

Creating an in-state travel authorization user guide

Overview

This document provides steps to create a travel authorization for in-state travel.

Procedure

Step 1. Log into PeopleSoft software.

A. From the Employee Self Service home page, select the Travel Authorization tile (Figure 1).

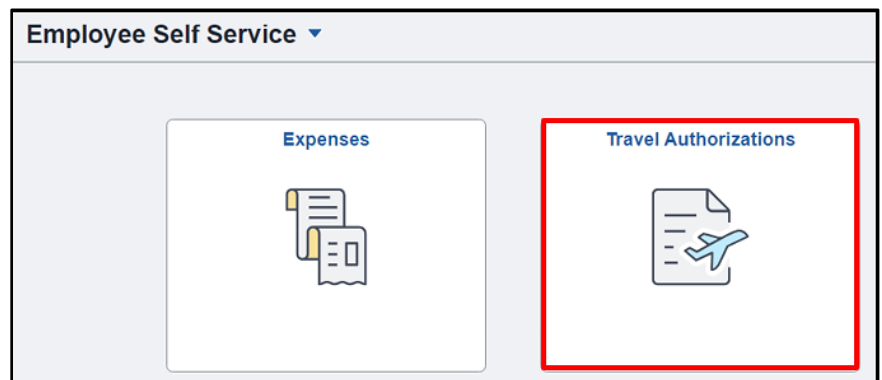


Figure 1. Employee Self Service home page.

Step 2. Select **Add Travel Authorization** from any tab (Figure 2).

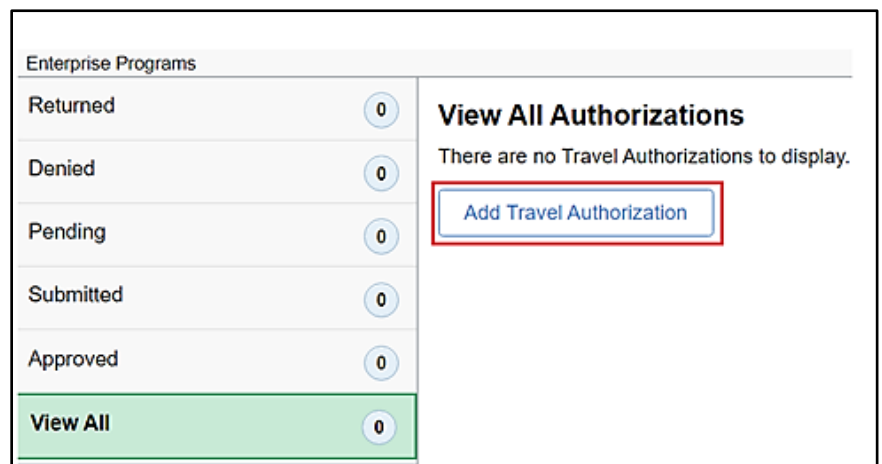


Figure 2. Add Travel Authorization.

Step 3. Complete the Travel Authorization request (Figure 3).

The screenshot shows the 'Travel Authorization' form. The 'Description' field contains 'Travel to Tulsa'. The 'Business Purpose' dropdown is set to 'In State Travel'. The 'Comments' field is empty. The 'Billing Type' dropdown is set to 'Internal'. The 'Travel From' field is empty. The 'Travel To' field is empty. The 'Date From' and 'Date To' fields are empty. The 'Trip Duration' is set to '1 Day'. The 'Total Expenses' are '0.00 USD'.

Figure 3. Travel Authorization Form.

- A. Description field – Enter a brief description of the purpose of travel.
 - i. Think of this field as the name of your travel authorization.

- B. Business Purpose – Select the dropdown arrow and select the appropriate option: **In State Travel** or **Out of State of Travel**.

This close-up shows the 'Business Purpose' dropdown menu. The 'In State Travel' option is selected and highlighted with a red box.

Figure 4. Business Purpose.

- C. Comments text field – Enter the justification for travel (Figure 5).

This close-up shows the 'Comments' text field. The text 'To attend annual meeting' is entered and highlighted with a red box.

Figure 5. Comments Field.

- D. Billing Type – Select the dropdown arrow and select the billing type, either **Internal** or **External**, as appropriate.

- E. Travel From (Figure 6).

