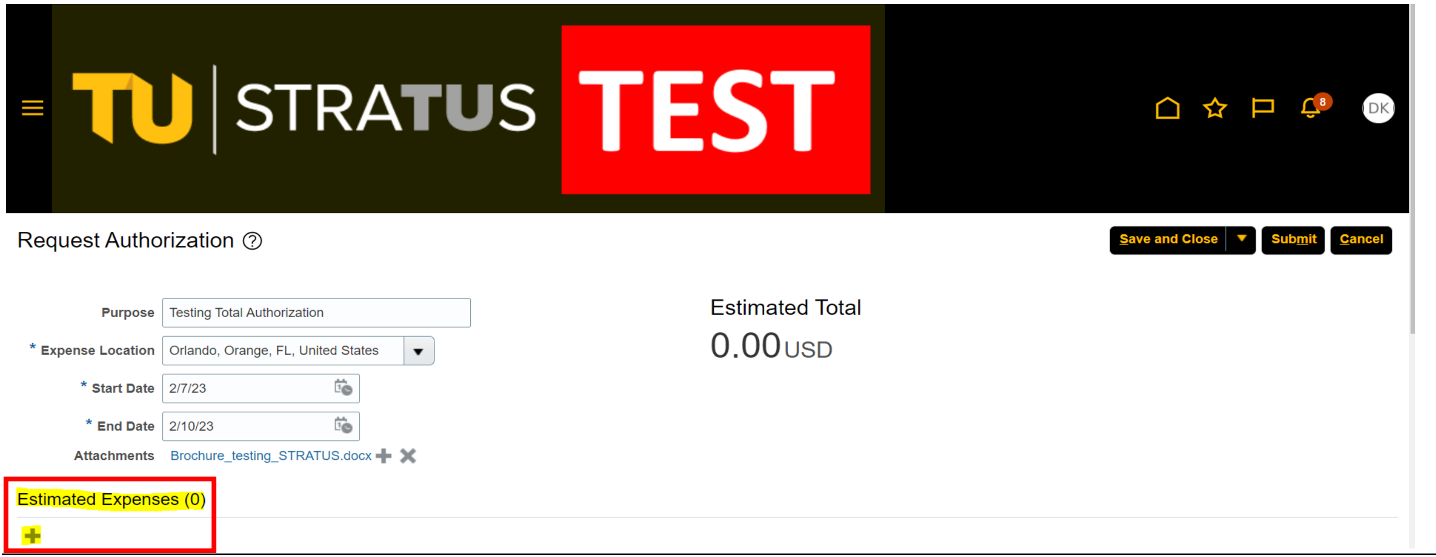
Total Travel Authorization Process

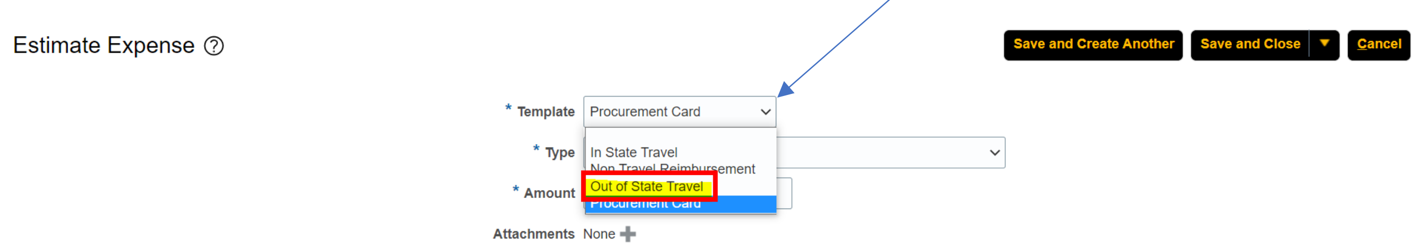
The Business Travel Office has implemented a new business process for the Travel authorization which will save time by reducing the number of clicks and entering estimated travel expense information.

The Traveler will begin by requesting a travel authorization and completing the trip purpose, expense location, start and end date along with attaching documentation or support as to why you are attending the trip.

