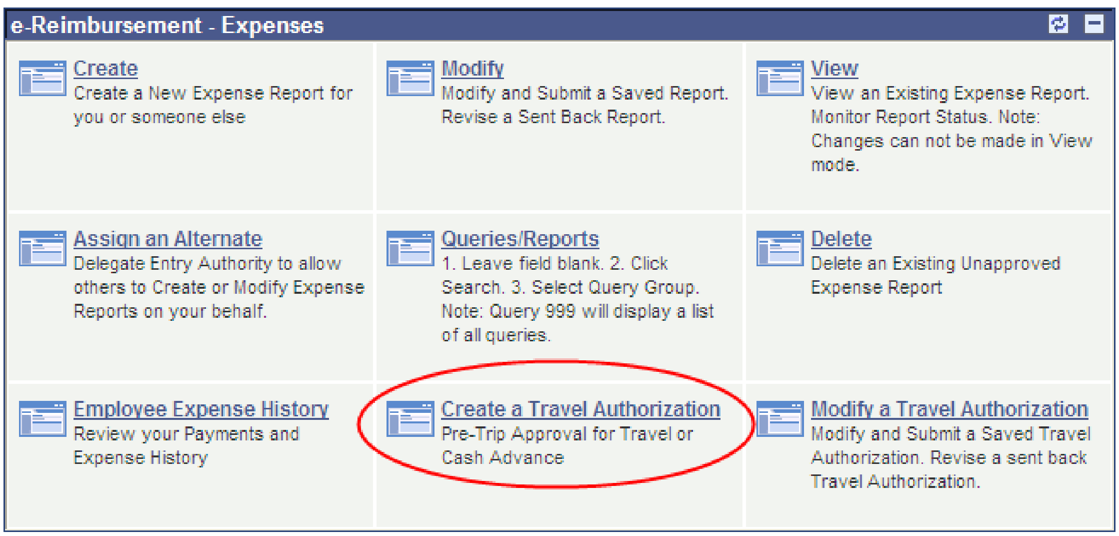
How to Work with Travel Authorizations in the Expense Module

Travel Authorizations may be used to obtain departmental pre-trip approval, according to current policies. Travel Authorization requests include estimated expenses such as airfare, lodging, meals, etc. which can be copied to an expense report after the trip is completed.

1) Sign into the Expense Module. Click on **Create a Travel Authorization** in the Expense Module - Expenses box. A blank Travel Authorization request will appear.

   Note: *If designated as an alternate for another individual, enter their employee or non-employee ID after selecting* ***Create a Travel Authorization*** *in the Expense Module – Expenses box. If you do not know the ID, click on the magnifying glass next to the Employee ID field. A list of travelers will appear. Select the appropriate ID from the list and click* ***Add*** *to open a blank Travel Authorization. If the desired traveler does not appear, see How to Assign an Alternate in the Expense Module.*



2) Complete the *General Information Panel* with the following information:
   a. **Description:** Enter a brief description of the future trip in 30 characters or less.
   b. **Business Purpose:** Click on the drop-down arrow and select the category that best describes the official business purpose of the travel or expense. See Business Purpose Descriptions for the Expense Module.
   c. **Comment:** Enter a detailed description of the future trip including expense/travel justification and supporting details. This field allows an unlimited number of characters. ***Note:*** *All acronyms must be spelled out.*
   d. **Default Location:** Enter the location where the expenses will be incurred (e.g. San Diego, CA). To look up specific locations, enter the first three characters of the city name and click on the magnifying glass icon.

__Note:__ Using the Default Location field minimizes data entry for each expense line in the Details section of the Travel Authorization. If most of the expenses will not be incurred in the same location, leave the field blank.

e. **Date From:** Enter a future date to reflect the departure date of the trip.

f. **Date To:** Enter a future date to reflect the return date of the trip.

3) Complete the *Details* section of the Travel Authorization request.

4) When entry is complete, proceed as follows:

a. If entering for yourself or on behalf of a non-employee, click **Submit**, verify the totals on the screen that follows and click **OK**.

b. If entering on behalf of another employee, click **Notify Traveler**. The traveler must login to the Expense Module, click **Modify a Travel Authorization** in the Expense Module – Expenses box, click search, locate the pending Travel Authorization, click **Submit**, verify the totals on the screen that follows and click **OK**.

__Note:__ If further entry is required, click __Save for Later__. To retrieve the existing Travel Authorization, click __Modify a Travel Authorization__ in the Expense Module – Expenses box.

After submission, the Travel Authorization is routed to the appropriate Approver. Travelers/Alternates will receive e-mail notification of Travel Authorization request approval or denial. If approved, the traveler/alternate will be able to create an expense report from the existing Travel Authorization after the completion of the trip by selecting **A Travel Authorization** from the *Quick Start* drop-down menu in the new expense report.