- i. Select the **Travel From** text box and enter the partial location of the location from where you'll be traveling.
- ii. Select the lookup icon.
- iii. The location description is divided into three parts, city-county-state.
- iv. Confirm the displayed selection represents the correct city name.

This close-up shows the 'Travel From' field. The text 'Oklahoma City' is entered and highlighted with a red box. The lookup icon (magnifying glass) is also highlighted with a red box. Below the field, a table shows the selected location details:

Expense Location	Description
32280	OKLAHOMA CITY-OKLAHOMA COUN-OK

Figure 6. Travel From.

- v. When the correct city displays, mouse click anywhere on the desired Expense Location row to confirm the city (Figure 7).
 - a. If the correct location does not display, contact your agency's travel administrator for assistance.

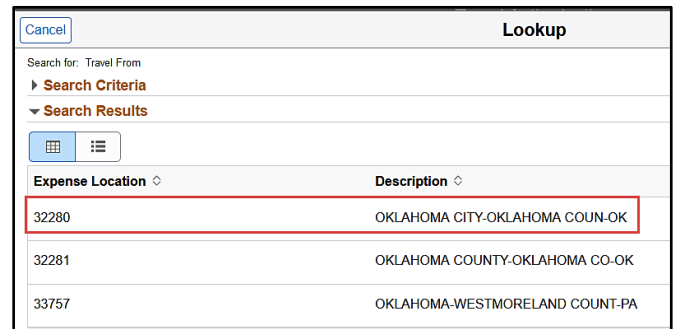


Figure 7. Select Expense Location row (From).

- F. Travel To (Figure 8).
 - i. Select the **Travel To** text box and enter the partial location of the location to where you'll be traveling.
 - ii. Select the lookup icon.
 - iii. The location description is divided into three parts, city-county-state.
 - iv. Confirm the first part that you select represents the city name.

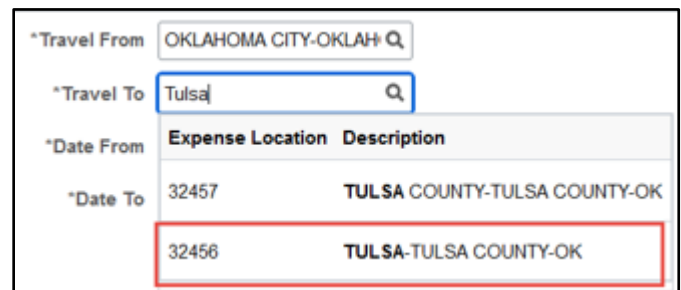


Figure 8. Travel To.

- v. When the correct city displays, mouse click anywhere on the desired Expense Location row to confirm the city (Figure 9).
 - a. If the correct location does not display, contact your agency's travel administrator for assistance.

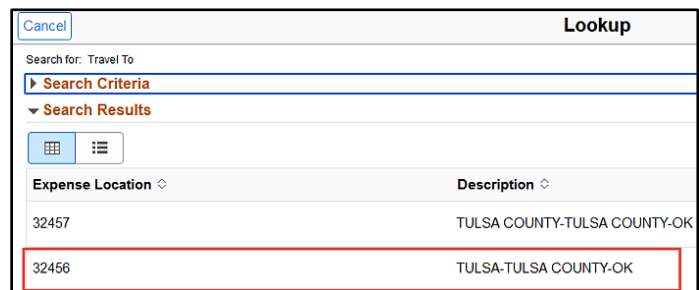


Figure 9. Select Expense Location row (To).

- G. Travel dates (Figure 10).
 - i. Select the **Date From** box and enter the departure date or use the calendar to select the departure date.
 - ii. Select the **Date To** box and enter the return date or use the calendar to select the return date.



Figure 10. Travel Dates and Attachments.

H. Attachments.

- i.** Select the **Attachments** box to upload all required documentation (e.g., flight comparison, itinerary, lodging cost, etc.).
 - a.** Ensure all required documentation is attached here, not on the expense lines.
- ii.** Select the **+Add Attachment** button, when prompted (Figure 11).

