## 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)
- 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

Charles in	//ms-tat.ps.sc.edd/psp/F131/EMPc	orespering rab-berrioe		· Search	
Favorites +	Main Menu +				
	Search Menu:	)@		Home Worklist	MultiChannel Console Add to Favorites Sign out
Top Menu Featu	USC Reports USC Conversion USC Enhancements USC Interfaces	* * *			Personalize Content   Layout ? Help
Menu to get star Highlights Recently Used appear under th menu, located a	Employee Self-Service     Manager Self-Service     Supplier Contracts     Customers     Partners     Products     Collon Management	Service Request Procurement Assets Travel and Expenses Mobile Applications Open Resource Requer Employee Project Centr	Expense Reports Time Reports Travel Authorizations USC Travel Advances	Modify	
Breadcrumbs your navigation you access to t subfolders.	Catalog Wahagement Customer Contracts Customer Contracts Pricing Configuration Customer Returns Items Cost Accounting	Staffing Apply Online Travel and Expense Ce Payment Request Cent	User Preferences Travel Services My Wallet My Wallet Restore Review Payments Review Payments		
Menu Search, Main Menu, nor ahead which m pages much fat	Suppliers Procurement Contracts Purchasing Inventory eProcurement Services Procurement		Print Bar Code Receipt Form Review Expense History Review/Edit Profile		

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)

Item Woodel Mathematicanee And is Parome Saigh Item Authorization India Busting Value   Add a New Value India Busting Value   Add a New Value	In Existing Value   Add a New Value	sile.		Class and
New Window	el Authorization  a el Existry Value  Add a New Value  In Distry Value  Add a New Value  In Distry Value	UNIVERSITY OF	Home Workist MultiChannel Console Add to Favorites	Sign out
Tavid Authorization  Find an Existing Value  Add Add a New Value  Add Add a New Value	ø     Muthorization       dan Edeling Value     Add a New Value       in Edeling Value     Add a New Value	N SOUTH CAROLINA		
ravel Authorization  End an Existing Value Add a New Value  nd an Existing Value Add a New Value	el Authorization			
Ind an Existing Value Add a New Value	el Authorization d as Ebsting Value Add a New Value In Division Value In Ebsting Value Add a New Value		New	window   Hel
End an Existing Value Add a New Value	d an Existing Value Add a New Value	ravel Authorization		
End an Existing Value Add a New Value	d an Ebstorg Value   Add a New Value			
AG ID VAILUE VAILUE AN INVENTIONE	ID VS1544101 QUAD AGE & New Yake	Find on Finisher Maker		
ISC ID VEISA4101 Q	ID (V\$154410)	Find an Existing value Add a New Value		
nd an Existing Value   Add a New Value	ID YESSAHID Q			
Add an Existing Value   Add a New Value	Add Carlotter Ca	ISC ID VE1544101		
Ad an Existing Yake   Add a New Vake	hta			
Add in Existing Value   Add a New Value	Acc			
nd an Existing Yalue   Add a New Value	en Existing Value   Add e New Value			
nd an Esisting Vilue   Add a New Vilue	n Existing Value   Add a New Value	200		
ind an Existing Value   Add a New Value	n Existing Value   Add a New Value			
ind an Existing Value   Add a New Value	in Existing Yalue   Add a New Yalue			
ng ng pangha yang i von a new yang	n Energy Anna 1 vog 3 kom Anna	and the second		
		nd an Existing value   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

Favorites • Main Menu • > Employee Self-Service • > Travel and Ex	penses + > Travel Authorizations + > Create/Modify	
UNIVERSITY OF AUTH SOUTH CAROLINA	Home	Worklist MultiChannel Console Add to Favorites Sign out
a		New Window   Help   Personalize Page
Create Travel Authorization	b	C Save for Later   🗟 Summary and Submi
LLOYD TABOR	·	Quick StartPopulate From G GO
*Business Purpose Employee Travel	Default Location Foreign	
*Description AICPA Conf. HK 10/31	*Date From 10/31/2017 3 *Date To 10/31/2017	8
	Attachments (1)	-
Projected Expenses @		d
Expand All   Collapse All Add:   🖸 Quick-Fill		Totals (0 Lines) 0.00 USD
*Date *Expense Type	Description *Payment	Type *Amount Currency
8		0.00 USD 💌 📼
Expand All   Collapse All		Totals (0 Lines) 0.00 USD

- 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.