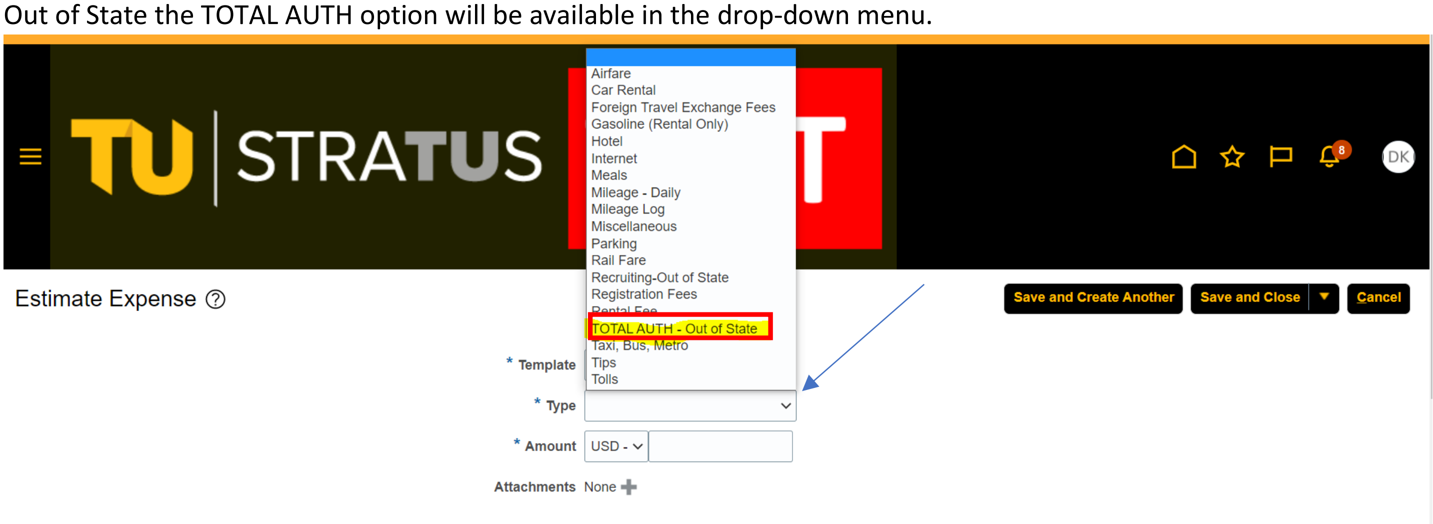
Click Estimated Expense + sign



When you begin to enter your first estimated expense the traveler always needs to select a template for travel. Use the drop down and from the list select In State or Out of State Travel.

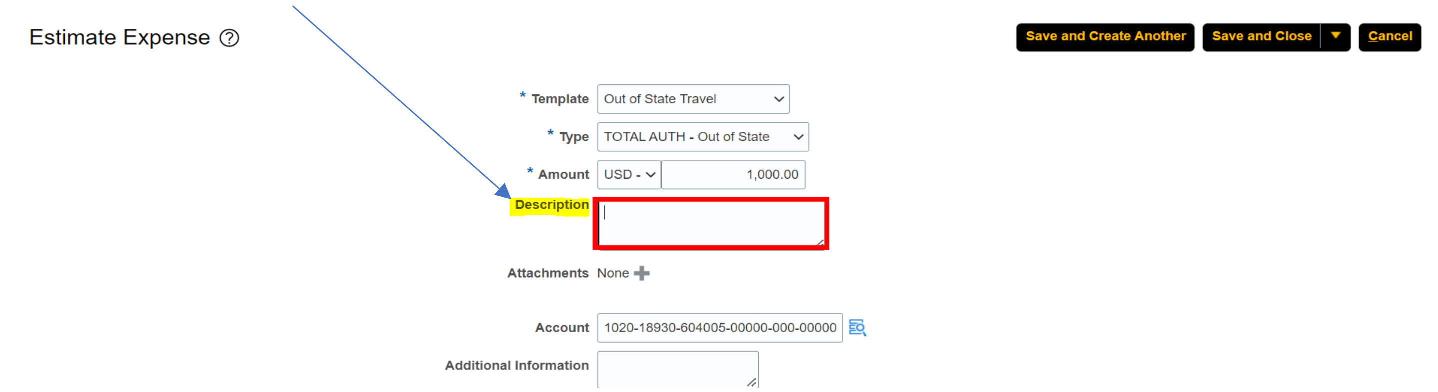


The next step is the new update to the travel authorization. Instead of selecting a type for each estimate expense such as hotel, airfare, or meals you now have the option to choose TOTAL AUTH. When you select the template In State or Out of State the TOTAL AUTH option will be available in the drop-down menu.



