

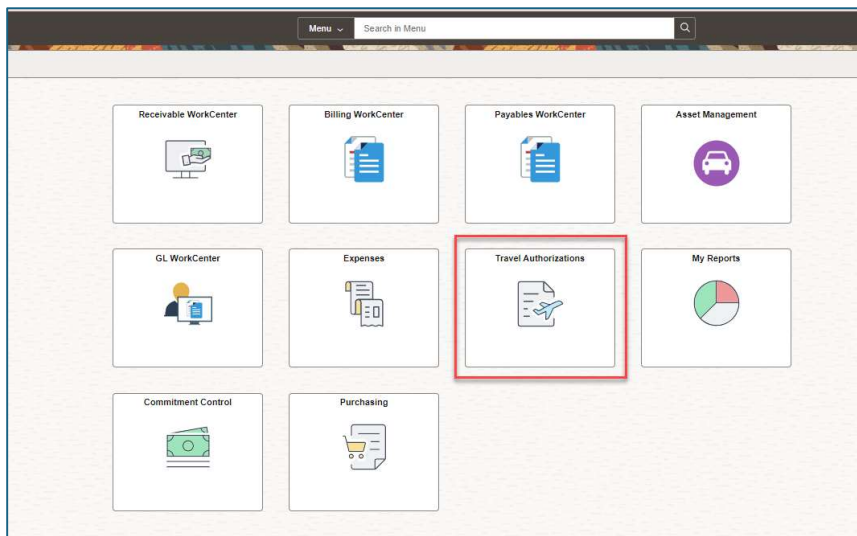
Travel Authorization

This user guide demonstrates how to create, submit, and review the status of Travel Authorizations.

A Travel Authorization must be submitted by the employee and approved by the supervisor before:

- Booking out-of-state travel
- Using a personal vehicle for in-state-travel
 - Business Purpose: In-State-Travel
 - The travel authorization request replaces the Personal Vehicle Use form

From the **Home** page, select the **Travel Authorizations** tile.



On the **Travel Authorization Search** page, you can view the status of previous transactions and Add Travel Authorizations.

Travel Authorization Search	
Britney Stiles	
084130	
SABHRS Financial System	
Returned	Returned Authorizations
Denied	There are no Returned Travel Authorizations to display.
Pending	Add Travel Authorization
Submitted	
Approved	
View All	

To create a new Travel Authorization request, complete all the **required*** fields in the Header and the Lines grids.

Header

- Required: Description, Business Purpose, Travel From, Travel To, Date From, Date To
- When selecting a location for travel, the county of the location must be used.
 - The locations are broken down by county based on the Department of Defense for per diem rates for locations in the United States.
 - The county can be searched by clicking the magnifying glass, opening the Search Criteria dropdown, and filling in the state code in the Expense Location field (i.e. entering AZ to see all Counties in Arizona.)

The screenshot displays the 'Travel Authorization' form. The 'Header' section is highlighted with a red box, and red arrows point to the required fields: *Description (IT Conference), *Business Purpose (Out of State Travel Related), *Travel From (LEWIS AND CLARK COUN), *Travel To (DENVER COUNTY,CO), *Date From (12/09/2024), and *Date To (12/13/2024). Other fields include Comments (Travel to Denver for IT Conference), Billing Type (Internal), Attachments, and Create A Cash Advance. The 'Details' section below shows a table with columns: Expense Type, Description, Amount, *Currency, Accounting, and Attachments. The first row shows 'Meals Lunch in State' with a dropdown arrow. The total expenses are shown as 0.00 USD.

Lines/Details

- Select **Expense Type** from the drop-down menu **or** select
 - Populate from Travel Authorization, Populate from Template, or Quick-Fill
- You must select Expense Types that match the Business Purpose.
 - e.g., Business Purpose: **Out of State** Travel / Expense Type: Lodging **Out of State**
- Travel expense types will have prefilled amounts based on where you are traveling and the expense type selected (e.g., out-of-state lodging).
 - You will enter all other expense types manually.
- Expenses for each meal and lodging must be entered on a separate line for each day.
 - These details are necessary for the supervisor to review/approve the request and for copying a Travel Authorization to an Expense Report.
- Select the **Attachments** icon to add attachments required for an expense type.

Travel Authorization

Report: NEXT Pending

Britney Stiles

Save

Submit

*Description

IT Conference

*Business Purpose

Out of State Travel Related

Comments

Travel to Denver for IT Conference

Billing Type

Internal

*Travel From

LEWIS AND CLARK COUN Q

*Travel To

DENVER COUNTY,CO

*Date From

12/09/2024

*Date To

12/13/2024

Trip Duration

4 Days

Attachments

Create A Cash Advance

Details

Accounting Default

Populate from Travel Authorization

Populate from Template

Quick-Fill

Expense Type	Description	Amount	Currency	Accounting	Attachments
Airline Charges Out of State	airfare to Denver		USD		Details
Lodging Out of State	hotel	165.00	USD		Details
Lodging Taxes and Fees-OutStat	hotel taxes and fees		USD		Details

Total Expenses 790.00 USD

Quik-Fill

Recommended when entering a travel authorization that includes meals and lodging for multiple days.

