

# 2015

## Travel Authorizations



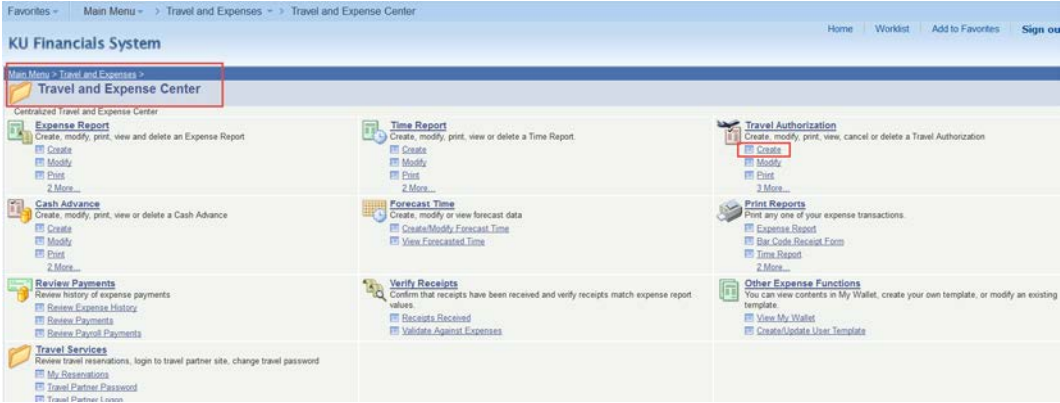


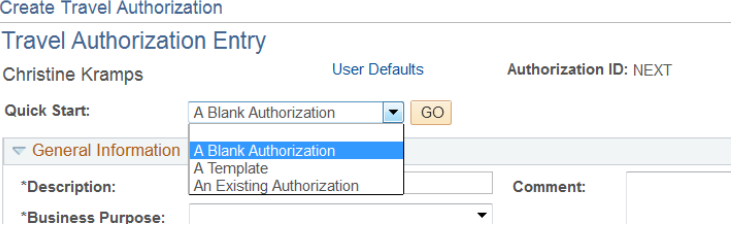


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## Create Travel Authorization

Step	Action
1	 <p>a. Begin by Navigating to 'Travel and Expenses'  b. Next Select 'Travel and Expense Center'  c. Click the 'Create' Link under Travel Authorization</p>
2	 <p>Enter Employee ID in the 'Empl ID' field and select 'Add'. Or click on the  to view the list of employees that the user is proxy to.</p>
3	 <p>Under 'Quick Start' - 'A Blank Authorization' option will be selected by default. 'An Existing Report' – additional options are explained in later steps.</p>



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### Choosing a Location with CONUS/OCONUS

CONUS and OCONUS locations are set up as:

**US Locations** (All US states excluding Alaska and Hawaii) – entered as the 2 digit state code followed by a comma and the city/county. *Note: For US locations if the specified city is not included, then choose the county that the travel took place in.*

**International Locations** (All Non US locations including Alaska and Hawaii) - entered as the 3 digit country code followed by a comma and the city/other *Note: Other is used for international locations that are not listed for the specified country. Note: Alaska and Hawaii will still use the 2 digit state code.*

When choosing the location Look up, change the “Search by:” drop down to Description. This will allow for searching by the 2 digit state abbreviation and city/county or the 3 digit country abbreviations and city/other.

Look Up Default Location

Search by: Expense Location begins with

Look Up Cancel Advanced Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Expense Location	Description
00001	AL, ABBEVILLE
00002	AL, ABERFOIL
00003	AL, ABERNANT
00004	AL, ADDISON

If searching for Dallas, Texas. Enter the 2 digit state abbreviation TX followed by part, or all of the city.



Look Up Default Location X

Search by: Description begins with TX, D Help

**Search Results**

View 100      First 1 1-90 of 90      Last

Description	Expense Location
TX, D'HANIS	26014
TX, DABNEY	26015
TX, DAINGERFIELD	26016
TX, DAISSETTA	26017
TX, DALE	26018
TX, DALHART	26019
TX, DALLAM COUNTY	26020
TX, DALLARDSVILLE	26021
TX, DALLAS	26022
TX, DALLAS COUNTY	26023
TX, DALWORTHINGTON GARDENS	26024
TX, DAMON	26025
TX, DANBURY	26026
TX, DANVILLE	26027

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Create Travel Authorization

**Travel Authorization Entry**

Christine Kramps      User Defaults      Authorization ID:      NEXT

Quick Start: A Blank Authorization

**General Information**

**A** \*Description: Boulder, CO 12/15 - 12/23      **D** Comment: Enter comments here:

**B** \*Business Purpose: Conference

**C** Default Location: CO, BOULDER       Multi Site Trip

\*Date From: **E** 12/15/2015      \*Date To: 12/23/2015

**F** Accounting Defaults      More Options:

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
							+
							+
							+
							+

New Expense

A. Enter 'Description' – identifying information for the Expense Report such as location and date of travel, for ex: 'Boulder, CO 12/01 – 12/06 2015' and



anything relevant to the department. *Note: This text will appear in DEMIS as the transaction description.*

- B. Select appropriate 'Business Purpose' from the list of values.  
Select appropriate 'Default Location' from the list of valid values. For multi location travel, select the location that will be traveled to first, and click the 'Multi-Site Trip' box. **UKANS** will use CONUS locations beginning January 1<sup>st</sup> 2015. This will allow users to choose the specific location (State, City or Country, City).  
**KURES** will continue to use In-State, Out-of-state, International.
- C. Enter 'Comment' for any additional information. For example: conference name, reason for travel, meals provided, multiple locations, estimated travel cost, expenses placed on pcard.
- D. Enter Date From and Date To information.
- E. Next Click on the 'Accounting Defaults' link.

