

The University of Texas at Tyler
UT Share / PeopleSoft Workflow
Travel Authorization Procedures for

“Reports To” Supervisor and “Budget Authority” Approver

Financial Services highly recommends that you choose Chrome as your browser for entry, certification and approval in UT Share/PeopleSoft.

In general the electronic Travel Authorization (TA) workflow path is as follows:

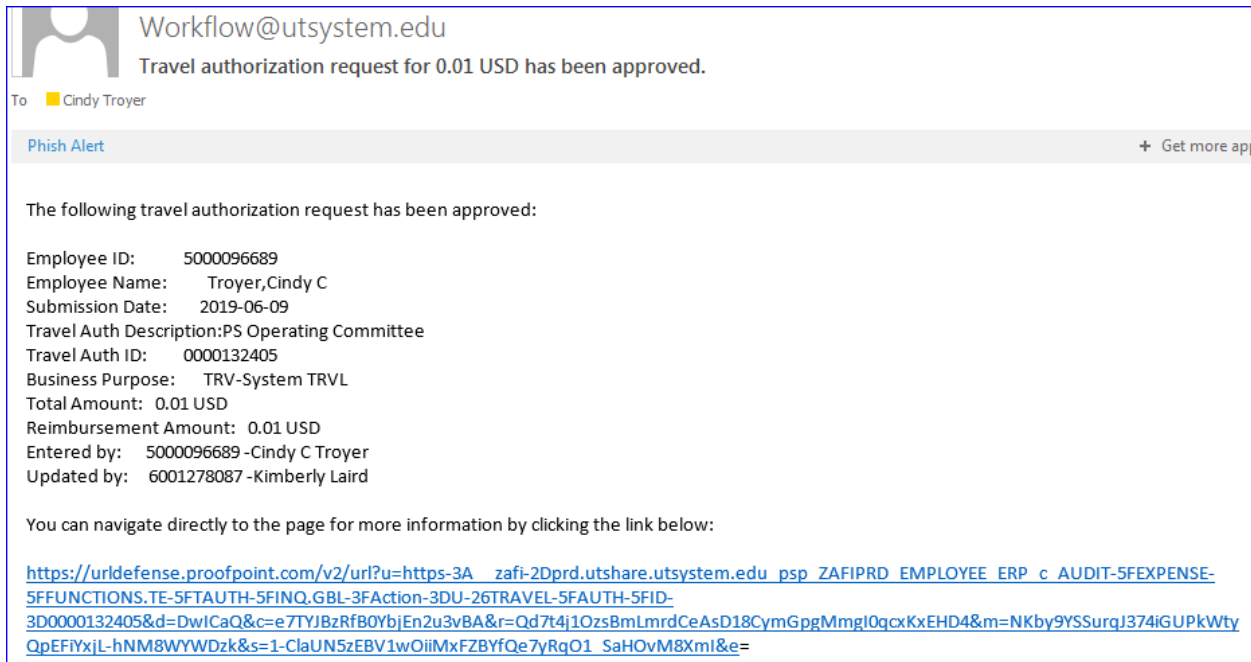
- TA is created by a department administrative assistant or other support staff.
- TA routes forward to the employee’s “Reports To” supervisor as per the official HR assignment.
- TA routes forward to one or more Budget Authorities depending on funding.

Pending Travel Authorizations may be accessed in one of two ways:

- 1. Approver will be notified by email.**

Once the Travel Authorization has been submitted by the creator, the approver will receive a notification email similar to the following.

Note: The email address that is on file with Human Resources is used to generate the email notification.



Click on the blue hyperlink at the bottom of the email to navigate directly to the Travel Authorization document.

Enter your entire email address and university single sign-on password if you are not already logged in.

Welcome to the UT Tyler Authentication System

Email Address:

Password:

- Or, if you deleted or cannot find the email notification, you may also login directly to [UT Share / PeopleSoft](#) using the university single sign-on user ID and password.

After you have logged in, you will be directed to the UT Share/PeopleSoft Home screen and then may click on the “Worklist” hyperlink found in the upper right corner of UT Share/PeopleSoft web page.



If you have any documents pending your approval the Worklist screen will populate similar to the below example. Click on the hyperlink beside your employee’s name for the TA which requires approval.

