

## Procurement: Create Overnight Travel Authorization

*For employees creating an overnight travel requisition*

**Purpose:**

Create an overnight travel authorization.

**How to Access:**

Log into the [Bear Trax](#) application and select the **Procurement** task in the Navigator.

**Helpful Hints:**

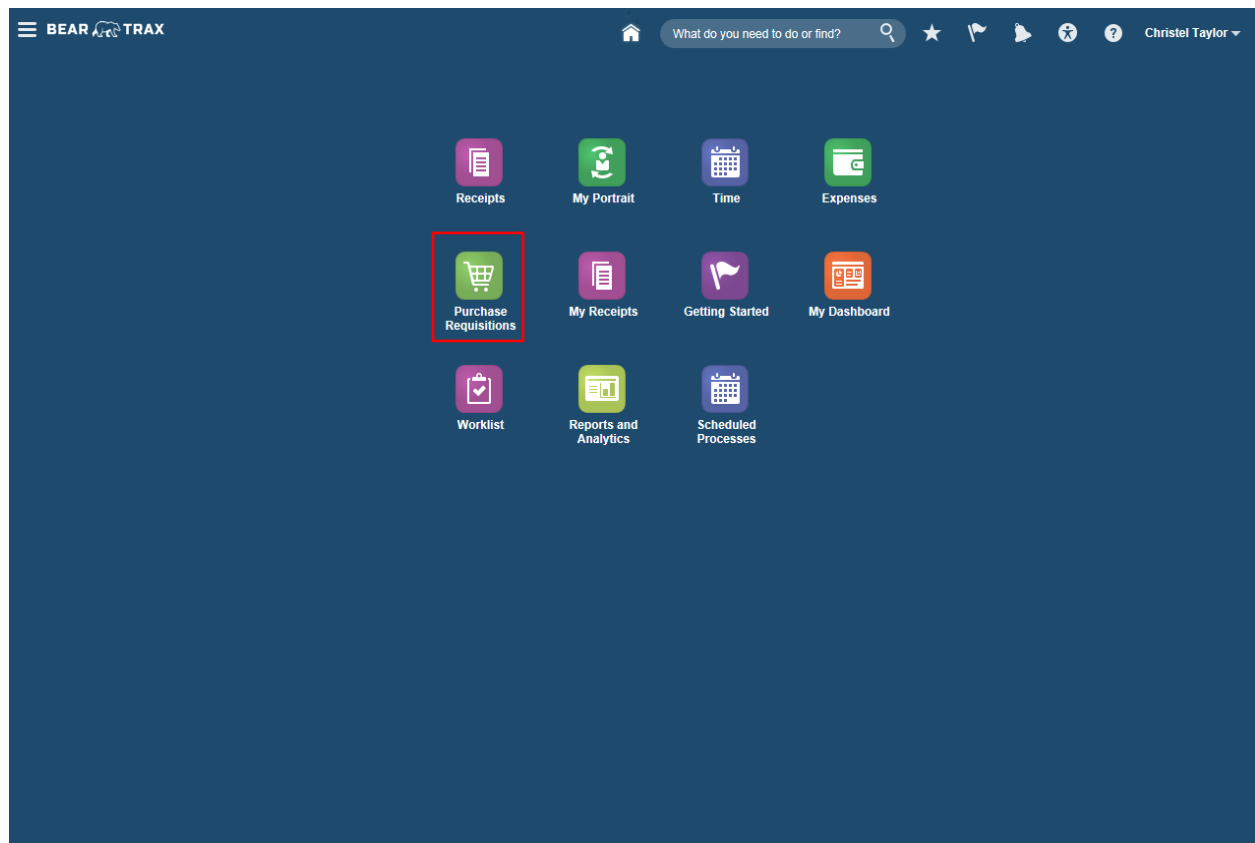
Be sure to keep in mind that...

