

A. Employee Travel Overview / Tips

- Employees are responsible for being familiar with state/agency/office policies & procedures. Check with your Travel Administrator (Trvl. Adm.).
- An employee **must** use direct deposit to use online ISIS Travel.
- The Trvl. Adm. **must** grant travel privileges to you before a Travel Request or Travel Expense information can be entered.
- **Only a Trvl. Adm. should enter an advance.** If an advance was issued, check with your Trvl. Adm. for instructions to enter Travel Expenses.
- Disabling pictures on the Welcome **Single Trip Entry** screen will conserve resources on your computer. Click , remove the checkmark by **Display Graphics** and click .
- Press ENTER after each field entry.
- Enter COMMENTS for additional information that may be important to your reimbursement.
- Enter COST DISTRIBUTION / ASSIGNMENT as required by your agency.

B. Create Travel Expense Report from Single Trip

Used for non-routine or out of state travel.

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Select **Create a Travel Expense Report**. The screen Welcome to Travel Manager displays with **Choose a Trip Schema**. Select type of trip and click .
3. When the Travel Expense screen displays, enter the appropriate values in the following fields:
Start of Trip – Enter the first date of travel.
Time – Enter the beginning time of travel (system utilizes 24 hour clock).
End of Trip – Enter the last date of travel.
Time – Enter the ending time of travel (system utilizes 24 hour clock).
First Destin. – Enter the first city and state traveling to.
Trip Country – Defaults US.
Region – Click on the dropdown to select region of travel (determines allowable costs).
Reason of Trip – Enter the reason for this trip.

4. Click **Mileage and per diem Reimbursement** tab to display mileage, meals & accommodations sections.
5. Enter amount of mileage. Click and select different vehicle type if necessary.
6. Click select the appropriate **Trip Type, Co.**
7. Click in **Exp Receipt 001** and select appropriate type receipt. Enter the amount of the receipt in the **Amount** field and press **Enter**. Click .
8. Enter all expense receipts for the entire trip.
9. Click . The Travel Expense displays message "Your trip was saved in status 'Trip Complet'd' 'To Be Settd'".
10. Click to view summary of trip.
11. Verify report includes all receipts and reimbursement amount is correct. If correct, print. For printing info see [Section H](#).
12. Attach receipts to printed report and follow agency policy concerning trip approvals.

C. Create Travel Expense from Weekly Entry

Used for routine travel.

1. Select **My Info > Travel Expense > Weekly Entry**.
2. Click . The Travel Expense screen will display with current dates. Change dates by typing new date and press Enter or click or .
3. Enter the appropriate values in the following fields:
Reason – Enter the reason for this entire trip.
Destin. – Enter the location of the entire trip.
Date – Beginning date of the week the trip was taken.
Reason – Enter the reason for this trip by date if different.
Day Dest. – Enter the location of the travel on this date.
Numbe Mls – Enter total number of miles traveled on this date.
M/kmAllow – Calculated amount reimbursed for mileage on this date.

Expense Typ. – Enter the amount next to the expense type for this day and press Enter. A receipt window is displayed. Enter additional information if necessary or click . Enter all expenses for the entire trip.

4. Click . The Overview of Weekly Reports displays message "Trip XXXX was saved".
5. Select the trip and click to view summary of trip.
6. Verify report includes all receipts and reimbursement amount is correct. If correct, print. For printing info see [Section H](#).
7. Attach receipts to report and follow agency policy concerning security trip approvals.

D. Modify a Travel Expense from Single Trip

If payment received for trip, contact Trvl. Adm.

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Welcome to Travel Manager Screen displays all open trips. Select trip to modify and click **Change Travel Expense Report** in the Subsequent Activities column.
3. Travel Expense screen is displayed. Verify Trip Number and dates.
4. Enter/adjust information as necessary.
5. Click . The Travel Expense displays message "Your trip was saved in the status 'Trip Complet'd' 'To Be Settd'".
6. Click to view summary of trip.
7. Verify report includes all receipts and reimbursement amount is correct. If correct, reprint. For printing info see [Section H](#).
8. Attach receipts to report and follow agency policy concerning trip approvals.

E. Modify a Travel Expense from Weekly Trip

If payment received for trip, contact Trvl. Adm.

1. Select **My Info > Travel Expense > Weekly Entry**.
2. Overview of Weekly Reports displays all trips. Select trip to modify and click .
3. Weekly Expense screen is displayed. Verify Trip Number and dates.
4. Enter / adjust information as necessary.

5. Click . The Overview of Weekly Reports displays message "Trip XXXX was saved".
6. Select the trip and click to view summary of trip.
7. Verify report includes all receipts and reimbursement amount is correct. If correct, reprint. For printing info see [Section H](#).
8. Attach receipts to report and follow agency policy concerning security trip approvals.

F. Delete a Travel Expense from Single Trip

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Welcome to Travel Manager screen displays all open trips. Select **List of All Trips**.
3. Click on trip to delete line verifying the date is correct. Click . A delete Trip Message is displayed "Are you sure you want XXX to delete the trip?"
4. Click . The Travel Manager screen will display the following message "The current version of trip XXX was deleted".

G. Delete a Travel Expense from Weekly Trip

1. Select **My Info > Travel Expense > Weekly Entry**.
2. Overview of Weekly Reports screen displays all open trips. Click on the trip number to delete and click . A delete Trip Message is displayed "Are you sure you want XXX to delete the trip?"
3. Click . The Overview of Weekly Reports screen will display the following message "The current version of trip XXX was deleted".

H. Print Or Save A Travel Report

1. Click .
2. Select **Print** from the drop down menu. The *Print dialog* box will display.
3. Type **PDF** if **not** displayed in the *Output Device* field.
4. Click . A small SAP Print Data Window will display. Do **not** close until printing is complete. A PDF report will display in another window.

5. **Save** the report click or **print** the report click . Verify correct printer is selected.
6. Click when **Print** box displays.
7. Click to close both report windows.

I. Payment Notification

If traveler uses Statewide Email: (your email address format is "firstname.lastname@la.gov") You will receive an email when payment is processed. The email indicates trip number, travel dates, and amount.

If traveler does not use Statewide Email: Verify payment is processed by opening your trip in LEO and clicking on the button. Approval is at a "Trip Completd" status and Settlement is at a "To Be Settd" status.

View details of the payment by selecting: **My Info > Payment Info > Travel Payments**.

J. A Travel Bank Account

Employees may have travel reimbursements deposited into a bank account other than their **Main Bank**. Create a **Travel Expense Bank** record to add this account in LEO under **My Info > Payment Info > Bank Information**. Refer to the **Bank Information** screen Help scripts before adding a record.

- If you are receiving a payroll check through the mail, you should NOT use this function to make changes to bank information. See your Employee Administrator for assistance.

DO NOT enter an amount in **Standard Value / Standard Percentage**.

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ISIS TRAVEL – EMPLOYEE QUICK REFERENCE CARD

Travel Administrator: _____

Travel Adm. Phone No: _____

Logon ID: _____
(P & system assigned 8 digit personnel no.)

How to Access Travel: <https://leo.louisiana.gov>
Logon to LEO
Select **My Info > Travel Expense**

How to Access Online Help:
Within ISIS Travel, select
Help > La Employees Online Reference

How to Access Online Learning Courses:
Within LEO, select
My Work > Online Learning

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For assistance with using LEO travel functions, contact your Travel Administrator.