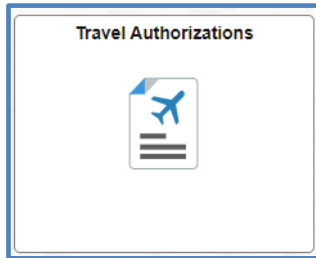


# Entering Travel Authorizations as a Delegate

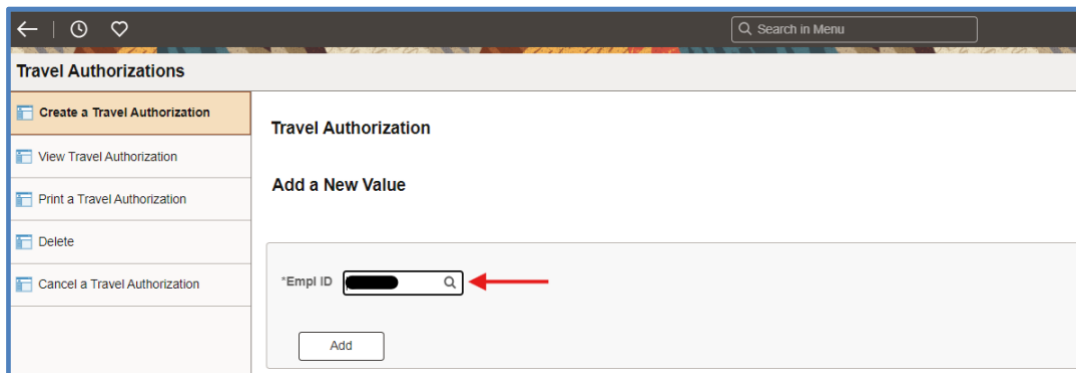
This job aid is designed to provide instructions on how to enter Travel Authorizations as a delegate using the GeorgiaFIRST PeopleSoft Financials Travel and Expense module. Fluid Navigation is shown first and Classic Navigation directions start on page 5.

## Fluid Navigation

1. Select the **Travel Authorization** tile found on your Employee Self Service homepage.

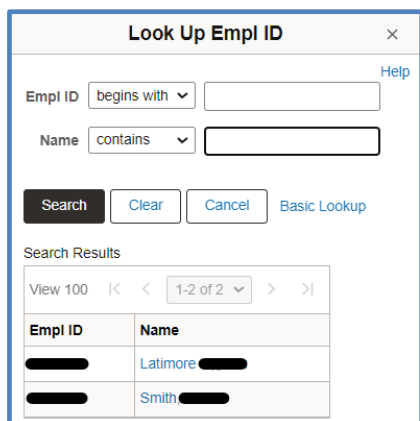


2. Select the magnifying glass next to the Empl ID field.



3. In the Employee Search box that appears, choose an employee to create a Travel Authorization for.

**Note:** Only employees for whom you are an authorized delegate will appear.



4. Click **Add**.

5. Enter the following information on the Travel Authorization header:

- a. \*Business Purpose
- b. \*Report Description
- c. Destination Location
- d. \*Date From
- e. \*Date To

6. Next, enter your Projected Expenses. Enter the following information on the Expense line:

- a.\*Date
- b.\*Expense Type,
- c. Select a \*Payment Type.

Example:

7. Review accounting details and or add any other projected expense lines needed by selecting the + Add button.

8. Once you finish the Travel Authorization, select the **Summary and Submit** button found in the top right corner of the page.

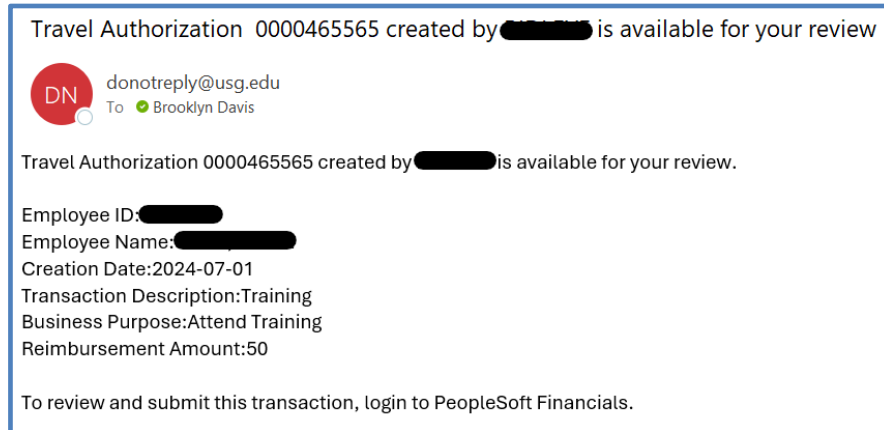
9. Once on the summary page, click the certification check box. Then, select the Submit Travel Authorization button.

