

Accounts Payable Job Aid

AP315_Creating an Expense Template

Creating an Expense Template Overview

Public Expense Report or Travel Authorization templates can be created in Cardinal which reflect typical combinations of expense items. These templates can be accessed by all users statewide and are not limited to a specific Agency. Users can then create new Expense Reports or Travel Authorizations by starting from a template, which can help reduce time and keying errors.

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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (<u>Section 1</u> , after Step 1; <u>Section</u> <u>2</u> , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.



Creating an Expense Template

This section of the Job Aid provides the steps for creating an expense template in Cardinal.

Step	Action
1.	Navigate to the Template page using the following path:
	Main Menu > Set Up Financials/Supply Chain > Product Related > Expenses > Management > Template

The **Template Search** page displays.

Favorites -	Main Menu
Template Find at ▼ Searc Enter a	Existing Value Add a New Value Add a New Value Criteria ny information you have and click Search. Leave fields blank for a list of all values.
۲	Recent Searches Choose from recent searches
	*SetID = v Q Document Template begins with v Template Type = v v v A Show fewer options Include History Correct History Search Clear
Ì	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Click the Add a New Value button.



Step	Action
The Add a	a New Value page displays.
Favorites	Main Menu Set Up Financials/Supply Chain Product Related Set Up Financials/Supply Chain Product Related Set Up Financials/Supply Chain Product Related Set Up Financials/Supply Chain Set Up Financials/Supply Set Up Finan
Template	9
Add a	a New Value
*Do	*SetID STATE Q cument Template *Template Type Add
3.	Verify the SetID field value is "STATE". If not, change it.
	*SetID STATE
4.	Enter a name for the Template in the Document Template field (not to exceed eight characters).
	*Document Template
5.	Click the Template Type dropdown menu.
	*Template Type
	The Template Type dropdown menu contains 4 options:
i	Contract Expense Report Standard Travel Authorization
	 Contract: Not used in Cardinal Expense Report: Used to create a template for Expense Reports Standard: Not used in Cardinal Travel Authorization: Used to create a template for Travel Authorizations
6.	Select the applicable Template Type by clicking the corresponding list item.
	*Template Type Expense Report



Accounts Payable Job Aid

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Step	Action
7.	Click the Add button.
	Add
The Publ	c Templates page displays.
F	avorites Main Menu Set Up Financials/Supply Chain Product Related Keypenses Management Template
F	ublic Templates
	SetID STATE Template CONF Template Type: Expense Report
	Public Templates Find View All First (1 of 1) Last
	*Effective Date 10/23/2024
	*Status Active
	*Description
	Short Description
	Expense Type
	*Expense Type
	🖥 Save 🔄 Notify
	The Effective Date field defaults to the current date. This can be updated if necessary.
	The Status defaults to "Active". Do not change this field
8.	Enter a description for the template in the Description field.
	Description
9.	Enter a shortened version of the description (10 characters max) in the Short Description
	tield.
	This is not a required field.

Short Description



Action	
Click the Expense Type Look Up icon to select the expense type(s) that should be for the template.	be included
*Expense Type	
٩	
	Action Click the Expense Type Look Up icon to select the expense type(s) that should be for the template. *Expense Type

The Look Up Expense Type page displays in a pop-up window.

LOOK UP EXPENSE Type Image: transmitter in the transmitter in transmiter in transmitter in transmitter in transmiter in tra		F		
*SetID STATE Expense Type begins with v	Look Up	Expense Type		×
*SetID STATE Expense Type begins with ↓ Description begins with ↓ Look Up Clear Cancel Basic Lookup Search Results View 100 First 1-28 of 28 Last Expense Type Description AIRLINE Airline Travel ALLINCTR All Meals - NonTravel Day ALLTRAV All Meals - NonTravel Day ALUTRAV All Meals - NonTravel Day BRENOTR Breakfast - NonTravel Day BRETRAV Breakfast - NonTravel Day BUSCALL Business Calls DINNOTR Dinner - NonTravel Day BUSCALL Business Calls DINNOTR Dinner - Travel Day BUSCALL Gasoline INCIDEN Per Diem Incidentis-Travel Day INTC Interfaced - Modified LODGFIE Lodging Fees and Taxes LODGING Lodging LUNNOTR Lunch - NonTravel Day UNTRAV Lunch - Travel Day UNTRAV Lunch - Travel Day UNTRAV Lunch - Travel Day UNTRAV Dinner - Travel Day UNTRAV Dinner - Travel Day UNTCA Interfaced - Modified LODGFIE Lodging Fees and Taxes LODGING Lodging LUNNOTR Lunch - NonTravel Day UNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTIMIL Overtime Meals				Help 📤
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INCTRAV Per Diem Incidentis-Travel Day INTC Interfaced INTC2 Interfaced - Modified LODGFEE Lodging Fees and Taxes LODGING Lodging LUNNOTR Lunch - NonTravel Day LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals	INCIDEN	Per Diem Incidnt-Non I ravel Day		
INTC Interfaced INTC2 Interfaced - Modified LODGFEE Lodging Fees and Taxes LODGING Lodging LUNNOTR Lunch - NonTravel Day LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals		Per Diem Incidentis-Travel Day		
INTC2 Interfaced - Modified LODGFEE Lodging Fees and Taxes LODGING Lodging LUNNOTR Lunch - NonTravel Day LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals	INTO	Interfaced		
LODGING Lodging LUNNOTR Lunch - NonTravel Day LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals		Interfaced - Modified		
LUNNOTR Lunch - NonTravel Day LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals	LODGING	Lodging Fees and Taxes		
LUNTRAV Lunch - Travel Day OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals	LUNNOTR	Lunch - NonTravel Day		
OTHREMP Other Employee Reimbursements OVRTMML Overtime Meals	LUNTRAV	Lunch - Travel Day		
OVRTMML Overtime Meals	OTHREMP	Other Employee Reimbursements		
	OVRTMML	Overtime Meals		-
		Meals Travel Day		
	AV AII	ivicais - Havel Day		