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Create Travel Authorization

**Accounting Defaults**

Christine Kramps Authorization ID: NEXT

SpeedChart  Key

**Accounting Summary**

%	*GL Unit <b>A</b>	Fund	Dept <b>B</b>	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
100.00	UKANS		1510000	2016					

Add ChartField Line Load Defaults

OK

- A. 'UKANS' will default in GL Unit field from the employee profile. Select 'UKANS' or 'KURES' in the GL Unit field depending on which business unit will be reimbursing the travel expenses. **Please note, if you choose the KURES business unit must be used to change the business unit and tab out in order to make the change.**
- B. 'Dept' will default from the employee profile. Change it as necessary.
- C. Enter the fund number. BudRef will now default based on travel dates on front page. *Only if UKANS or nonproject related travel.*

**Accounting Summary**

%	*GL Unit	Fund	Dept	Bud Ref
100.00	UKANS	099	1510000	2016

- D. If the travel is on behalf of a project or other KURES held funds, click on SpeedChart  Key  and find appropriate project name. The Accounting Summary information will be autopopulated in with the correct fund, dept, bud ref, PC Bus Unit, Project and Activity. **Also, if you are splitting a project, you will need to add another Expense type line and change the amount**



in both lines. Then you will click on the SpeedChart  of that expense line and change to the appropriate project.

Accounting Summary

%	*GL Unit	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
100.00	KURES	908	2930000	ALL			KURES	NFP0060339	1

E. Click on 'OK' to go back to the travel authorization entry page.

7 Next select 'Expense Type'. Note: Expense Types with –RS ONLY may only be used for KURES reimbursement.

8

Details

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	*Detail
<input type="checkbox"/>	MEALS AND INCIDENTALS	08/01/2016	59	USD	Reimbursem	Out of State	*Detail
<input type="checkbox"/>	MILEAGE AUTO	08/01/2016	0.00	USD	Reimbursem	Out of State	*Detail
<input type="checkbox"/>	HOTEL OR LODGING	08/01/2016	125.00	USD	Reimbursem	Out of State	*Detail

Copy Selected    Delete Selected    New Expense    Add    Check For Errors

A. Enter the expense date on each 'Expense Type' line.  
 B. Select the 'Billing Type' for each expense type. This value correspond with the location chosen for the expense type.  
*These Values include: In State, Out of State, and International*  
 C. Click on 'Detail' on each 'Expense Type' line.

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[Accounting Detail](#)

[Check Expense For Errors](#)

[Return to Travel Authorization Entry](#)

To Split the funding on the Accounting Detail Level, Click on the accounting detail link.

Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
45.00	UKANS	125280	099	1510000	2016					
14.00	UKANS	125280	700	1510000						

[Add ChartField Line](#)

[OK](#)

Next, Add Chartfield Line and enter the information for the splitting of the the amount, the fund, department, etc in the line and Click OK.



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### Create Travel Authorization

## Authorization Detail for MILEAGE AUTO (Line 2)

Christine Kramps

Authorization ID:

#### About This Expense

\*Date:

\*Payment Type:

\*Billing Type: **A**

Miles: **B**  x 0.5700  **E**

\*Destination Location: **C**

\*Description: **D**

Amount: 0.00 USD

#### Exception Comments

Location Amount:

#### Accounting Detail

**F**

[Return to Travel Authorization Entry](#) **G**

**Entering Mileage** - After clicking 'Detail' on the first expense line.

- A. Ensure that 'Billing Type' corresponds to location of expense type. Example, if travel is in a location outside of the state choose "Out of State".
- B. Enter the number of miles for personal mileage.
- C. Enter the correct 'Destination Location' for the expense type. *KURES will continue to use In State, Out of State, and International.*
- D. Enter the 'Description' in the box.
- E. Click the 'Calc Mileage' button and the amount of mileage reimbursement will be displayed.
- F. Click 'Check Expense for Errors' box.
- G. Click 'Return to Travel Authorization Entry' link.





11

Create Travel Authorization

Authorization Detail for MEALS AND INCIDENTALS (Line 1)

Christine Kramps

Authorization ID: NEXT

About This Expense

\*Date: 12/16/2015

\*Payment Type: Reimbursements

\*Billing Type: **A** Out of State

\*Location: **B** CO, BOULDER

Amount: **C** 59.00 USD

Exception Comments

Location Amount:

Accounting Detail

[Return to Travel Authorization Entry](#)

**Entering Meals and Incidentals** - After clicking 'Detail' on the expense line.

- A. Enter 'Billing Type' that corresponds with the location of the expense type.
- B. Choose the 'Location' This value will drive the daily per diem rate. *Note: This value should be determined based on where the traveler ended up at the end of the day. KURES will continue to use In State, Out of State, and International.*
- C. Per Diem amount can be adjusted down if needed, but not increased.



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Create Travel Authorization

Authorization Detail for HOTEL OR LODGING (Line 1)

Ola Faucher

Authorization ID: NEXT

About This Expense

\*Date: 12/16/2015

\*Payment Type: Reimbursements

\*Billing Type: **A** Out of State

Number of Nights: 1

\*Merchant (Choose One):

Preferred:

Non-preferred: Marriott

\*Location: **B** CO, BOULDER

\*Description: Hotel in Boulder for Conference

\*Nightly Rate: **C** 125.00 USD

\*Total Amount: **D** 125.00 USD

Exception Comments

Location Amount:

[Accounting Detail](#)

[Return to Travel Authorization Entry](#)

**Entering Hotel or Lodging** – - After clicking 'Detail' on the expense line.

- A. Enter 'Billing Type' that corresponds with the location of the expense type.
- B. Choose the 'Location' This value will drive the maximum allowable nightly rate.  
*Note: This value is always the location that the traveler ends the day at. KURES will continue to use In State, Out of State, and International.*
- C. The 'Nightly Rate' may be reduced if needed. If an increase past the maximum rate is needed, then please include the reason for the increased rate in the 'Location Amount' field.
- D. The 'Total Amount' is the 'Number of Nights' multiplied by the 'Nightly Rate'.