- This is replacing the previous overnight travel authorization
- This is exclusively for overnight travel authorization
- There will be no more cash advances for travel
- Make sure to use the SSU Travel AUTH supplier as the supplier in the requisition submitted
- Make sure to check the box for Negotiated in order to automatically create a Purchase Order

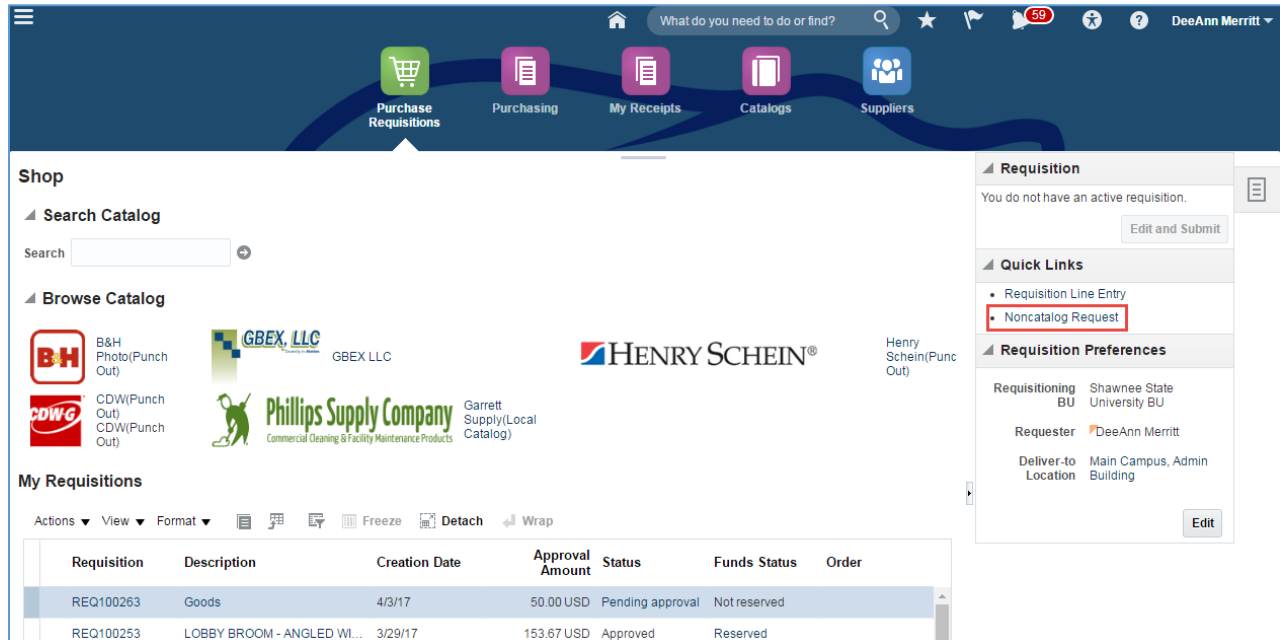
**Procedure:**

Complete the following steps to create an overnight travel authorization:

1. Click on the **Purchase Requisitions** icon.



2. On the right hand side of the page under **Quick Links** select **Noncatalog Request**.



**Shop**

Search Catalog

Search

Browse Catalog

B&H Photo(Punch Out)

CDW(Punch Out)

CDW(Punch Out)

GBEX, LLC

Phillips Supply Company

Garrett Supply(Local Catalog)

HENRY SCHEIN®

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**My Requisitions**

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100263	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
REQ100253	LOBBY BROOM - ANGLED WI...	3/29/17	153.67 USD	Approved	Reserved	

**Requisition**

You do not have an active requisition.