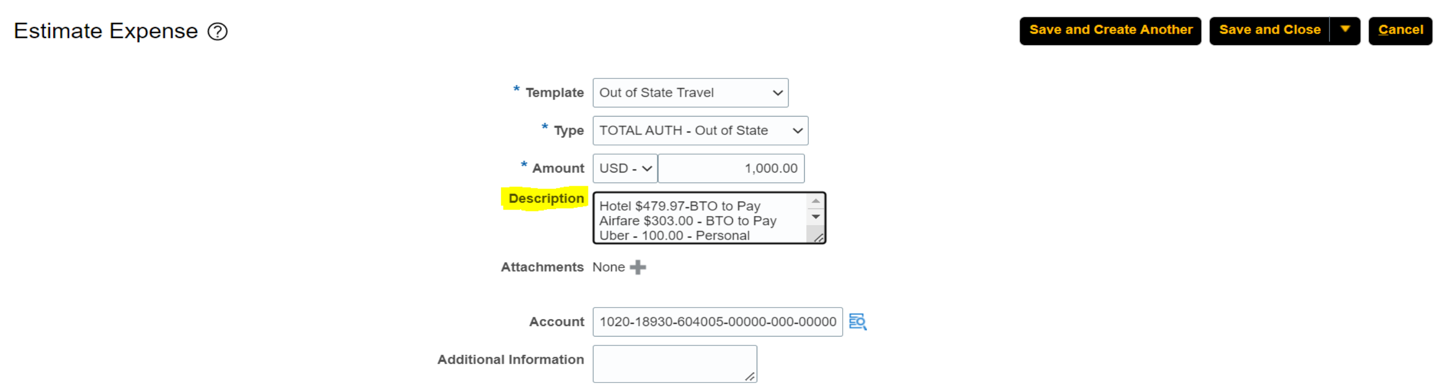
If a traveler would prefer to attach a word document instead of using the description field to itemize all their estimated expenses that would be an acceptable format. The traveler would select the Attachments None + below the description field to search for their saved document to attach to their authorization form.

Once you select the appropriate TOTAL AUTH Type (In State or Out of State) the description field will automatically populate.

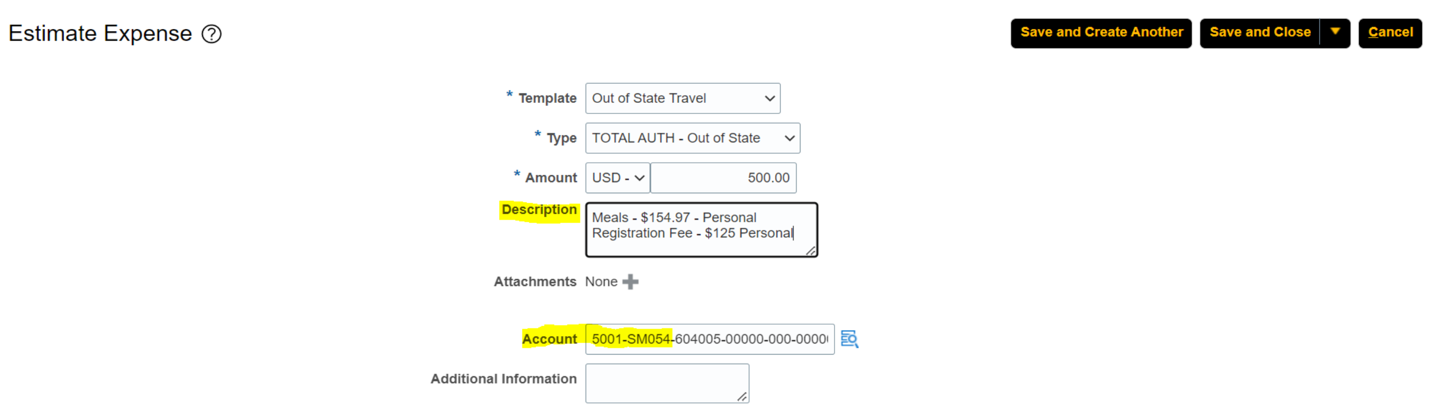


In the description field the traveler will itemize all estimated expenses funded by that cost center. Remember the travel authorization automatically defaults to the home cost center. Therefore, if your home cost center is not funding your trip you will need to manually update the cost center. If more than one cost center is funding your trip, you will need to do another TOTAL AUTH for the additional cost center and once again itemize those estimated expenses the cost center will fund.