13. Create Travel Authorization

Authorization Detail for NON REIMBURSABLE EXPENSE (\$1) (Line 1)

Ola Faucher Authorization ID: NEXT

**About This Expense**

\*Date: 12/16/2015

\*Payment Type: Reimbursements

\*Billing Type: **A** Out of State

\*Location: **B** CO, BOULDER

\*Amount: **C** 1.00 USD

**Exception Comments**

Location Amount:

Accounting Detail

[Return to Travel Authorization Entry](#)

**Entering Non Reimbursable Expense** - After clicking 'Detail' on the expense line.

- Enter 'Billing Type' that corresponds with the location of the expense type.
- Choose the 'Location' This value will drive the maximum allowable nightly rate.  
*Note: This value is always the location that the traveler ends the day at. KURES will continue to use In State, Out of State, and International.*
- Enter \$1 in the amount field for a non reimbursable expense.

---

13

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	*Detail
<input type="checkbox"/>	MEALS AND INCIDENTALS	08/01/2016	59.00	USD	Reimburse	Out of State	<a href="#">Detail</a>
<input type="checkbox"/>	MILEAGE AUTO	08/01/2016	0.00	USD	Reimburse	Out of State	<a href="#">Detail</a>
<input type="checkbox"/>	HOTEL OR LODGING	08/01/2016	125.00	USD	Reimburse	Out of State	<a href="#">Detail</a>

After all Expense type information has been entered and updated. Click 'Check For Errors'.

---

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<input type="checkbox"/>	MILEAGE AUTO	08/01/2016	0.00	USD	Reimburse	Out of State	<a href="#">Detail</a>
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Notice that there is a **Red Flag** on one Expense Line. Click on the **Red Flag**.



15

Create Travel Authorization

Authorization Detail for MILEAGE AUTO (Line 2)

Christine Kramps

Authorization ID: NEXT

Please enter or update the following information:

Description

About This Expense

*Date:	08/01/2016	
*Payment Type:	Reimbursements	▼
*Billing Type:	Out of State	▼
Miles:	35 x 0.5700	<a href="#">Calc Mileage</a>
*Destination Location:	CO, BOULDER	
*Description:	<div style="background-color: red; height: 15px; width: 100%;"></div>	
Amount:	19.95 USD	

Exception Comments

Location Amount:

[Accounting Detail](#)

[Check Expense For Errors](#)

[Return to Travel Authorization Entry](#)

Notice the description of the error on the top of the page, 'Please enter or update the following information: Description' Enter a description of the reimbursement in the 'Description' box. Example, to/from origin or destination of mileage. Click on 'Return to Travel Authorization Entry' link.



16

**Create Travel Authorization**  
**Travel Authorization Entry**  
 Annie Rajaei [User Defaults](#) Authorization ID: NEXT

Quick Start: A Blank Authorization

**General Information**

\*Description:  Comment:   
 \*Business Purpose:   
 Default Location:    
 \*Date From:   \*Date To:

[Accounting Defaults](#) More Options:

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
							<input type="button" value="+"/>
							<input type="button" value="+"/>
							<input type="button" value="+"/>
							<input type="button" value="+"/>

New Expense

**Totals**

Authorized Amount: 0.00 USD

[Project Summary](#) [Printable View](#)  
[Return to Travel Authorization](#)

As a business process, **DO NOT** click “Create a Cash Advance” while creating a travel authorization. To create a cash advance, refer to the cash advance instruction material.

17

**Totals**

Authorized Amount: 631.00 USD

[Create A Cash Advance](#) [Project Summary](#)  
[Return to Travel and Expense Center](#)

Once all expenses have been entered and no errors remain, click the ‘Submit’ button. You have successfully completed a ‘Travel Authorization’. If you are not ready to submit the Travel Authorization, you may click ‘Save for Later’. *Note: Make note of the Authorization ID for future reference.*

18

To create a Travel Authorization from an ‘Existing Authorization, complete the following steps.

19

**Create Travel Authorization**  
**Travel Authorization Entry**  
 Steven Moore [User Defaults](#) Authorization ID: NEXT

Quick Start: An Existing Authorization

**General Information**

\*Description:  Comment:   
 \*Business Purpose: An Existing Authorization

Under ‘Quick Start’ – select ‘An Existing Report’ and select ‘Go’.



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**Create Travel Authorization**  
**Copy From an Existing Travel Authorization**

Steven Moore Authorization ID: NEXT

From Date: 02/17/2012 To: 06/17/2012 Search

	Description	Authorization ID	Date From	Date To	Amount	Currency
Select	TEST send back	0000000049	05/17/2012	05/17/2012	10.00	USD
Select	TEST send back 2	0000000050	05/17/2012	05/17/2012	10.00	USD
Select	lets	0000000051	05/16/2012	05/16/2012	50.00	USD
Select	TEST send back2	0000000052	05/17/2012	05/17/2012	10.00	USD

[Return to Travel Authorization Entry](#)

After clicking 'Go' the screen will take the user list of previously approved Travel Authorizations to copy. Click 'Select' on the existing Travel Authorization you wish to copy.

