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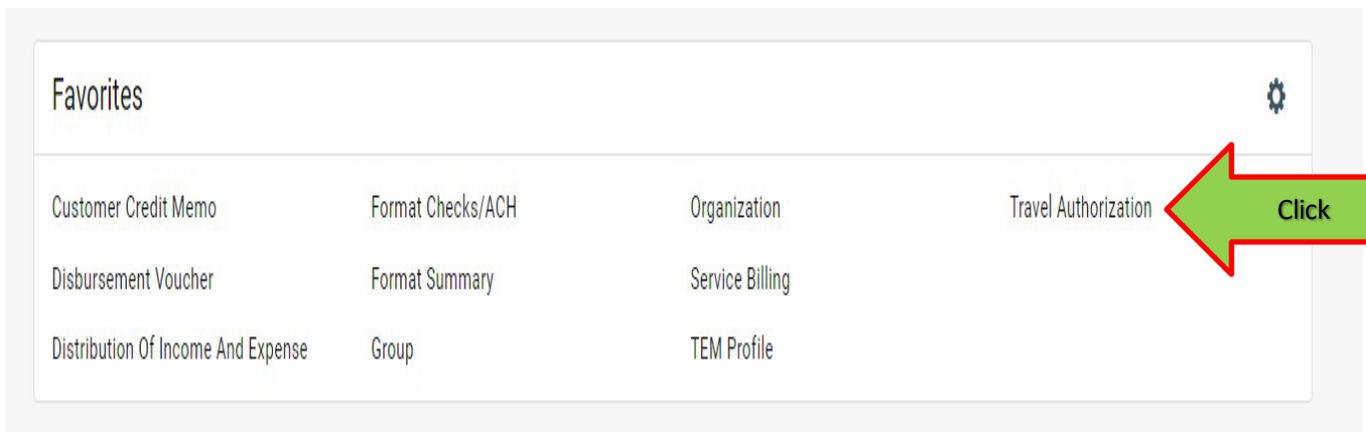
This document will show you how to create a TA for a traveler who travels out of state and international on the same trip.

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".

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

Click

* Region:	UNITED KINGDOM
County:	
ry Destination:	Oxford
Active:	● Yes ○ No ○ Both

search   clear   cancel

Click

* Region:	UNITED KINGDOM
County:	
Primary Destination:	Oxford
Active:	● Yes ○ No ○ Both

search   clear   cancel

One item ret

| Value | Region | County | Primary Destination | Active |
| return value | GBR | | OXFORD | Yes |

Export options: CSV | spreadsheet | XML

Complete fill in all required information.

* Trip Type Code :	International ∨		* Trip End :	08/07/2015
* Trip Begin :	07/12/2015			
* Primary Destination :	OXFORD 🔍			
	Destination not found Per Diem Links			
Primary Destination Country/State :	UNITED KINGDOM		Primary Destination County :	
* Business Purpose :	Oxford UK 08/07/2015			
Delinquent TR Exception :	☐			

Group Travel	▶ show
Estimated Per Diem Expenses	▼ hide
Estimated Per Diem Expenses	
	Click → Create Per Diem Table
Expenses	▶ show
Trip Detail Estimate Total	▼ hide

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 🔍 destination not	☐	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): | | | |

Click

Copy Down

Trip Detail: 07/13/2015

Country State	County	* Primary Destination	Person	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
UNITED KINGDOM		OXFORD 🔍 destination not found	☐	15.00	25.00	40.00	20.00	100.00	194.00	0	MP - 0.52 ∨ 🔍	0.00	294.00

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".

- 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.

- 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 🔍 destination not found	☐	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: 07/25/2015

Country State	County	* Primary Destination	Personal	Breakfast	Lunch	Dinner	Incidentals	Meals and Incidentals	Lodging	Miles	Mileage Rate	Mileage Total	Daily Total
PERU		LIMA 🔍 destination not found	☐	13.35	22.25	35.60	17.80	89.00	250.00	0	MP - 0.52 ⌄ 🔍	0.00	339.00

International Accommodation Information

Accommodation Type:	Hotel ⌄	Name (i.e. Hotel Name, Campsite):	Sheraton Lima Hotel & Convent	Address:	Paseo de la Republica 170, Lima, 1 Peru
		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 🔍 destination not found	☐	13.35	22.25	35.60	17.80	89.00	250.00	0	MP - 0.52 ⌄ 🔍	0.00	339.00

International Accommodation Information

Accommodation Type:	Hotel ⌄	Name (i.e. Hotel Name, Campsite):	Sheraton Lima Hotel & Convent	Address:	Paseo de la Republica 170, Lima, 1 Peru
		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 🔍 destination not found	☐	10.01	16.69	26.70	13.35	66.75	0.00	0	MP - 0.52 ⌄ 🔍	0.00	66.75

International Accommodation Information

Accommodation Type:	Hotel ⌄	Name (i.e. Hotel Name, Campsite):	Sheraton Lima Hotel & Convent	Address:	Paseo de la Republica 170, Lima, 1 Peru
		Phone (if applicable):			

Grand Totals

Grand Totals:		Meals & Incidentals: 2,157.75	Lodging: 7,452.00	Miles: 0	Mileage Total: 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 Rate Conversion Site	☐	☐		N/A	0.00	add
Notes:											

	* Expense Date	* Expense Type Code	Company Name	* Expense Amount	Currency Rate	Non-Reimbursable	Taxable	Receipt Required	Missing Receipt	$US	Actions
	07/01/2015	Airfare		3,500.00	1	Yes	No	No	N/A	3,500.00	delete
Notes:											

▾ hide Estimated Expenses Details - Airfare - 1

		* Expense Date	* Expense Type Code	* Expense Amount	$US	Non-Reimbursable	Taxable	Missing Receipt	Airfare Source Code	Class of Service	Actions
1	add:	07/01/2015	Airfare	0.00	0.00	Yes	☐	N/A	⌄	⌄	add
	Notes										
	1	07/01/2015	Airfare	3,500.00	3,500.00	Yes	☐	N/A	Frosch (Ghost Card) ⌄	Coach-Economy ⌄	delete
	Notes										

	* Expense Date	* Expense Type Code	Company Name	* Expense Amount	Currency Rate	Non-Reimbursable	Taxable	Receipt Required	Missing Receipt	$US	Actions
2	07/12/2015	Shuttle/Bus/Taxi		85.00	1	☐	☐	No	N/A	85.00	delete
	Notes:	Airport Shuttle									

▸ show Estimated Expenses Details - Shuttle/Bus/Taxi - 2

	* Expense Date	* Expense Type Code	Company Name	* Expense Amount	Currency Rate	Non-Reimbursable	Taxable	Receipt Required	Missing Receipt	$US	Actions
3	07/12/2015	Other (requires note)		700.00	1	☐	☐	No	N/A	700.00	delete
	Notes:	Mis. expenses during the trip									

▸ show 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.

DONE!