-Rental Car	29,950	USD
economy class rental		
Friday, October 21, 2022		
Domestic TR-PerDiem-OutofState	32,000	USD
breakfast lunch and dinner		

Domestic TR-PerDiem-OutofState - 10/21/2022

*Date: 10/21/2022

*Expense Type: Domestic TR-PerDiem-Outof

*Description: breakfast lunch and dinner

Payment Details

*Payment: Employee Paid

*Amount: 32,000 USD

Additional Information

*Originating Location: Indianapolis, IN

*Expense Location: Louisville, KY

Per Diem Deductions >

Attach Receipt 1 >

Accounting 1 >

Receipt Split