21

**Create Travel Authorization**  
**Travel Authorization Entry**

Steven Moore User Defaults Authorization ID: NEXT

**General Information**

\*Description: Test Comment: Test

\*Business Purpose: Conference  Multi Site Trip

Default Location: CA, ALAMO  Multi Site Trip

\*Date From: 12/22/2015 \*Date To: 12/27/2015

Accounting Defaults More Options:  GO

**Details** Personalize | Find | First 1 of 1 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	*Detail
<input type="checkbox"/>	INTERNET	12/23/2015	50.00	USD	Reimburseme	Out of State	+Detail

Copy Selected  New Expense

After clicking 'Select' on the preceding page. If user needs to make adjustments to existing Travel Authorization. Click 'the Plus' sign to add more lines to the Travel Authorization.

22

Enter number of rows to add:

Enter the number of lines to add to the Travel Authorization. Click 'OK'.



23	Details <span style="float: right;">Personalize   Find     First 1-2 of 2 Last</span>							
	Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
	<input type="checkbox"/>	INTERNET	12/23/2015	50.00	USD	Reimburseme	Out of State	*Detail
<input type="checkbox"/>	HOTEL OR LODGING	12/23/2015	132.00	USD	Reimburseme	Out of State	*Detail	
Choose the additional Expense Type(s) that are to be added to the Travel Authorization.								
24	Repeat steps 7-15 as needed for each expense type that is to be reimbursed.							



## Travel Authorization Approval Via Module

Step	Action
1	<div style="text-align: center;"> </div> <p>Sign into PeopleSoft.</p>
2	<p>Click on Manager Self-Service and click on 'Travel and Expense Center'</p>





3

Main Menu > Manager Self-Service >

### Travel and Expense Center

Manager Travel and Expense Center

- Approvals**
  - Approve expense transactions
  - Approve Transactions**
  - Modify Approved Transactions
- Budget Check**
  - Request budget check, review budget exceptions and cancel approved travel authorizations
  - View Exceptions - Travel Auth
  - View Exceptions - Expense Rep
  - Cancel Travel Authorizations
- Manage Security**
  - Authorize users, setup approvers and reassign work
  - Authorize Expense Users
  - Update Employee Profile
- Analysis**
  - Access analysis tools for time and expense entries
  - View Predicted Expense Summary
  - View Forecasted Time
- Print Reports**
  - Print management reports for travel expenses
  - Corporate Card Report
  - Employee Data by Department
  - Employee Data by Business Unit
  - 6 More...
- Review Payments**
  - Review history of expense payments
  - Review Expense History
  - Review Payments
  - Review Payroll Payments
- Profiles and Preferences**
  - Manage your personal, organizational and financial details for travel and expense reporting
  - Review/Edit Profile
  - Delegate Entry Authority
  - Filter Mobile Data

Click on 'Approve Transactions' under Approvals

4

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

Search Pending Transactions

Change Sort Order

Refresh List

Transactions to Approve								
Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test 0103</a>	0000000057	05/21/2012	Approvals in Process
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test for approval</a>	0000000058	05/21/2012	Approvals in Process

Refresh List

The approver will have a list of all transactions that are needing approval regardless of the type of transaction. The list may be changed to reflect only those that are Expense Reports, Travel Authorizations or Cash Advances(KURES only). **KU doesn't use Time Reports, Time Adjustments or Errors in this module.**

5

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

Search Pending Transactions

Change Sort Order

Refresh List

Transactions to Approve								
Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test 0103</a>	0000000057	05/21/2012	Approvals in Process
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test for approval</a>	0000000058	05/21/2012	Approvals in Process

Refresh List

Select the transaction that is requiring approval. **Please note, the blue hyperlink is clicked to enter the transaction.**



6

**Approve Travel Authorization**  
**Travel Authorization Summary**

Robert Linseisen-Kerley [User Defaults](#) Authorization ID: 000000058

**General Information**

Description: Test for approval Comment: Test  
 Business Purpose: Conference  
 Status: Approvals in Process  
 \*Date From: 05/22/2012 To: 05/22/2012 Last Updated: 05/21/2012 By: GILLESPIEC

[Accounting Defaults](#) More Options:

You can deny individual expenses and still approve or send back the overall report.

**Details** [Customize](#) | [Find](#) |

Expense Type	Date	PC BU	Project	Activity	Amount	Currency	Approve
<b>MEALS AND INCIDENTALS</b>	05/22/2012	KURES	NIH0066303	1	13.00	USD	<input checked="" type="checkbox"/>

**Totals**

Total: 13.00 USD  
 Less Non-Approved: 0.00 USD  
 Total Authorized: 13.00 USD

Click on MEALS AND INCIDENTALS to review the accounting defaults and all listed expenses.

7

**Approve Travel Authorization**  
**Expense Detail for MEALS AND INCIDENTALS (Line 1)**

Robert Linseisen-Kerley Authorization ID: 000000058

**About This Expense**

Date: 05/22/2012  
 Payment Type: Reimbursements  
 Expense Billing Code: Billable  
 Per Diem Range: 0 - 99  
 Location: Domestic  
 Amount: 13.00 USD

Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
13.00	KURES	125180	908	2970000	ALL			KURES	NIH0066303	1

[Update Accounting Detail](#)

Approve Authorization

[Return to Travel Authorization Summary](#)

J

A. Review the Amount.  
 B. Review the GL Unit.  
 C. Review the Account.  
 D. Review the Fund.  
 E. Review the Dept.  
 F. Review the Bud Ref.