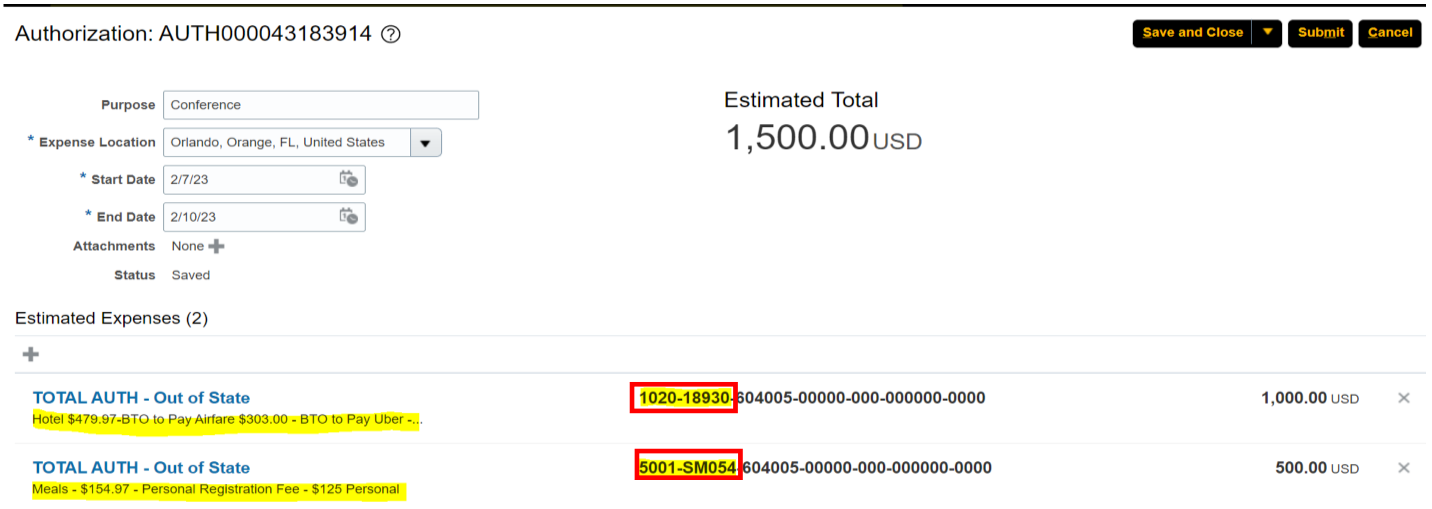
The example below is my home cost center. I have itemized all the estimated expenses which includes the total dollar amount and payment method. The reason the payment method is important is because if you are requesting the Business Travel Office to prepay your hotel or airfare expenses, they need to know which cost center is funding the trip and if you have enough funding to cover the expense.



For this example, I am using two cost centers to fund my trip. I must manually update the account field from my home cost center to the cost center that is funding the remainder of the trip. In the description field I have itemized those expenses.



As you see below, I have two cost centers funding my trip with an itemized description.



This completes the new process for the total travel authorization.

The report is ready for approval. The report will go to the traveler's immediate supervisor and then the final review by the Business Travel Office. When the immediate supervisor or BTO receives the travel authorization form they will be able to clearly see all information needed to approve or reject the form.

*Note for Approvers: The home cost center does not display on the form.

Authorization Approval AUTH000043183914 for Dawn Kuessner (1,500.00 …

View Approvals | Approve | Reject | Claim

Authorization Approval

1,500.00 USD
Dawn Kuessner

AUTH000043183914 submitted on 2/13/23

Conference

2/7/23 - 2/10/23, Orlando, FL

Funds check ran on 2/13/23 4:18 PM: Passed

Items

TOTAL AUTH - Out of State Hotel $479.97-BTO to Pay Airfare $303.00 - BTO to Pay Uber - 100.00 - Personal Meals - 117.03 - Personal	1,000.00
TOTAL AUTH - Out of State Meals - $154.97 - Personal Registration Fee - $125 Personal Cost Center SM054	500.00

The traveler will receive an email confirmation. Below is an example email of an approved travel authorization with comments and approvals.

Approved: Authorization Approval AUTH000043183914 for Dawn Kuessner (1,500.00 USD)

TS TU Stratus Financials <elbz-test.fa.sender@workflow.mail.us2.cloud.oracle.com>
To Kuessner, Dawn R.

Reply | Reply All | Forward | ...

