

## How to create a Travel Authorization (TA) in PeopleSoft

Department of Chemistry and Biochemistry (10/8/24)

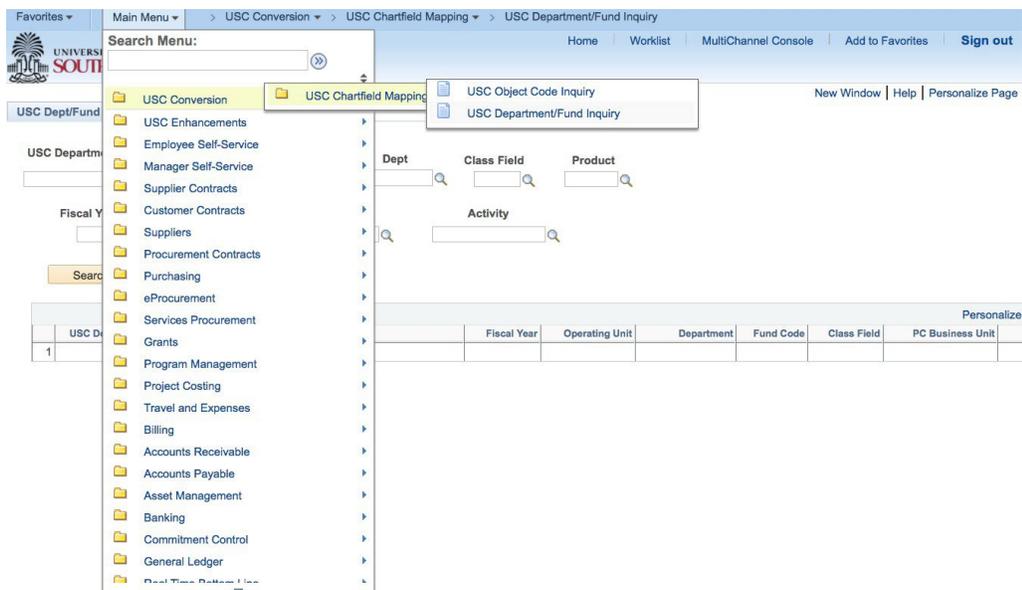
- TAs will be required for all travel in the College of Arts and Science
- TAs must be submitted AND APPROVED before the start of travel !!!

There are several levels of approval for the TAs just like with proposals in USCERA. So, to be safe, **TAs should be submitted 2 weeks prior to travel.**

- TAs must be done in PeopleSoft

### INSTRUCTIONS

1. Login to PeopleSoft ([finance.ps.sc.edu](http://finance.ps.sc.edu))
2. Find the PeopleSoft account numbers for the grant or account that you will be charging for your travel. (Skip to item 3, if you already know the Chartfield string for your grant account.)  
Go to **Menu (on top bar) → Employee Self-Service → USC Conversion → USC Chartfield Mapping → USC CoA Combos Inquiry**



- i. Type in your project number to find your grant. Then click **Search**.

The information you need is:

Operating Unit: CL071

Dept: 1302xxx

Fund:

Class:

PC Bus Unit:

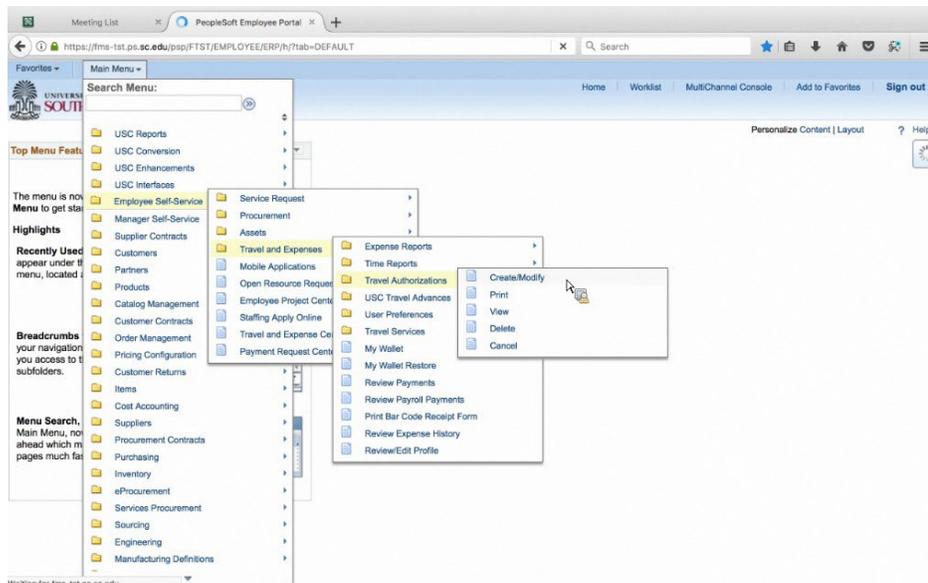
Project:

Activity:

- ii. Copy down this information. You will need it later. (Some of these fields might be blank. That is okay.)
- iii. Alternatively, the Business Manger will be able to provide you with your grant information if needed.

3. Navigate to:

Main Menu → Employee Self-Service → Travel and Expenses →  
Travel Authorization → Create/Modify

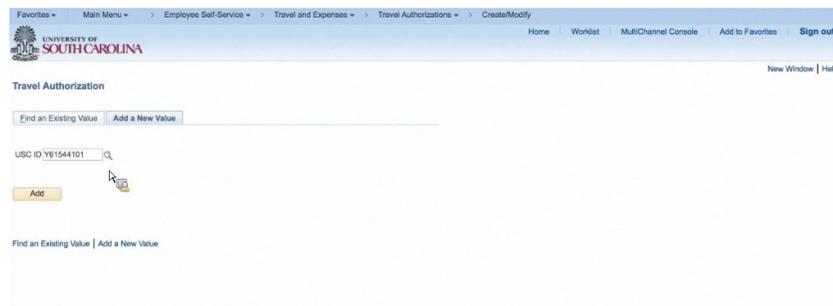


4. Enter your USC ID:

If this field is already populated, check to see that it is your USC ID. Your USC ID should start with a letter followed by eight numbers.

You can look up your USC ID by clicking on the magnifying glass.

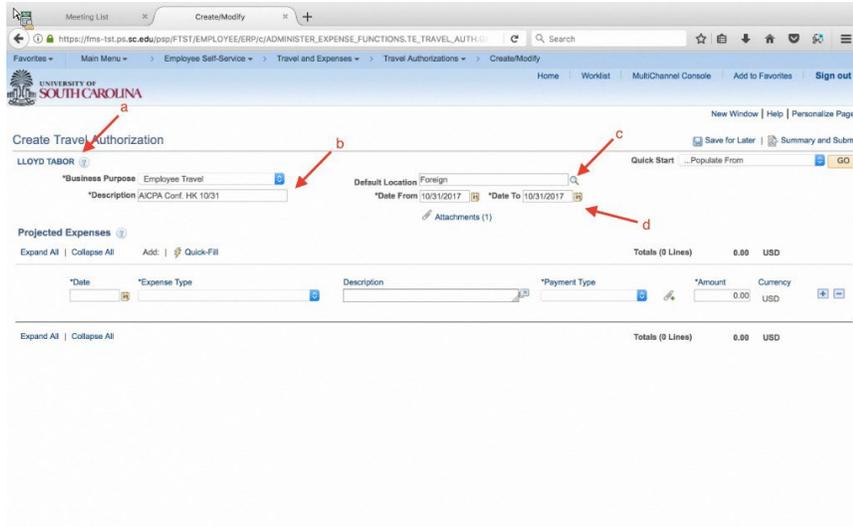
If the search does not find your USC ID, make sure you have completed filling in your banking information. **(Main Menu (on top bar) → Employee Self-Service → Travel and Expenses → Review/Edit Profile → USC Bank Accounts)**



The screenshot shows the 'Travel Authorization' page in the University of South Carolina's Employee Self-Service system. The breadcrumb trail at the top reads: 'Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify'. The page title is 'Travel Authorization'. Below the title, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. A search input field contains the text 'USC ID Y61544101' and has a magnifying glass icon to its right. Below the search field is an 'Add' button. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