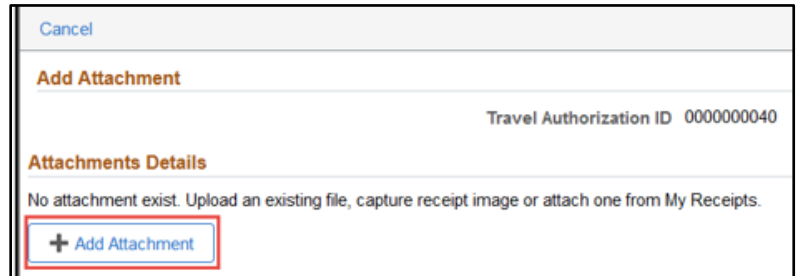


Figure 11. Add Attachment.

- iii.** Select **My Device** button to indicate location where attachments are stored (Figure 12).

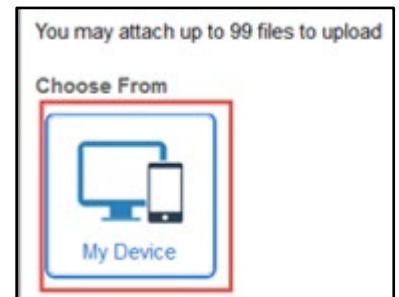


Figure 12. My Device.

- iv.** Select necessary document(s) attachment (Figure 13).
- v.** Select **Upload**.

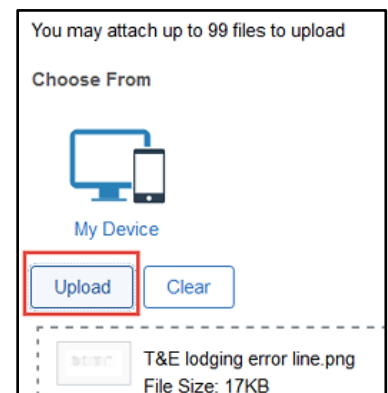


Figure 13. Select Attachments and Upload.

- vi.** Upload Complete status displays indicating file(s) successfully attached (Figure 14).

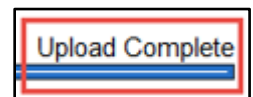


Figure 14. Upload Complete.

- vii. Enter a description for the uploaded attachment (Figure 15).
- viii. Select **Done**.

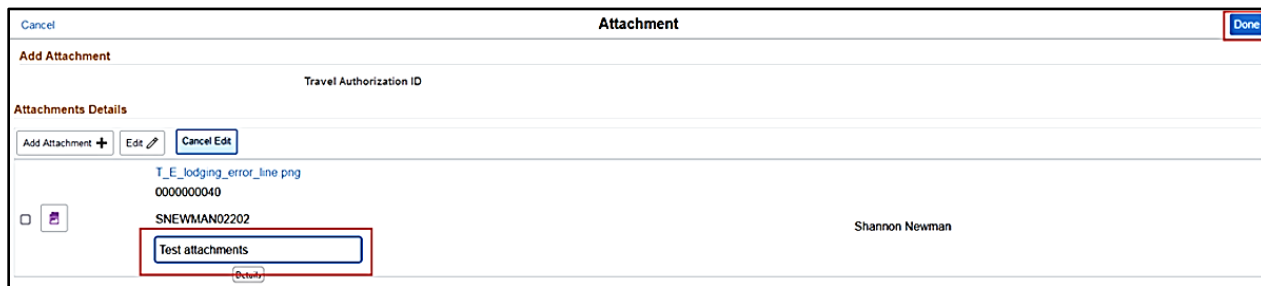


Figure 15. Add Attachment Description.

- I. Add account default information.
 - i. Select **Account Default** button under the Details section to add accounting information indicating where travel expenses will be charged (Figure 16).

- a. Important tip: If Accounting Defaults are not populated here, you will have to manually enter your Accounting Details on each new expense line.
- b. If you are unaware of your accounting detail information, contact your travel administrator or supervisor.

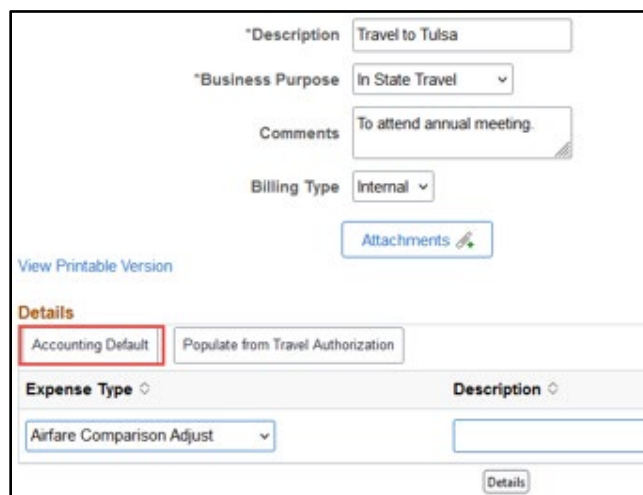


Figure 16. Accounting Default.

