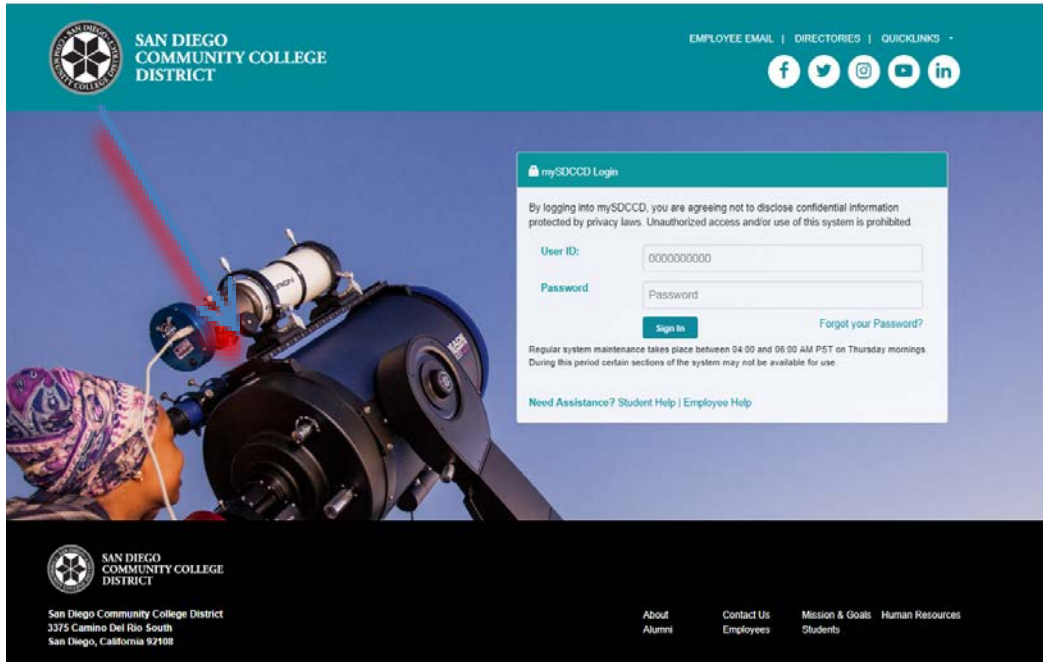
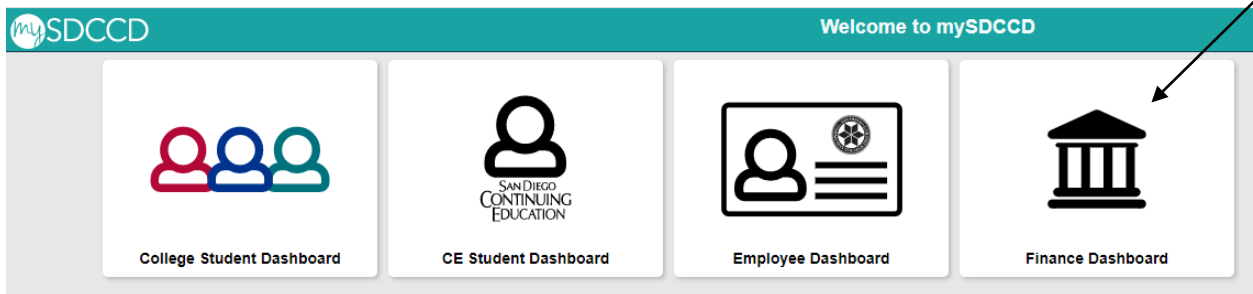


