User Manual

for

Travel Allowances and Bill Reimbursement

Version 1.0   Course: CS253

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Revisions

Version	Primary Author(s)	Description of Version	Date Completed
1	Group Members	This is the first version of the User Manual. It will be updated with time according to user feedback.	04/04/22

1 Introduction

<u>Potential Users</u>:

The potential users of our service are the students, faculty, staff and other members of the IIT Kanpur community. But this facility can easily be extended to work for any organization or institution for Reimbursement.

<u>Types of Users</u>:

This manual is intended for the users of **Travel Allowances and Bill Reimbursement** website for the IIT Kanpur community. The users include:

1. **<u>Applicants</u>:**
You need to **Register** yourself using your IITK CC ID. Once registered, you will be redirected to the **Login page.** Enter the details and you'd be redirected to the **Homepage.**The next step is to go to **My Profile** and fill out the relevant information. Now, you can submit the **Application Form**. After your Application Form is accepted, only then you can fill the **Claim Bill Form.**

2. **<u>Office Admins</u>:**
After **Login**, you will be able to view the **Application Form(s)** of the applicants. After going through the details and verifying them, you can click on the check sign to **accept** the form (or **reject** the form by clicking on the cross option).
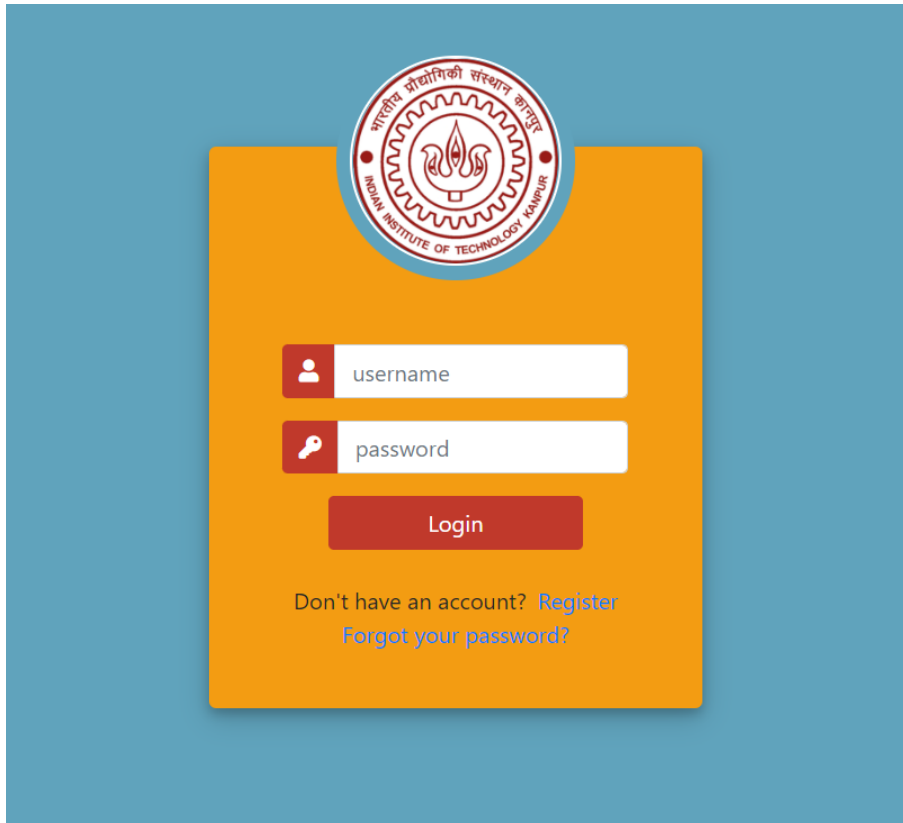
3. **<u>Accounts Admins</u>:**
After **Login**, you will be able to view the **Claim Bill Form(s)** of the applicants. After going through the receipts and verifying them, you can click on the check sign to **accept** the form (or **reject** the form by clicking on the cross option).

Detailed explanation of each of the functionalities can be found in the manual. Refer to the Contents to directly jump to your issue.

