Entering a Travel Authorization

- From the FOR FACULTY & STAFF tab, Under the Financial Systems Summary > Select **Travel** > Select **Travel Authorizations**

- NC State Travel Center

  - My Profile
    - If this is your first time entering an authorization, you will need to verify your information.

    - Enter your 'Default Funding Source'

    - Check the checkbox if you will enter travel requests on behalf of others

    - Add travelers to your 'Proxy List'
      - Click on the Traveler ID icon
      - Look Up Traveler ID
        - Enter Name or Employee ID
        - Click the Look Up button
        - Click on the row for the employee to add

    - Click OK when all employees have been added

- Travel Requests

  - Click on the **NEW AUTHORIZATION** button

    - Travel Details
      - Enter trip **Begin Date** and **Begin Time**
      - Enter trip **End Date** and **End Time**
      - Enter a description in the **Purpose of Trip** field
      - Select type of travel by **Category** from the dropdown list

    - Destinations.
      - Enter a destination **City**
      - Enter a destination **State.**
      - Use the **Add/Remove** button to add or remove multiple destinations

    - Click on the down arrow box to respond to the question. **Will this trip include any personal travel?**

    - Travel Estimate. Enter travel expenses by category.
      - **Mileage**. Enter total mileage.
      - **Other Ground Transportation.**
      - **Airfare**.

- **Conf/Registration Fees and URL.**
- **Workshop/Training Fees.**
- **Lodging.** Enter lodging amount or click on icon to calculate by per diem.
- **Meals.** Click on icon to view meal allowance. Exclude paid meals.
- **Other Expenses.** Enter total other expenses or click on icon to itemize.

▪ Special Authorizations.
  - Overnight Travel checkbox will be checked if travel involves overnight stay.
  - Excess Lodging Rates checkbox will be checked if lodging per day is greater than the per diem amount.
  - Vehicle Rental checkbox <user must check if renting a vehicle>
  - Use of Personal Vehicle checkbox will be checked if mileage is entered.
  - Attendants for Handicapped Employees <user must check if applicable>

▪ Additional Information
  - Enter Comments <optional field>
  - Contact Information <defaulted>

▪ Accounting Information. Project will default from the user profile.
  - Use the **Add** button to add an additional project. Enter the Amount to be charged to the project added.
  - Use the **Remove** button to delete the row.

▪ Status of Travel Authorization.
  - View status of the authorization.
  - To Cancel the Travel Authorization, Click on the **Cancel Authorization** link

▪ Approvals
  - To add an approver, click on the Approver's User ID icon.
    - o Enter the User ID or Description and Click on the Look Up button.
    - o Click on the Add Approver button. Verify the Ad Hoc Approver added. Use the Remove button if needed.

▪ **Save for Later** button. This button will save the travel authorization and allow the user to come back to the document and complete and/or route for approval.

▪ **Submit for Approval** button. This button will route the travel authorization to the worklist of the approver.