PUM Travel Authorization Procedure

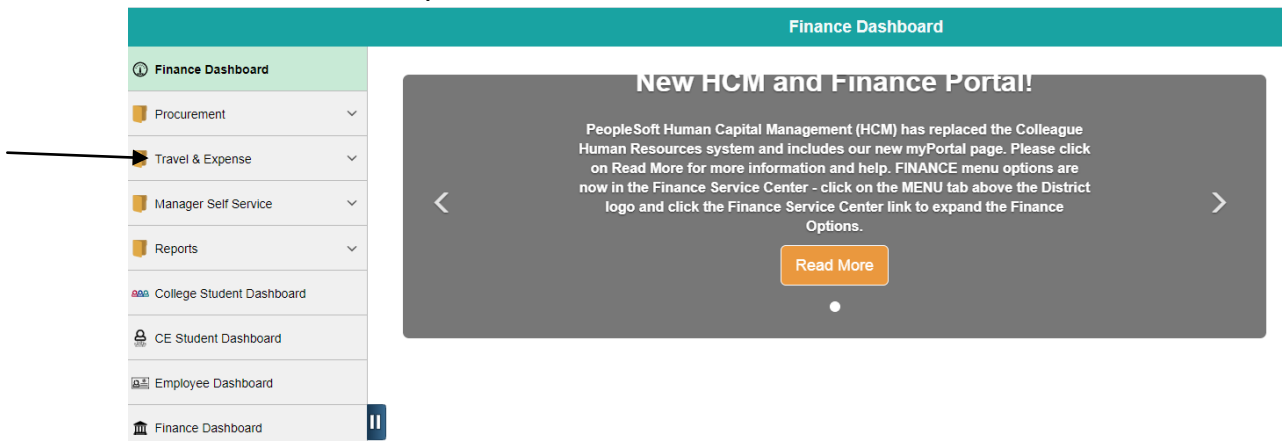
1. Log into PeopleSoft using: <https://myportal.sdccd.edu>



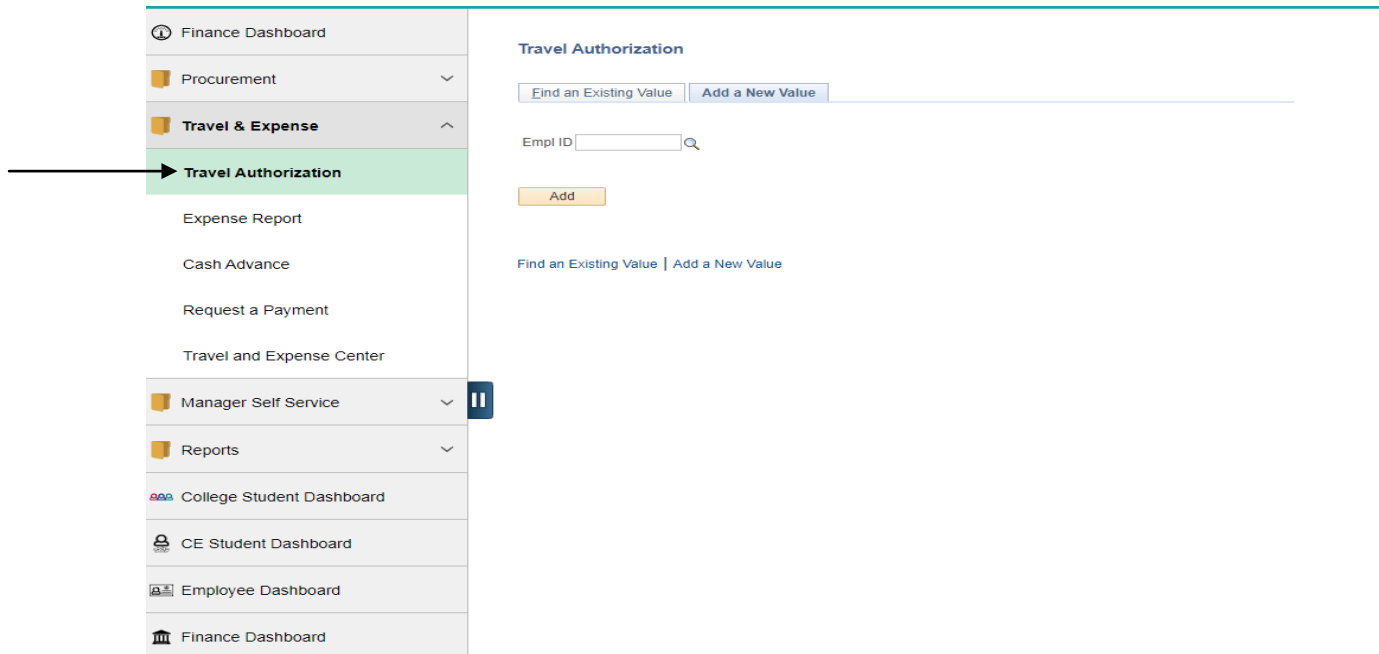
2. Click on the Finance Dashboard tile on the main portal.



