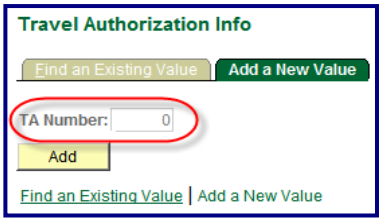
ENTERING A TRAVEL AUTHORIZATION REQUEST

In PeopleSoft Financials

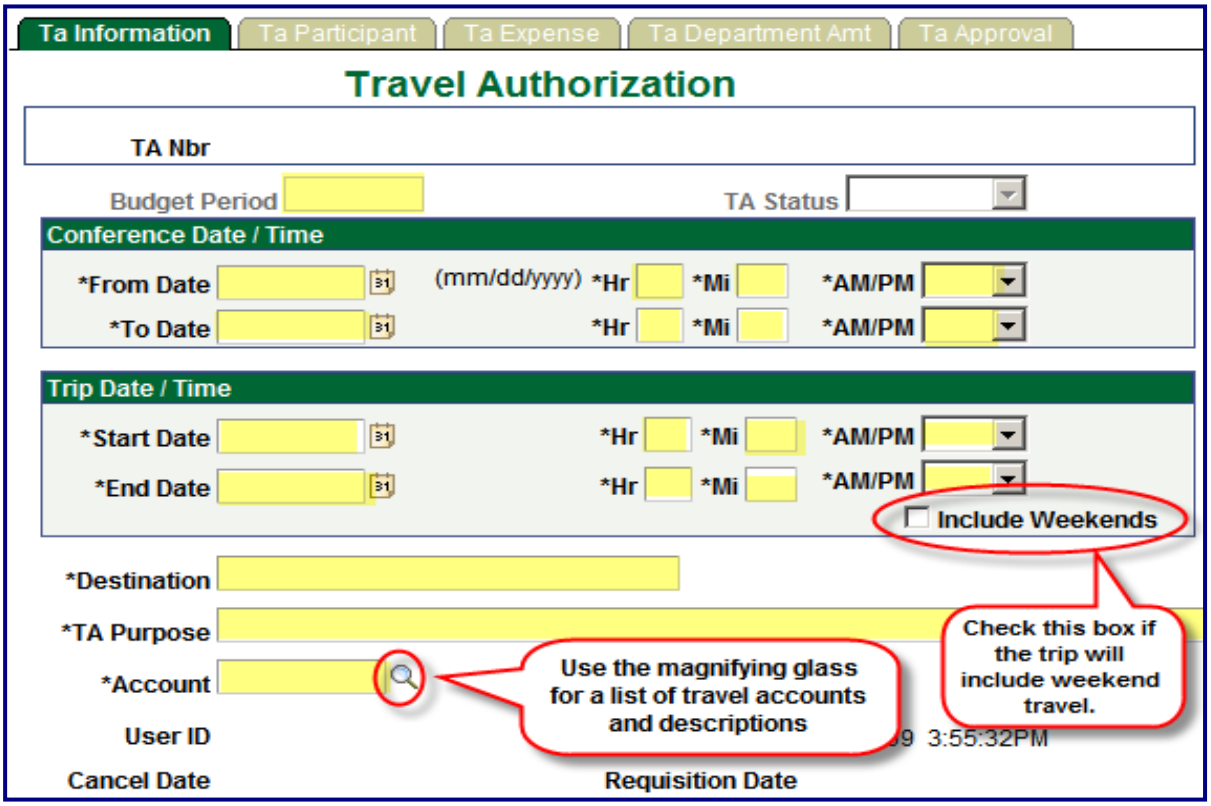
1. After logging in to PeopleSoft Financials, navigate to **Travel Authorization Info:**
   Southeastern TA Data -> Travel Authorization Info

2. The **TA Number** defaults to zero and is grayed out. You cannot enter a number in this field. The system assigns a TA number when the travel authorization is saved.

   Click the **Add** button.