- ii. Select the **GL Chartfields** button and provide necessary information (Figure 17).

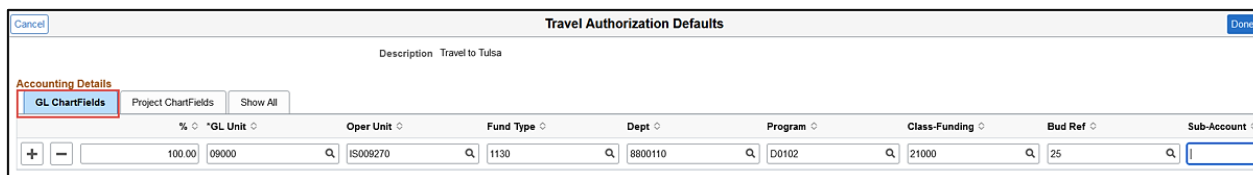


Figure 17. GL Chartfields.

- iii. Select the **Project Chartfields** button and provide necessary information, if required for your agency (Figure 18).

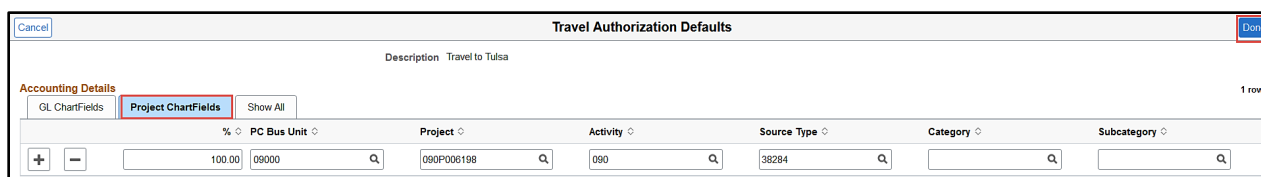


Figure 18. Project Chartfields.

iv. Select **Done** when finished.

J. Expense Type (Figure 19).

- i. Select the dropdown arrow under Expense Type and select **In-State Lodging**.
 - a. Lodging expenses can be combined into one line (For example, day one through day three).

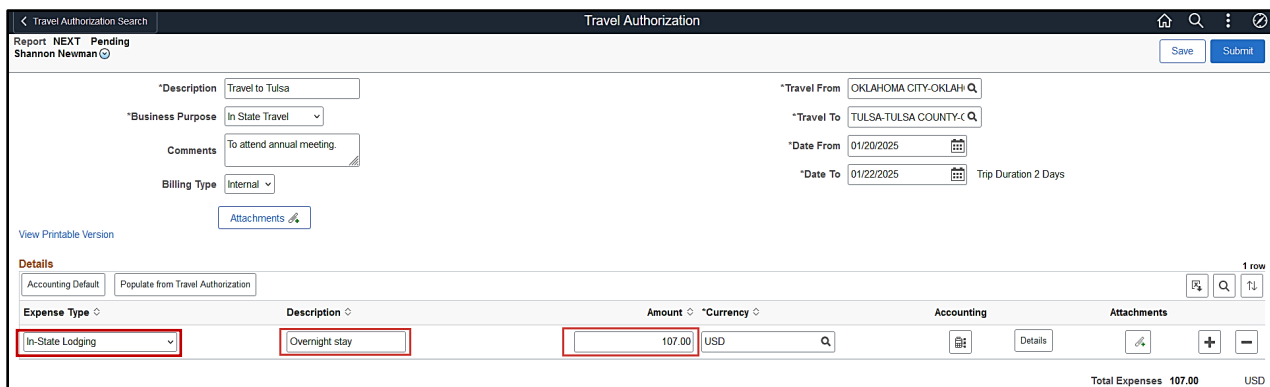


Figure 19. Expense Type.

