

Process Name: Creating and Working with Travel Authorization	Date Created: 2/18/2020
Functional Area: Accounting Services	Last Updated: 2/18/2020
Purpose: To outline the process of creating and submitting a travel authorization within PeopleSoft Financials	
Reviewed By <or> Reviewed By:	Director of Accounting Services
Process Frequency:	As Needed
Prerequisite Process: N/A	
Corresponding Policy:	

Create a Travel Authorization (Classic View)

1. Log into PeopleSoft Self Service: <http://fprod-selfservice.gafirst.usg.edu>.
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel & Expense or Travel & Expense Center**
6. Select **Travel Authorization**
7. Select **Create/Modify**
8. Select **Add**
9. In the **Description** field, enter a short explanation of your planned travel
10. Select the appropriate **Business Purpose** in the drop down list
11. Enter or search/select the **Destination Location (if destination is not listed, select “other” for that state)**
12. In the **Date From** field, enter the starting date of travel (only future dates can be entered on travel authorizations)
13. In the **Date To** field, enter the ending date of travel
14. To add attachments to your Travel Authorization, select the **Attachments** link
15. Select the **Accounting Defaults** link
 - a. Chartfield information is populated from your **User Profile**, yet it is good practice to review this information to ensure it is accurate and applicable to your current transaction
 - b. To edit/update a chartfield for the entire Travel Authorization (each transaction line), update the information here under the **Accounting Defaults** link; to edit/update a chartfield just for a particular line, that is done after adding the line to the Travel Authorization
 - c. After reviewing and/or editing Chartfields, click **OK**
16. For each expense type you wish to add to the Travel Authorization:
 - a. Enter the applicable date for the Expense type
 - b. Select the **Expense Type** drop down and select the Expense Type
 - c. Enter the description*N for the expense line (fields are based on the expense type)

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- i. For mileage, you will need to enter the miles, the originating location and the destination location
 - d. Select the **Payment type** for the Expense type to show how you will pay for the expense.
If the expense type is mileage, select N/A (e.g. Mileage)
17. Lines with errors are marked with a red flag. Click the red flag, review the comment, and correct the error(s)
18. To save the Travel Authorization without submitting, select **Save for Later**
19. To submit the Travel Authorization for approval, select **Submit**

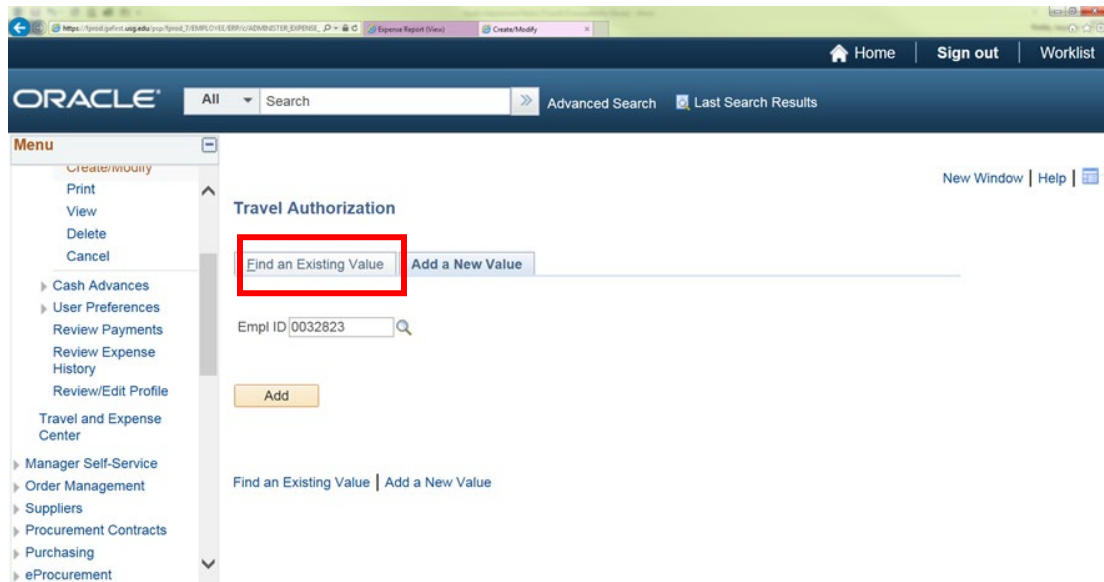
View Travel Authorization (Classic View)