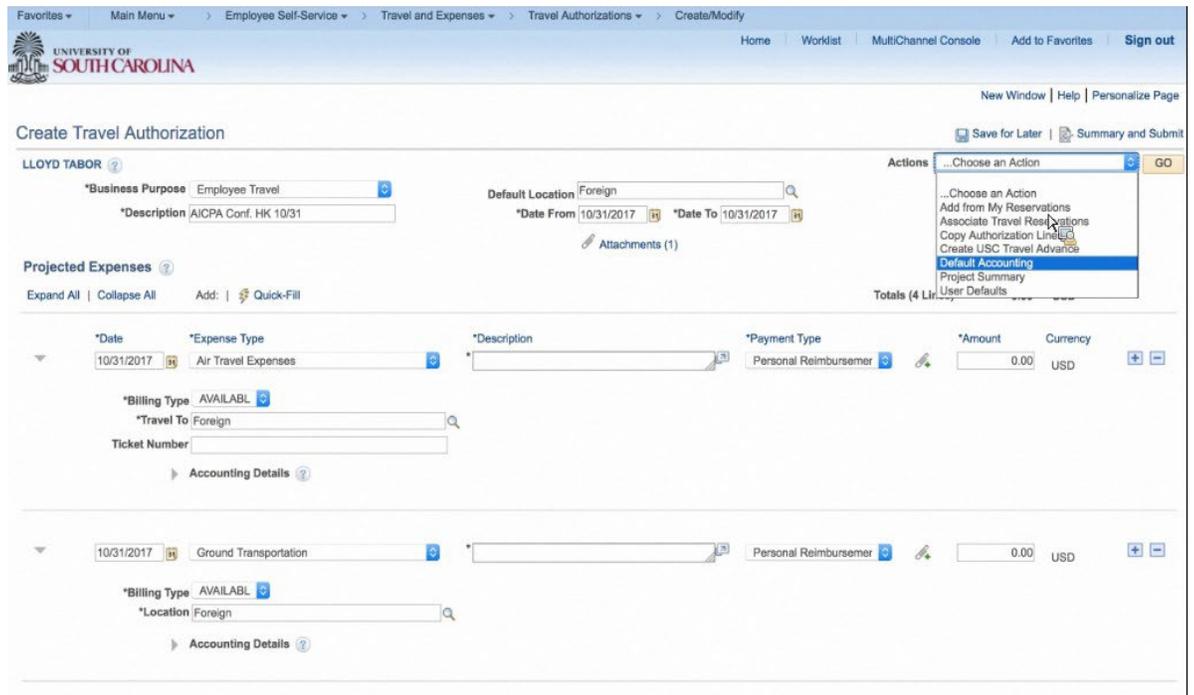
5. Fill out the general information for the TA:

- a. Make sure your name is on the TA.
- b. Title of the TA (use abbreviations because the field is limited)
- c. Location (use the magnifying glass to see the options)
- d. Dates of travel



6. List the projected Expenses:

- a. To fill in the account information for each expense item, go to actions (in the upper right hand side) and select **default accounting** AND CLICK GO.



- b. Fill in the PeopleSoft account information for your grant or account that you found in part 1. **DO NOT USE the magnifying glasses to lookup other values!!**

Fill in the information for the: GL Unit, Oper Unit, Dept, Fund(this is PeopleSoft Fund/code), Class etc...

Some fields may be blank. That is okay.

**Make sure that all the fields are exactly the same as in the Excel lookup table or the Chartfield search. Account codes in PeopleSoft are not a single number. They are the whole string of 5-8 numbers and fields and will vary based on the expense type.**

Accounting Summary

%	*GL Unit	Oper Unit	Dept	Fund	Class	PC Bus Unit	Project	Activity	Cost Share	Product	Funding Source
100.00	USC01	CL071	211070	E2452	202						

Buttons: Add Chartfield Line, Add Default, OK, User Defaults

- i. If you are charging the trip to more than one account, then you can click **Add Chartfield Line** with a second account. Fill-in the percentages that will be charged to each account.

7. For each expense, fill-in the **Description** and **projected amount**.

**Projected Expenses**

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
10/31/2017	Air Travel Expenses	Return trip from CAE to Hong Kong	Personal Reimbursmer	1200.00	USD
10/31/2017	Ground Transportation		Personal Reimbursmer	0.00	USD

8. Click **Save for Later** (upper right hand corner). This will check that you have completed all required fields.

9. To complete your TA, click **Summary and Submit** (upper right hand corner).

**Modify Travel Authorization**

Authorization ID: 1000000018 Pending

**Projected Expenses**

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
10/31/2017	Air Travel Expenses	Return trip from CAE to Hong Kong	Personal Reimbursmer	1,200.00	USD
10/31/2017	Ground Transportation	Taxi to and from hotel and conference center	Personal Reimbursmer	200.00	USD