- ii. Enter the Description and amount of expenses for the chosen expense type.
- iii. Review or adjust the accounting and line details (Figure 20).
 - a. Select the icon beneath the Accounting section to review or adjust the accounting details.
 - b. Select the **Details** button to review and adjust the line details.

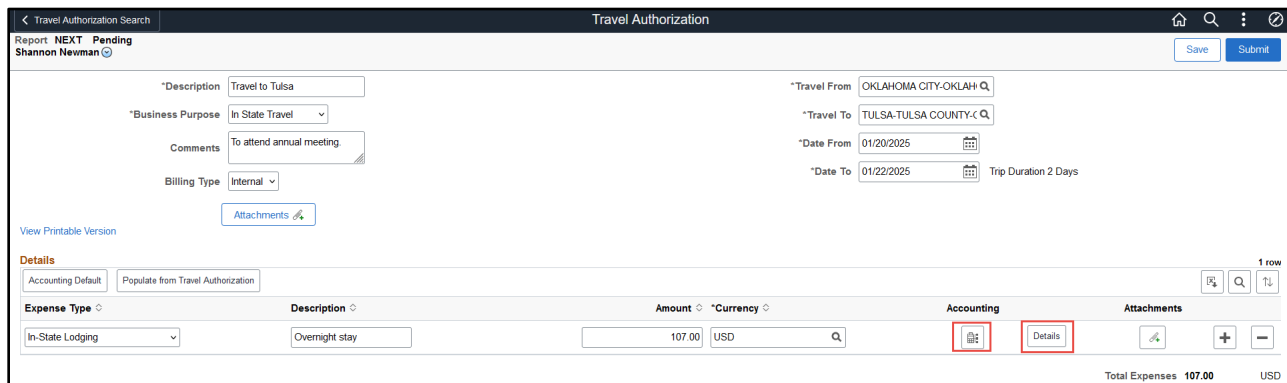


Figure 20. Accounting and Line Detail.

- iv. Complete the Line Details screen when prompted (Figure 21).
 - a. The Date will default to the first day of the trip.
 - (1) Update the date to reflect the expense date.
 - b. Select the appropriate Payment Type from the drop-down.
 - c. Select the appropriate Billing Type from the drop-down based on the Payment Type chosen.
 - d. Enter the number of nights for in-state lodging expense type.

- e. Select **Done** when finished.
- f. Select **Save** often to avoid loss of information.

Figure 21. Line Detail.

K. In-State Per Diem Meal.

- i. Add an expense line for in-state per diem meal.
 - a. Select the **plus** icon to add an additional expense line (Figure 22).
 - b. Select the dropdown arrow under Expense Type and select **In-State Per Diem Meal**.

Expense Type	Description	Amount	Currency	Accounting	Attachments
In-State Lodging	Overnight stay	107.00	USD		
In-State Per Diem Meal		54.00	USD		

Figure 22. Add an expense line.

- ii. Enter the per diem meal Description in the text box (Figure 23).

Expense Type	Description	Amount	Currency	Accounting	Attachments
In-State Lodging	Overnight stay	107.00	USD		
In-State Per Diem Meal	Day 1	54.00	USD		

Figure 23. Per Diem Description.

- a. For in-state per diem meal, the amount is defaulted.
- b. The amount will change depending on the location allowable per diem amount.

- iii. Select the **Details** button and complete the Line Detail screen when prompted (Figure 24).

- a. The Date will default to the first day of the trip.

- (1) Update the date to reflect the expense date.

- b. Select the appropriate Payment Type from the drop-down.

- (1) Per diem are typically **Employee Paid** payment type.

- c. Select the appropriate Billing Type from the drop-down based on the Payment Type chosen.

- d. Provide the Per Diem Details.

- (1) Reference the [Statewide Accounting Manual](#) for per diem rates.

- (2) Select the First/ Last Day slider to display **Yes** for day one and last day of travel for per diem only.

- (3) Breakfast Provided – Select **Yes**, if meal provided.

- (4) Lunch Provided – Select **Yes**, if meal provided.

- (5) Dinner Provided – Select **Yes**, if meal provided.

- e. Select **Done** when complete.

- f. Select **Save** often to avoid loss of information.

Figure 24. Per Diem Line Details.