Cancel

Quick-Fill

Done

Enter the date range you want applied to the authorizations you will be adding to the report. Then choose the expense types and whether you want to add one instance of the expense type or have an entry of that expense type for each day within the date range.

Quick-Fill Options

Date From

Date To

Start Time (HH:MI)

12:00AM

End Time (HH:MI)

11:59PM

Add Expense Types

51 rows

One Day	All Days	Expense Type
<input type="checkbox"/>	<input type="checkbox"/>	Airline Charges Out of State
<input type="checkbox"/>	<input type="checkbox"/>	Airline Charges in State
<input type="checkbox"/>	<input type="checkbox"/>	Auto Rental In State
<input type="checkbox"/>	<input type="checkbox"/>	Auto Rental Out of State
<input type="checkbox"/>	<input type="checkbox"/>	Cellular Phones State Owned
<input type="checkbox"/>	<input type="checkbox"/>	Dues and Memberships

Next, select the **Details** button for each Expense Type and complete the required fields.

Cancel

Line Detail

Done

Date

12/04/2024

Expense Type

Lodging Out of State

Description

hotel

Amount

165.00

Currency

USD

Payment Type

*Billing Type

Internal

Number of Nights

1

Save/Submit

You can click **Save** to leave the Travel Authorization and return to it later to complete it.

Travel Authorization

Report NEXT Pending
Britney Stiles

Save

Submit

Once the Travel Authorization is complete, select the **Submit** button.

- A message will be displayed for you to confirm your submission.
- Click **OK**.
- The request will be sent to the approving supervisor for review.



Submission Confirmation.

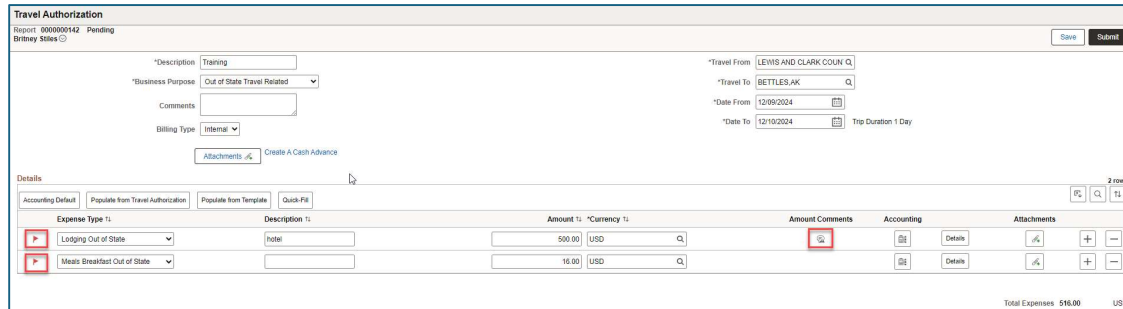
CERTIFICATION: This is to certify that the data contained in this travel authorization is accurate and comply with expense policy.

OK

Cancel

Error / Exception Comments

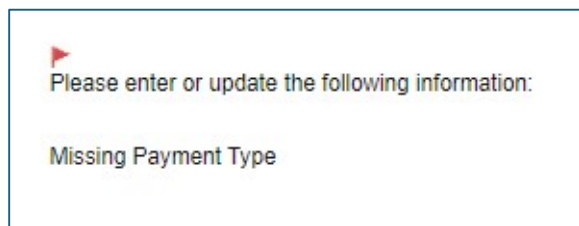
After submitting your travel authorization request, a red flag  or a comment box  may appear on the screen. These will indicate that you have forgotten the required information or that a change must be made before you can submit your request.



The screenshot shows the 'Travel Authorization' form. At the top, there's a header with 'Report: 000000142 Pending' and 'Britney Stiles'. Below this, there are fields for 'Description' (Training), 'Business Purpose' (Out of State Travel Related), 'Comments', 'Billing Type' (Internal), 'Attachments', and 'Create A Cash Advance'. On the right, there are fields for 'Travel From' (LEWIS AND CLARK COUN Q), 'Travel To' (BETTLES, AK), 'Date From' (12/09/2024), and 'Date To' (12/10/2024). Below these fields, there's a 'Details' section with a table of expenses. The table has columns for 'Expense Type', 'Description', 'Amount', 'Currency', 'Amount Comments', 'Accounting', and 'Attachments'. The first row shows 'Lodging Out of State' with a description of 'hotel' and an amount of '500.00 USD'. A red flag icon is next to the 'Amount Comments' field for this row. The second row shows 'Meals Breakfast Out of State' with an amount of '10.00 USD'. At the bottom right, it says 'Total Expenses: 510.00 USD'.

In this example:

The red flag tells us you have forgotten the payment type in the Details screen.



The screenshot shows a message box with a red flag icon and the text: 'Please enter or update the following information: Missing Payment Type'.

The exception comment lets you know you have exceeded the federal rate for the hotel stay and requires an explanation.



The screenshot shows a dialog box titled 'Amount Exceeded Comment'. It has 'Cancel' and 'OK' buttons. The text inside says: 'Authorized Amount 230.000 USD', 'Transaction Amount 500.00 USD', and 'The authorized amount for expense type Lodging Out of State in BETTLES, AK has been exceeded on line 1. Please provide an explanation as to why.' Below this text is a text input field.