GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft 9.2

EX.010.033 - Creating a Public Travel Authorization Template

Purpose	• To identify the reasons for creating a public travel authorization template. • To identify what the effective date should be for public templates. • To create a public travel authorization template.
Description	To reduce time and errors in preparing Travel Authorizations, users can create templates that reflect typical combinations of expense items. The system administrator sets up public templates for all employees to use. Employees set up user templates for their own personal use. For instructions on how to set up personal travel authorization templates, see business process EX.010.035.
Security Role	**BOR_EX_SETUP_CONFIG**
Dependencies/ Constraints	None
Additional Information	None

Procedure

For this topic, create a Public Travel Authorization Template for Meal Expenses, to include Breakfast, Lunch and Dinner.

Step	Action
1.	Click the **NavBa**r icon.
2.	Click the **Menu** link.
3.	Click the **Set Up Financials/Supply Chain** link.
4.	Click the **Product Related** link.
5.	Click the **Expenses** link.
6.	Click the **Management** link.
7.	Click the **Template** link.
8.	To alter an existing public template, search for that template in the **Find an Existing Value** Tab. To create a new public template, click the **Add a New Value** tab.
9.	Click the **Add a New Value** tab.
10.	Click the **Look up SetID** button.
11.	Select the **SetID** from the list option.
12.	Enter "**MEALS**" in the **Document Template** field.
13.	Click the **Template Type** list.
14.	Click the **Travel Authorization** list item.
15.	Click the **Add** button.
16.	The effective date should be changed to 01/01/1901 for consistency purposes. Enter "**01/01/1901**" in the **Effective Date** field.
17.	Enter "**Meals Only**" in the **Description** field.
18.	Enter "**MEALS**" in the **Short Description** field.
19.	Click the **Expense Type** list.
20.	Click the **Breakfast** list item.
21.	Click the **Add a new row** button at the end of the first row.
22.	Click the **Expense Type** list for row 2.
23.	Click the **Lunch** list item.
24.	Click the **Add a new row** button at the end of row 2.
25.	Click the **Expense Type** list item for row 3.
26.	Click the **Dinner** list item.
27.	Click the **Save** button.