<u>Features</u>:

- **Register** for new users
- **Login** for existing users
- **Forgot Password** for registered users
- **My Profile** page for user details
- **Application Form** filling and submission
- **Claim Bill** Form filling and submission
- **Application Status** page for viewing the current status.

Users who have already registered for the TA-Reimbursement Web Application must login by:

> Entering their **Username**.
> Entering their **Password**.
> Selecting **Login** to advance to the next screen and begin using the application.
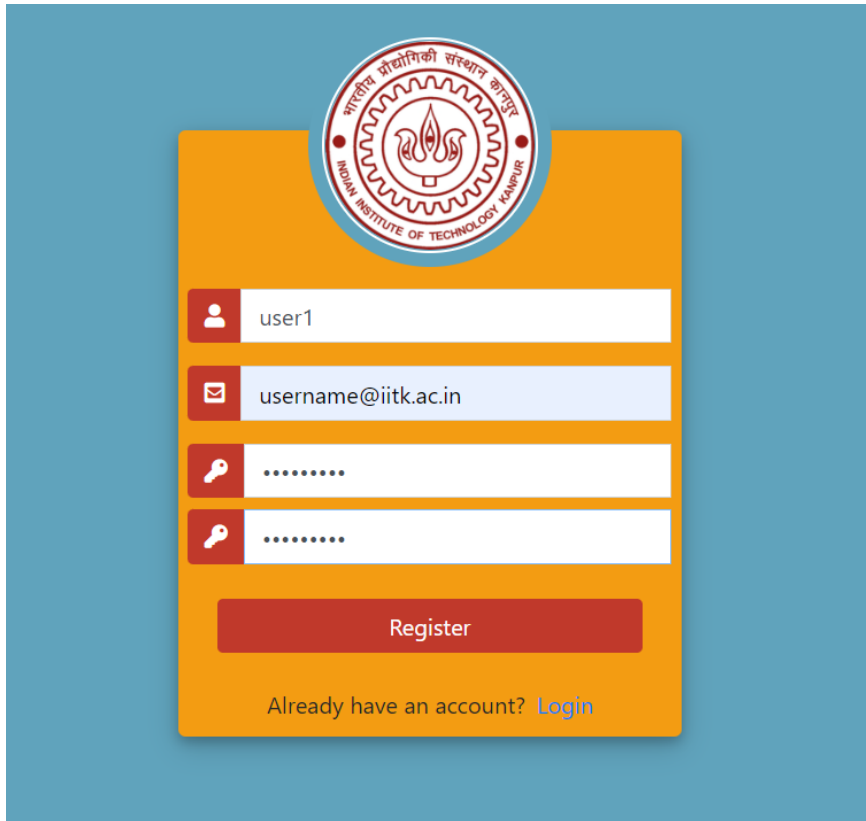
Site Registration
Users who have not previously registered for TA-Reimbursement Web Application must select "Register" to access the "User Registration" page.

Forgotten Passwords
If a user forgets his or her password, he or she must select "Forgot your password"

3   New User Registration

Users will be asked to enter or select the following information (all items in blue are required):

Username
The User will have to enter a username.

Email Address
User will have to enter his IIT-K email address which must be unique.

Password
Passwords must be at least eight characters long and contain at least one letter character and one numeric character. Passwords are case sensitive. They must not be very similar to username and Email address.

