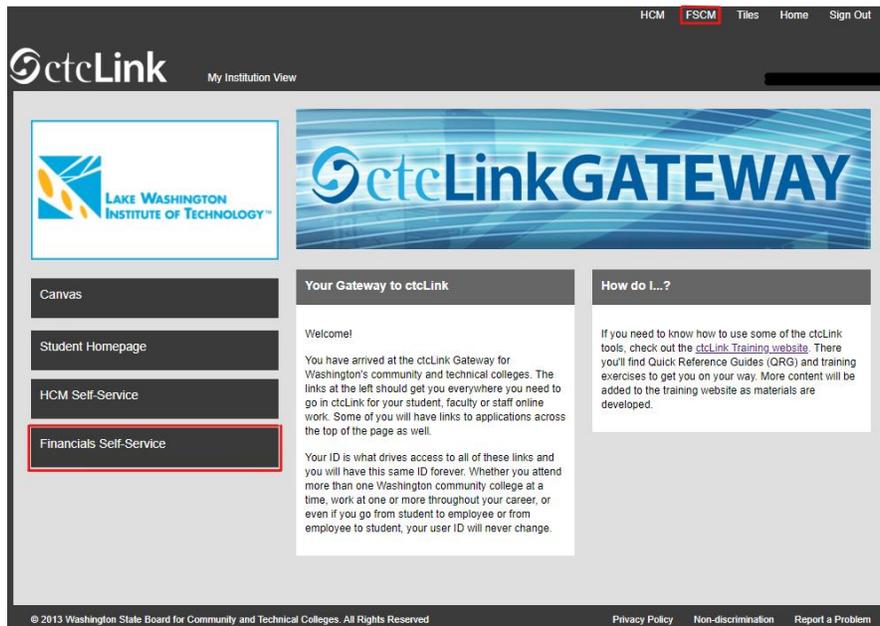# Creating a Travel Authorization

Intended Audience: Campus Community

To access Travel & Expense documentation, you will need to be in LionLink's Finance Pillar. Select the "**FSCM**" hyperlink on the top right-hand side of your screen or the "**Financials Self-Service**" tile on the left-hand side of your screen.

Navigation: NavBar > Navigator > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

1. The Travel Authorization search page displays. Depending on your role, the Empl ID will default into the Empl ID field. If you are authorized to enter a travel authorization on behalf of someone else, then you will need to look up and enter their Empl ID first.
   a. If you cannot find the Empl ID of the employee that you are trying to enter a Travel Authorization on behalf of, contact Maria Morales (maria.morales@lwtech.edu) or Yan Li (yan.li@lwtech.edu)

2. Check that the "Add a New Value" tab is selected, then click **Add**.

3. The **Create Travel Authorization** page displays. Select the **Business Purpose** from the drop-down menu that is relevant to your travel. This can also be thought of as the reason you are traveling.

4. Enter a **Description**.
   a. Further describe the purpose of your travel (Name of a conference you are attending, reason for expenditure, etc.)

5. Click the magnifying glass to the right of the **Default Location** field. Select the appropriate location from the drop-down menu. This will be used to look up the Expense Location codes in Washington.
   a. Enter the name of the city you are visiting in the field next to 'begins with'. Select **Look Up.**
      i. Select the appropriate city/state from the given list.
   b. For an international trip, enter the country you are visiting.

6. Use the calendar menu in the **Date From** field to select the first day of travel.
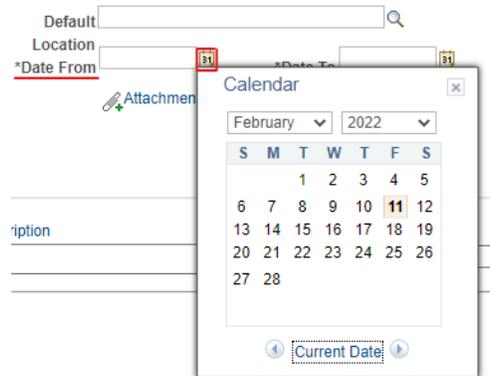
7. Use the calendar menu in the **Date To** field to select the last day of travel.