	<p>G. Review the PC Bus Unit(if project related).          H. Review the Project(if project related).          I. Review the Activity(if project related).          J. <b>If all accounting detail is correct, click Return to Travel Authorization Summary.</b></p>																																												
8	<table border="1"> <tr> <th colspan="2">Totals</th> </tr> <tr> <td>Total:</td> <td>13.00 USD</td> </tr> <tr> <td>Less Non-Approved:</td> <td>0.00 USD</td> </tr> <tr> <td><b>Total Authorized:</b></td> <td><b>13.00 USD</b></td> </tr> </table> <table border="1"> <tr> <th colspan="4">Pending Actions</th> </tr> <tr> <td colspan="4" style="text-align: right;">Customize   Find      First 1 of 1 Last</td> </tr> <tr> <th>Profile</th> <th>Name</th> <th>Action</th> <th>Date/Time</th> </tr> <tr> <td>Project Manager</td> <td>Moore,Steven</td> <td></td> <td></td> </tr> </table> <table border="1"> <tr> <th colspan="4">Action History</th> </tr> <tr> <td colspan="4" style="text-align: right;">Customize   Find      First 1-2 of 2 Last</td> </tr> <tr> <th>Profile</th> <th>Name</th> <th>Action</th> <th>Date/Time</th> </tr> <tr> <td></td> <td></td> <td>Submitted</td> <td>05/21/2012 3:42:28PM</td> </tr> <tr> <td>Expense Manager</td> <td>Brock,Linda</td> <td>Approved</td> <td>05/22/2012 7:09:43AM</td> </tr> </table> <div style="border: 1px solid black; height: 30px; width: 100%;"></div> <p><b>Budget Status:</b> Valid  <a href="#">Budget Options</a></p> <p style="text-align: center;"> <input type="button" value="Approve"/> <input type="button" value="Send Back"/> <input type="button" value="Hold"/> </p> <p>Click on 'Approve' to approve the transaction and send on to the next approval level if applicable. <b>Please note, 'Send Back' will be covered in a later training procedure. And Hold will not be used in this module.</b></p>	Totals		Total:	13.00 USD	Less Non-Approved:	0.00 USD	<b>Total Authorized:</b>	<b>13.00 USD</b>	Pending Actions				Customize   Find      First 1 of 1 Last				Profile	Name	Action	Date/Time	Project Manager	Moore,Steven			Action History				Customize   Find      First 1-2 of 2 Last				Profile	Name	Action	Date/Time			Submitted	05/21/2012 3:42:28PM	Expense Manager	Brock,Linda	Approved	05/22/2012 7:09:43AM
Totals																																													
Total:	13.00 USD																																												
Less Non-Approved:	0.00 USD																																												
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		Submitted	05/21/2012 3:42:28PM																																										
Expense Manager	Brock,Linda	Approved	05/22/2012 7:09:43AM																																										



## Travel Authorization Approval Via Email

Step	Action
1	<div data-bbox="394 432 1455 1129" style="border: 1px solid #ccc; padding: 10px;"><p>From: ffn2@ffn2.ku.edu <span style="float: right;">Sent: Mon 5/21/2012 3:50 PM</span> To: Moore, Steven W Cc: Subject: Approval requested for travel authorization Test for approval for Linseisen-Kerley,Robert Patrick.</p><p>A travel authorization request has been submitted that requires your attention:</p><p>Employee ID: 1367095 Employee Name: Linseisen-Kerley,Robert Patrick Submission Date: 2012-05-21 Travel Auth Description:Test for approval Travel Auth ID: 0000000058 Business Purpose: Conference Reimbursement Amount: 13 USD</p><p>You can navigate directly to the page for more information by clicking the link below:</p><p><a href="https://ffn2.ku.edu/psp/ffn2/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_TAUTH_APPR.GBL?Action=U&amp;TRAVEL_AUTH_ID=0000000058&amp;LINE_NBR=1">https://ffn2.ku.edu/psp/ffn2/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_TAUTH_APPR.GBL?Action=U&amp;TRAVEL_AUTH_ID=0000000058&amp;LINE_NBR=1</a></p></div> <p>The approver, will receive an email from PeopleSoft informing them that they have a pending Travel Authorization to approve. Click on the link and the approver will be directed to the transaction to approve. <b>Please note, if the list of approvers is pooled, each approver will receive email notification, however, it is only necessary for one approver to actually approve the transaction. Once complete, the transaction will be removed from the remaining pooled approvers' work list.</b></p>



2

**ORACLE**  
**PEOPLESOFT ENTERPRISE**

User ID:

Password:

**Sign In**

[Set Trace Flags](#)

**Select a Language:**

<a href="#">English</a>	<a href="#">Español</a>
<a href="#">Dansk</a>	<a href="#">Deutsch</a>
<a href="#">Français</a>	<a href="#">Français du Canada</a>
<a href="#">Italiano</a>	<a href="#">Magyar</a>
<a href="#">Nederlands</a>	<a href="#">Norsk</a>
<a href="#">Polski</a>	<a href="#">Português</a>
<a href="#">Suomi</a>	<a href="#">Svenska</a>
<a href="#">Čeština</a>	<a href="#">日本語</a>
<a href="#">한국어</a>	<a href="#">Русский</a>
<a href="#">ไทย</a>	<a href="#">简体中文</a>
<a href="#">繁體中文</a>	<a href="#">العربية</a>
<a href="#">UK English</a>	

Sign into PeopleSoft. You will be directed to the transaction needing approval.

3

**Approve Travel Authorization**

**Travel Authorization Summary**

Robert Linseisen-Kerley      [User Defaults](#)      Authorization ID: 0000000058

General Information							
<b>Description:</b>	Test for approval	<b>Comment:</b>	Test				
<b>Business Purpose:</b>	Conference						
<b>Status:</b>	Approvals in Process						
<b>*Date From:</b>	05/22/2012	<b>To:</b>	05/22/2012	<b>Last Updated:</b>	05/21/2012	<b>By:</b>	GILLESPIEC
<a href="#">Accounting Defaults</a>				<b>More Options:</b> <input type="text"/> <input type="button" value="GO"/>			

You can deny individual expenses and still approve or send back the overall report.

