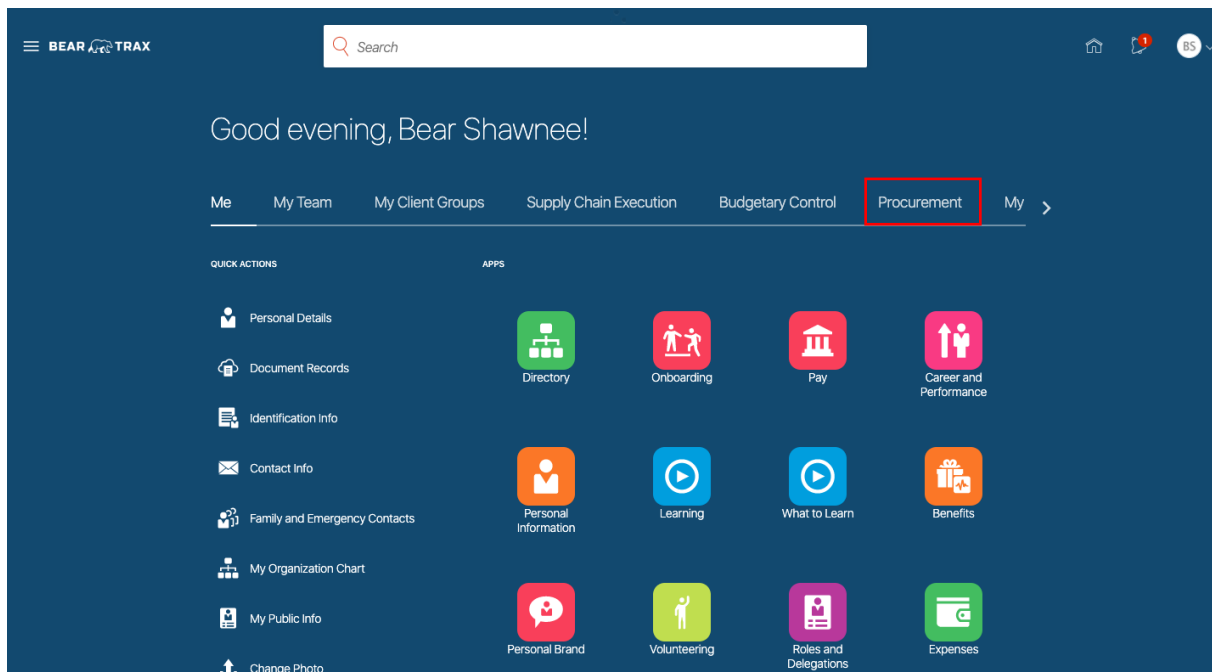


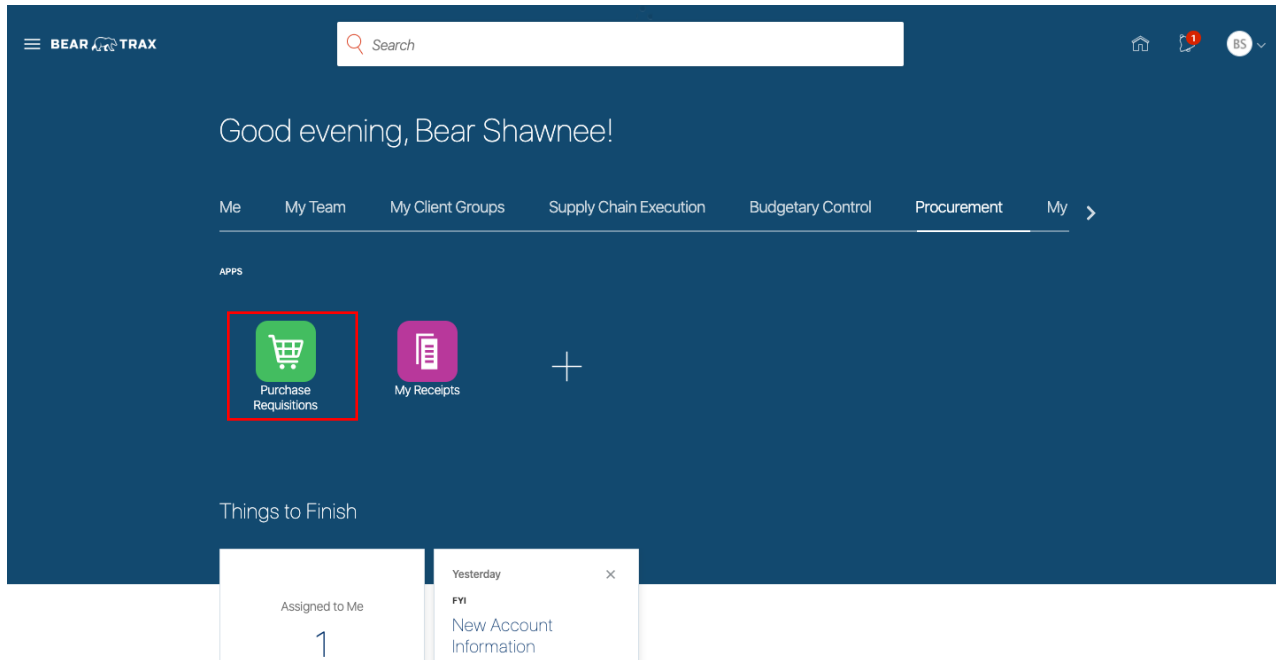
## Procurement: Create Overnight Travel Authorization