Confirm Password
As a security check, users will be asked to retype their password.
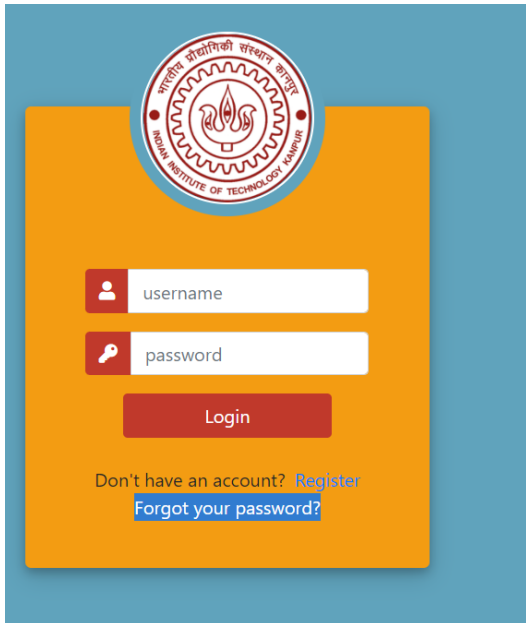
Register
Select "Register" to submit the registration information and continue to the next screen. The User will be redirected to the Login page.
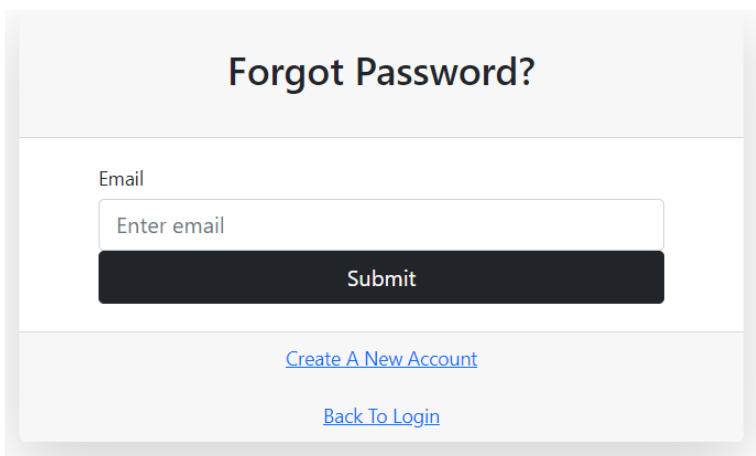
4   Forgot your Password?

Suppose the user with a valid email address forgets his/her password.

Then he/she can regenerate the new password as per the procedure described below:

1) Click on the Forget your password link.

2) A window will get opened as shown.

Enter your email address and submit.

You will receive a message as shown below .
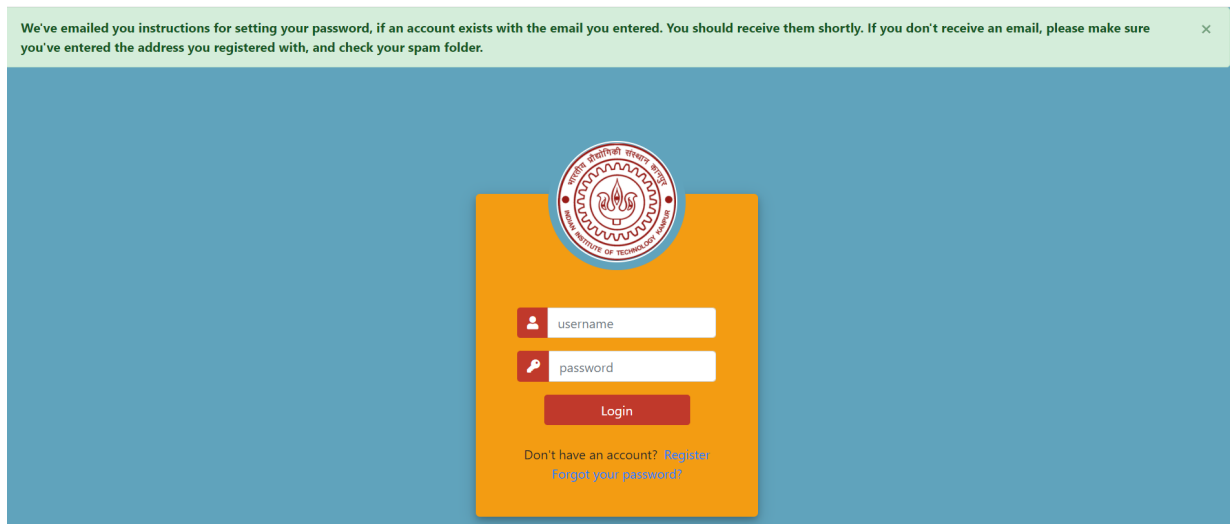
3) Check your email where you will receive a link to change your password.