Edit and Submit

**Quick Links**

- Requisition Line Entry
- Noncatalog Request**

**Requisition Preferences**

Requisitioning BU Shawnee State University BU

Requester DeeAnn Merritt

Deliver-to Location Main Campus, Admin Building

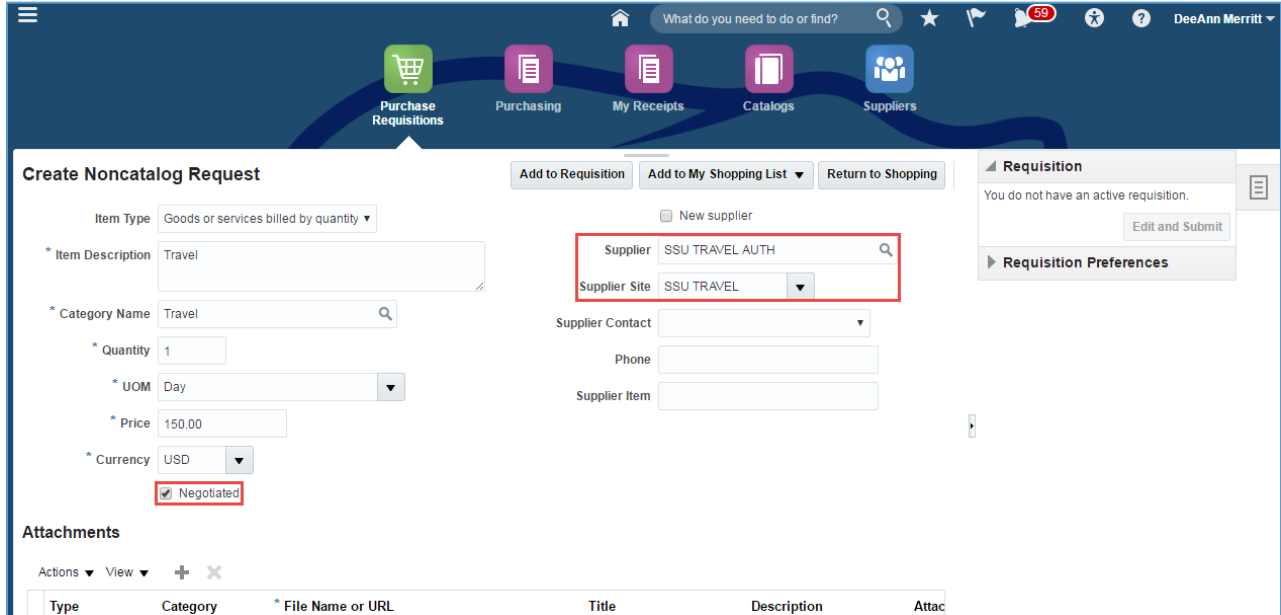
Edit

Complete the following fields:

Field Name	Description
Item Description	Input Traveler name, date of the trip, and destination
Category	Use Travel as the category
Quantity	Just enter 1 as the number here
UOM	Day or EA (Each)
Price	Enter an estimated cost of the trip
Currency	Use USD
Supplier Site	Use SSU TRAVEL AUTH
Negotiated	Always check this box
Item Description	Input Traveler name, date of the trip, and destination