*For employees creating an overnight travel requisition*

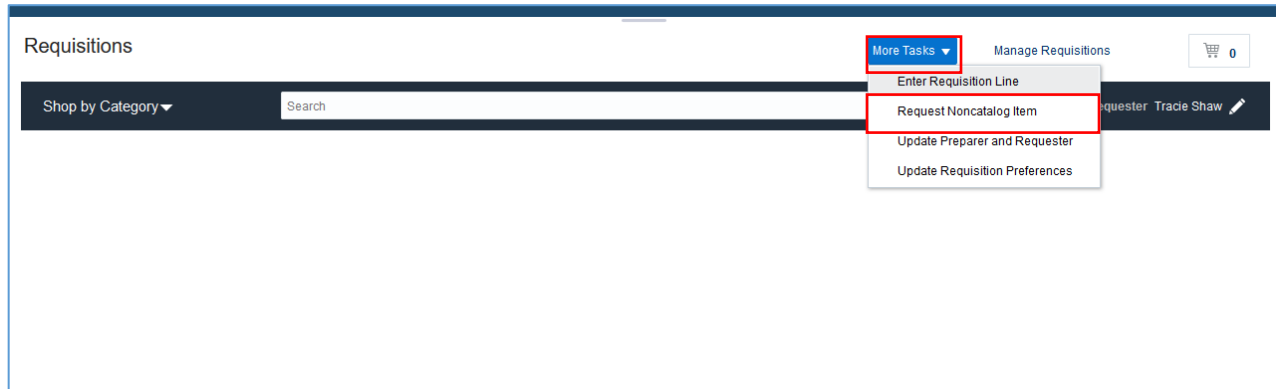
- Purpose:** Create an overnight travel authorization.
- How to Access:** Log into the [Bear Trax](#) application and select the **Procurement** task in the Navigator.
- Helpful Hints:** Be sure to keep in mind that...
- This is replacing the previous overnight travel authorization
  - This is exclusively 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 **Procurement** icon – then **Purchase Requisitions**.





