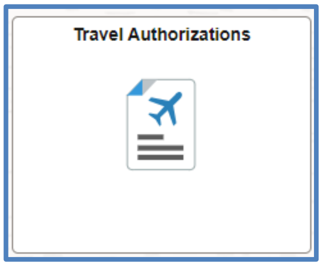
Entering Travel Authorizations as a Delegate

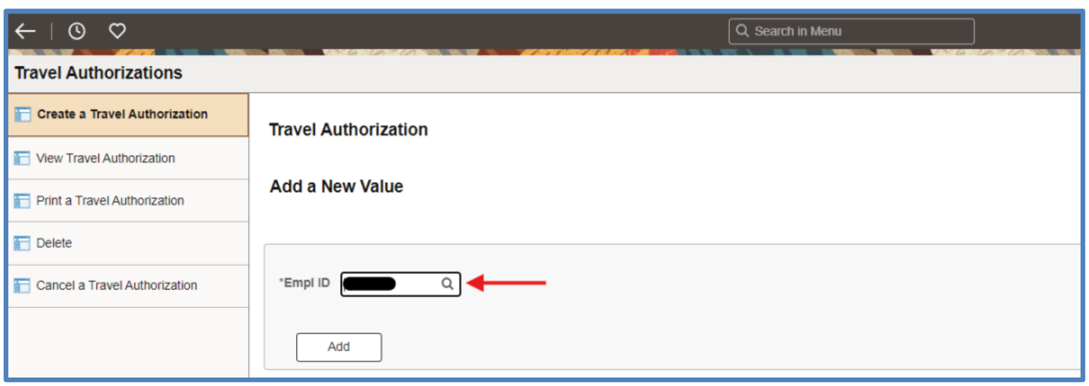
This job aid is designed to provide instructions on how to enter Travel Authorizations as a delegate using the Georgia*FIRST* PeopleSoft Financials Travel and Expense module. Fluid Navigation is shown first and Classic Navigation directions start on page 5.

Fluid Navigation

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

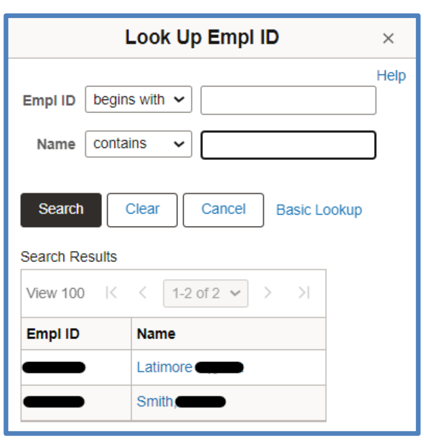


2. Select the magnifying glass next to the Empl ID field.



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.**

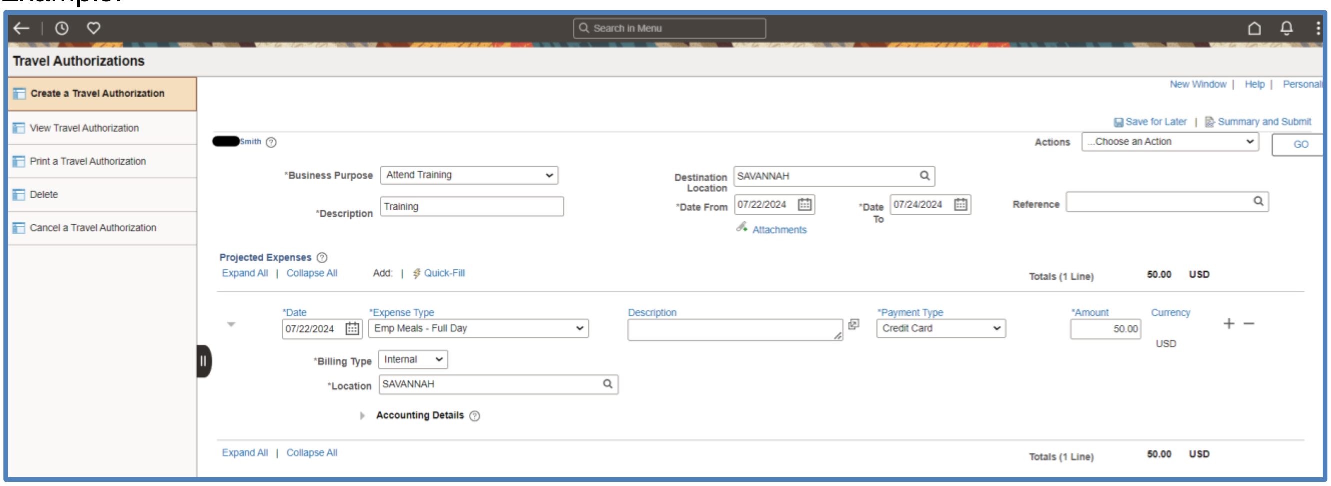
5. Enter the following information on the Travel Authorization header:

   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:

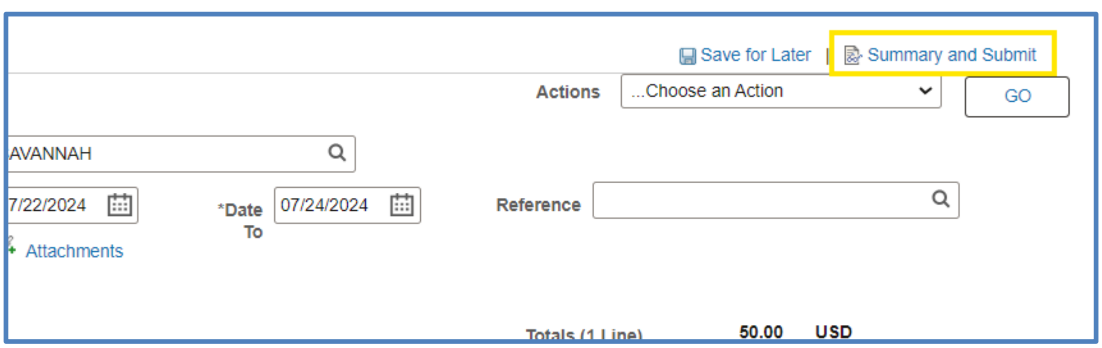
   a.*Date
   b.*Expense Type,
   c. Select a *Payment Type.

Example:

