

EX.020.012 - Copying an Existing Travel Authorization

Purpose	- To identify the different ways to create a Travel Authorization. - To identify the purpose of a Travel Authorization. - To create a Travel Authorization from an existing authorization.
Description	If the institution requires written permission to travel for the performance of official duties, submit a travel authorization. Travel Authorizations within PeopleSoft are specific to a planned trip with defined start and end dates and locations. Travel Authorizations submitted within the Expenses Module can only be entered for future travel dates. Travel Authorization cannot be created for a trip that has start and end dates in the past. Institutions may have guidelines on how far before a planned trip that travel authorizations should be submitted. To create a travel authorization, the options are to start from a blank report, copy an existing travel authorization, or create a travel authorization using a template. Copying a travel authorization can reduce entry time by with users changing only minor details to a previous authorization, rather than creating a blank transaction from scratch.
Security Role	BOR PeopleSoft User
Dependencies/ Constraints	None
Additional Information	None

Procedure

For this topic, the example is submitting a travel authorization for a conference with mileage expenses for one day. There is an existing travel authorization that is very similar. Let's copy the existing travel authorization and update it for the new trip.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu link.
3.	Click the Employee Self-Service link.
4.	Click the Travel Authorization link.
5.	Click the Create link.
6.	Select only from a template list since the user default preferences are defined to use templates for travel authorizations. For this example, let's copy an existing travel authorization and not use a template. Click the Return to Travel Authorization Entry link.
7.	To begin, use the Quick Start drop-down list to select a creation method for the travel authorization. Expenses initially displays this field if the User Defaults for travel authorizations are set to open to a Blank Report. Options within the Quick Start drop down list are: • A Blank Authorization: Select to start with a blank travel authorization. • A Template: Select to access the Select a Template page and select existing templates from which to copy expense lines to the new travel authorization. • An Existing Authorization: Click to access the Copy From an Existing Travel Authorization page and select existing travel authorizations to copy to the new travel authorization. Click the Quick Start list.
8.	Click the An Existing Authorization list item.
9.	Click the GO button.
10.	Upon page entry, the system automatically calculates the From Date: to be three months prior to the current date, and the To: Date to be one month past the current date. Enter different search criteria in the From and To Date boxes and search for a different date range if needed.
11.	Click the blue text in the Description field to preview what the travel authorization includes before copying it to the new travel authorization.

Step	Action
12.	Click the Select button next to the travel authorization that is being copied to the new transaction.
13.	For this example, change the Description, update the dates for travel and remove two expense rows.
14.	Enter " ITS Planning Conf " in the Description field.
15.	Click in the Choose a date (Alt+5) field.
16.	Enter " 03/11/2024 " in the Choose a date (Alt+5) field. Reminder: Dates for a travel authorization can only be for future dates.
17.	Click in the Date To field.
18.	Enter " 03/11/2024 " in the Date To field.
19.	Update the dates on the expense lines since only future dates for travel authorizations can be entered. They should fall within the date range specified in the General Information section. Click in the Date field.
20.	Enter " 03/11/2024 " in the Date field.
21.	Delete and copy as many lines as needed. New expense lines can also be added if needed. For this exercise, two lines will be deleted. Click the Select checkbox next to one of the rows that is being deleted.
22.	Click the Select checkbox next to another row that is being deleted.
23.	Click the Delete Selected button.
24.	Click the OK button.
25.	Click the Check For Errors button.
26.	To print this report, click the Printable View link near the bottom of the page.
27.	Click the Save for Later button.