**Note:** Fields marked with an asterisk \* are required.

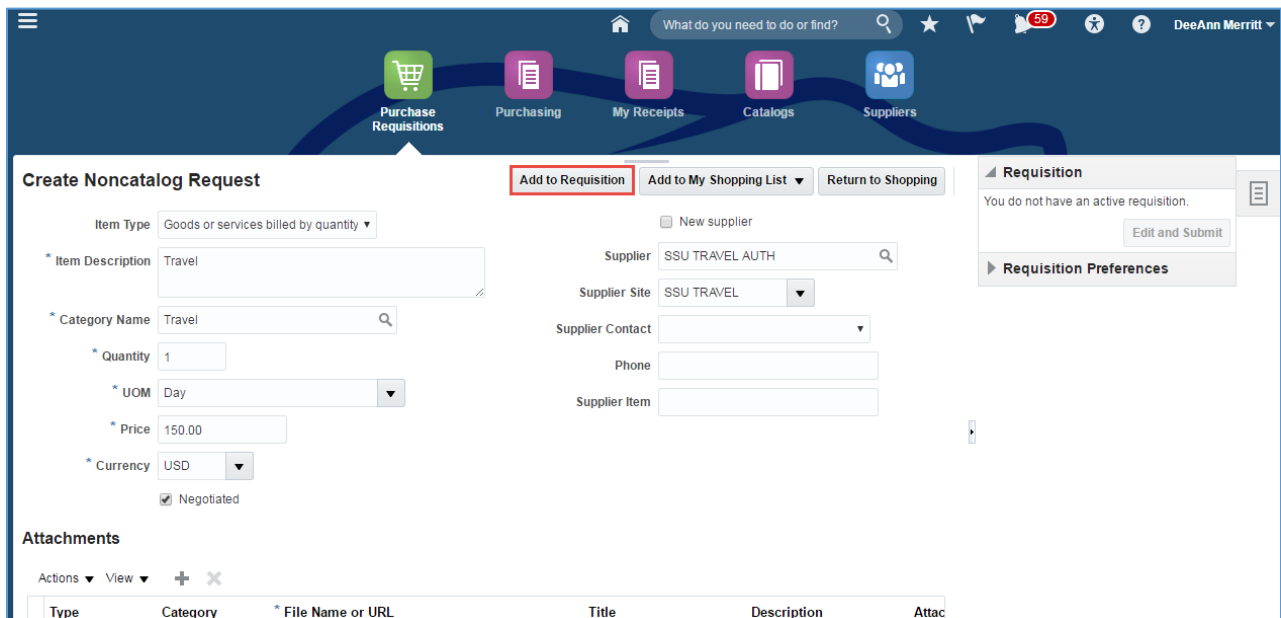
3. Add **SSU TRAVEL AUTH** to the **Supplier** field. Make sure to click in the box next to **Negotiated**.



The screenshot shows the 'Create Noncatalog Request' form. The 'Supplier' field is set to 'SSU TRAVEL AUTH' and the 'Supplier Site' is 'SSU TRAVEL'. The 'Negotiated' checkbox is checked. The 'Item Description' is 'Travel', 'Category Name' is 'Travel', 'Quantity' is '1', 'UOM' is 'Day', 'Price' is '150.00', and 'Currency' is 'USD'. The 'Attachments' table is empty.

Type	Category	* File Name or URL	Title	Description	Attac
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4. Click **Add to Requisition**.

