

Guide for creating TA for out of state and international combination trip

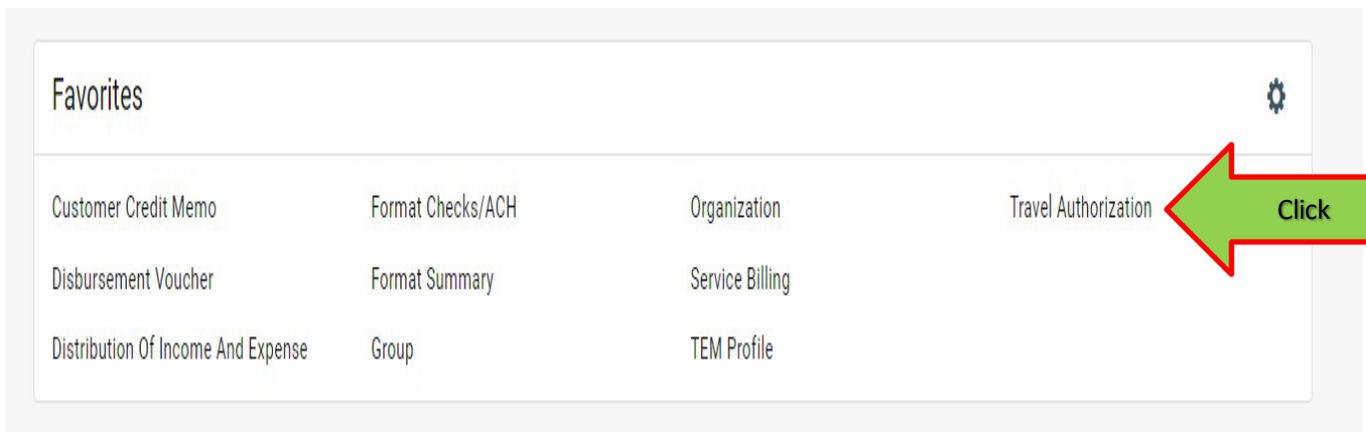
This document will show you how to create a TA for a traveler who travels out of state and international on the same trip.

On this trip: Erin Mercurio will:

- Fly to Boston from Denver, destination Portland, Maine from Jul 12-Jul 20
- Fly to London, destination Oxford from Jul 20 – Jul 25
- Fly to Lima, Peru from Jul 25 – Aug 7
- Fly back to Denver Aug 7

Assuming Erin will stay at the same hotel at each location.

On the main menu screen of Kauli, click on Travel Authorization if you marked it as a "favorite".



A screenshot of the 'Travel Authorization' form in the Kauli system. The form is titled 'Travel Authorization' and contains several sections. A red arrow points to the 'Traveler Lookup' field in the 'Traveler Section'. The sections and fields are:

- Document Overview**
 - * Description: (Description will be filled upon submit)
 - Organization Document Number:
 - Explanation:
- Financial Document Detail**
 - * Bank Code: 02 GENERAL DISBURSEMENTS
- Trip Overview**
 - Traveler Section
 - Traveler Lookup: (highlighted with a red box and a red arrow)
 - * Traveler Type Code:
 - First Name:
 - Address Lookup:
 - Street Address Line1:
 - City Name:
 - Country Code:
 - Email Address:
 - Liability Insurance:
- Trip Information Section**

action list doc search Impersonating Use

TEM Profile Lookup u is in use

KIM Principal Name:
 First Name:
 Last Name:
 Traveler Type Code:
 Department Code:
 Chart Code:
 Account Number:
 Active: Yes No Both

KIM Principal Name:
 First Name:
 Last Name:
 Traveler Type Code:
 Primary Department Code:
 Chart Code:
 Account Number:
 Active: Yes No Both

2 items found, displaying all items.

Account Value	Profile Id	KIM Principal Name	AR Customer Id	First Name	Last Name	Street Address Line1	City Name	State	Zip Code	Country	Email	Phone Number	Active
1021	spillsbu@colostate.edu	ERIN	2005	ERIN	MERCURIO	6003 CAMPUS DELIVERY	FORT COLLINS	CO	80523	US	ERIN.MERCURIO@COLOSTATE.EDU	970-491-6752	Yes
1045	zamer@colostate.edu	ZACHARY		ZACHARY	MERCURIO	8011 CAMPUS DELIVERY	FORT COLLINS	CO	80523	US	ZACHARY.MERCURIO@COLOSTATE.EDU	970-491-6011	Yes

Export options: CSV | spreadsheet | XML

“International” must be selected so the TA routes to RMI for required approval.

