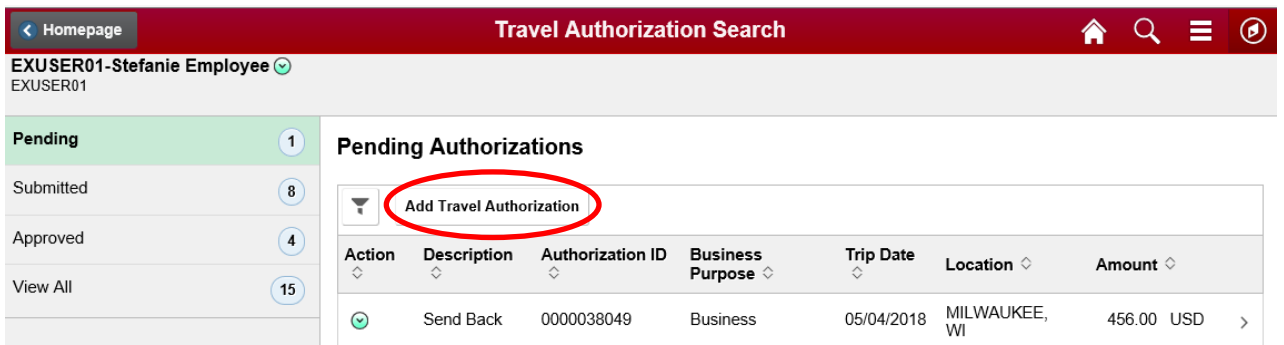
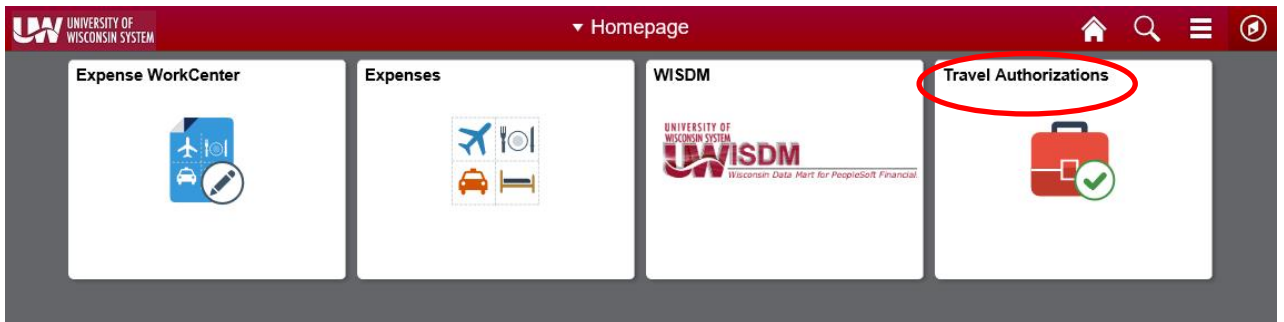


## How to Work with Travel Authorizations in the Expense Module

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

- 1) Sign into the Expense Module. Click on **Travel Authorizations** tile from Home page. A Travel Authorization search page will appear.



**Note:** If designated as an alternate for another individual choose the down arrow next to the Traveler Name and select the appropriate traveler that this Travel Authorizations is being created for. If the desired traveler does not appear, see [How to Assign an Alternate in the Expense Module](#).

Travel Authorization Search
Travel Authorization

Report NEXT Pending  
EXUSER01-Stefanie Employee Save Submit

\*Description

\*Business Purpose Business

\*Justification and Supporting Details

\*Reference In-State Travel

Accounting Default Custom Funding

\*Travel From MADISON, WI

\*Travel To

\*Date From

\*Date To  Trip Duration 1 Day

**Details**

Expense Type	Description	Merchant	Non-Preferred Merchant	Non-Preferred Comments	Amount	Accounting
Airfare		-Non-Preferred Merchant <input type="button" value="v"/>	<input type="text"/>	<input type="button" value="Q"/>	<input type="text"/>	<input type="button" value="Q"/>
Lodging-Individual		-Non-Preferred Merchant <input type="button" value="v"/>	<input type="text"/>	<input type="button" value="Q"/>	<input type="text"/>	<input type="button" value="Q"/>
Registration Fee					<input type="text"/>	<input type="button" value="Q"/>
Travel Miscellaneous	<input type="text"/>				<input type="text"/>	<input type="button" value="Q"/>
Travel Reduction	<input type="text"/>				<input type="text"/>	<input type="button" value="Q"/>
Vehicle Rental		<input type="button" value="v"/>			<input type="text"/>	<input type="button" value="Q"/>
<b>Total</b>						0.00 USD

- 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. **Justification and Supporting Details:** 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. **Reference:** Click on the drop-down arrow and select the type of travel
  - e. **Travel From/Travel To:** Enter the travel from/to 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.

- f. **Date From:** Enter a future date to reflect the departure date of the trip.
- g. **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, verify the totals on the screen and click **Submit**.
  - b. If entering on behalf of another employee, click **Notify Traveler**. The traveler must login to the Expense Module, click **Travel Authorization** in the Home page – locate the pending Travel Authorization, verify the totals on the screen that follows and click **Submit**.

The screenshot shows the 'Travel Authorization' form. At the top right, there are 'Save' and 'Notify Traveler' buttons. The 'Notify Traveler' button is circled in red. Below the form, there are two buttons: 'Accounting Default' and 'Custom Funding', with the latter also circled in red. The form includes fields for Description, Business Purpose, Justification and Supporting Details, Reference, Accounting Default, and Custom Funding. Below the form is a table with columns: Expense Type, Description, Merchant, Non-Preferred Merchant, Non-Preferred Comments, Amount, and Accounting.

**Note:** If further entry is required, click **Save** for Later. To retrieve the existing Travel Authorization, click **Travel Authorization** in the Home page.

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 *Approved Authorizations* using Action menu in the Travel Authorization Search.

The screenshot shows the 'Travel Authorization Search' page. The 'Approved' filter is selected. An 'Actions' menu is open over the first row, with 'Copy To Expense Report' circled in red. The table lists approved authorizations with columns: Authorization ID, Business Purpose, Trip Date, Location, and Amount.

Authorization ID	Business Purpose	Trip Date	Location	Amount
0000038054	Business	05/08/2018	OSHKOSH, WI	200.00 USD
0000038050	Business	05/04/2018	OSHKOSH, WI	567.00 USD
0000037904	Business	04/02/2018	OSHKOSH, WI	500.00 USD
0000037903	Business	04/02/2018	CHICAGO, IL	400.00 USD