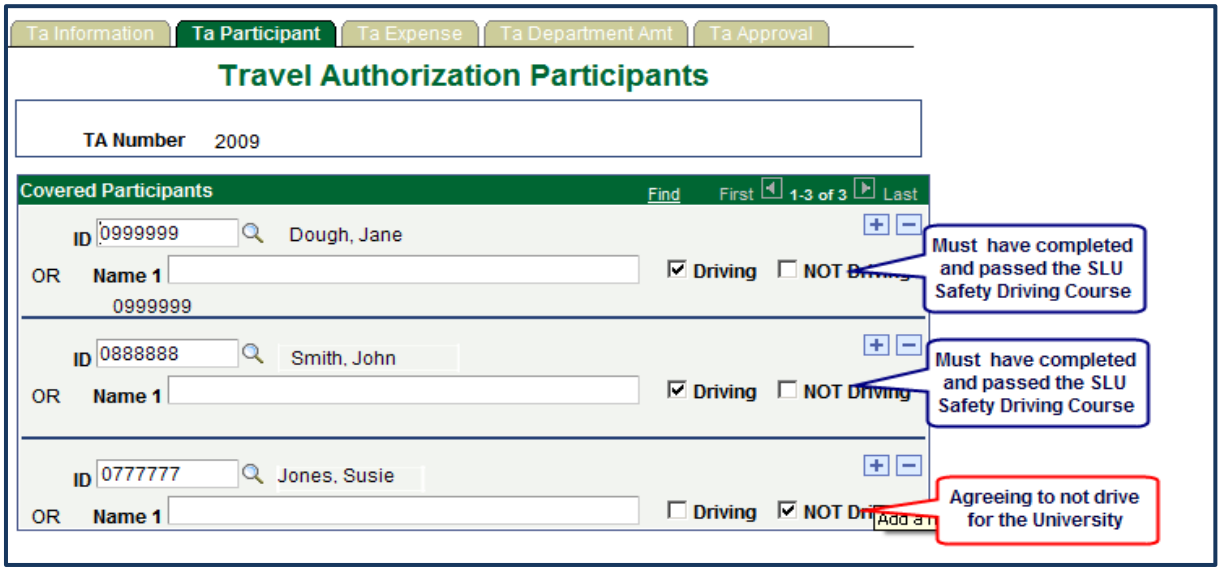


3. The **Travel Authorization** page allows you to enter the details about the trip. You must complete all fields with an (*) (even if you are not attending a conference).



4. Click the **TA Participant** tab.

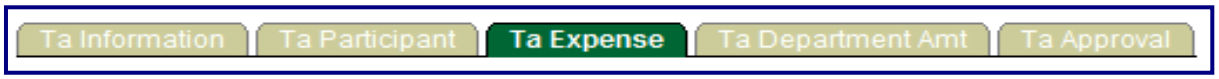
5. When a participant is entered, you will have the option of selecting "Driving" or "NOT Driving". If "Driving" is selected, the TA program will verify that the participant is a certified driver. If "NOT Driving" is selected, the participant is agreeing that he/she will not be authorized to drive for the university on this trip, and WILL NOT be reimbursed for any driving related expenses. Driving related expenses include the following expense codes: Car Person (mileage), Car Rental, and Parking. When selecting "NOT Driving", the following warning message will appear: ***By selecting "Not Driving" you are agreeing that you will not drive for the university on this trip. You will not be reimbursed for any driving related expenses.*** You can click OK to continue.



With the new TA program multiple drivers will be able to be included on one TA. If six participants are traveling to a conference and two will be driving, both driving participants will be selected as drivers and eligible for reimbursement of driving related expenses. Please remember that at least one participant must be selected as a driver. *Note: If a traveler is not a university employee or student, and does not have a work number (W#), enter their name in the* ***Name 1*** *field.*