	ERSITY OF JTH CAROLINA			Home Worklist	MultiChanne	el Console Add	to Favorites	Sign out
						New Windo	ow Help Pe	rsonalize Page
Create 1	ravel Authorization					Save for Lat	er   🛃 Sumn	nary and Submi
LLOYD TAI	BOR	_			Actions	Choose an Actio	n	GO
	*Business Purpose Employee Travel		Default Location Foreign	Q		Choose an Action	1 sustions	
	*Description AICPA Conf. HK 10/31		*Date From 10/31/2017 B *Date T	0 10/31/2017		Associate Travel R	esterations	
			Attachments (1)			Copy Authorization Create USC Travel	Advance	
Projecter	d Expenses 👔					Default Accounting		
Expand All	Collapse All Add:   🕸 Quick-Fill				Totals (4 Li	User Defaults		
	*Date *Expense Type		*Description	*Payment Type		*Amount	Currency	
Ŧ	10/31/2017 Air Travel Expenses	0	•	Personal Reimbursemer	🖸 <i>8</i> .	0.00	USD	•
	*Billing Type AVAILABL							
	*Travel To Foreign	Q						
	Ticket Number							
	Accounting Details (2)							
-	10/31/2017 B Ground Transportation	0	•	Personal Reimbursemen	o <i>I</i> .	0.00	USD	• -
	AVAILADI 0							
	*Location Foreign	0						
	Looming ( Codd)	4						
	Accounting Details (?)							

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.

S	JUIHO	CAR	OLINA										New Window   Help   Personalize P
eate 1	Travel A	uthor	rization										
cou	nting [	Defa	aults				Authorizat	ion ID NEXT					
cou	nting Su	mma	iry						Set Perso	nalizations   Fin	4   🖓   🔜	First 🚳 1 of 1 🕑 Last	
6	GL Unit		Oper Unit	Dept	Fund	Class	PC Bus Unit	Project	Activity	Cost Share	Product	Funding Source	
0.00	USC01	Q	CL071 Q	211070 Q	E2452 Q	202	a	Q	Q	Q	a	Q E	0
Add	d Charles	Id Lin	ie 🔶	bead	Default		+	+	1				
OK			1	1		1	1	1					
	-		1	1	1	1	1		1				
Defa	ults	1	1	1	1	1	1	1	1				

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.

SOU	TH CAROLIN	4								Home	Worklist M	ultiChannel C	Jonsole Add t	o Favontes	Sign out
													New Windo	w   Help   Pen	sonalize Pag
reate Tr	avel Authoriz	ation											Save for Late	r   🛃 Summa	ary and Subn
LOYD TABO	DR @											Actions	Choose an Action	ř.	GO
	Business Purpose	Employee Tra	vel			Def	ault Locatio	n Foreign		Q					
	*Description	AICPA Conf. H	K 10/31				*Date From	m 10/31/2017	*Date To	10/31/2017					
								Attachments	s (1)						
Projected	Expenses 👔									1				1	
Expand All	Collapse All	Add:   🦸 Qu	uick-Fill							/	т	otals (4 Line	s) 0.00	USD	
	*Dete	*Evenena Tura				*Deser	ntine		1	*Downey17			thereas a	-	
-	10/31/2017 M	Air Travel Exp	enses		0	* Return	trip from CA	E to Hong Kong	JC.	Personal	ype Reimbursemer		1200.00	LIED	•
			-						10					030	
	*Billing Type	AVAILABL													
	Ticket Numbe	P Foreign			G										
	TICKEL HUILDE														
		Accounting De	italis 😰				R								
		Chartfields					Ψ <u>Q</u>								
		Amount	*GL Unit	Oper Unit	Dept		Fund	Account	Class	PC Bus Unit	roject	Activity	Cos		
			USC01 Q	CL071	211070	Q	E2452 Q	52024	202 Q	~	Q		la l		
			-							/				/	
										/				/	

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

- 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).