1. Access PSFIN Self-Service: <http://fprod-selfservice.gafirst.usg.edu>.
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel & Expense or Travel & Expense Center**
6. Select **Travel Authorization**
7. Select **View**
8. Enter the **Travel Authorization ID** and click **Search** or click **Search** (with the ID field blank) to display all Travel Authorizations available for modification.
9. Select the **Travel Authorization ID** link to view the transaction
10. The Travel Authorization is displayed in a read-only format
11. The **Approval History** section displays the approval levels and names of the approvers (if not pooled) which are still required for the transaction
12. The **Action History** section displays any actions that have been taken on the transaction

Modify Travel Authorization (Classic View)

1. Access PSFIN Self-Service: <http://fprod-selfservice.gafirst.usg.edu>.
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel Authorization**
6. Select **Create/Modify**
7. On the **Find an Existing Value** tab

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8. Enter the **Travel Authorization ID** and click **Search** or click **Search** (with the ID field blank) to display all Travel Authorizations available for modification.
9. Select the **Travel Authorization ID** link to modify it.
10. Modify the Travel Authorization in the same fashion as you created it.

Print Travel Authorization (Classic View)

1. Access PSFIN Self-Service: <http://fprod-selfservice.gafirst.usg.edu>.
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel and Expenses**
6. Select **Travel Authorization**
7. Select **Print**
8. Enter the **Travel Authorization ID** and click **Search** or click **Search** (with the ID field blank) to display all Travel Authorizations
9. Select the **Travel Authorization ID** link to view the transaction
10. A read-only view of the Travel Authorization is displayed
11. Select the **Print Travel Authorization** link
12. A new window/tab will automatically open which will display the printed travel authorization. Note that this may take several minutes
13. Use the print function on your browser to print the report after it displays
14. When you have finished viewing and/or printing the report, close the report window to return to the Travel Authorization view page

Delete Travel Authorization (Classic View)

1. Access PSFIN Self-Service: <http://fprod-selfservice.gafirst.usg.edu>.

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2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel and Expenses**
6. Select **Travel Authorization**
7. Select **Delete**
8. Enter the **Travel Authorization ID** or click **Search** and locate the Travel Authorization needing to be deleted
9. Put a checkmark in the appropriate box to select the travel authorization you wish to delete
10. Select the **Delete Selected Authorization(s)** button
11. The Delete Confirmation message is displayed

Note: Travel Authorizations can only be deleted if they are in the “pending” stage

Cancel Travel Authorization (Classic View)

1. Access PSFIN Self-Service: <http://fprod-selfservice.gafirst.usg.edu>.
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel and Expenses**
6. Select **Travel Authorization**
7. Select **Cancel**
8. Select **Search**
9. Put a checkmark in the appropriate box to select the travel authorization you wish to cancel
10. Select the **Cancel Selected Authorization(s)** button
11. The Cancel Confirmation message is displayed
12. Select **OK**

Note: Travel Authorizations can only be canceled if they are in the “approved” stage

Save a Travel Authorization (TAuth) in PDF

1. Navigator
2. Select **NavBar Icon** (last icon in top right)
3. Select **Navigator**
4. Select **Employee Self-Service**
5. Select **Travel and Expenses**
6. Select **Travel Authorization**
7. Select **View or Print** (whichever button is available)
8. Search or Select Travel Authorization to Print
9. Travel Authorization Appears

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10. Select **View Printable Version**
11. Travel Authorization Printable View Appears
12. Right Click on Travel Authorization
13. Select **Print**
14. Print Screen Appears
15. Under “**Destination**” Select Change Button
16. Under “Print Destination” Select **Save as PDF**
17. Save the PDF Document (Status of document should read Approved)
18. Attach Document to Payment Request