TA Reimbursement Portal Password Reset Request link ↗

From travelallowanceiitk@gmail.com on 2022-04-03 20:59
✉ Details

To initiate the password reset process for your akhilj20@iitk.ac.in TA Reimbursement Portal Account,
click the link below:

https://ta-reimbursement-project.herokuapp.com/password-reset-confirm/OQ/b3b9py-
d38df0e81315a043c685ad8ac873c188/

If clicking the link above doesn't work, please copy and paste the URL in a new browser
window instead.

Sincerely,
The Developer
TA Reimbursement Portal

4) Click on the link and you will be redirected to a portal where you can reset your password. Enter the new password and then login again.

Reset Your Password

New Password

••••••••

New Password Confirmation

••••••••

Reset Password

5 Homepage and My Profile

Home Page is displayed after the user logs in

Home   My Profile   Application Form   Claim Bill   Application Status   Hello, user1   **Logout**

Login successful! ×

Welcome user1 !

Hello! This is the Travel Allowance Reimbursement portal of IIT Kanpur. If you are new to this page, kindly update your user profile using this button.

My Profile

Features

Application and Advance Request

Apply for the journey approval along with relevant proofs and journey details. You can also request advance payment if required by clicking on the button below.

Application Form

After logging in, the user has to update his profile first by clicking the My Profile option.

Updating the Profile

Name		Email	
		username@iitk.ac.in	

Roll No./PF No.		Designation	

Department		Bank Name	

Type of Bank A/C	Bank A/C Number

Bank IFSC Code		Aadhar Number	

Mobile Number	

☐ I guarantee that the above information is correct and to the best of my knowledge.

Submit

A screen will be displayed like this, where the user will have to enter all the required details.

Name	Email
abcde	username@iitk.ac.in

Roll No./PF No.	Designation
201200	Student

Department	Bank Name
Chemical Engineering	State Bank of India

Type of Bank A/C	Bank A/C Number
Savings	4548944516567

Bank IFSC Code	Aadhar Number
SBIN1419410026302	51949849840606

Mobile Number
9999999999

☑ I guarantee that the above information is correct and to the best of my knowledge.

Submit

After entering all the values, the user will have to tick the check-box and then submit the profile.
Note : As of the current version, the user profile is only one-time updatable, so be very careful while submitting your details.

6 The Application Form

If you are planning a journey, then you have to fill the Application Form and get it verified by the admin of your office.
For filling it, click on the "**Application Form**" tab on the navbar after you login.

A screen like this will be displayed .

Application for Grant of LTC

| Block year | | Email | username@iitk.ac.in | P.F. No. / Roll No. | 201200 |

Basic Pay Rs.

1. Name	abcde
2. Designation	
3. Department/Section	Chemical Engineering
4. (a) Whether leave is required for availing L.T.C ?	Yes/No
(b)(i) If so, duration of leave applied for	Duration
(b)(ii) Date of departure of family, if not availing for himself	dd/mm/yyyy
(c) Nature of leave	Nature
(d) Purpose	Purpose
5. (i) Whether L.T.C is applied for going to home town or elsewhere?	Home town/Elsewhere
(ii) Place of visit	Place of visit
6. Address during leave	Address
7. Mode	Mode: Rail/Road/Air

8. Details of family members who will avail L.T.C

	Full Name	Age
1.	Put NA if none	Put NA if none
2.	Put NA if none	Put NA if none
3.	Put NA if none	Put NA if none

9.

Amount of advance required

Rs.

Submit

Fill the form carefully and then click the Submit button below .

Note : The form is only one time editable so make sure that all the details entered are correct.

The user can even request for the Advance Money that he/she requires before the Travel.

Application for Grant of LTC

Block year	2022	Email	username@iitk.ac.in	P.F. No. / Roll No.	201200

Basic Pay Rs.

5000

1. Name		abcde
2. Designation		Student
3. Department/Section		Chemical Engineering
4. (a) Whether leave is required for availing L.T.C ?		Yed
(b)(i) If so, duration of leave applied for		10
(b)(ii) Date of departure of family, if not availing for himself		22/04/2022
(c) Nature of leave		Official Visit
(d) Purpose		Project Related Work
5. (i) Whether L.T.C is applied for going to home town or elsewhere?		Elsewhere
(ii) Place of visit		Mumbai
6. Address during leave		NA
7. Mode		Rail

8. Details of family members who will avail L.T.C

	Full Name	Age
1.	vwxyz	49
2.	NA	0
3.	NA	0

9.