Step	Action
The Publi section.	c Templates page returns with the selected Expense Type displayed in the Expense Type
	Favorites • Main Menu • > Set Up Financials/Supply Chain • > Product Related • > Expenses • > Management • > Template
	Public Templates
	SetID STATE Template QTR MEET Template Type: Expense Report
	Public Templates Find View All First () 1 of 1 () Last
	*Effective Date 10/23/2024
	*Description Quarterly Team Meeting
	Short Description QTR MEET
	Expense Type
	*Expense Type
	All Meals - Travel Day
	Save Notify Add Update/Display Include History
12.	Click the Add a New Row (+) button to add an additional row.
i	Users can click the (-) button to remove an expense type if needed.
13.	Repeat steps 10-12 until all desired expense types have been selected.



Step	Action
14.	Click the Save button to save the template.
	Favorites • Main Menu • > Set Up Financials/Supply Chain • > Product Related • > Expenses • > Management • > Template
	Public Templates
	SetID STATE Template QTR MEET Template Type: Expense Report
	Public Templates Find View All First () 1 of 1 () Last
	*Effective Date 10/23/2024 🛐
	*Status Active V
	*Description Quarterly Team Meeting
	Short Description QTR MEET
	*Expense Type
	All Meals - Travel Day
	Per Diem IncidentIs-Travel Day
	Personl Mileage Cost Justified
	Ravel E Notify Dpdate/Display Dpdate/Display
ĺ	The template can now be accessed by all expense processors.



Accessing the Expense Template

This section of the Job Aid demonstrates how to access a template that has been created for Travel Authorizations or Expense Reports.

Step	Action
1.	Navigate to the Expense Report page using the following path:
	Main Menu > Employee Self Service > Travel and Expense Center > Expense Report > Create/Modify
	Navigation for VDOT only
	Main Menu > Travel and Expenses >Travel and Expense Center > Expense Report > Create/Modify

The Expense Report Search page displays with the Add a New Value page displayed by default.

Favorites	Main Menu → Employee Self-Service → Travel and Expenses → Expense Reports → Create/Modify
Expense	Report
Add a	New Value
*Em	Add
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter or select the employee's Employee ID in the Empl ID field.
	*Empl ID
3.	Click the Add button.
	Add



Step	Action						
The Create Expense Report page displays.							
F	avorites Main Menu Employee Self-Service Travel and Expenses Expense Reports Create/Modify						
C	ireate Expense Report 🔛 Save for Later 🎪 Home 🗟 Summary and Submit						
	Business Purpose Contraction C						
	"Report Description Attachments Q						
	Expenses @ Expand All Collapse All Add: 🏪 My Wallet (0) 🗚 Quick-Fill Total 0.00 USD						
	*Date *Expense Type Description *Payment Type *Amount *Currency Image: Constraint of the second secon						
	Expand All Collapse All Total 0.00 USD						
4.	Click the Quick Start dropdown button.						
	Quick StartPopulate From GO						
The drop	down options display.						
	Quick StartPopulate From V GO						
	Populate From						
	A Template						
	An Existing Report						
	Entries from My Wallet						
5.	Click the "A Template" list item.						
	A Template						
6.	Click the GO button.						
	Quick Start A Template						