Trip Information Section

* Trip Type Code:
 * Trip Begin:
 * Trip End:
 * Primary Destination:
 Primary Destination Country/State:
 Primary Destination County:
 * Business Purpose:
 Delinquent TR Exception:

Trip Information Section

* Trip Type Code:
 * Trip Begin:
 * Trip End:
 * Primary Destination:
 Primary Destination Country/State:
 Primary Destination County:
 * Business Purpose:
 Delinquent TR Exception:

*** Region:** UNITED KINGDOM

County:

Primary Destination: Oxford

Active: Yes No Both

search clear cancel



*** Region:** UNITED KINGDOM

County:

Primary Destination: Oxford

Active: Yes No Both

search clear cancel

One item returned

Value	Region	County	Primary Destination	Active
return_value	GBB		OXFORD	Yes

Export options: CSV, I spreadsheet, XML



Complete fill in all required information.

* Trip Type Code: International

* Trip Begin: 07/12/2015

* Trip End: 08/07/2015

* Primary Destination: OXFORD

Destination not found Per Diem Links

Primary Destination Country/State: UNITED KINGDOM

Primary Destination County:

Oxford UK 08/07/2015

* Business Purpose:

Delinquent TR Exception:

Group Travel show

Estimated Per Diem Expenses hide

Estimated Per Diem Expenses

Expenses show

Trip Detail Estimate Total hide

Click

Create Per Diem Table

Here we need to modify the Per Diem Table to fit the trip.

Estimated Per Diem Expenses hide

Estimated Per Diem Expenses

Trip Detail: 07/12/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD	<input type="checkbox"/>	11.25	18.75	30.00	15.00	75.00	194.00	0	MP - 0.52	0.00	269.00

International Accommodation Information

Accommodation Type: Name (i.e. Hotel Name, Campsite): Address: Phone (if applicable):

Copy Down

Trip Detail: 07/13/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD	<input type="checkbox"/>	15.00	25.00	40.00	20.00	100.00	194.00	0	MP - 0.52	0.00	294.00



* Region: MAINE
 County:
 Primary Destination: Portland
 Active: Yes No Both
 search clear cancel

One item retrieved

return value	Region	County	Primary
	ME	CUMBERLAND COUNTY	PORTLAND

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Enter all known information then click Copy Down. This will fill in all days of the trip as Portland, Maine for all the days of the trip. Since it is not required to fill in Hotel information for domestic trip on the TA, for the Accommodation Type select "Other" and for Name and Address put "N/A".

Estimated Per Diem Expenses

Trip Detail: 07/12/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
MAINE	CUMBERLAND COUNTY	PORTLAND	<input type="checkbox"/>	6.75	9.75	21.75	3.75	300.00	0	MP - 0.52	0.00	342.00

International Accommodation Information

Accommodation Type: Other
 Name (I.e. Hotel Name, Campsite): N/A
 Address: N/A
 Phone (if applicable):
 Copy Down

Trip Detail: 07/13/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
MAINE	CUMBERLAND COUNTY	PORTLAND	<input type="checkbox"/>	9.00	13.00	29.00	5.00	56.00	300.00	0	MP - 0.52	0.00	356.00

International Accommodation Information

Accommodation Type: Other
 Name (I.e. Hotel Name, Campsite): N/A
 Address: N/A
 Phone (if applicable):
 Copy Down

Trip Detail: 07/14/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
MAINE	CUMBERLAND COUNTY	PORTLAND	<input type="checkbox"/>	9.00	13.00	29.00	5.00	56.00	142.00	0	MP - 0.52	0.00	198.00

International Accommodation Information

Accommodation Type: Other
 Name (I.e. Hotel Name, Campsite): N/A
 Address: N/A
 Phone (if applicable):
 Copy Down

- Scroll down to the Jul 20. Edit information to show Erin will travel from Portland, Maine to Oxford, United Kingdom. It is required to have Hotel information for International trip on the TA.
- Repeat the previous 3 steps.

Trip Detail: 07/19/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
MAINE	CUMBERLAND COUNTY	PORTLAND	<input type="checkbox"/>	9.00	13.00	29.00	5.00	56.00	142.00	0	MP - 0.52	0.00	198.00

International Accommodation Information

Accommodation Type: Hotel
 Name (I.e. Hotel Name, Campsite): The Westin Portland Harborview
 Address: 157 High St, Portland, ME 04101
 Phone (if applicable):
 Copy Down

Trip Detail: 07/20/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD	<input type="checkbox"/>	15.00	25.00	40.00	20.00	100.00	550.00	0	MP - 0.52	0.00	650.00

International Accommodation Information

Accommodation Type: Hotel
 Name (I.e. Hotel Name, Campsite): The Old Bank Hotel
 Address: 92-94 High Street, Oxford OX1 4BJ, United Kingdom
 Phone (if applicable):
 Copy Down

Trip Detail: 07/21/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD	<input type="checkbox"/>	15.00	25.00	40.00	20.00	100.00	550.00	0	MP - 0.52	0.00	650.00

International Accommodation Information

Accommodation Type: Hotel
 Name (I.e. Hotel Name, Campsite):
 Address:
 Phone (if applicable):
 Copy Down

- Scroll down to the Jul 25. Edit information to show Erin will travel from Oxford, United Kingdom to Lima, Peru.
- Repeat the previous 3 steps.