Amount of advance required

Rs.

4000

[Submit]

After submitting the form, the user will have these messages displayed.

Request has been submitted successfully! [×]

Please note your application id for future reference : 9 [×]

The user shall note the Application ID since it will be required to submit the Claim Bills Form.
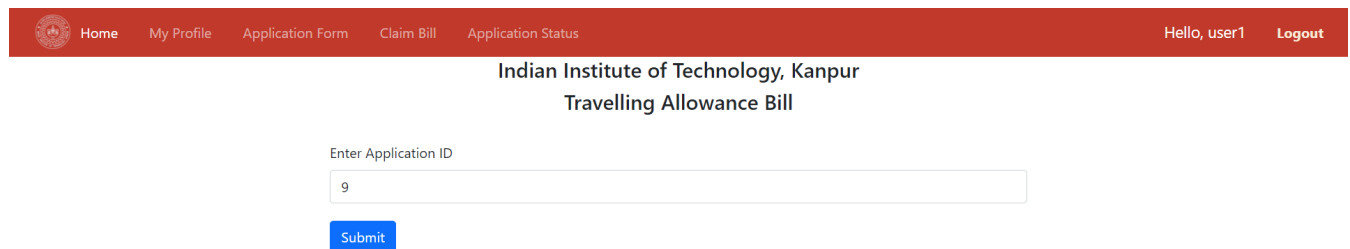
7 Application Status

The "**Application Status**" tab will display the status of different Applications filed by the user.

Once the application gets verified, the user can start the journey. After the journey ends, the user can access the Claim Bills form by the Application ID given to him earlier.

8 Claim Bills Form

After submitting the Application Form, the Claim Bills Form will be displayed as shown below:

Indian Institute of Technology, Kanpur
Travelling Allowance Bill

Enter Application ID

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Institute A/C or CPDA	Email	Project Number
Enter institute A/C or CPD	username@iitk.ac.in	Enter project number

Name	Roll No. / PF No.	Designation
abcde	201200	Student

Department	Pay Band	Purpose
Chemical Engineering	Enter your pay band	Project Related Work

Summary of the claim submitted

1. Total travel cost	Total Travel Cost
2. Road KMs	Distance in KMs
3. DA for the No. of days, hospitality availed	
4. DA for the No. of days, hospitality not availed	
5. Other expenses	Other Expenses
6. Grand total	Grand Total
7. Less Advance	Less Advance
8. Net claim: Payable/Refundable	Net Claim

Drive Link (with view access)

Must contain all the receipts and tickets

Details of Family Members(in case of LTC or Home town concession)

Sl. No.	Name	Date of Birth	Age	Relationship
1.	Enter your name	dd/mm/yyyy	Enter your age	Relationship
2.	Enter your name	dd/mm/yyyy	Enter your age	Relationship
3.	Enter your name	dd/mm/yyyy	Enter your age	Relationship
4.	Enter your name	dd/mm/yyyy	Enter your age	Relationship
5.	Enter your name	dd/mm/yyyy	Enter your age	Relationship

Details of Other Actual Expenses

Sl. No.	Particulars	Amount(Rs.)
1.		Rs.
2.		Rs.
3.		Rs.
4.		Rs.
5.		Rs.

Submit

Indian Institute of Technology, Kanpur
Travelling Allowance Bill

Enter Application ID

9

Institute A/C or CPDA	Email	Project Number
5151651651651	username@iitk.ac.in	417

Name	Roll No. / PF No.	Designation
abcde	201200	Student

Department	Pay Band	Purpose
Chemical Engineering	5000	Project Related Work

Summary of the claim submitted

1. Total travel cost	48000
2. Road KMs	450
3. DA for the No. of days, hospitality availed	9
4. DA for the No. of days, hospitality not availed	3
5. Other expenses	5000
6. Grand total	54000
7. Less Advance	4000
8. Net claim: Payable/Refundable	50000