Home     Wordsit     MaticDannet Console     Add to Favorities       SOUTH CALCULAX     New Wordsit     MaticDannet Console     Add to Favorities       Modify Travel Authorization     Save for Later     Save for Later     Save for Later       "Business Purpose Employee Travel     Default Location Foreign     Actions     Authorization ID       "Description AUDPA Cond. HK 1031     Default Location Foreign     Authorization ID     1000000000000000000000000000000000000	Home Workst MultiChannel Console Add to Favorites Sign our New Window Help Personalize Pag Save for Later Stremmary and Sub Actions Choose an Action Stremmary and Sub Actions Choose an Action B 000	Home								A	RSITY OF	
Modify Travel Authorization  LLOY TABOR	New Window   Help   Personalize Pag Save for Later   ActionsChoose an Action Authorization ID 100000000 Pending 1031/2017 @	Pate Te Jan Lon J										B.
Modify Travel Authorization	Save for Later 1 Southary and Sut Actions Choose an Action Authorization ID 1000000000 Pending 1031/2017 (3)	10-1- To 1001/0017										
LLOYD TABOR @  *Business Purpose Employee Travel  Description ACPA Cent: HK 10/31 Default Location Foreign Description ACPA Cent: HK 10/31 Default Location Foreign Deta From 10/31/2017 @ *Date From	Actions Choose an Action 0 00 Q Authorization ID 1000000000 Pending 1031/2017 B	Pate To 10/21/2017								ation	ravel Authoriz	Modify Tr
"Business Purpose Employee Trand     Image: Second State S	Q Authorization ID 100000008 Pending	Date To 10/21/2017									OR (2)	LLOYD TAB
"Description     "Date From (103/2017) (g)     "Date To (103/2017) (g)       Projected Expenses (g)	10/31/2017	Date To 10/24/2017		Foreign	ult Locatio	Defa		0	vel	Employee Tra	*Business Purpose	
Attachments (1)      Projected Expenses		Date 10 10/31/2017	17 🕞 📍	n 10/31/20	*Date From				K 10/31	AICPA Conf. HI	*Description	
Projected Expenses Expand All   Collapse Al Add:   © Quick-Fill Totals (4 Lines) 2,700.00 USD * Date * Expense Type * Description * Description * Payment Type * Anount Currency Personal Reinbursemer ©  * 1,200.00 USD ** Billing Type AVALABLE © ************************************		(1)	hments (1)	& Attac								
Expand AI   College AI Add:   @ Ouldo-FII Totals (4 Lines) 2,700.00 USD  * Oute *Expanse Type * *Description **Payment Type **Amount Currency * 100312017 (*) Air Travel Expanses (*) **Return tip from CAE to Hong Kong 2 ***********************************											Expenses ②	Projected
"Date         "Expense Type         "Description         "Payment Type         "Amount         Currency           100312017         IN         Air Tavel Expenses         Influent tip from CAE to Hong Kong         Influent to Hong Kong	Totals (4 Lines) 2,700.00 USD								lick-Fill	Add:   🖸 🗛	Collapse All	Expand All
10312017 B Ar Tavel Expenses       **     Testum tip from CAE to Hong Kong     Ar     Pensonal Reinbursemer     A     1.200.00     USD       *Billing Type     Arravel Expenses     O     ************************************	*Payment Type *Amount Currency	*Paym			ption	*Descri				*Expense Type	*Date	
*Billing Type AVALABL	Personal Reimbursemer 😨 🔏 1,200.00 USD 💌 🖃	Pers	Kong	E to Hong	trip from CA	* Return	0		enses	Air Travel Exp	10/31/2017	w
Travel To Foreion										e AVAILABL	*Billing Typ	
the standard							Q			P Foreign	"Travel T	
Ticket Number DELTA AIRLINES									ES	r DELTA AIRLIN	Ticket Numbe	
✓ Accounting Details ②									stalls 👔	Accounting De	v	
Chartfields										Chartfields		
Amount "GL Unit Oper Unit Dept Fund Account Class PC Bus Project Activity Con	PC Bus Project Activity Con	Class PC Bus Unit	ci	Account	Fund		Dept	Oper Unit	"GL Unit	Amount		
1200.00 USC01 Q CL071 Q 211070 Q E2452 Q 52024 Q 202 Q Q Q	Unit		0 2	52024	E2452 Q	Q	211070	CL071 Q	USC01 Q	1200.00		
Landstein Lands S. Landstein S		202 0				- 3						