2. Select **More Tasks** for the drop down list to appear. Select **Request Noncatalog Item**.



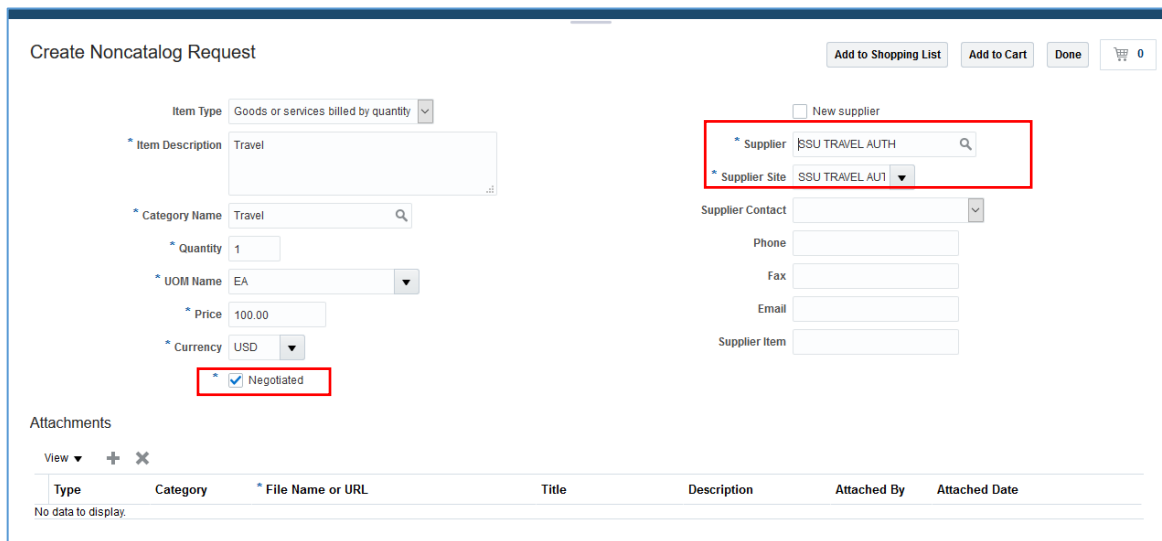
Complete the following fields:

| Field Name       | Description  |
|------------------|--|
| Item Description | Input Traveler name, date of the trip, and destination |
| Category Name    | Use Travel as the category                             |
| Quantity         | Just enter 1 as the number here                        |
| UOM Name         | Day or EA (Each)                                       |

| Field Name       | Description  |
|------------------|--|
| Price            | Enter an estimated cost of the trip                    |
| Currency         | Use USD  |
| Supplier         | 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** and **Supplier Site** field. Make sure to click in the box next to **Negotiated**.



Create Noncatalog Request

Item Type: Goods or services billed by quantity

\* Item Description: Travel

\* Category Name: Travel

\* Quantity: 1

\* UOM Name: EA

\* Price: 100.00

\* Currency: USD

\*  Negotiated

Supplier: SSU TRAVEL AUTH

\* Supplier Site: SSU TRAVEL AUTH

Supplier Contact: [Dropdown]

Phone: [Text]

Fax: [Text]

Email: [Text]

Supplier Item: [Text]

Attachments

| Type                | Category | * File Name or URL | Title | Description | Attached By | Attached Date |
|---------------------|----------|--------------------|-------|-------------|-------------|---------------|
| No data to display. |          |                    |       |             |             |               |

**4.** Click **Add to Cart** then **Done**.

Create Noncatalog Request

[Add to Shopping List](#)
[Add to Cart](#)
[Done](#)
0

Item Type: Goods or services billed by quantity

\* Item Description: Travel

\* Category Name: Travel

\* Quantity: 1

\* UOM Name: EA

\* Price: 100.00

\* Currency: USD

Negotiated

New supplier

\* Supplier: SSU TRAVEL AUTH

\* Supplier Site: SSU TRAVEL AU1

Supplier Contact: [Dropdown]

Phone: [Text]

Fax: [Text]

Email: [Text]

Supplier Item: [Text]

Attachments

View [Dropdown] + X

| Type                | Category | File Name or URL | Title | Description | Attached By | Attached Date |
|---------------------|----------|------------------|-------|-------------|-------------|---------------|
| No data to display. |          |                  |       |             |             |               |

Newly added requisition information will display under **Recent Requisitions**.

