

Copying & Deleting Travel Authorization Expense Lines

Expense lines are able to be copied to additional days. When used, the copy feature moves everything about the expense, including the detail and accounting information over to the new date range. This can help save time when creating an authorization that includes an expense that is reoccurring (e.g. Meals/Incidentals).

- 1) Create a new travel authorization and fill in the detail for the expense that you want to copy **(1)**. If you want each of the expenses to contain different details, you will have to go in manually after copying and change them. After you are finished, go to the **“Actions”** box at the top right of the screen, select **“Copy Authorization Lines”** and then select **“GO”** **(2)**.

10/09/2017 | Meals/Incidental Expenses | Florida | Personal Credit Card | 59.00 | USD

- 2) On the next screen, select whether you want the expense copied to one date or a range of dates **(1)**. You can then fill in the date(s) that you require, selecting the calendar icon if you don't want to write it in **(2)**. Please note that if a date falls on a weekend or holiday, you must select the appropriate box in order for the expense to be included on that day. Select the check box of the expense that you wish to copy and then hit **“OK”** **(3)**.

Copy Option

Copy to One Date

Copy to Range of Dates

To Date []

From Date 10/10/2017 []

To Date 10/13/2017 []

Include Weekends

Include Holidays

Select	Expense Type	Expense Date	Amount Spent	Transaction	Currency
<input checked="" type="checkbox"/>	Meals/Incidental Expenses	10/09/2017	59.00		USD

OK Cancel

- 3) After returning to the travel authorization you will see that the expense(s) have been copied to the selected dates. If you want to delete a line, select the “-“ sign found to the right of the expense **(1)**. A “Delete Confirmation” page will show requesting confirmation for the expense to be deleted. Once the “OK” button is selected, the expense will be removed from the authorization **(2)**.

The screenshot shows a table titled "Projected Expenses" with the following columns: *Date, *Expense Type, *Description, *Payment Type, *Amount, and Currency. The table contains four rows of data, all with an amount of 59.00 USD. A red circle labeled "1" highlights the minus sign (-) in the rightmost column of the first row. A dialog box titled "Delete Confirmation" is overlaid on the table. The dialog box contains the text: "You have selected one or more expense lines to delete. To continue and delete the expense lines, press OK; otherwise, press Cancel." Below this text are two buttons: "OK" and "Cancel". A red circle labeled "2" highlights the "OK" button.

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
10/09/2017	Meals/Incidental Expenses	Florida	Personal Credit Card	59.00	USD
10/10/2017	Meals/Incidental Expenses			59.00	USD
10/11/2017	Meals/Incidental Expenses			59.00	USD
10/12/2017	Meals/Incidental Expenses			59.00	USD

Totals (5 Lines) 295.00 USD

Save Confirmation

Create Travel Authorization

Delete Confirmation

Authorization ID NEXT

You have selected one or more expense lines to delete. To continue and delete the expense lines, press OK; otherwise, press Cancel.

OK Cancel