3. Click on Travel & Expense



4. Choose Travel Authorization



5. There are two tabs: 'Find an Existing Value' and 'Add a New Value.'

- a. Click on the 'Find an Existing Value' tab if you are looking for a travel authorization that was submitted. You can search by the Authorization ID number. .
- b. You can also 'Search by:' Name of the employee or the employee ID number

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: begins with

[Search](#) [Advanced Search](#)

- c. Click on the 'Add a New Value' tab, if you are creating a new travel authorization for yourself or another employee you are authorized to arrange travel for.

- i. The Empl. ID field will default to your Employee ID from your PeopleSoft profile
- ii. You can click on the magnifying glass to search for an Empl.ID if necessary

The screenshot shows the 'Travel Authorization' interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, the 'Empl ID' field contains the value '0002066081' and has a magnifying glass icon to its right. An 'Add' button is located below the field. A modal window titled 'Look Up Empl ID' is open, showing a search interface. It has a 'Search by:' dropdown set to 'Empl ID' and a 'begins with' text box. Below the search box are 'Look Up', 'Cancel', and 'Advanced Lookup' buttons. The 'Search Results' section shows a table with columns 'Empl ID' and 'Name'. The first row contains the values '0000018022' and 'Bennett,James'. Navigation controls for the results include 'View 100', 'First', '1-138 of 138', and 'Last'.

- iii. Click on “Add” to choose your TA creation option.

This screenshot shows the 'Travel Authorization' interface with the 'Empl ID' field containing '0000123456'. The 'Add' button is highlighted with a red arrow pointing to it from the left. The interface also shows 'Find an Existing Value' and 'Add a New Value' buttons at the top and bottom.

First, add your attachments. *Note: **Please combine receipts** (hotel confirmation, flight itinerary, conference registration confirmation) **into one PDF.**

*Click "Attachments"

Create Travel Authorization

Travel Authorization Entry

Nancy Lane

User Defaults

General Information

*Description: NLANE_2016-09-01 Authorization ID: NEXT

*Business Purpose: Professional Development Comment: []

Default Location: [] [Attachments](#)

*Date From: 09/01/2016 *Date To: 09/01/2016

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

Details ? Personalize | Find | [] | [] First 1 of 1

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
<input checked="" type="checkbox"/>	Air Travel	09/01/2016	200.00	USD	Prepaid Airf	Internal Distri	*Detail

[Copy Selected](#) [Delete Selected](#) [Check For Errors](#) [New Expense](#) [Add](#)

Totals

Authorized Amount	200.00 USD
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[Update Totals](#)

d. Click "Add Attachment"

Travel Auth Attachments

Travel Authorization ID: NEXT

Details

File Name	Description	User	Name
View			

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

[Add Attachment](#)

[OK](#) [Cancel](#)

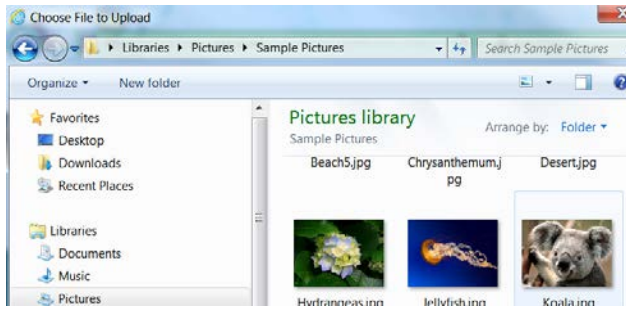
e. Click "Browse"

File Attachment [x] [Help](#)

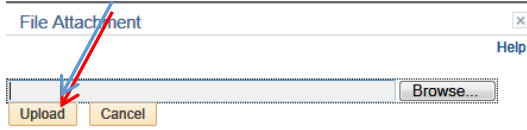
[Browse...](#)

[Upload](#) [Cancel](#)

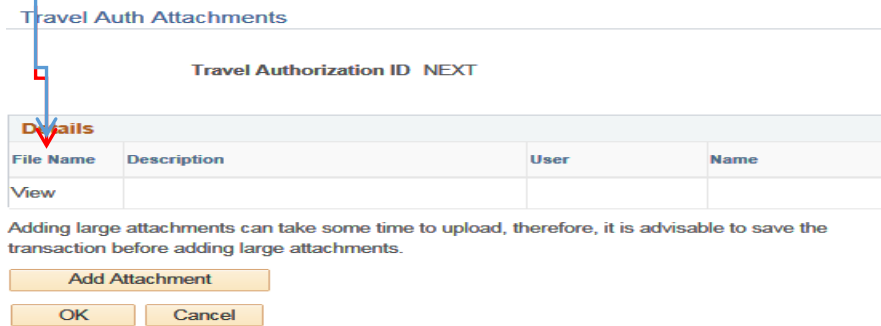
f. Choose document as attachment



g. Click "Upload"



h. Click "OK"



19. You now see the number of Attachments in parentheses.

Note: Please combine receipts (hotel confirmation, flight itinerary, conference registration confirmation, Google Maps of distance if traveling by car) into one PDF.