10. A message will appear verifying that you would like to submit the Travel Authorization for the traveler to review.

10. Click **Yes** to send an email notification to the traveler.

11. A message will appear in the top left corner of the page.

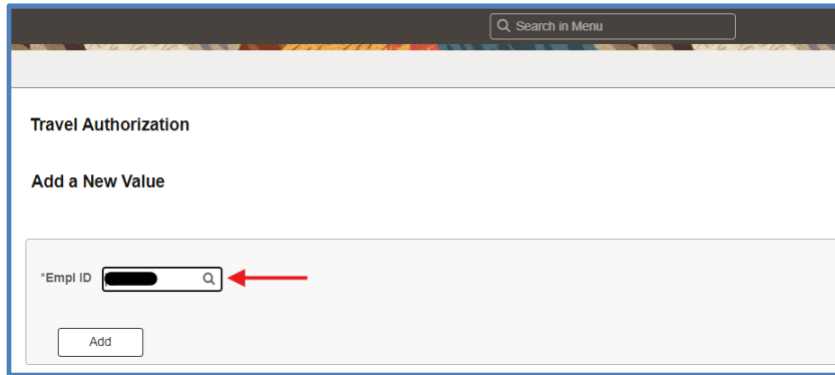
12. The Traveler will receive an email notification to review the travel authorization.



13. The traveler will log in, review and submit the Travel Authorization.

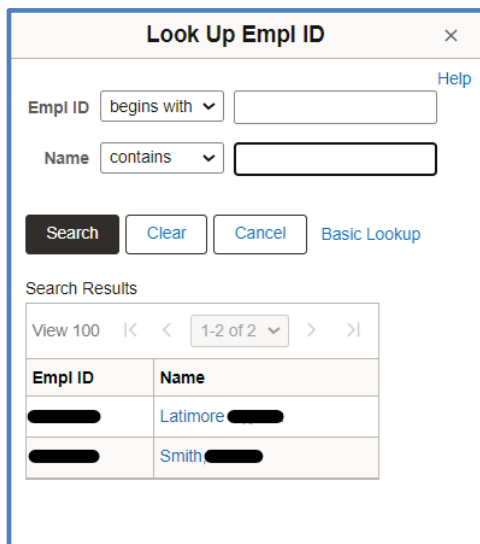
## Classic Navigation

1. Navigate to **Employee-Self Service > Travel and Expenses > Travel Authorizations > Create a Travel Authorization**
2. Select the magnifying glass next to the Empl ID field.



The screenshot shows a web interface for 'Travel Authorization'. Under the heading 'Add a New Value', there is a field labeled '\*Empl ID' with a magnifying glass icon to its right. A red arrow points to this magnifying glass icon. Below the field is an 'Add' button.

3. In the Employee Search box that appears, choose an employee to create a report on behalf of.  
**Note:** Only employees for whom you are an authorized delegate will appear.



The screenshot shows a 'Look Up Empl ID' dialog box. It has a 'Help' link in the top right. There are two search criteria: 'Empl ID begins with' and 'Name contains', each with a dropdown menu and a text input field. Below these are 'Search', 'Clear', and 'Cancel' buttons, along with a 'Basic Lookup' link. The 'Search Results' section shows a table with two columns: 'Empl ID' and 'Name'. The results are:

Empl ID	Name
██████████	Latimore ██████████
██████████	Smith ██████████

4. Click **Add**.

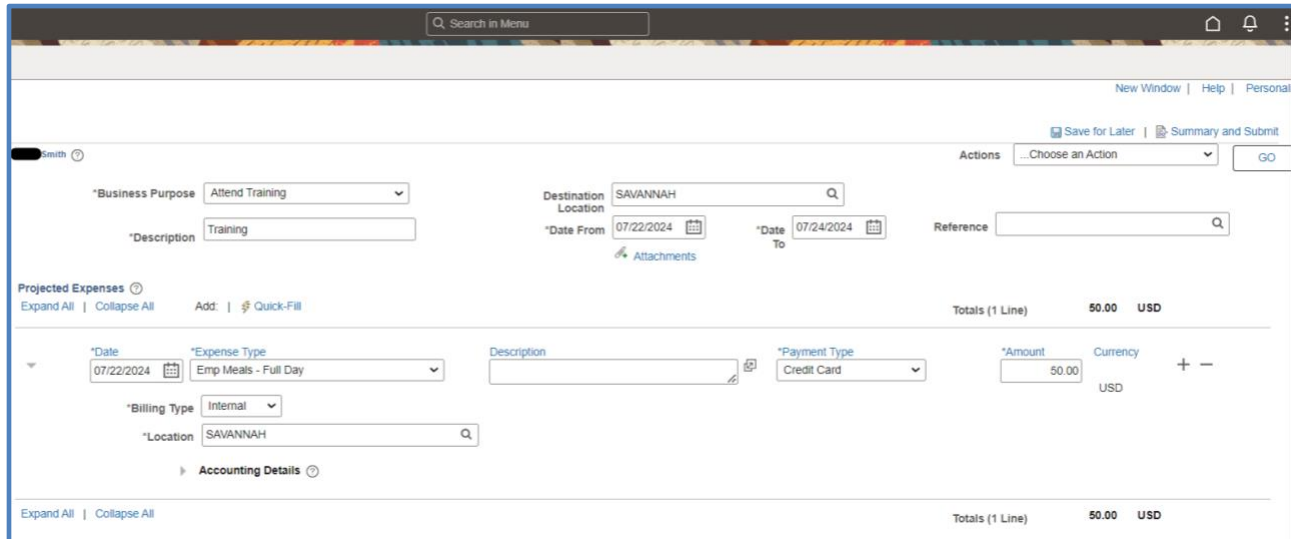
5. Enter the following information on the Travel Authorization header:

- a. \*Business Purpose
- b. \*Report Description
- c. Destination Location
- d. \*Date From
- e. \*Date To

6. Next, enter your Projected Expenses. Enter the following information on the Expense line:

- a.\*Date
- b.\*Expense Type,
- c. Select a \*Payment Type.

Example:



The screenshot shows the PeopleSoft Travel Authorization form. The header section includes fields for Business Purpose (Attend Training), Description (Training), Destination Location (SAVANNAH), Date From (07/22/2024), and Date To (07/24/2024). Below the header is a table for Projected Expenses. The table has columns for Date, Expense Type, Description, Payment Type, Amount, and Currency. One expense line is visible with Date 07/22/2024, Expense Type Emp Meals - Full Day, Payment Type Credit Card, and Amount 50.00 USD. The table also shows a total of 50.00 USD for 1 line.

7. Review accounting details and or add any other projected expense lines needed by selecting the + Add button.

8. Once you are finished with the report, select the **Summary and Submit** button found in the top right corner of the page.

The screenshot shows a form with the following elements:
 

- Buttons: "Save for Later" and "Summary and Submit" (highlighted in yellow).
- Actions: "...Choose an Action" dropdown menu and a "GO" button.
- Search: "AVANNAH" in a search box.
- Dates: "7/22/2024" and "\*Date To 07/24/2024" with calendar icons.
- Reference: A search box labeled "Reference".
- Attachments: A link labeled "Attachments".
- Totals: "Totals (1 Line) 50.00 USD".

9. Click the certification check box.

The screenshot shows a form with the following elements:
 

- Search: "Search in Menu" at the top.
- Business Purpose: "Attend Training" dropdown.
- Destination Location: "SAVANNAH" search box.
- Description: "Training" text box.
- Date Range: "\*Date From 07/22/2024" and "\*Date To 07/24/2024" with calendar icons.
- Reference: A search box.
- Totals: "Projected Expenses (1 Line) 50.00 USD" and "Denied Expenses 0.00 USD".
- Total Authorized Amount: "Total Authorized Amount 50.00 USD".
- Certification: A checked checkbox with the text "By checking this box, I certify these costs are reasonable estimates and comply with expense policy." Below it is a "Submit Travel Authorization" button.

10. Select the Submit Travel Authorization button.

11. A message will appear verifying you would like to submit the report for the traveler to review.

The screenshot shows a confirmation dialog box with the following elements:
 

- Text: "Click Yes to submit Travel Authorization for review by traveler. (28000,21)"
- Buttons: "Yes" and "No".




12. Click **Yes** to send an email notification to the traveler.

13. A message will appear in the top left corner of the page. This message says the Travel

authorization has been submitted to the traveler for review.


Travel authorization 0000465565 has been submitted to the traveler for review.


<b>Business Purpose</b>	Attend Training	<b>Destination Location</b>	SAVANNAH
<b>Description</b>	Training	<b>Date From</b>	07/22/2024
		<b>Date To</b>	07/24/2024
		<b>Reference</b>	

Totals 
 [View Printable Version](#)
 [Notes](#)

14. The Traveler will also receive the following email notification.

Travel Authorization 0000465565 created by [REDACTED] is available for your review



 donotreply@usg.edu  
 To  Brooklyn Davis

Travel Authorization 0000465565 created by [REDACTED] is available for your review.

Employee ID: [REDACTED]  
 Employee Name: [REDACTED]  
 Creation Date: 2024-07-01  
 Transaction Description: Training  
 Business Purpose: Attend Training  
 Reimbursement Amount: 50

To review and submit this transaction, login to PeopleSoft Financials.

15. The traveler will then log in, review and submit the Travel Authorization.