Tue 2/14/2023 9:39 AM

Authorization Approval

1,500.00 USD
Dawn Kuessner

AUTH000043183914 submitted on 2/13/23

Conference

2/7/23 - 2/10/23, Orlando, FL

Funds check ran on 2/13/23 4:18 PM: Passed

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Approvers

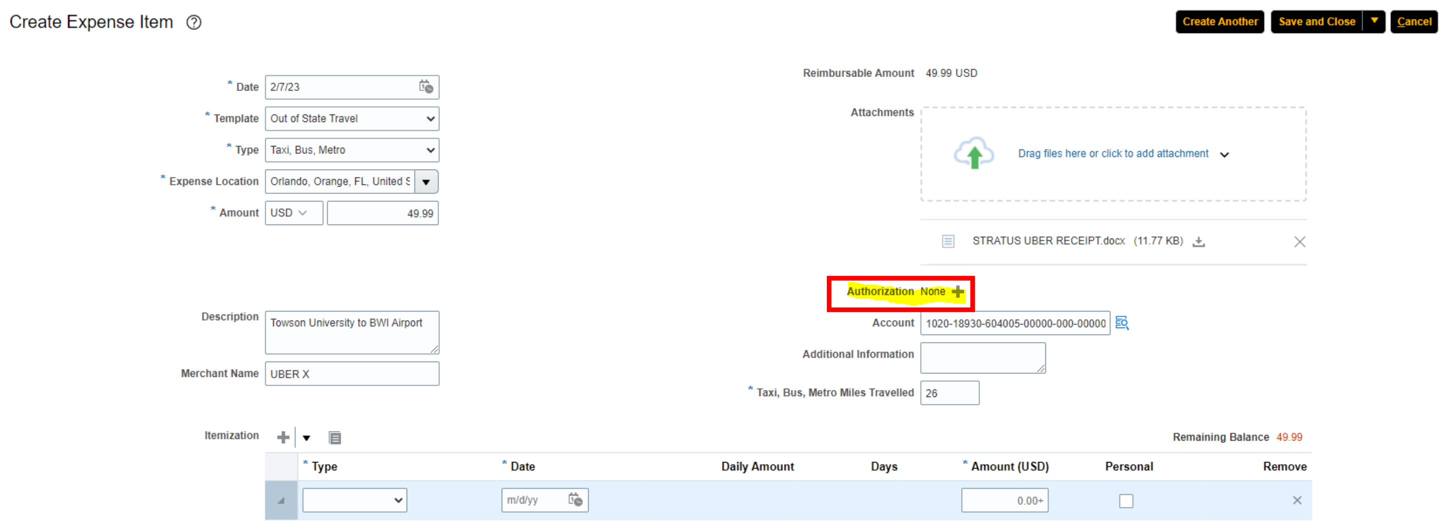
Approved by **Dawn Kuessner**	2/14/23 9:39 AM
Approved by **Lauren Rowe**	2/14/23 8:54 AM
Submitted by **Dawn Kuessner**	2/13/23 4:19 PM

Transaction details | In-app notification

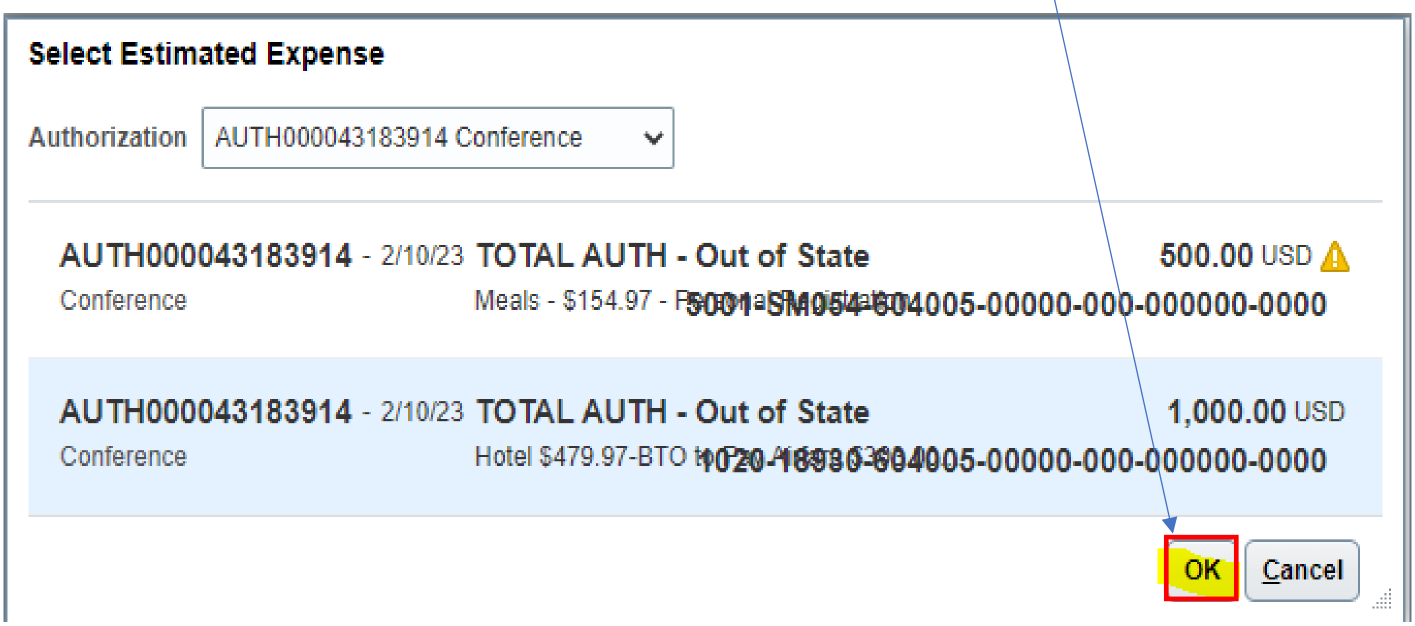
Once the traveler returns from their business trip, they will complete an expense report for reimbursement of any personal expenses. No prepaid items will go on the expense report.