Details								<a href="#">Customize</a>   <a href="#">Find</a>
Expense Type	Date	PC BU	Project	Activity	Amount	Currency	Approve	
MEALS AND INCIDENTALS	05/22/2012	KURES	NIH0066303	1	13.00	USD	<input checked="" type="checkbox"/>	

Totals	
<b>Total:</b>	13.00 USD
<b>Less Non-Approved:</b>	0.00 USD
<b>Total Authorized:</b>	13.00 USD

Click on MEALS AND INCIDENTALS to review the accounting details.



4

**Approve Travel Authorization**

**Expense Detail for MEALS AND INCIDENTALS (Line 1)**

Robert Linseisen-Kerley Authorization ID: 0000000058

**About This Expense**

Date: 05/22/2012  
 Payment Type: Reimbursements  
 Expense Billing Code: Billable  
 Per Diem Range: 0 - 99  
 Location: Domestic  
 Amount: 13.00 USD

Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
13.00	KURES	125180	908	2970000	ALL			KURES	NIH0066303	1

[Update Accounting Detail](#)

Approve Authorization

**J** [Return to Travel Authorization Summary](#)

- A. Review the Amount.
- B. Review the GL Unit.
- C. Review the Account.
- D. Review the Fund.
- E. Review the Dept.
- F. Review the Bud Ref.
- G. Review the PC Bus Unit(if project related).
- H. Review the Project(if project related).
- I. Review the Activity(if project related).
- J. **If all accounting detail is correct, click Return to Travel Authorization Summary.**



5

Totals	
Total:	13.00 USD
Less Non-Approved:	0.00 USD
<b>Total Authorized:</b>	<b>13.00 USD</b>

Pending Actions			
Profile	Name	Action	Date/Time
Project Manager	Moore, Steven		

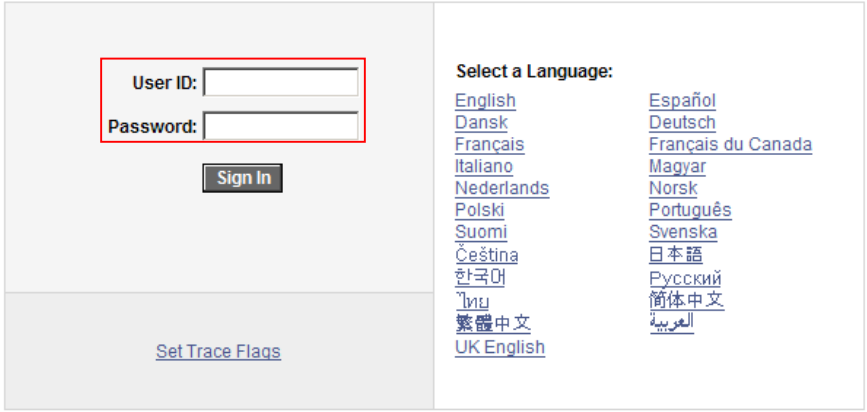
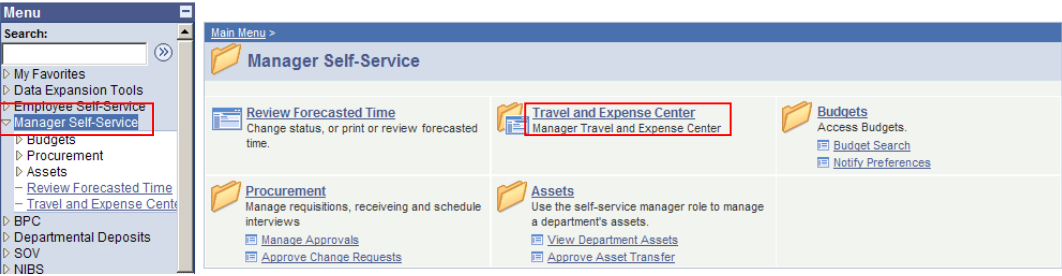
Action History			
Profile	Name	Action	Date/Time
Expense Manager	Brock, Linda	Submitted	05/21/2012 3:42:28PM
		Approved	05/22/2012 7:09:43AM

**Budget Status:** Valid  
[Budget Options](#)

Click on 'Approve' to approve the transaction and send on to the next approval level if applicable. **Please note, Send Back will be covered in a later training procedure.**



## Travel Authorization Send Back Via Approval in Module

Step	Action
1	<div style="text-align: center;">  </div> <p>Sign into PeopleSoft.</p>
2	 <p>Click on Manager Self-Service and click on 'Travel and Expense Center'</p>





3

Main Menu > Manager Self-Service >

### Travel and Expense Center

Manager Travel and Expense Center

- Approvals**
  - Approve expense transactions
  - Approve Transactions**
  - Modify Approved Transactions
- Budget Check**
  - Request budget check, review budget exceptions and cancel approved travel authorizations
  - View Exceptions - Travel Auth
  - View Exceptions - Expense Rep
  - Cancel Travel Authorizations
- Manage Security**
  - Authorize users, setup approvers and reassign work
  - Authorize Expense Users
  - Update Employee Profile
- Analysis**
  - Access analysis tools for time and expense entries
  - View Predicted Expense Summary
  - View Forecasted Time
- Print Reports**
  - Print management reports for travel expenses
  - Corporate Card Report
  - Employee Data by Department
  - Employee Data by Business Unit
  - 6 More...
- Review Payments**
  - Review history of expense payments
  - Review Expense History
  - Review Payments
  - Review Payroll Payments
- Profiles and Preferences**
  - Manage your personal, organizational and financial details for travel and expense reporting
  - Review/Edit Profile
  - Delegate Entry Authority
  - Filter Mobile Data

