EX.020.015 - Modifying a Travel Authorization

Purpose	• To identify what status a travel authorization must be in to be modified. • To learn how to modify a travel authorization.
Description	A Travel Authorization must be in a pending status to be modified. After an authorization has been submitted, it can't be modified. Authorizations can only be modified when "saved for later" or when returneded from an approver.
Security Role	**BOR PeopleSoft User**
Dependencies/ Constraints	A Travel Authorization must be in a pending status.
Additional Information	None

Procedure

For this topic, let's modify a Travel Authorization that is "saved for later." Modify the authorization by splitting the mileage between two departments and by adding a Breakfast expense for the second day of travel.

Step	Action
1.	Click the **NavBa**r icon.
2.	Click the **Menu** link.
3.	Click the **Employee Self-Service** link.
4.	Click the **Travel Authorization** link.
5.	Click the **Modify** link.
6.	Click the **Search** button.
7.	A list will be displayed if there are any pending authorizations. Otherwise, the system automatically opens up a pending item if it is the only transaction in that status. Click an entry in the **Authorization ID** column.
8.	In this exercise, let's split the mileage for this proposed trip between two Departments. As there are two mileage entries for this travel authorization, each entry will need to be updated separately.
9.	Click the **Detail** button at the end of the row that's going to be modified.
10.	Click the **Accounting Detail** link.
11.	Make any changes to the chartfield from this **Accounting Detail** page. For this exercise, let's change an Account number, add a new chartfield line, and change the Department Number for the new line.
12.	Enter the new value in the chartfield. To look up the new account number, click the look-up button next to each field to view applicable values.
13.	Click the **Account** look-up button.
14.	Either select a listing from the displayed values, or search for a specific range of accounts.
15.	For this example, search for all accounts that begin with "64" Enter "**64**" in the **begins with** field.
16.	Click the **Look Up** button.

Step	Action
17.	Click an entry in the **Account** column.
18.	Additional distribution lines can be added with the **Add ChartField Line** button. This would work for splitting the expense between departments, projects, and so forth. Click the **Add ChartField Line** button.
19.	When additional chartfield lines are added, make sure to allocate the total amount of expense between the multiple chartfield lines.
20.	Update the **Amount** field for the first chartfield row. Enter "**11.40**" in the **Amount** field.
21.	Update the **Amount** field for the second chartfield row. Enter "**11.40**" in the **Amount** field.
22.	Click the **Dept** look-up button for the second row.
23.	Enter the beginning digits of the Department to to charge the expense to by using the **begins with** field and click **Search**. Otherwise, select an entry directly from the provided list.
24.	Click an entry in the **Department** column. (Department numbers will vary based upon institution.)
25.	The expense has been split successfully between two Departments.
26.	Click the **OK** button.
27.	Click the **Check Expense For Errors** button.
28.	Click the **Return to Travel Authorization Entry** link.
29.	Click the **Detail** button at the end of another row that needs to be modified.
30.	Click the **Accounting Detail** link.
31.	Click the **Add ChartField Line** button.
32.	When additional chartfield lines are added, make sure to allocate the total amount of expense between the multiple chartfield lines.
33.	Update the **Amount** field for the first chartfield row. Enter "**11.40**" in the **Amount** field.
34.	Update the **Amount** field for the second chartfield row. Enter "**11.40**" in the **Amount** field.
35.	Click the **Dept** look-up button.

Step	Action
36.	Click an entry in the **Department** column.
37.	Click the **OK** button.
38.	Click the **Check Expense For Errors** button.
39.	Click the **Return to Travel Authorization Entry** link.
40.	The final modification for this travel authorization will be to copy an existing expense line to a new date.
41.	Click the **Select** checkbox on the left side of the expense row that will be copied.
42.	Click the **Copy Selected** button.
43.	Check that expense row for error or a warning message will appear. Click the **OK** button.
44.	Copy the expense row to only one date. Enter "**05/13/2024**" in the **To Date** field.
45.	Click the **OK** button.
46.	Click the **vertical** scrollbar to navigate to the bottom of the page.
47.	Click the **Check For Errors** button to check the entire report for errors.
48.	To print this travel authorization, select the **Printable View** link near the bottom of the page.
49.	Click the **Save for Later** button.