Step	Action							
The Select a Template page displays.								
ſ	Favorites -	Main Menu 🗸	> Employee Self-Service ->	Travel and Expenses \checkmark >	Expense Reports	Create/Modify		
	Create Expor	an Roport						
	Select a Te							
		piere		Report ID NEXT				
		Template	Description	Template Type				
	Select	VSOTA	2024apr16apr18 VSOTA Train	Public Template		^		
	Select	ATRAVEL	6/3-6/20 PHASE II TRNG @ ACC	Public Template				
	Select	702UPS	702UPS	Public Template				
	Select	OUTREACH	ALL TRAVEL EXP	Public Template		-		
	Return to Expen	se Report Entry						
7.	Use the	Scrollbar ((if necessary) to locate	the desired templ	ate.			
		Template	Description	Template Type				
	Select	VSOTA	2024apr16apr18 VSOTA Train	Public Template				
	Select	A TRAVEL	6/3-6/20 PHASE II TRNG @ ACC	Public Template				
	Select	702UPS	702UPS	Public Template				
	Select	OUTREACH	ALL TRAVEL EXP	Public Template	-			
	Return to E	xpense Report Entry						
8.	Click th	e Select but	tton next to the desired	d template.				
	Create E	xpense Report						
	Select	a Template						
				Report ID NEXT				
		Template	Description	Template Type				
	Sele	ct SPRTRN17	Plan Review Training-Insp.Trn	Public Template	-			
	Sele	ct QTR MEET	Quarterly Team Meeting	Public Template				
	Sele	ct COE	ROANOKE	Public Template		I		
	Sele	ct SWTRANS	SW TRANSPORT	Public Template	-			
	Return to	Expense Report Entr	у					



Step	Actio	n							
The page refreshes and the Expense Type(s) for the selected template display.									
	Favorites -	Main Me	enu 👻 >	Employee Self-Service					
	Templa	Template QTR MEET Description Quarterly Team Meeting							
	Date Rang	Date Range							
	Fro	From 10/23/2024 J							
	Add Expens	Add Expense Types:							
	One Day	All Days	Expense Type						
			All Meals - Tra	avel Day					
			Per Diem Inci	dentis-Travel Day					
			Personl Milea	ge Cost Justified					
	OK	Can	cel						
9.	The d	ate rand	ae in the I	F rom and To fields default to the current date.					
-	Enter	or selec	t the Dat	e range associated with the expense in the From and To fields.					
		40/0/	0004						
	Fro	m 10/23	3/2024	To 10/23/2024					
10.	Click shoul exper	the appi d be app ise.	ropriate in olied to fo	ndicator (checkbox options) next to the Expense Type(s) to denote if it or One Day or All Days depending on the date range and type of					
	Add	Expense	Types:						
	On	e Day	All Days	Expense Type					
				All Meals - Travel Day					
				Per Diem IncidentIs-Travel Day					
				Personl Mileage Cost Justified					
		OK	Can	cel					



Step	Action					
11.	Click the OK button.					
	Add Expense Types:					
	One Day All Days Expense Type					
	All Meals - Travel Day					
	Per Diem IncidentIs-Travel Day					
	Personl Mileage Cost Justified					
	OK Cancel					
The Crea	te Expense Report page redisplays.					
[Favorites • Main Menu • > Employee Self-Service • > Travel and Expenses • > Expense Reports • > Create/Modify					
	Create Expense Report 📓 Save for Later 🏠 Home 🔯 Summary and Submit					
	Flower Pot ?					
	*Business Purpose Default Location Q					
	Reference					
	Expenses @					
	Expand All Collapse All Add: 🐻 My Wallet (0) 🦸 Quick-Fill 101					
	*Date *Expense Type *Description *Payment Type *Amount *Currency ▼ 10/16/2024 (ii) All Meals - Travel Day * * 0.00 USD (iii)					
	*Billing Type Billable 💙 时 Receipt Split 🔽 Default Rate *Exchange Rate 1.00000000 🗘 🛅					
	Accounting Details					
	Chartfields VAT Amounts TTTT					
	15100 USD 1.00000000 Q 5612880 Q 01000 Q 95200					
	· · · · · · · · · · · · · · · · · · ·					
	▼ 10/16/2024 [6] Per Diem Incidentis-Travel Day					
	*Billing Type Billable *Billing Type Billable *Billing Type Billable *Billing Type Billable *Exchange Rate 1.00000000 Ber Den Deductions					
	Outroining O					
	Accounting Uetails A Chartfields VAT Amounts (777)					
	Amount GL Unit Monetary Amount Currency Rate SpeedType Key Account Fund Program Department					
	15100 USD 1.0000000 Q 5012880 Q 01000 Q 737004 Q 95200					
L	▶ 10/16/2024 (B) Personi Mileage Cost Justified • 0.00 USD • ■					
	The selected Expense Types populate on the page.					
	The other expense related details will need to be entered to complete the Expense Report or					
	Travel Authorization.					