Click on 'Approve Transactions' under Approvals

4

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

Search Pending Transactions

Change Sort Order

Refresh List

Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test 0103</a>	0000000057	05/21/2012	Approvals in Process
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test for approval</a>	0000000058	05/21/2012	Approvals in Process

Refresh List

The approver will have a list of all transactions that are needing approval regardless of the type of transaction. The list may be changed to reflect only those that are Expense Reports, Travel Authorizations or Cash Advances (KURES only). **KU doesn't use Time Reports, Time Adjustments or Errors in this module.**

5

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

Search Pending Transactions

Change Sort Order

Refresh List

Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test 0103</a>	0000000057	05/21/2012	Approvals in Process
Travel Authorization	13.00	USD	Linseisen-Kerley, Robert Patrick	1367095	<a href="#">Test for approval</a>	0000000058	05/21/2012	Approvals in Process

Refresh List

Select the transaction that is requiring approval. **Please note, the blue hyperlink is clicked to enter the transaction.**



6

**Approve Travel Authorization**  
**Travel Authorization Summary**

Robert Linseisen-Kerley [User Defaults](#) Authorization ID: 0000000058

**General Information**

Description: Test for approval Comment: Test  
 Business Purpose: Conference  
 Status: Approvals in Process  
 \*Date From: 05/22/2012 To: 05/22/2012 Last Updated: 05/21/2012 By: GILLESPIEC

[Accounting Defaults](#) More Options:

You can deny individual expenses and still approve or send back the overall report.

**Details** [Customize](#) | [Find](#) |

Expense Type	Date	PC BU	Project	Activity	Amount	Currency	Approve
MEALS AND INCIDENTALS	05/22/2012	KURES	NIH0066303	1	13.00	USD	<input checked="" type="checkbox"/>

**Totals**

Total:	13.00 USD
Less Non-Approved:	0.00 USD
Total Authorized:	13.00 USD

Click on MEALS AND INCIDENTALS to review the accounting defaults and all listed expenses.

7

**Approve Travel Authorization**  
**Expense Detail for MEALS AND INCIDENTALS (Line 1)**

Robert Linseisen-Kerley Authorization ID: 0000000058

**About This Expense**

Date: 05/22/2012  
 Payment Type: Reimbursements  
 Expense Billing Code: Billable  
 Per Diem Range: 0 - 99  
 Location: Domestic  
 Amount: 13.00 USD

Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity
13.00	KURES	125180	908	2970000	ALL			KURES	NIH0066303	1

[Update Accounting Detail](#)

Approve Authorization

[Return to Travel Authorization Summary](#)

J

- A. Review the Amount.
- B. Review the GL Unit.
- C. Review the Account.
- D. Review the Fund.
- E. Review the Dept.
- F. Review the Bud Ref.



G. Review the PC Bus Unit(if project related).  
 H. Review the Project(if project related).  
 I. Review the Activity(if project related).  
**If not all accounting detail is incorrect or the travel is not approved, click Return to Travel Authorization Summary to send back to entry level person.**

8

Totals	
Total:	13.00 USD
Less Non-Approved:	0.00 USD
<b>Total Authorized:</b>	<b>13.00 USD</b>

Pending Actions			
Profile	Name	Action	Date/Time
Project Manager	Moore, Steven		

Action History			
Profile	Name	Action	Date/Time
Expense Manager	Brock, Linda	Submitted	05/21/2012 3:42:28PM
		Approved	05/22/2012 7:09:43AM

Comments

Please adjust the fund in this transaction.

Budget Status: Valid  
[Budget Options](#)

Enter comments in the Comment field to identify the reason for sending the transaction back to the entry level person. **Please note, comments are required before the transaction may be sent back.** Click on 'Send Back' to send back the transaction to the entry level person.



## Travel Authorization Send Back Via Email

Step	Action
1	<div data-bbox="391 499 1456 1199" style="border: 1px solid gray; padding: 5px;"><p>From: ffn2@ffn2.ku.edu <span style="float: right;">Sent: Mon 5/21/2012 3:50 PM</span> To: Moore, Steven W Cc: Subject: Approval requested for travel authorization Test for approval for Linseisen-Kerley,Robert Patrick.</p><p>A travel authorization request has been submitted that requires your attention:</p><p>Employee ID: 1367095 Employee Name: Linseisen-Kerley,Robert Patrick Submission Date: 2012-05-21 Travel Auth Description:Test for approval Travel Auth ID: 0000000058 Business Purpose: Conference Reimbursement Amount: 13 USD</p><p>You can navigate directly to the page for more information by clicking the link below:</p><p><a href="https://ffn2.ku.edu/psp/ffn2/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_TAUTH_APPR.GBL?Action=U&amp;TRAVEL_AUTH_ID=0000000058&amp;LINE_NBR=1">https://ffn2.ku.edu/psp/ffn2/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_TAUTH_APPR.GBL?Action=U&amp;TRAVEL_AUTH_ID=0000000058&amp;LINE_NBR=1</a></p></div> <p>The approver, will receive an email from PeopleSoft informing them that they have a pending Travel Authorization to approve. Click on the link and the approver will be directed to the transaction to approve. <b>Please note, if the list of approvers is pooled, each approver will receive email notification, however, it is only necessary for one approver to actually approve the transaction. Once complete, the transaction will be removed from the remaining pooled approvers' work list.</b></p>