8. If a Cash Advance is needed, enter "CA request" in the "**Reference**" field.

9. Attach the agenda and supporting documents (lodging reservations, etc.) of your travel by using the "**Attachments**" hyperlink.

10. In the **Projected Expenses** section, enter a **Date** or use the calendar menu to select a **Date** for the expenditure.

11. Select the appropriate **Expense Type** from the drop-down menu.
    a. Depending on the expense type chosen you may be prompted with additional fields to fill out related to that expense type.
        i. If **Billing Type** appears, select "**Billable**" from the dropdown list.

12. Enter **Description**.
    a. For international travel, please enter the city name where the expenditure will take place.
    b. Please enter the specifics of this expenditure ("Drive from Kirkland to Everett," "Hotel room at Marriot," etc.)
    c. The **Expense Type** Description field accommodates up to 60 characters.

13. Select "**Employee**" as the **Payment Type** from the drop-down menu.
    a. If the expense will be paid for by a college credit card or college check, select, "**Pre-Paid**."

14. Enter the anticipated **Amount** for the expenditure if it did not auto populate based on the **Expense Type**.
    a. If **Expense Type** is transportation mileage, please select **Transportation ID** from the drop-down menu, then enter miles.
        i. Once this is complete, please select the green arrows icon to recalculate the expenditure amount. The amount will repopulate in the **Amount** field.
    b. **Note**: If your lodging expense is greater than the given allowable rate, the system will ask you for a justification for the expense amount. Please use one of the following for your comment:
        i. Multiple nights are bundled into one line item.

ii. Required to attend a meeting, conference convention or training where business interaction with other participants is expected.

iii. Benefit will be achieved by staying at the facility where the event is held.

iv. Available accommodations in the area exceed the allowable per diem rate (attach explanation in attachments).

v. Compliance with the Americans with Disabilities Act.

15. Select the **Accounting Details** expansion icon. The Accounting Details tab will display.
    a. This is where you will input the **chartstring** for the budget you are charging.

16. If default **chartstring** looks correct, skip to step 18. If you want to charge a different budget than the defaulted chartstring, proceed to step 17.

17. Enter the chartstring of the budget that you would like to charge.
    a. Chartstrings are found in SharePoint location (To be determined).
    b. The required fields are: Account, Oper Unit, Fund, Class, Dept, and State Purpose (and Approp for state funds only).
        i. For Grant and Capital budgets, you ALSO need PC Bus Unit, Project, and Activity.
        ii. You may have to scroll right to see all available Chartfields.
        iii. If you would like to charge multiple budgets, click the **+** button at the end of the chartstring line.

18. If you have more projected expenses to enter into the Travel Authorization, click the **+** button on the right-hand side to add another expense line.
    a. You can also remove an unwanted expense line by using the **–** Button.

Projected Expenses ?

Expand All | Collapse All   Add: | ⚡ Quick-Fill   Totals (0 Lines)   0.00   USD

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	
📅	⌄	🔲	Employee ⌄	0.00	USD	➕ ➖

Airline in State of WA
Airline International
Airline outside State of WA
Automobile Rental
Communication Miscellaneous
Hotel in State of WA
Hotel International
Hotel outside State of WA
Hotel Room Tax (IN STATE)
Hotel Room Tax (out of State)
Hotels Misc no per diem
Meal in State of WA Breakfast
Meal in State of WA Dinner
Meal in State of WA Lunch
Meal outside of WA Breakfast
Meal outside of WA Dinner
Meal outside of WA Lunch
Meals International
Meals no per diem

Expand All | Collapse All   Totals (0 Lines)   0.00   USD

19. You can complete the Travel Authorization now by selecting "**Summary and Submit**" in the upper right corner.
    a. If you would like to come back and finish the Travel Authorization at a later time, select, "**Save for Later**."

20. Process complete.

Note: If a Travel Authorization needs to be modified after it has been submitted for approval, then it must either be withdrawn from approval or sent back during the approval process