5. Click on the **Requisition Name (highlighted in blue)**.

Requisitions

More Tasks Manage Requisitions 1

Shop by Category Search Requester Trade Shaw

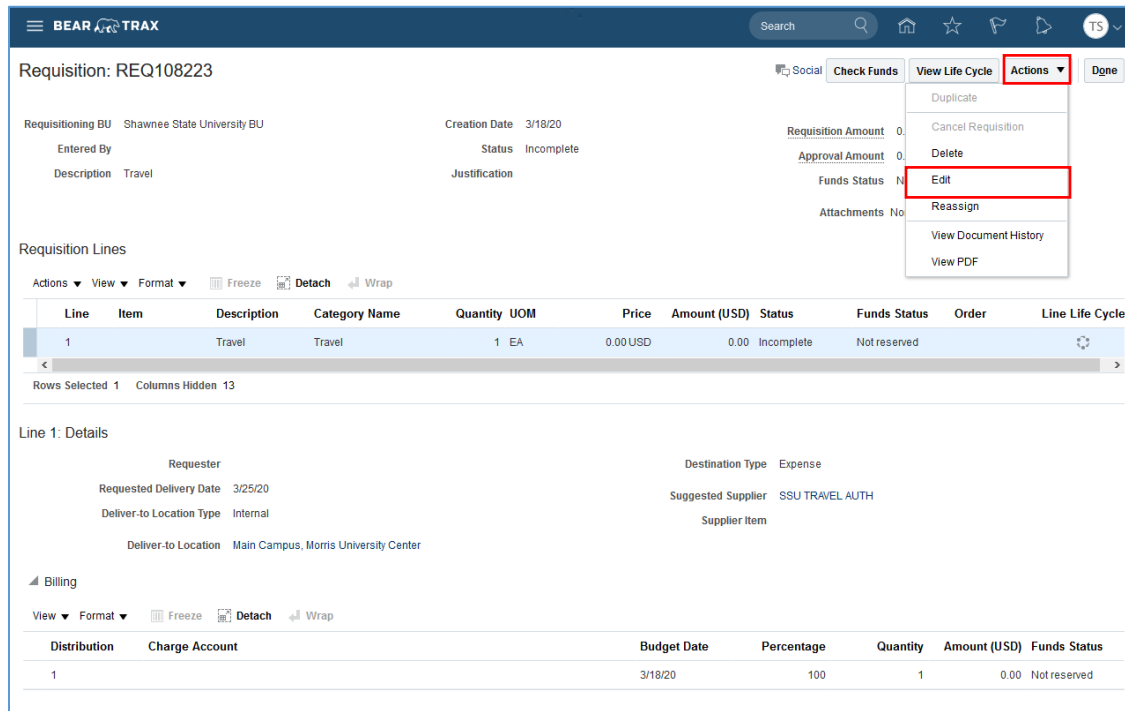
Recent Requisitions [View More](#)

|           |        |            |
|-----------|--------|------------|
| REQ108223 | Travel | Incomplete |
|-----------|--------|------------|

Recent Purchases

No data to display.

6. Click **Actions – Edit**.



Requisition: REQ108223

Requisitioning BU: Shawnee State University BU  
 Entered By: [Name]  
 Description: Travel

Creation Date: 3/18/20  
 Status: Incomplete  
 Justification:

Requisition Amount: 0.00  
 Approval Amount: 0.00  
 Funds Status: Not reserved  
 Attachments: None

Requisition Lines

| Line | Item | Description | Category Name | Quantity | UOM | Price    | Amount (USD) | Status     | Funds Status | Order | Line Life Cycle |
|------|------|-------------|---------------|----------|-----|----------|--------------|------------|--------------|-------|-----------------|
| 1    |      | Travel      | Travel        | 1        | EA  | 0.00 USD | 0.00         | Incomplete | Not reserved |       |                 |

Line 1: Details

Requester: [Name]  
 Requested Delivery Date: 3/25/20  
 Deliver-to Location Type: Internal  
 Deliver-to Location: Main Campus, Morris University Center