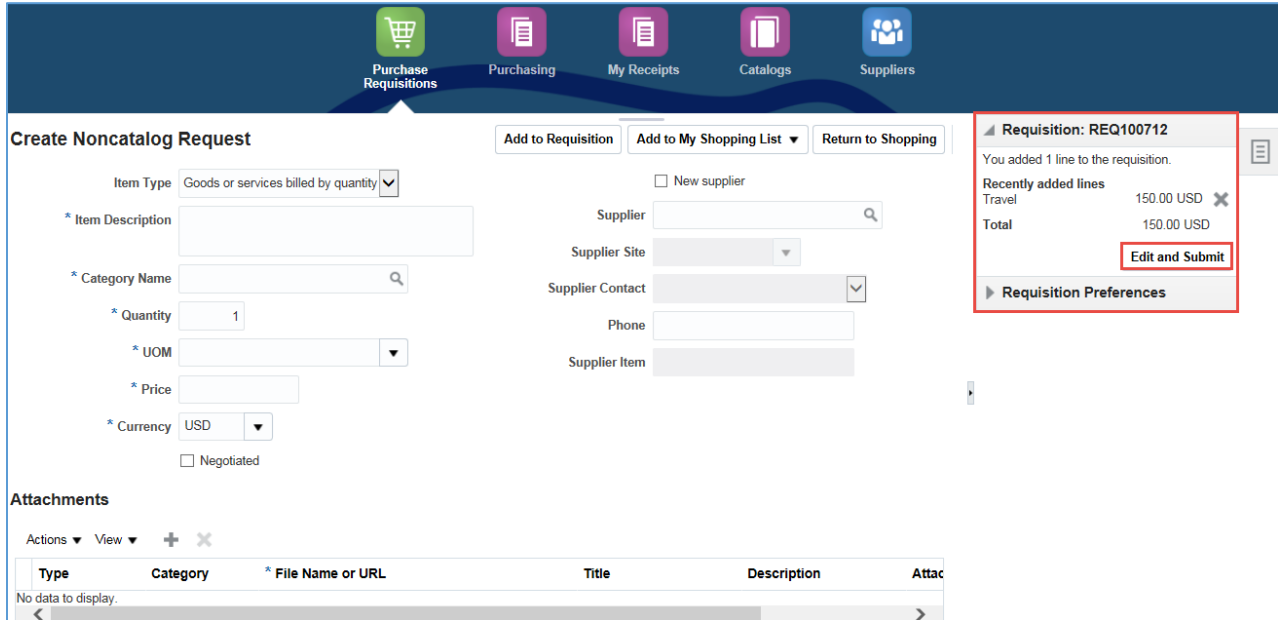


The screenshot shows the 'Create Noncatalog Request' form with the 'Add to Requisition' button highlighted. The 'Supplier' field is set to 'SSU TRAVEL AUTH' and the 'Supplier Site' is 'SSU TRAVEL'. The 'Negotiated' checkbox is checked. The 'Item Description' is 'Travel', 'Category Name' is 'Travel', 'Quantity' is '1', 'UOM' is 'Day', 'Price' is '150.00', and 'Currency' is 'USD'. The 'Attachments' table is empty.

Type	Category	* File Name or URL	Title	Description	Attac
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Newly added requisition information will display on the top right side of the page.

## 5. Click on **Edit and Submit**.



**Create Noncatalog Request**

Item Type: Goods or services billed by quantity

\* Item Description:

\* Category Name:

\* Quantity: 1

\* UOM:

\* Price:

\* Currency: USD

☐ Negotiated

Supplier:

Supplier Site:

Supplier Contact:

Phone:

Supplier Item:

**Requisition: REQ100712**

You added 1 line to the requisition.

Recently added lines

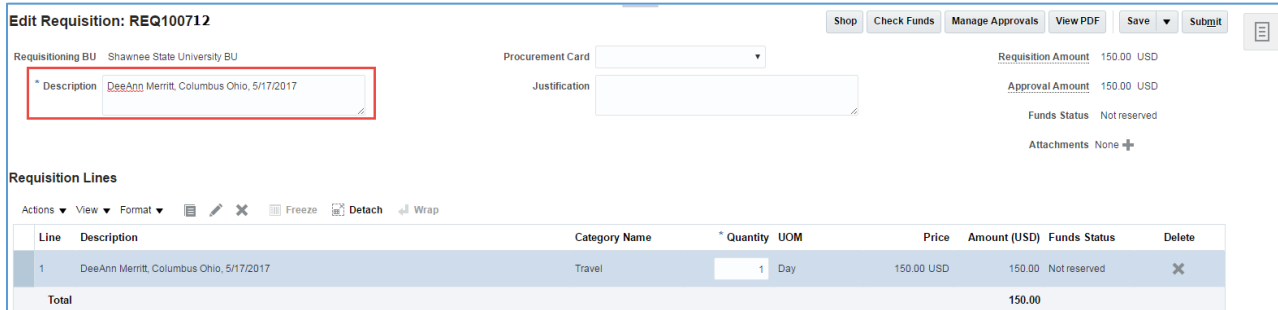
Travel	150.00 USD
<b>Total</b>	<b>150.00 USD</b>

**Edit and Submit**

**Attachments**

Type	Category	* File Name or URL	Title	Description	Attac
No data to display.					