New Window | Help | Personalize Page |

Worklist

Worklist for 5000096689: Cindy C Troyer

Detail View Worklist Filters Feed -

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
Patricia Speer	05/28/2019	Approval Routing	Approval Workflow	2-Medium <input type="button" value="v"/>	TAApproval_376377_UTSHR_2018-02-16_N_0_TRAVEL_AUTH_ID:0000125137_RDC-RA.0.A
Cindy C Troyer	05/28/2019	Approval Routing	Approval Workflow	3-Low <input type="button" value="v"/>	VoucherApproval_751980_NonPOVoucher_2014-10-01_N_0_BUSINESS_UNIT:UTTYL_VOUCHER_ID:00060787_RDC-RA.0.A
Patricia Speer	05/28/2019	Approval Routing	Approval Workflow	2-Medium <input type="button" value="v"/>	TAApproval_376376_UTSHR_2018-02-16_N_0_TRAVEL_AUTH_ID:0000125288_RDC-RA.0.A

The **Travel Authorization** document will populate your computer screen.

Travel Authorization document review:

Review the trip information in the **Summary** section to determine whether it is appropriate for your employee to be away during the time frame indicated on the document and also to determine whether the trip is appropriate business travel in accordance with university policy.

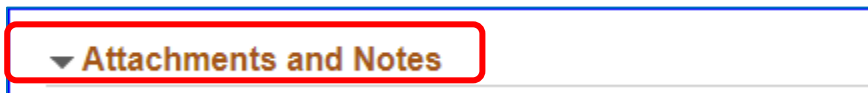
For **Reports To Supervisors** only (i.e. you are not the department budget authority), Review the trip information to make the determination whether to Approve or not Approve the employee's trip. (See instructions for the document actions below).

Additional Budget Authority Review:

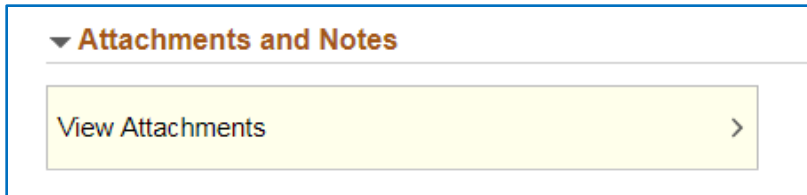
A Budget Authority must also review the document detail and estimate for anticipated expenses and assigned fund source prior to approving.

Review the **Attachments and Notes** section.

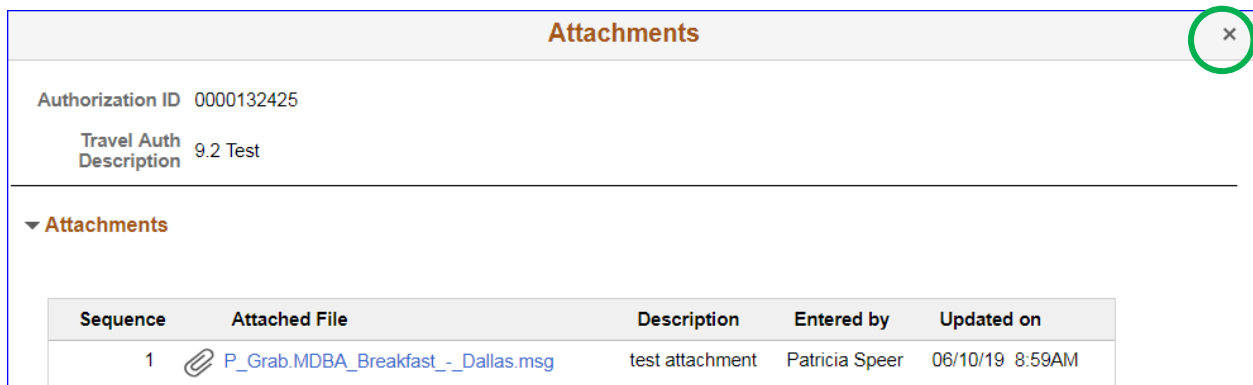
You may need to click the arrow to the left of the **Attachments and Notes** label to expand the section for review.



By scrolling over the box for **Attachments and Notes**, the whole box becomes a "button".



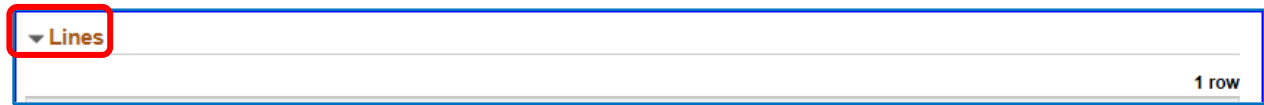
Click anywhere in the box to access the **Attachments** popup window.