L. In-State Local Incidental.

- i. Select the **plus** icon to add an additional expense line (Figure 22).

- ii. Select the dropdown arrow under Expense Type and select **In State Local Incidental** (Figure 25).

Figure 25. Add In-State Local Incidental.

- a. For in state local incidental, the amount is defaulted.

- b. Add Expense Types for Out-of-State or In-State Local Incidental Expenses for every day traveled.

- c. Meals and incidentals are only allowed for overnight travel status.

iii. Enter the Description in the text box (Figure 26).

The screenshot shows the 'Travel Authorization' interface. At the top, there are search and navigation options. Below, the 'Details' section is active, showing a table of expense lines. The first line is 'In-State Lodging' with an amount of 107.00 USD. The second line is 'In State Per Diem Meal' with an amount of 39.25 USD. The third line is 'In State Local Incidental' with an amount of 300 USD. The 'Description' for this line is 'Day 1'. A red box highlights the 'Details' button for this line.

Figure 26. In-State Local Incidental Description Details.

iv. Select the **Details** button and complete the Line Detail screen when prompted.

a. The Date will default to the first day of the trip (Figure 27).

- (1) Update the date to reflect the expense date.
- (2) Select **Save** often to avoid loss of information.

b. Select the appropriate Payment Type from the dropdown.

- (1) Incidentals are typically **Employee Paid** payment type.

c. Select the appropriate Billing Type from the dropdown menu based on the Payment Type chosen.

d. Select **Done** when complete.

e. Select **Save** often to avoid loss of information.

The 'Line Detail' screen shows the following information: Date: 1/20/2025, Expense Type: In State Local Incidental, Description: Day 1, Amount: 5.00, Currency: USD, Payment Type: Employee Paid, *Billing Type: Internal. Below this, there are 'Per Diem Details' with toggle switches for 'First/ Last Day', 'Breakfast Provided', 'Lunch Provided', and 'Dinner Provided', all currently set to 'No'. A red box highlights the 'Done' button in the top right corner.

Figure 27. In-State Local Incidental Line Detail.

M. In-State Mileage.

i. Select the **plus** icon to add an additional expense line (Figure 22).

ii. Select the dropdown arrow under Expense Type and select **In-State Mileage-Pri Veh** (Figure 28).

The screenshot shows the 'Details' section of the Travel Authorization system. The 'Expense Type' dropdown menu is open, and 'In-State Mileage-Pri Veh' is selected. The other expense lines are 'In-State Lodging', 'In State Per Diem Meal', and 'In State Local Incidental'. A red box highlights the 'In-State Mileage-Pri Veh' option in the dropdown menu.

Figure 28. In-State Mileage Expense Type.

- iii. Enter what the mileage is for (e.g., duty station to hotel) in the Description text box (Figure 29).

The screenshot shows the 'Travel Authorization' interface. At the top, there are fields for Description, Business Purpose, Comments, Billing Type, Travel From, Travel To, Date From, and Date To. Below this is a table of expenses. The table has columns for Expense Type, Description, Amount, Currency, Accounting, and Attachments. The 'In-State Mileage-Pri Veh' row is highlighted with a red box, and its 'Details' button is also highlighted with a red box.

Expense Type	Description	Amount	Currency	Accounting	Attachments
In-State Lodging	Overnight stay	107.00	USD		
In State Per Diem Meal	Day 1	39.25	USD		
In State Local Incidental	Day 1	5.00	USD		
In-State Mileage-Pri Veh	Duty Station to hotel		USD		

Figure 29. In-State Mileage Details.

- iv. Select the **Details** button and complete the Line Detail screen when prompted (Figure 30).
 - a. The Date will default to the first day of the trip.
 - (1) Update the date to reflect the expense date.
 - b. Select the appropriate Payment Type from the dropdown.
 - (1) In-state mileage is typically **Employee Paid** payment type.
 - c. Select the appropriate Billing Type from the dropdown menu based on the Payment Type chosen.
 - (1) The billing type, originating location and travel to information defaults from the travel authorization header.
 - (2) The miles must be manually updated.
 - d. Select **Done** when complete.
 - e. Select **Save** often to avoid loss of information.