## 6. Add name of person travelling, location of trip, and date of trip in the **Description** field.



**Edit Requisition: REQ100712**

Requisitioning BU: Shawnee State University BU

Procurement Card:

\* Description: DeeAnn Merritt, Columbus Ohio, 5/17/2017

Justification:

Requisition Amount: 150.00 USD

Approval Amount: 150.00 USD

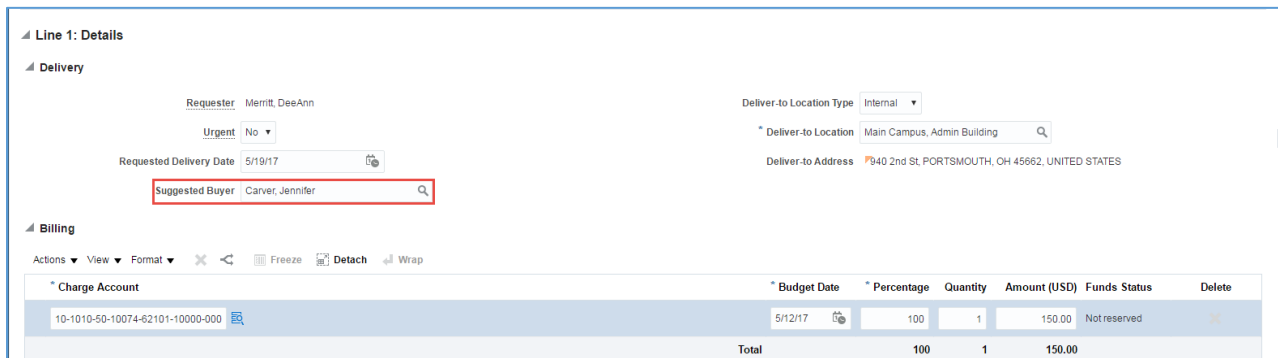
Funds Status: Not reserved

Attachments: None

**Requisition Lines**

Line	Description	Category Name	* Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	DeeAnn Merritt, Columbus Ohio, 5/17/2017	Travel	1	Day	150.00 USD	150.00	Not reserved	X
<b>Total</b>						<b>150.00</b>		

## 7. Enter Carver, Jennifer in the **Suggested Buyer** field. This is for travel authorizations only.



**Line 1: Details**

**Delivery**

Requester: Merritt, DeeAnn

Urgent: No

Requested Delivery Date: 5/19/17

**Suggested Buyer: Carver, Jennifer**

Deliver-to Location Type: Internal

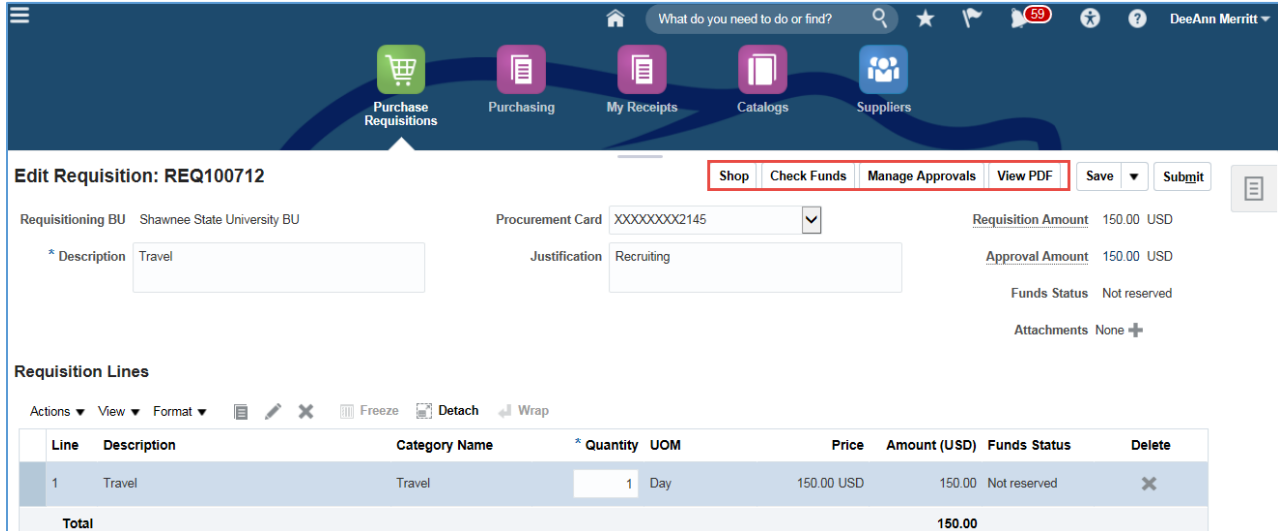
\* Deliver-to Location: Main Campus, Admin Building

