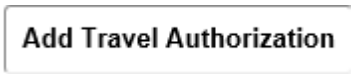
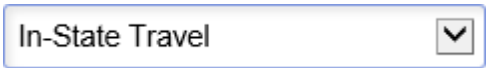
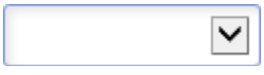
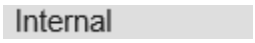
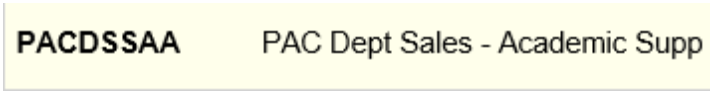
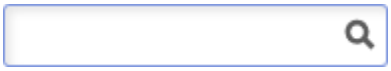
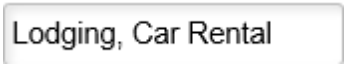
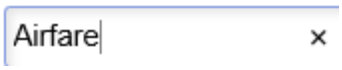
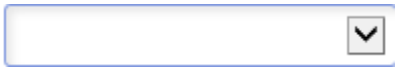
Creating a Travel Authorization

Step	Action
1.	Click the **Travel Authorizations** tile.
2.	The Travel Authorizations Search page is displayed. This page allows you to view and add travel authorizations. Press **[Enter]** to continue.
3.	If you are filling out a Travel Authorization as a delegate for another employee, you would click the **Green Arrow** icon by your name to change your perspective. Press **[Enter]** to continue.
4.	Click the **Add Travel Authorization** to create a new travel authorization. 
5.	The Travel Authorization page allows you to add information to create a new travel request. The first field to populate is the **Description** field. Users should enter a brief description of what the trip is for. For this demonstration, enter "**Presentation**".
6.	In the **Business Purpose** field, click the drop-down list to choose the travel purpose. **Note:** The Business Purpose field, and other header defaults, can be defaulted by traveler by updating the traveler's profile defaults. Click [**Enter**] to continue. 
7.	Click the **Out-of-State Travel** list item. **Note**: You would choose "Out-of-State Travel" for International travel as well.
8.	The **Comments** field can be utilized for any additional comments or justification needed for the trip. In this demo, enter "**Conference**".
9.	In the **Billing Type** field, click the drop-down list to choose the billing type. **Note**: The Billing Type should always be set to Internal. This is another profile default that can be saved on the traveler's profile defaults if desired. 

Step	Action
10.	Click the **Internal** list item. 
11.	Click the **PAC Dept Sales - Academic Supp** option. 
12.	
13.	The Accounting Tag you selected in the previous page fills in all the default information for the GL ChartFields. **Note**: Budget Reference (**Bud Ref**) is the fiscal year that the expense should be charged to. To locate the Bud Ref, click the lookup magnifying glass in the **Bud Ref** field. 
14.	Click the **2018** option.
15.	Be sure to review the accounting details before closing the window. Use the scrollbar at the bottom of the window to review the enitre chartstring. **Note:** If the department code lists "**74999999**", you **MUST** change that to reflect the appropriate unit, college, or school. Failure to change this field will result in your document flowing to the wrong approval workflow. Press **[Enter]** to continue.
16.	Click the **Done** button.
17.	The **Travel From** and **Travel To** fields should be completed. The **Travel From** field can be utilized to search for the location that the traveler is leaving from (i.e. Georgia, Athens-Clarke) or the From location can be set as Headquarters as a default on the traveler's profile. The **Travel To** field can be utilized to search for the destination for the trip. If the traveler makes trips to the same destination repeatedly, the Travel To location can be set as a default on the traveler's profile.
18.	For this demonstration, we will enter "**Tenn**" in the **Travel To** field. As we begin to type, a drop-down selection will appear for easy selection.

Step	Action
19.	The travel dates should be selected using the calendars in the **Date From** and **Date To** fields. Click **[Enter]** to continue.
20.	**Note**: The **Notes** feature allows the initiator to add additional information to validate the critical nature of the travel. Click the **Notes** button.
21.	Click the **Add Notes** button.
22.	when you are done entering information, click the **Done** button.
23.	Your notes have been saved. **Note:** The **Edit** function on the Travel Authorization Notes window allows you to delete a selected note and add a new one. You will have to click **Save** on the Travel Authorization page after clicking the **Done** button to save the new note. Click the **Done** button.
24.	**Note**: In the **Details** section of the Travel Authorization, employees should provide estimates for anticipated spend for the trip. For DOMESTIC trips, use rows one and two to provide the estimates. For INTERNATIONAL trips, use rows three and four to provide the estimates.
25.	For this demonstration, we are using rows one and two. In the **Description** field next to **Domestic Pay by Employee**, input the anticipated expenses, such as lodging, car rental, per diem, conference registration etc. Click [**Enter**] to continue. 
26.	For any domestic charges being direct billed to UGA, list those on row two. In the **Description** field, enter "**airfare**". 
27.	This row will also require a **Merchant** to be selected. Utilize the drop down-menu to select the UGA Authorized Travel Agency that the traveler is using to make airfare arrangements. 

Step	Action
28.	Click the **Orbit Travel Agency** list item.
29.	Enter "**1350**".
30.	**Note:** The total amount is reflected on the bottom. Click [**Enter**] to continue.
31.	If you would like to save the travel authorization to review and submit at a later time, click the **Save** button. After saving, you can access the saved authorization under the **Pending** link on the **Travel Authorization Search** page.
32.	Before submitting your travel authorization. Verify that you have completed the correct lines in the detail section. Domestic trips should use the first two lines, while international trips use the last two lines. Failure to do this correctly will result in your travel authorization being denied.
33.	Click the **Submit** button to request approval for the travel authorization.
34.	The travel authorization has been submitted for approval. Click the **Home** button to return to the Home page.
35.	You have completed the steps to create a travel authorization for out-of-state travel. **End of Procedure.**