Drive Link (with view access)

ClaimBills.drive.com

Details of Family Members(in case of LTC or Home town concession)

Sl. No.	Name	Date of Birth	Age	Relationship
1.	wxyz	29/02/1975	0	Wife
2.	NA	NA	0	NA
3.	NA	NA	0	NA
4.	NA	NA	0	NA
5.	NA	NA	0	NA

Details of Other Actual Expenses

Sl. No.	Particulars	Amount(Rs.)
1.	NA	0
2.	NA	0
3.	NA	0
4.	NA	0
5.	NA	0

Submit

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The user must upload an accessible Drive-Link, which contains the receipts/tickets/bills of all the expenses made.

After the Claim Bills Form is submitted, then the following is displayed and the Application goes to the Accounts Admin for verification.

9 Accounts Admin

After logging in, the Accounts admin will see the following page:

The Accounts Admin can view the Application-

Indian Institute of Technology, Kanpur

Travelling Allowance Bill

Enter Application ID [Application ID]

Institute A/C or CPDA
5151651651651

Email [username@iitk.ac.in]

Project Number
417

Name [abcde]

Roll No. / PF No.
201200

Designation
Student

Department [Chemical]

Pay Band [5000]

Purpose [Project]

Summary of the claim submitted

1. Total travel cost	48000
2. Road KMs	450
3. DA for the No. of days, hospitality availed	9
4. DA for the No. of days, hospitality not availed	3
5. Other expenses	5000
6. Grand total	54000
7. Less Advance	4000
8. Net claim: Payable/Refundable	50000

Drive Link (with view access) [ClaimBills.drive.com]

Details of Family Members(in case of LTC or Home town concession)

SI. No.	Name	Date of Birth	Age	Relationship
1.	vwxyz	29/02/1975	0	Wife
2.	NA	NA	0	NA
3.	NA	NA	0	NA
4.	NA	NA	0	NA
5.	NA	NA	0	NA

Details of Other Actual Expenses

SI. No.	Particulars	Amount(Rs.)
1.	NA	0
2.	NA	0
3.	NA	0
4.	NA	0
5.	NA	0

[Back]

After viewing the application, the Admin may Accept or Reject it.

Let us say, he accepts the application of User1, then a message is displayed as below.
After this, the Accounts Cell can initiate the process of Reimbursement in their Office.

Hello, accountshead   **Logout**

Application accepted! ×

Pending application requests :

ID	Email	PF No./Roll No.	Application	Accept Reject
1	naman@iitk.ac.in		View Application	✅ ❌
2	kushagras20@iitk.ac.in		View Application	✅ ❌

Once the Application is verified, the user gets the message of Verification in his "**Application Status**" tab.

Home   My Profile   Application Form   Claim Bill   Application Status   Hello, user1   **Logout**

Welcome username@iitk.ac.in ! You can view the status of your application here.

Claim-Bill | Bill-id : 3 | Status : Congratulations! Your application is verified

Application-Form | Application-id : 9 | Status : Congratulations! Your application is verified

10   Office Admin

On login, the office admin sees this page:

Hello, officehead   **Logout**

Welcome officehead@iitk.ac.in ! You are now logged in as office staff.

Then he can view the pending requests by clicking on the Pending Requests Tab

Hello, officehead   Logout

Pending application requests :

ID	Email	PF No./Roll No.	Application	Accept	Reject
4	nsingla21@iitk.ac.in	200619	View Application	✅	❌
7	kushagras20@iitk.ac.in	200539	View Application	✅	❌
8	kushagras20@iitk.ac.in	200539	View Application	✅	❌
9	nsingla21@iitk.ac.in	200619	View Application	✅	❌

The Office Head can view the Application similar to the Account Head.

After viewing the application, the office may Accept or Reject it.

After accepting the application, the application status on user side changes as:

Home   My Profile   Application Form   Claim Bill   Application Status   Hello, mehtask20   Logout

Welcome mehtask20@iitk.ac.in ! You can view the status of your application here.

Application-Form | Application-id : 10 | Status : Congratulations! Your application is verified