Deliver-to Address: P940 2nd St, PORTSMOUTH, OH 45662, UNITED STATES

**Billing**

* Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10074-62101-10000-000	5/12/17	100	1	150.00	Not reserved	X
<b>Total</b>				<b>100</b>	<b>1</b>	<b>150.00</b>

There are action buttons at the top of the page **Shop**, **Check Funds**, **Manage Approvals**, and **View PDF**. These are OPTIONAL, and not required to complete the requisition.



**Edit Requisition: REQ100712**

Requisitioning BU: Shawnee State University BU

Procurement Card: XXXXXXXX2145

\* Description: Travel

Justification: Recruiting

Requisition Amount: 150.00 USD

Approval Amount: 150.00 USD

Funds Status: Not reserved

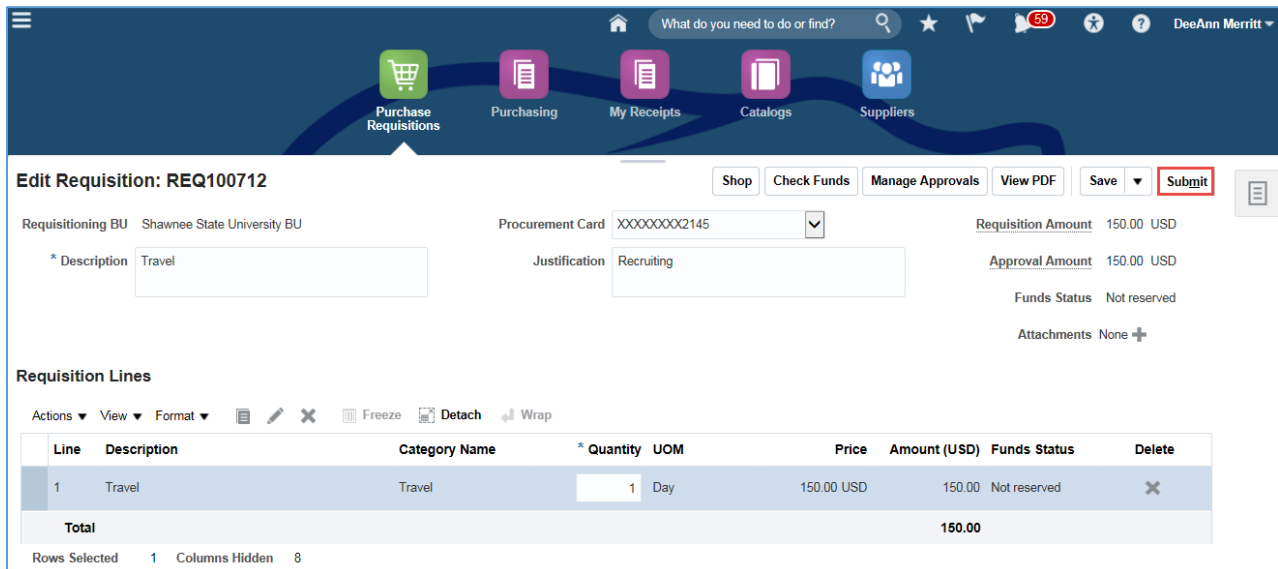
Attachments: None +

**Requisition Lines**

Actions: View, Format, Freeze, Detach, Wrap

Line	Description	Category Name	* Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	Travel	Travel	1	Day	150.00 USD	150.00	Not reserved	X
<b>Total</b>						<b>150.00</b>		

