Before creating a TA in Onesource:

NOTE: Please refer to the original Grady Travel Authorization form as needed for estimated expense and chartstring approval before creating a TA in Onesource. *If using other funding sources than through your department, then you will need to use the internal TA for Grady so you can have documentation that you have the correct chartstring and it has been approved for you to use it.

How to create a Travel Authorization in Onesource:

Step 1:	Under "Employee Self Service" tab, click "Travel Authorizations"
Step 2:	Click "Add Travel Authorization"
Step 3:	Type a brief description of why you're traveling. Ex "AEJMC Conference 2019"
Step 4:	Select the appropriate Business Purpose for your travel:
	Select from 4 options: *Group Travel paid by Employee *In-State Travel *(don't need a TA for in-state travel)* *Non-Travel Reimbursement *(shouldn't be selected, as non-travel reimbursements are not on a TA)* *Out-of-State-Travel
Step 5:	Provide more detail in Comments of where/why you're traveling. Ex "to attend AEJMC conference from 8/7 - 8/10, 2019"
Step 6:	Select "Internal" for **Billing Type**. *This will always be Internal*
Step 7:	**Accounting Tag -** For now we are leaving this blank as we are not using accounting tags (shortcuts) for chartstrings.
Step 8:	Click **"Accounting Default"**
Step 9:	**Chartstring:** Be sure to type in the correct and complete Chartstring (starting with the "Bud Ref", or current <u>fiscal</u> year) to be used for your travel expenses. If your expenses are to be split <u>evenly</u> across more than one Chartstring, click the "+" button next to your chartstring and enter in the second chartstring on that new line and type in "50%" in the first boxes on each line. When you've finished, click "done". This will automatically fill in the chartstring info next to your expense items below.
Step 10:	**NOTES:** Click **"notes"** and provide a detailed breakdown of what your expenses are estimated to be for each item. Use the Grady TA form as a guide to what information we need in the notes if needed. Be sure to also provide the "who, what, when, where, and why" for this particular trip above or below your cost breakdown to provide further clarification of this travel. The more info you provide, the better. Click "done" when finished.
	***Info we need to see in Notes, *if applicable,* for each trip: **Lodging:** (X amount per day) x (X nights)= X total for Lodging **Airfare:** X amount *(if direct billed, indicate that in the notes as well so we know you will not be paying for this with your own funds)* **Meals:** Total amount for meals *($X for 1 full day and $X for travel day) <- provide the daily rate you are using so we know on the backend when you submit your travel expense report after the trip takes place* **Mileage to/from airport:** X number of miles (roundtrip) x .5454 = TOTAL $X for mileage **Airport Shuttle:** X amount for roundtrip airport shuttle **Registration Fees:** X amount **Airport Parking:** X amount for X days= TOTAL **Ground transportation on site**: TOTAL amount for taxi, uber, train, rental car, bus, etc expected to be used for program related purposes
Step 11:	**Travel From and Travel To:** Always use "Headquarters" as your travel <u>from</u> location. Use the eyeglass to search for the location that you will be traveling to. (Search by State then City)
Step 12:	**Date from and Date To:** Enter the dates starting and ending with travel dates.
Step 13:	**Expense Type:** Next to the correct **Expense Type** at the bottom, *domestic or International,* provide a description of what the expenses are for (Ex. "airfare, mileage, ground transp"... Then provide the TOTAL amount for your estimated expenses in the "amount" box to the right.
Step 14:	****If your expenses are to be split across more than one chartstring,** (if you didn't type in the Accounting Defaults tab earlier) click the **accounting box** to the right of "amount" and enter in the chartstring(s) to be used and be sure to provide the accurate amount to be expensed against each different chartstring. If you are not sure, consult the person who handles your budgets <u>before</u> submitting. If you indicated for the expense to be paid 50/50 with two chartstrings in the defaults tab, you should see that the total amount is already split for you.
Step 15:	**Note: If your airfare is going to be direct billed by a travel agency**, separate that expense from the rest and put this information in the **"Direct bill UGA"** category. Then select the correct merchant that you will be using for purchasing that flight and the estimated cost. KEEP RECORD OF YOUR TICKET NUMBER, YOU WILL NEED IT FOR THE EXPENSE REPORT. Review chartstring information to ensure it is accurate.
Step 16:	**Submit:** Once you know all the information is in and the notes are accurate and detailed, hit **"Submit"** for approval.