The screenshot shows the 'Line Detail' screen. It has a 'Date' field set to 01/20/2025, an 'Expense Type' of 'In-State Mileage-Pri Veh', a 'Description' of 'Duty Station to hotel', and an 'Amount' of 5.00. The 'Payment Type' is set to 'Employee Paid', and the 'Billing Type' is 'Internal'. The 'Originating Location' is 32280 and the 'Travel To' is 32456. The '*Miles' field is set to 100.2. Below this are 'Per Diem Details' with radio buttons for 'First/ Last Day', 'Breakfast Provided', 'Lunch Provided', and 'Dinner Provided', all set to 'No'.

Figure 30. In-State Mileage Line Detail.

N. Repeat Steps [K](#), [L](#) and [M](#), adding line items, Descriptions and Detail for each travel day (Figure 31).

Expense Type	Description	Amount	Currency	Accounting	Attachments
In-State Lodging	Overnight stay	107.00	USD		
In State Per Diem Meal	Day 1	39.25	USD		
In State Local Incidental	Day 1	5.00	USD		
In-State Mileage-Pri Veh	Duty Station to hotel	70.14	USD		
In State Per Diem Meal	Day 2	54.00	USD		
In State Local Incidental	Day 2	5.00	USD		
In-State Mileage-Pri Veh	Hotel to duty station	72.94	USD		

Figure 31. Add Expense Type and Detail.

- i. Select **First/ Last Day** box in the Line Detail screen Per Diem Details section for first day and last day of travel only (Figure 24).
- ii. Select **Review** and **Submit** buttons when complete.

Step 4. Check for travel authorization errors (Figure 32).

- A. After submitting the finished authorization, error flags may appear on the travel authorization.
- B. Select the error flag to view each error.
- C. If unsure of errors or how to correct, contact your budget analyst or travel administrator.

Figure 32. Error Flags.

D. Error examples:

- i. The error example (Figure 33) concerns the accounting information on the expense lines.
 - a. If the flag only shows on a few lines, go to each line and correct.
 - b. If the flag shows on all expense lines:
 - (1) Go to the accounting default option and correct the accounting information.
 - (2) Saving the new information should fix all the expense line errors.

Figure 33. Error Example.

c. Save the authorization and ensure all error flags resolve (Figure 34).

Travel Authorization

Report: 000000045 Pending
Shannon Newnam

*Description: Travel to Tulsa
*Business Purpose: In State Travel
Comments: To attend annual meeting
Billing Type: Internal

*Travel From: OKLAHOMA CITY-OKLAH
*Travel To: TULSA-TULSA COUNTY-OK
*Date From: 01/20/2025
*Date To: 01/22/2025 Trip Duration 2 Days

View Printable Version

Attachments

Details

Accounting Default: Populate from Travel Authorization

Expense Type	Description	Amount	Currency	Accounting	Attachments
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Figure 34. Save After Change Corrections.

d. Select **Submit** to resubmit the travel authorization.

(1) An authorization ID will generate for reference (Figure 35).

Travel Authorization

Your travel authorization 000000045 has been submitted for approval.

Description: Travel to Tulsa
Business Purpose: In State Travel
Comments: To attend annual meeting
Billing Type: Internal

Travel From: OKLAHOMA CITY-OKLAHOMA COUR-OK
Travel To: TULSA-TULSA COUNTY-OK
Date From: 01/20/2025
Date To: 01/22/2025 Trip Duration 2 Days

Approvals

View Printable Version

Details

Accounting Default

Expense Type	Description	Line Status	Amount	Currency	Reimbursement	Accounting	Details	Attachments
In-State Lodging	Overnight stay	Pending	107.00	USD	Prepaid		Details	
In State Per Diem Meal	Day 1	Pending	39.25	USD	Reimbursable		Details	
In State Local Incidentals	Day 1	Pending	5.00	USD	Reimbursable		Details	
In-State Mileage-Pri Veh		Pending	70.14	USD	Reimbursable		Details	
In State Per Diem Meal	Day 2	Pending	39.25	USD	Reimbursable		Details	
In State Local Incidentals	Day 2	Pending	5.00	USD	Reimbursable		Details	
In-State Mileage-Pri Veh		Pending	72.94	USD	Reimbursable		Details	

Total Authorized	338.58	USD
Less Non-Approved	0.00	USD
Total Expenses	338.58	USD

Figure 35. Travel Authorization Reference.