8. Click **Submit** to send the requisition request through the approval process.



**Edit Requisition: REQ100712**

Requisitioning BU: Shawnee State University BU

Procurement Card: XXXXXXXX2145

\* Description: Travel

Justification: Recruiting

Requisition Amount: 150.00 USD

Approval Amount: 150.00 USD

Funds Status: Not reserved

Attachments: None +

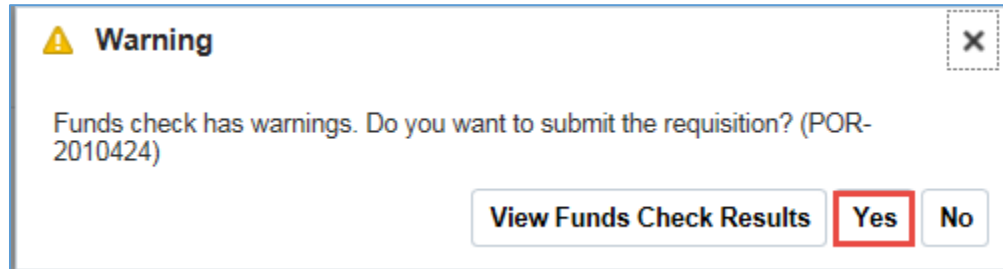
**Requisition Lines**

Actions: View, Format, Freeze, Detach, Wrap

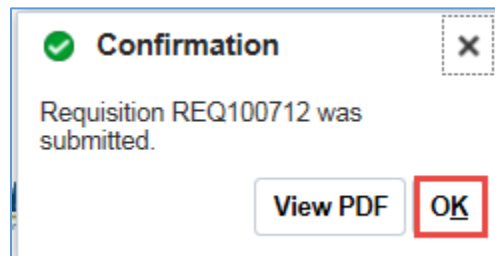
Line	Description	Category Name	* Quantity	UOM	Price	Amount (USD)	Funds Status	Delete
1	Travel	Travel	1	Day	150.00 USD	150.00	Not reserved	X
<b>Total</b>						<b>150.00</b>		

Rows Selected: 1 Columns Hidden: 8

9. You may receive a warning to check funds. Click **Yes** to continue.



10. A confirmation window will appear. Click **OK**.




11. The new requisition line item appears under **My Requisitions** and the requisition status will display as **Pending approval**.

**Shop**


Search Catalog

Search


Browse Catalog




Amazon (Punch Out)




B&H Photo(Punch Out)




CDW(Punch Out)  
CDW(Punch Out)



GBEX LLC



Garrett Supply



Henry Schein

**My Requisitions**

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100712	Travel	5/12/17	150.00 USD	Pending approval	Not reserved	
REQ100604	Test	5/2/17	500.00 USD	Incomplete	Not reserved	

**Requisition**

You do not have an active requisition.

Edit and Submit

**Quick Links**

- Requisition Line Entry
- Noncatalog Request

**Requisition Preferences**

Requisitioning BU: Shawnee State University BU

Requester: DeeAnn Merritt

Deliver-to Location: Main Campus, Admin Building

Edit

**Note:** Make sure to use the Requisition Number on related future Expense Reports. Procurement will need this information to match expenses with Travel Authorizations.

### Final Notes

By following these steps, you have successfully created a purchase requisition for an Overnight Travel Authorization and submitted it for approval.