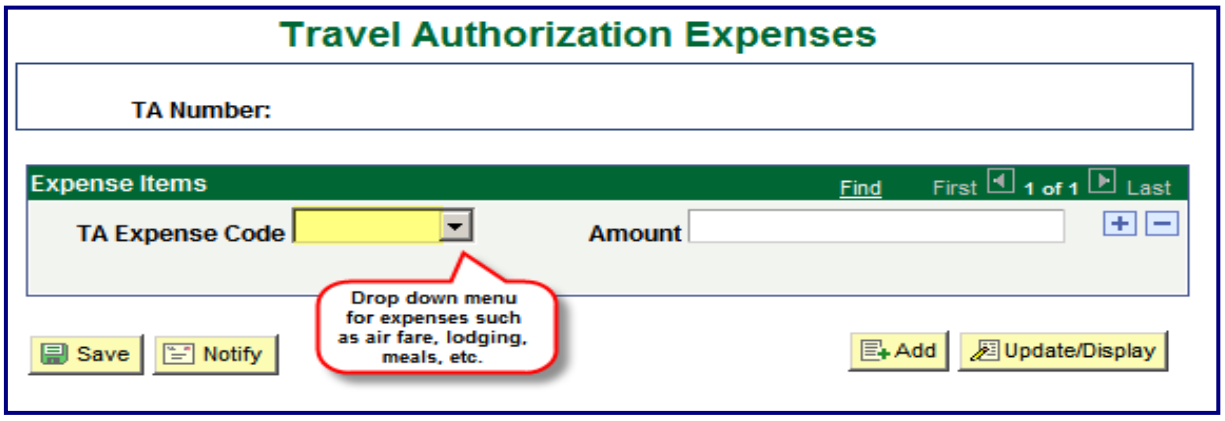
NOTE: If a student is required to drive when traveling for the university, they must be a certified driver and included on the TA as "Driving". Once the student has completed the Certified Driving on-line course the office they are traveling for will need to notify Camille Moniotte in the Safety/Hazardous Materials Management office at ext. 2157 to have their records updated in the Safety database.

6. Click the **TA Expense** tab.



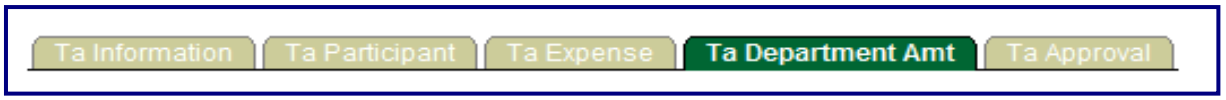
7. The **Travel Authorization Expenses** page allows you to enter all of your anticipated travel expenses such as **Lodging***, Meals, Airfare, Car (Personal and Rental), Registration Fees, etc. Click on the pull down menu to pick the appropriate expense. Enter the expense amount in the Amount field. To enter another expense, click on the "plus" icon. Continue adding all expenses accordingly.

* *If the Conference lodging rate exceeds the state allowed rate, a memo must be submitted for the appropriate Vice-President's approval and must be attached to the expense account. Please check Travel Regulations for detailed information."*

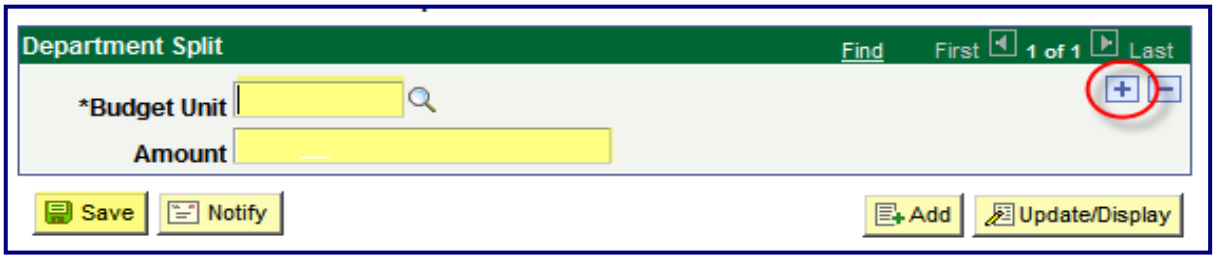


8. When entering airfare, a warning message appears stating that you must use the Short's Travel Management. Click the **OK** button.

9. When all expenses have been added, click on the **TA Department Amt** tab.



10. On this screen, enter each **Budget Unit** that will pay for any of the trip's travel expenses and the amount that it will pay.



11. Once the Travel Authorization request has been saved, PeopleSoft will generate a unique **TA number**.

12. To determine the approval status of the TA, return to the **Travel Authorization Info** menu option, choose **Find An Existing Value**, select the TA by entering search fields, then choose the **TA Approval** tab. If the **Date/Time** field appears on a line, that approval level has been completed.

NOTE: If a Travel Authorization needs to be canceled for any reason, you ***must*** contact the Travel Office for assistance (x2089).