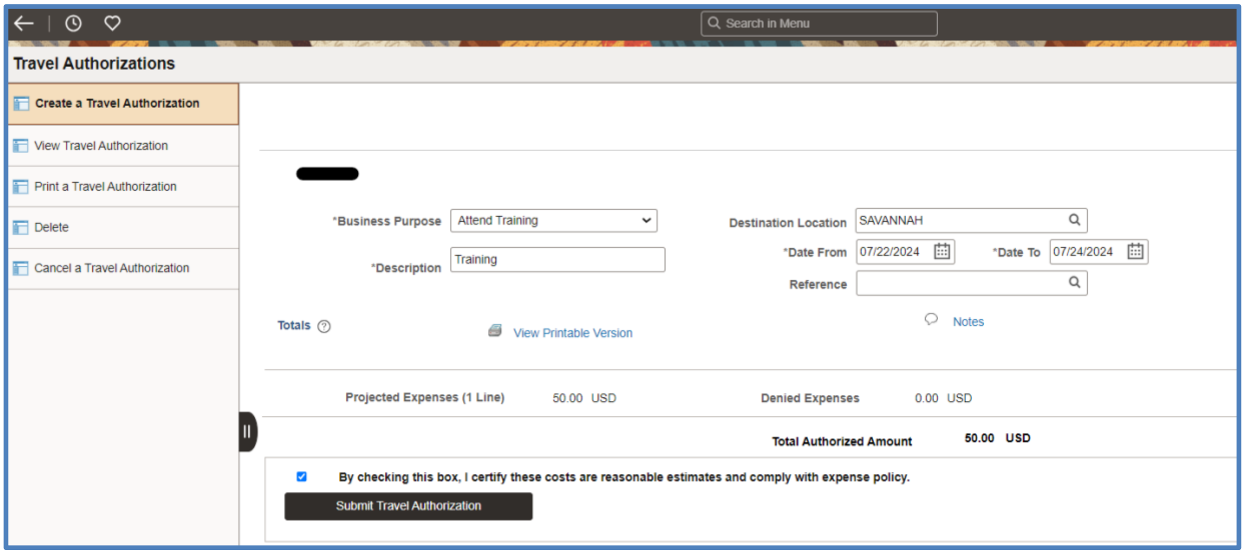


7. Review accounting details and or add any other projected expense lines needed by selecting the + Add button.

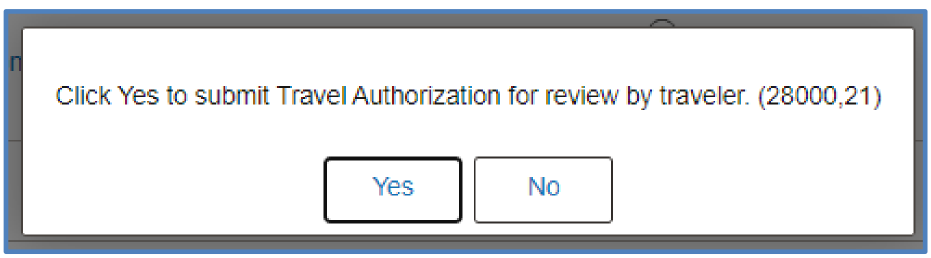
8. Once you finish the Travel Authorization, select the **Summary and Submit** button found in the top right corner of the page.



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

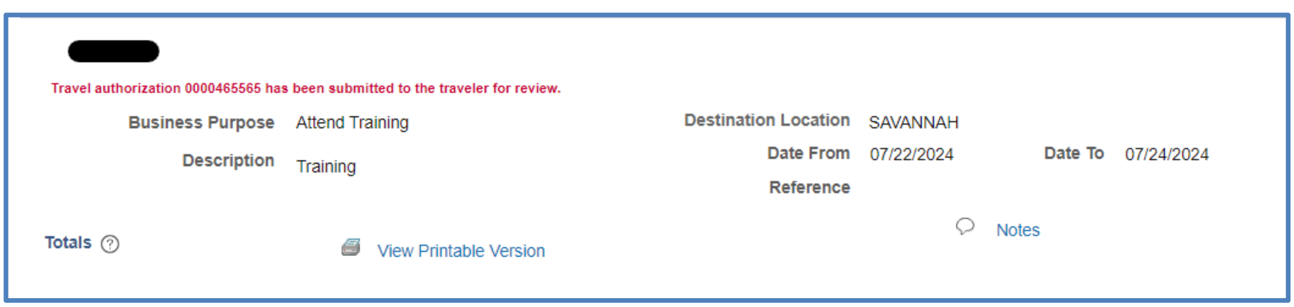


10. A message will appear verifying that you would like to submit the Travel Authorization for the traveler to review.



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.

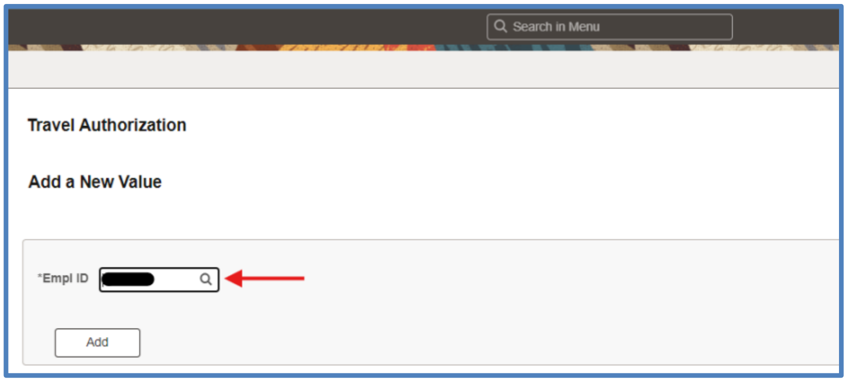
> Travel Authorization 0000465565 created by [redacted] is available for your review
>
> DN donotreply@usg.edu
> To Brooklyn Davis
>
> Travel Authorization 0000465565 created by [redacted] is available for your review.
>
> Employee ID: [redacted]
> Employee Name: [redacted]
> Creation Date:2024-07-01
> Transaction Description:Training
> Business Purpose:Attend Training
> Reimbursement Amount:50
>
> To review and submit this transaction, login to PeopleSoft Financials.

