GEORGIAFIRST
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft Travel and Expenses Panel Discussion

Panel Members:

Daphne Burch – Armstrong State University
Penny Beverly – Gordon State College
Kate Smith – Information Technology Services
Celeste Wade – Clayton State University

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PeopleSoft 9.2

Release 5.20 Resolved Known Issues

- KI9.2-21_EX – Accounting Details Covered by Scroll Bar
- KI9.2-36_EX – Cancel TAuths Retaining Old Accounting Date
- KI9.2-42_EX – Comments Not Displaying on Expense Report Sent Back by Approver

New with Release 5.20

- Travel Authorization entry
  - Now like Expense Report entry

Old Travel Authorization Entry

Favorites | Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

ORACLE

All | Search | Advanced Search

Create Travel Authorization

Travel Authorization Entry

Elsie Ridley User Defaults

General Information

*Description: Georgia Summit Conference
*Business Purpose: Attend Conference
Destination Location: AUGUSTA
*Date From: 09/14/2016 *Date To: 09/16/2016
Authorization ID: NEXT
Comment:
Attachments

Accounting Defaults More Options GO

Details

Personalize | Find | First 1-4 of 4 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
	Emp Mileage	09/14/2016	32.40	USD	N/A (e.g. Mil	Internal	*Detail
	Emp Lunch	09/14/2016	9.00	USD	Cash	Internal	*Detail
	Emp Lodging	09/14/2016	129.00	USD	Credit Card	Internal	*Detail
						Internal	

Copy Selected | Delete Selected | Check For Errors | New Expense | Add

Totals

Authorized Amount: 170.40 USD

Update Totals

Save for Later | Submit | Create A Cash Advance | View Printable Version

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New Travel Authorization Entry

Travel Authorization | Create Travel Authorization

Menu

Search:

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    - Review Payments
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    - Review/Edit Profile
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- Purchasing
- eProcurement
- Travel and Expenses
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- Financial Gateway
- Commitment Control
- General Ledger
- Real Time Bottom Line
- Allocations
- Statutory Reports
- Set Up Financials/Supply Chain
- Enterprise Components

New Window | Help | Personalize Page

Create Travel Authorization

Save for Later | Summary and Submit

Elsie Ridley

Actions ...Choose an Action GO

*Business Purpose: Attend Conference

Destination Location: AUGUSTA

*Description: Georgia Summit Conference

*Date From: 09/14/2016 *Date To: 09/16/2016

Projected Expenses

Attachments

Expand All | Collapse All Add: | Quick-Fill Totals (3 Lines) 41.40 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency
09/14/2016	Emp Mileage		N/A (e.g. Mileage)	32.40	USD
09/14/2016	Emp Lunch		Cash	9.00	USD
09/14/2016	Emp Lodging		Credit Card	0.00	USD

Mileage detail: *Billing Type: Internal; *Originating Location: FORT VALLEY; *Destination Location: AUGUSTA; *Miles: 60 x 0.5400; Accounting Details

Lunch detail: *Billing Type: Internal; *Location: AUGUSTA; Accounting Details

Lodging detail: *Billing Type: Internal; *Location: AUGUSTA; Number of Nights: 1; *Nightly Rate: 129.00; Accounting Details

Expand All | Collapse All Totals (3 Lines) 41.40 USD

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New Travel Authorization Summary and Submit page (before submission)

Travel Authorization | Create Travel Authorization

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- Procurement Contracts

New Window | Help | Personalize Page

Create Travel Authorization

Save for Later | Travel Authorization Details

Elsie Ridley

Actions ...Choose an Action GO

*Business Purpose Attend Conference

Default Location AUGUSTA

*Description Georgia Summit Conference

*Date From 09/14/2016

*Date To 09/16/2016

Totals

View Printable Version

Notes

Attachments

Projected Expenses (3 Lines)	170.40 USD	Denied Expenses	0.00 USD

Total Authorized Amount 170.40 USD

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

Submit Travel Authorization

New Travel Authorization Summary and Submit page (after submission)

Authorization Summary | Travel Authorization

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New Window | Help | Personalize Page |

Travel Authorization

Travel Authorization Details

Elsie Ridley

Actions ...Choose an Action GO

Business Purpose Attend Conference

Default Location AUGUSTA

Authorization ID 0000433819 Submitted for Approval

Date From 09/14/2016 Date To 09/16/2016

Created 09/13/2016 Elsie Ridley

Last Updated 09/13/2016 Elsie Ridley

Description Georgia Summit Conference

Totals View Printable Version Notes

Projected Expenses (3 Lines) 170.40 USD Denied Expenses 0.00 USD

Total Authorized Amount 170.40 USD

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

Submit Travel Authorization | Withdraw Travel Authorization

Submitted On 09/13/2016 Submitted By Elsie Ridley

Approval History

Submitted Elsie Ridley → 1st Level Finance Dept Manager Multiple Approvers → Reviewer (Pooled)

Action	Role	Name	Date/Time
Submitted	Employee	Elsie Ridley	09/13/2016 11:59:13AM

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Questions?