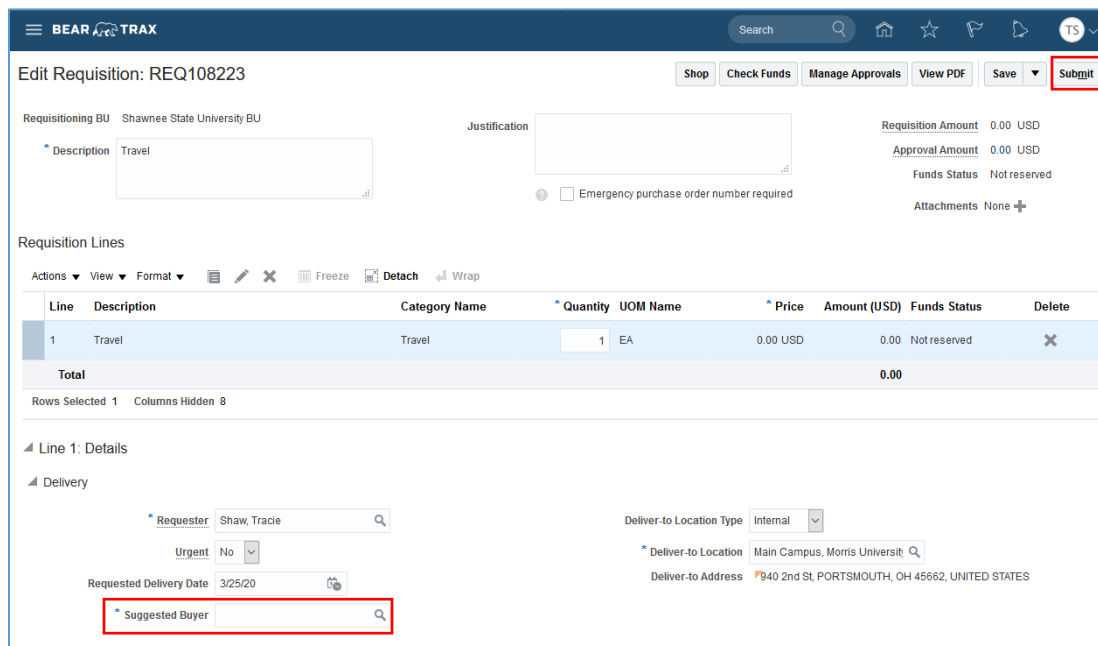
Destination Type: Expense  
 Suggested Supplier: SSU TRAVEL AUTH  
 Supplier Item:

Billing

| Distribution | Charge Account | Budget Date | Percentage | Quantity | Amount (USD) | Funds Status |
|--------------|----------------|-------------|------------|----------|--------------|--------------|
| 1            |                | 3/18/20     | 100        | 1        | 0.00         | Not reserved |

7. Add name of person travelling, location of trip, and date of trip in the **Description** field. Enter Carver, Jennifer in the **Suggested Buyer** field. This is for travel authorizations only.

Once finished editing, click **Submit**.



Edit Requisition: REQ108223

Shop | Check Funds | Manage Approvals | View PDF | Save | **Submit**

Requisitioning BU: Shawnee State University BU  
 Description: Travel  
 Justification: [Text Area]  
 Requisition Amount: 0.00 USD  
 Approval Amount: 0.00 USD  
 Funds Status: Not reserved  
 Attachments: None

Requisition Lines

| Line         | Description | Category Name | *Quantity | UOM Name | *Price   | Amount (USD) | Funds Status | Delete |
|--------------|-------------|---------------|-----------|----------|----------|--------------|--------------|--------|
| 1            | Travel      | Travel        | 1         | EA       | 0.00 USD | 0.00         | Not reserved | X      |
| <b>Total</b> |             |               |           |          |          | <b>0.00</b>  |              |        |