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

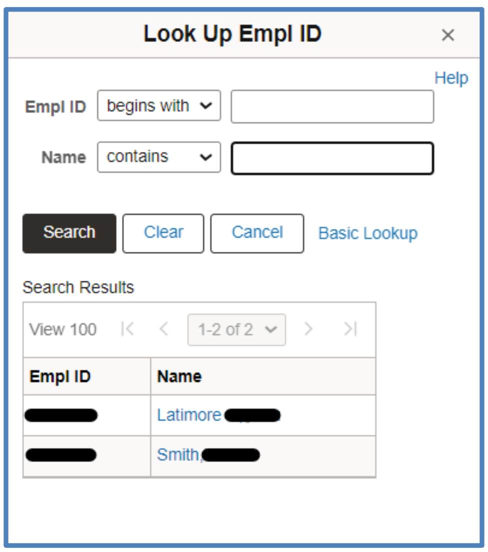
Classic Navigation

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.



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.



4.Click **Add.**

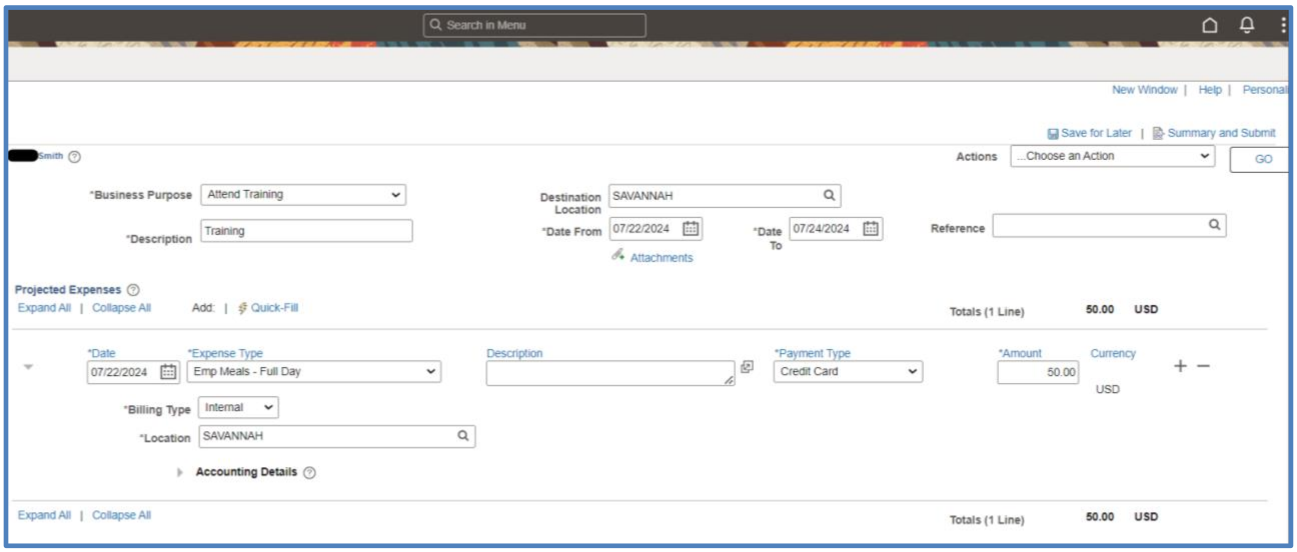
5. Enter the following information on the Travel Authorization header:

    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:

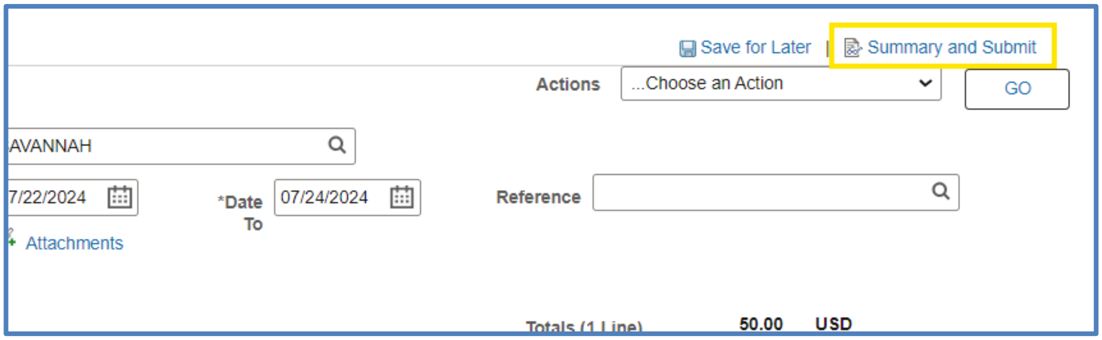
    a.*Date
    b.*Expense Type,
    c. Select a *Payment Type.

Example:

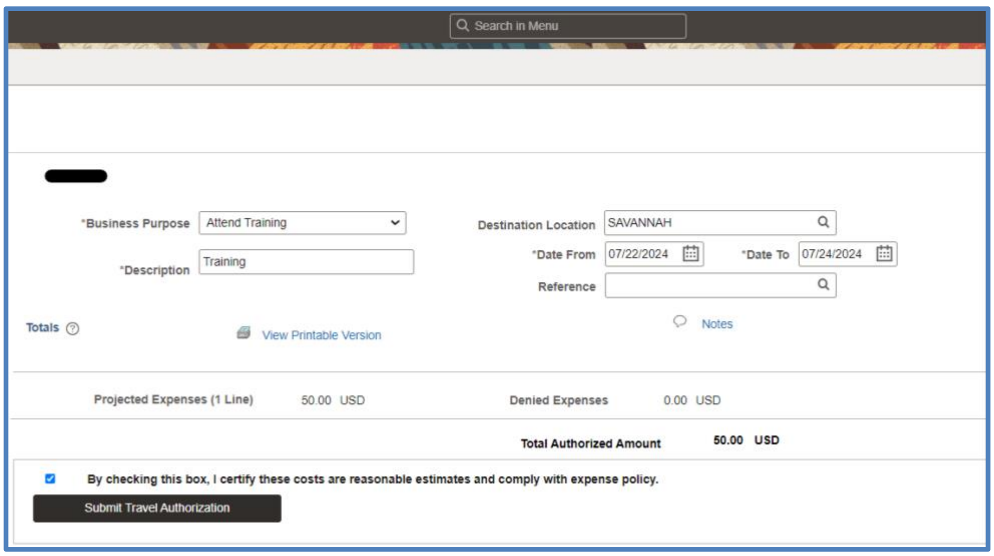


7. Review accounting details and or add any other projected expense lines needed by selecting the + Add button.

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

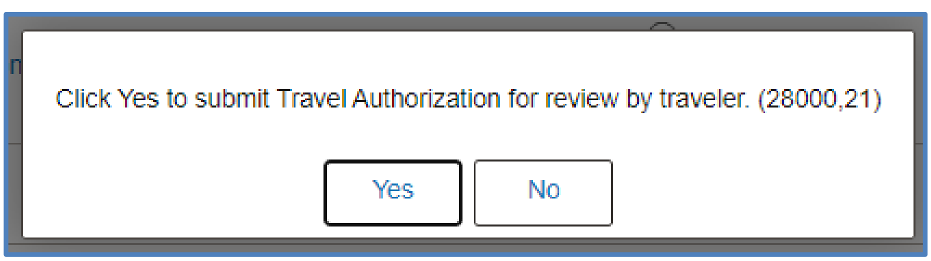


9. Click the certification check box.



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.



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.

[redacted]

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

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

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

DN 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.