[Copy Down](#)

Trip Detail: 07/24/2015													
Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD	<input type="checkbox"/>	15.00	25.00	40.00	20.00	100.00	550.00	0	MP - 0.52	0.00	650.00
		<small>destination not found</small>											

International Accommodation Information

Accommodation Type: Name (i.e. Hotel Name, Campsite): Address:

Phone (if applicable):

[Copy Down](#)

Trip Detail: 07/25/2015													
Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
PERU		LIMA	<input type="checkbox"/>	13.35	22.25	35.60	17.80	89.00	250.00	0	MP - 0.52	0.00	339.00
		<small>destination not found</small>											

International Accommodation Information

Accommodation Type: Name (i.e. Hotel Name, Campsite): Address:

Phone (if applicable):

[Copy Down](#)

Trip Detail: 07/26/2015													
Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
PERU		LIMA	<input type="checkbox"/>	13.35	22.25	35.60	17.80	89.00	250.00	0	MP - 0.52	0.00	339.00
		<small>destination not found</small>											

International Accommodation Information

Accommodation Type: Name (i.e. Hotel Name, Campsite): Address:

Phone (if applicable):

[Copy Down](#)

Trip Detail: 07/27/2015

Next we add additional expenses related to the trip.

Trip Detail: 08/07/2015													
Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
PERU		LIMA	<input type="checkbox"/>	10.01	16.69	26.70	13.35	66.75	0.00	0	MP - 0.52	0.00	66.75
		<small>destination not found</small>											

International Accommodation Information

Accommodation Type: Name (i.e. Hotel Name, Campsite): Address:

Phone (if applicable):

Grand Totals				
Grand Totals:	Meals & Incidentals:	Lodging:	Miles:	Mileage Total:
	2,157.75	7,452.00	0	0.00
Daily Total: 9,609.75				

[Update Per Diem Table](#) [Remove Per Diem Table](#)

Expenses [hide](#)

Estimated Expenses											
* All fields required if section is used											
* Expense Date	* Expense Type Code	Company Name	* Expense Amount	Currency Rate	Non-Reimbursable	Taxable	Receipt Required	Missing Receipt	\$US	Actions	
add:			0.00	1	<input type="checkbox"/>	<input type="checkbox"/>		N/A	0.00		add
Notes:											
07/01/2015	Airfare		3,500.00	1	Yes	No	No	N/A	3,500.00		delete
Notes:											
Estimated Expenses Details - Airfare - 1											
add:	07/01/2015	Airfare	0.00	0.00	Yes	<input type="checkbox"/>		N/A			add
Notes:											
1	07/01/2015	Airfare	3,500.00	3,500.00	Yes	<input type="checkbox"/>		N/A		Frosch (Ghost Card)	Coach-Economy delete
Notes:											
07/12/2015	Shuttle/Bus/Taxi		85.00	1	<input type="checkbox"/>	<input type="checkbox"/>	No	N/A	85.00		delete
Notes: Airport Shuttle											
Estimated Expenses Details - Shuttle/Bus/Taxi - 2											
07/12/2015	Other (requires note)		700.00	1	<input type="checkbox"/>	<input type="checkbox"/>	No	N/A	700.00		delete
Notes: Mls. expenses during the trip											
Estimated Expenses Details - Other (requires note) - 3											

Reconciled Expenses

- Double check on Total Estimated, Actual Encumbrance.
- Add Accounting information.
- Add approval documents to the Notes and Attachments section from Risk Management and International Programs if applicable.
- Ad hoc to Department Higher Authority using the Ad Hoc Group Requests.
- Click Submit.

Total Estimated: 13,894.75	
Less Manual Per Diem Adjustment:	0.00
Less CTS Charges:	0.00
Less Non-Reimbursable:	3,500.00
Travel Expense Limit:	N/A
Actual Encumbrance:	10,394.75

Accounting Lines

Source	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	Actions
add: Colorado State University	CO	1356570 Campus Services		6050 Travel Encumbrance			10...	<input type="button" value="add"/>
Line Description								

General Ledger Pending Entries

View Related Documents

Agency Links

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

DONE!