2

**ORACLE**  
**PEOPLESOFT ENTERPRISE**

User ID:

Password:

**Sign In**

[Set Trace Flags](#)

**Select a Language:**

<a href="#">English</a>	<a href="#">Español</a>
<a href="#">Dansk</a>	<a href="#">Deutsch</a>
<a href="#">Français</a>	<a href="#">Français du Canada</a>
<a href="#">Italiano</a>	<a href="#">Magyar</a>
<a href="#">Nederlands</a>	<a href="#">Norsk</a>
<a href="#">Polski</a>	<a href="#">Português</a>
<a href="#">Suomi</a>	<a href="#">Svenska</a>
<a href="#">Čeština</a>	<a href="#">日本語</a>
<a href="#">한국어</a>	<a href="#">Русский</a>
<a href="#">ไทย</a>	<a href="#">简体中文</a>
<a href="#">繁體中文</a>	<a href="#">العربية</a>
<a href="#">UK English</a>	

Sign into PeopleSoft. You will be directed to the transaction needing approval.

3

**Approve Travel Authorization**

**Travel Authorization Summary**

Robert Linseisen-Kerley [User Defaults](#) Authorization ID: 0000000058

**General Information**

**Description:** Test for approval **Comment:** Test

**Business Purpose:** Conference

**Status:** Approvals in Process

**\*Date From:** 05/22/2012 **To:** 05/22/2012 **Last Updated:** 05/21/2012 **By:** GILLESPIEC

[Accounting Defaults](#) **More Options:**  **GO**

You can deny individual expenses and still approve or send back the overall report.

Details <span style="float: right;"><a href="#">Customize</a>   <a href="#">Find</a>   </span>							
Expense Type	Date	PC BU	Project	Activity	Amount	Currency	Approve
MEALS AND INCIDENTALS	05/22/2012	KURES	NIH0066303	1	13.00	USD	<input checked="" type="checkbox"/>

**Totals**

**Total:** 13.00 USD

**Less Non-Approved:** 0.00 USD

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**Total Authorized:** 13.00 USD

Click on MEALS AND INCIDENTALS to review the accounting defaults and all listed expenses.





4	<b>Approve Travel Authorization</b>																															
	<b>Expense Detail for MEALS AND INCIDENTALS (Line 1)</b>																															
	Robert Linseisen-Kerley						Authorization ID: 0000000058																									
	<b>About This Expense</b>																															
	Date:		05/22/2012																													
	Payment Type:		Reimbursements																													
	Expense Billing Code:		Billable																													
	Per Diem Range:		0 - 99																													
	Location:		Domestic																													
	Amount:		13.00 USD																													
<table border="1"> <thead> <tr> <th>Amount</th> <th>*GL Unit</th> <th>Account</th> <th>Fund</th> <th>Dept</th> <th>Bud Ref</th> <th>CF1</th> <th>Program</th> <th>PC Bus Unit</th> <th>Project</th> <th>Activity</th> </tr> </thead> <tbody> <tr> <td>13.00</td> <td>KURES</td> <td>125180</td> <td>908</td> <td>2970000</td> <td>ALL</td> <td></td> <td></td> <td>KURES</td> <td>NIH0066303</td> <td>1</td> </tr> </tbody> </table>											Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity	13.00	KURES	125180	908	2970000	ALL			KURES	NIH0066303	1
Amount	*GL Unit	Account	Fund	Dept	Bud Ref	CF1	Program	PC Bus Unit	Project	Activity																						
13.00	KURES	125180	908	2970000	ALL			KURES	NIH0066303	1																						
<p style="text-align: center;"> <span style="margin-right: 20px;">A</span> <span style="margin-right: 20px;">B</span> <span style="margin-right: 20px;">C</span> <span style="margin-right: 20px;">D</span> <span style="margin-right: 20px;">E</span> <span style="margin-right: 20px;">F</span> <span style="margin-right: 20px;">G</span> <span style="margin-right: 20px;">H</span> <span style="margin-right: 20px;">I</span> </p> <p> <a href="#">Update Accounting Detail</a>  <input checked="" type="checkbox"/> Approve Authorization  <input type="button" value="Previous Expense"/> <input type="button" value="Next Expense"/> </p>																																
<p>J <a href="#">Return to Travel Authorization Summary</a></p>																																
<p>A. Review the Amount.          B. Review the GL Unit.          C. Review the Account.          D. Review the Fund.          E. Review the Dept.          F. Review the Bud Ref.          G. Review the PC Bus Unit(if project related).          H. Review the Project(if project related).          I. Review the Activity(if project related).          J. <b>If not all accounting detail is incorrect or the travel is not approved, click Return to Travel Authorization Summary to send back to entry level person.</b></p>																																





5

Totals			
Total:		13.00	USD
Less Non-Approved:		0.00	USD
<hr/>			
Total Authorized:		13.00	USD

Pending Actions			
		Customize   Find    	First <input type="text" value="1 of 1"/> Last
Profile	Name	Action	Date/Time
Project Manager	Moore,Steven		

Action History			
		Customize   Find    	First <input type="text" value="1-2 of 2"/> Last
Profile	Name	Action	Date/Time
		Submitted	05/21/2012 3:42:28PM
Expense Manager	Brock,Linda	Approved	05/22/2012 7:09:43AM

Comments	
<input type="text" value="Please adjust the fund in this transaction."/>	

Budget Status: Valid  
[Budget Options](#)

Enter comments in the Comment field to identify the reason for sending the transaction back to the entry level person. **Please note, comments are required before the transaction may be sent back.** Click on 'Send Back' to send back the transaction to the entry level person.