Nancy Lane ?

*Business Purpose Professional Development

*Description Lane, Nancy_2017-12-19

Default Location

*Date From 12/19/2017 *Date To 12/19/2017

Attachments (1)

Actions ...Choose an Action GO

Projected Expenses ?

Expand All | Collapse All

Totals (2 Lines) 330.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
12/19/2017	Air Travel	AIRFARE 247 characters remaining	Employee Paid	330.00	USD
12/19/2017	Meals & Incidental Expenses	MEALS 249 characters remaining	Employee Paid	0.00	USD

Expand All | Collapse All

Totals (2 Lines) 330.00 USD

6. If errors occur, correct the budget number by expanding the Accounting Detail. Click the gray arrow to the left to expand, make corrections.

Projected Expenses ?

Expand All | Collapse All

Totals (2 Lines) 330.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
12/19/2017	Air Travel	AIRFARE 247 characters remaining	Employee Paid	330.00	USD

Billing Type Internal Dis

Ticket Number

Accounting Details ?

Chartfields

Amount	*GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project	Activity	Aff
198.00	DIS01	1110	74200	672000	5355					
132.00	DIS01	1110	74400	678010	5355					

7. Click on "Save for Later" to obtain a TA # and to ensure work is saved

Modify Travel Authorization

Nancy Lane ?

*Business Purpose Professional Development

*Description Lane, Nancy_2017-12-19

Default Location

*Date From 12/19/2017 *Date To 12/19/2017

Attachments (1)

Actions ...Choose an Action GO

Authorization ID 0000004374 Pending

Save for Later | Summary and Submit

Projected Expenses ?

Expand All | Collapse All

Totals (2 Lines) 330.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
12/19/2017	Air Travel	AIRFARE 247 characters remaining	Employee Paid	330.00	USD

*Billing Type Internal Dis

Ticket Number

Accounting Details ?

8. Make any necessary changes or updates then click on the “Summary and Submit” button

Modify Travel Authorization

Nancy Lane

Business Purpose: Professional Development

Description: Lane, Nancy, 2017-12-19

Default Location: [Search]

Authorization ID: 0000004374 Pending

Date From: 12/19/2017 Date To: 12/19/2017

Attachments (1)

Projected Expenses

Totals (2 Lines) 330.00 USD

Date	Expense Type	Description	Payment Type	Amount	Currency
12/19/2017	Air Travel	AIRFARE	Employee Paid	330.00	USD

Billing Type: Internal Dis

Accounting Details

9. Check the compliance box confirming accuracy and compliance, then press ‘Submit Travel Authorization’

Modify Travel Authorization

Nancy Lane

Business Purpose: Professional Development

Description: Lane, Nancy, 2017-12-19

Default Location: [Search]

Authorization ID: 0000004374 Pending

Date From: 12/19/2017 Date To: 12/19/2017

Totals

Projected Expenses (2 Lines) 330.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 330.00 USD

By checking this box, I certify that costs are reasonable estimates and comply with expense policy.

Submit Travel Authorization

23. Click ‘OK’ to submit

Save Confirmation

Create Travel Authorization

Submit Confirmation

Keith Barron Authorization ID NEXT

Travel Authorization Totals

Total	550.00 USD
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Click OK to submit, or click Cancel to return to the travel authorization without submitting.

OK Cancel

Authorized Amount 550.00 USD

Update Totals

Submit

Create A Cash Advance Project Summary View Printable Version

10. Confirm that the TA was "Submitted for Approval"

Travel Authorization [Travel Authorization Detail](#)

Nancy Lane Actions

Your travel authorization 0000004374 has been submitted for approval.

Business Purpose: Professional Development Default Location: Authorization ID: 0000004374 Submission in Process

Description: Lane, Nancy_2017-12-19 Date From: 12/19/2017 Date To: 12/19/2017

Totals ?

Projected Expenses (2 Lines) 376.00 USD Denied Expenses 0.00 USD

Total Authorized Amount 376.00 USD

By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

[Return to Expense](#) [PDF Audit](#)