

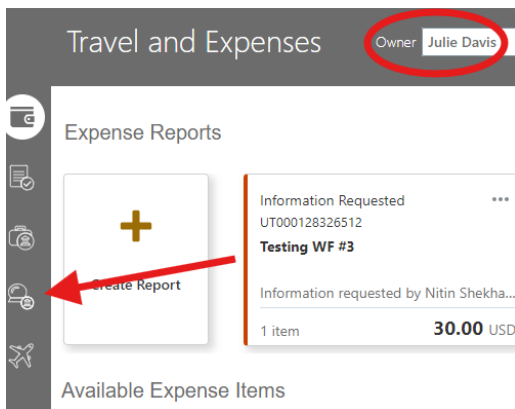
Travel Authorizations

Formerly known as 'Request' or 'Trip Request', Authorizations are used for travel, card requests and card limit increases or decreases. This job aid is specific to creating an Authorization to travel.

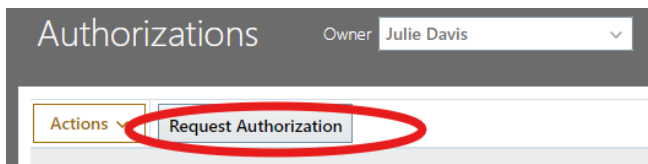
Creating an Authorization for Travel

From the **Expenses** module, click on the **Authorizations** icon on the left side of the screen.

Note: If you are a delegate, make sure you are acting on behalf of the person for whom you are creating the authorization.



From the **Authorizations** application, click on **Request Authorization**.



Fill in the fields on the **Authorization** header. Each field with a * in front of it is a **required field**. After the header is completed, **at least one expense must be entered in order to submit the Authorization**. To enter an expense, click on the + icon located under 'Estimated Expenses.'

Request Authorization ?

Purpose

* Expense Location

* Start Date

* End Date

Attachments

Estimated Expenses (0)

+

Choose the appropriate Template. Our example destination is Puebla, Mexico, so we will need to select the **International Template**. We will then select an expense type from the **Type** dropdown. Lastly, we will enter a **estimate** of what we think our cost will be in the **Amount** field. Once the estimate is entered, the **Account Stream** will appear. The default is the travelers responsible account which will automatically populate the field. The traveler can then (if applicable) select a **Project Number** to assign the request to.

Please note: Amounts entered on the authorization are estimates only and do not encumber funds.

* Template

* Type

* Amount

Description

Attachments None

Account

Project Number

Task Number

Contract Number

Funding Source

Once all expense estimates have been entered, the user can click 'Save and Close' to return to the header.

[Save and Close](#) [Cancel](#)

Submitting the Authorization

The authorization is now ready to be submitted. Click on Submit

[Save and Close](#) [Submit](#) [Cancel](#)

The authorization has now been assigned a number and is visible in the Authorizations library. The end user can see the workflow status showing directly under the Authorization Number.

Authorizations			
Owner <input type="text" value="Julie Davis"/>		<input type="text"/>	
Actions		Request Authorization	
AUT000146280043 - Research SAMPLE		1 item	800.00 USD
Puebla, PUE, Mexico			1/6/2025
Pending manager approval			