When the traveler completes the expense report you must select the correct expense item type you are claiming reimbursement for along with completing any required fields. The expense report must have detailed information for the auditing and statistical purposes.

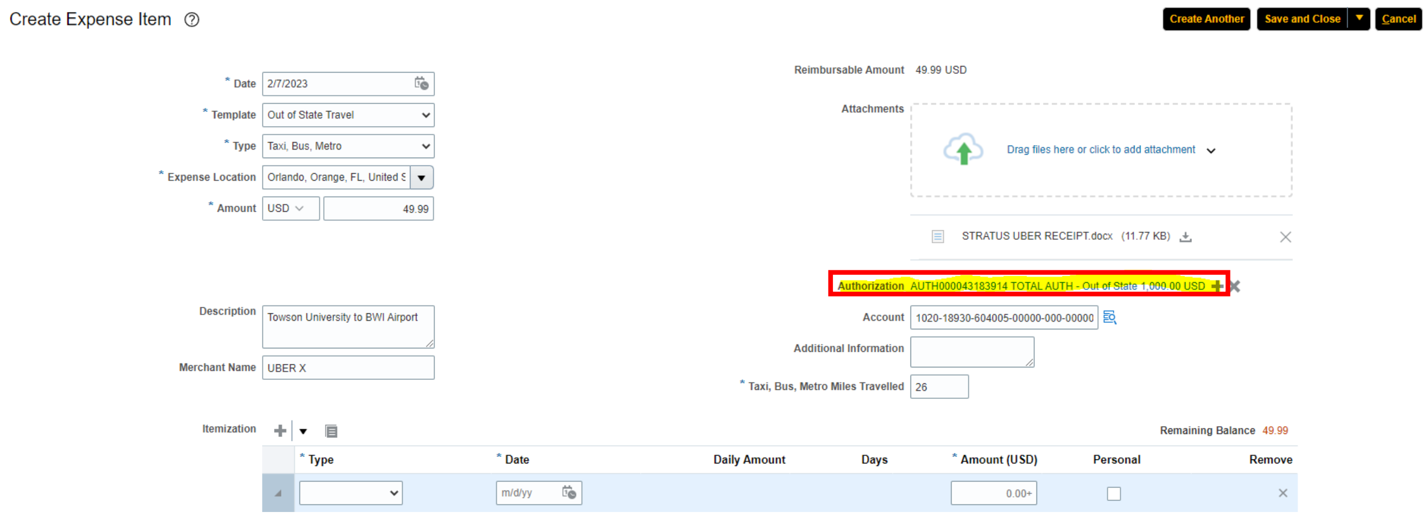
The traveler must link the approved travel authorization to the personal expense item. In this example I am requesting reimbursement for an Uber from Towson to BWI airport since I personally paid for this expense item. The authorization none + highlighted in yellow is where the traveler will click to see a listing of their approved travel authorization.



The traveler will select the correct TOTAL AUTH for the Uber expense item and click ok.



The approved travel authorization is linked to the Uber expense item.



The traveler will continue to do the above process for each personal expense.