Line 1: Details

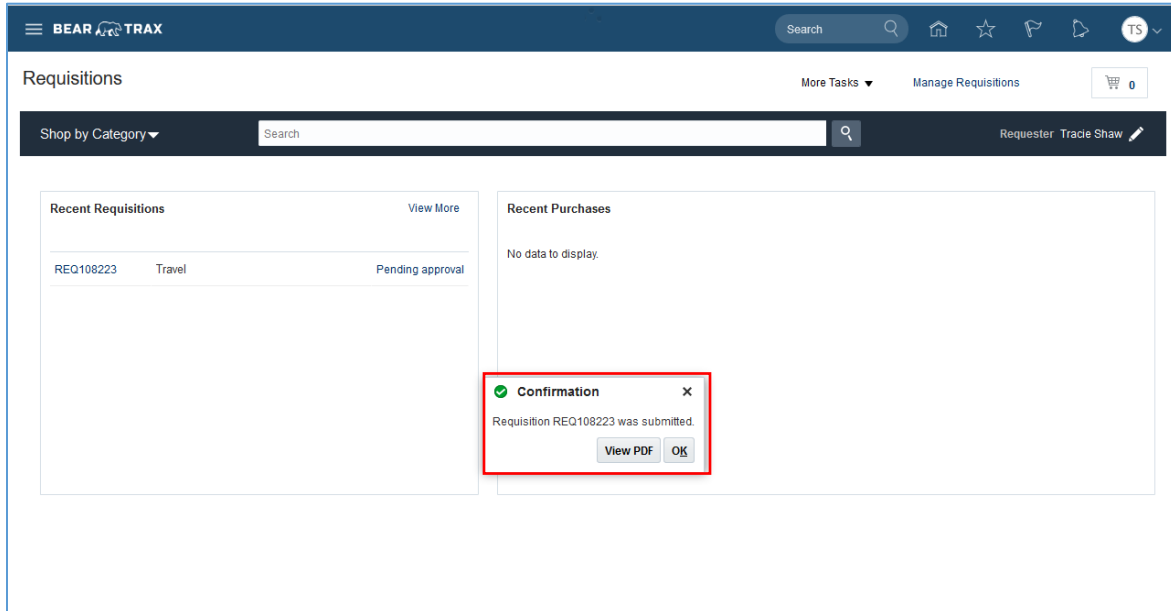
Delivery

\* Requester: Shaw, Trade  
 Urgent: No  
 Requested Delivery Date: 3/25/20  
 \* Suggested Buyer: [Text Field]

Deliver-to Location Type: Internal  
 \* Deliver-to Location: Main Campus, Morris University  
 Deliver-to Address: 940 2nd St, PORTSMOUTH, OH 45662, UNITED STATES

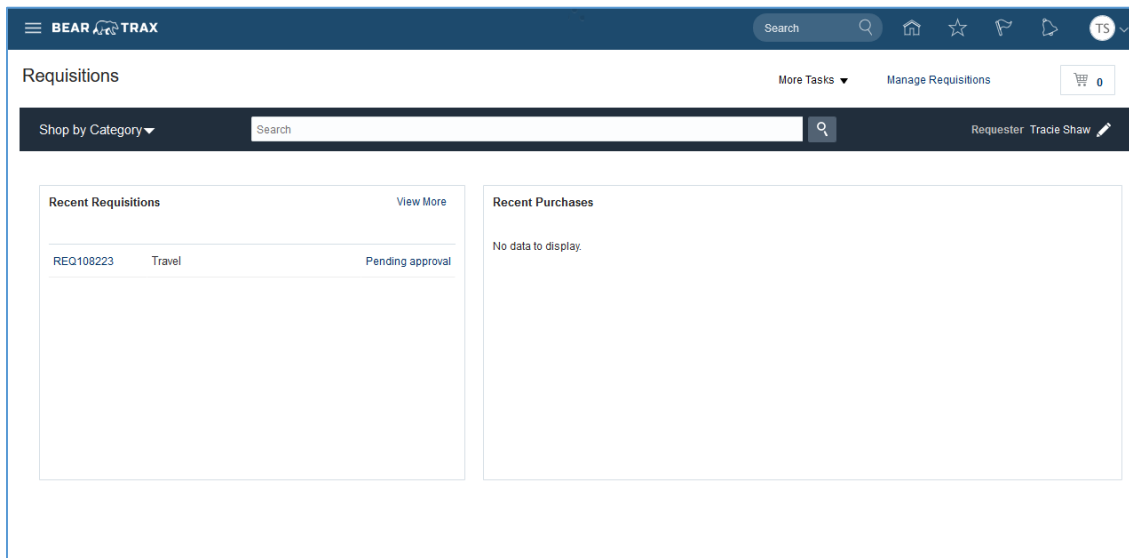
There are action buttons at the top of the page **Shop**, **Check Funds**, **Manage Approvals**, and **View PDF**. These are OPTIONAL, and not required to complete the requisition.

8. After submission, a Confirmation box will appear. Click **OK**.



You

will now see the Travel Requisition Under Recent Requisitions with a status of *Pending Approval*.



**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.