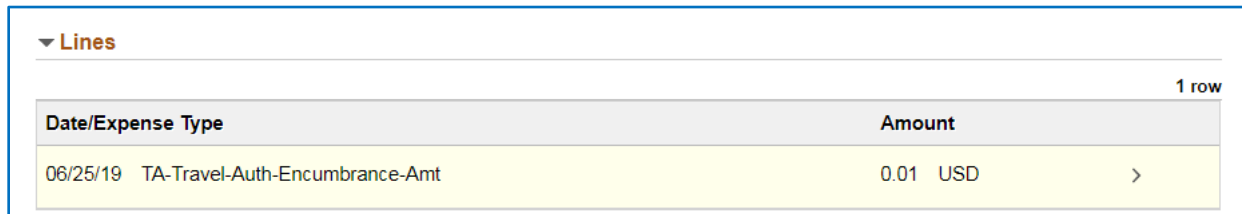
Open and review each attachment for the trip cost estimate or for appropriateness of the requested trip.

Close the popup window by clicking on the "X" in the top right corner of the window.

Back on the **Travel Authorization** home screen review the transaction **Lines** section. You may need to click the arrow to the left of the **Lines** label to expand the section for review.



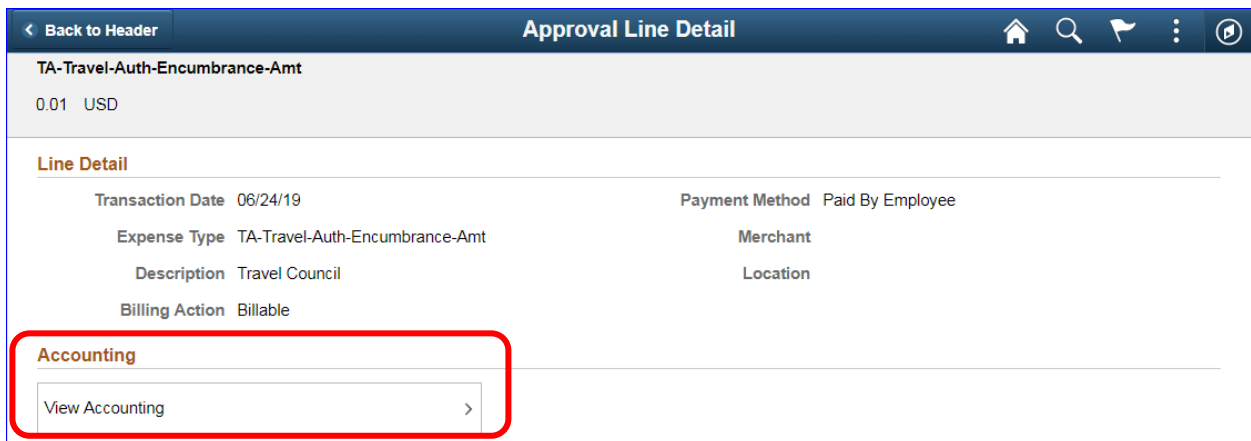
By scrolling over the box for each **Date/Expense Type**, the whole box becomes a “button”. Click anywhere in the box to access the **Date/Expense Type** popup window.



A screenshot of a table with one row of data. The table has two columns: 'Date/Expense Type' and 'Amount'. The first row contains the text '06/25/19 TA-Travel-Auth-Encumbrance-Amt' and '0.01 USD' respectively. A red rectangular box highlights the entire row.

Date/Expense Type	Amount
06/25/19 TA-Travel-Auth-Encumbrance-Amt	0.01 USD

On the **Approval Line Detail** screen review the **Line Detail** and then click anywhere in the box labeled **View Accounting** to access the Chart Field funding information.



A screenshot of the 'Approval Line Detail' screen. The screen shows a header with 'Back to Header' and 'Approval Line Detail'. Below the header, there is a section for 'Line Detail' with fields for Transaction Date, Expense Type, Description, Billing Action, Payment Method, Merchant, and Location. At the bottom, there is an 'Accounting' section with a 'View Accounting' button and a right-pointing arrow. A red rectangular box highlights the 'Accounting' section.

Accounting ✕

Accounting

Expense Type TA-Travel-Auth-Encumbrance-Amt

Amount 0.01 USD

Accounting Details

GL ChartFields Show All

Amount	*GL Unit	*Account	Fund	Dept	Cost Center	Function	Program	PG Bus Unit	Project	Activity	Affiliate
0.01	UTTYL	62491	3100	115300	31001888	700					

A popup window labeled **Accounting** will result. Review the chart field data for appropriateness – Is this where you want the expense paid from? If the funding is not correct, you will need to send the **Travel Authorization** back to the creator.

Click the “X” to close the popup window for the **Accounting** information.

From the **Approval Line Detail** screen, click the **Back to Header** button in the top left corner to return to the **Travel Authorization** home screen.

← Back to Header Approval Line Detail 🏠 🔍 🚩 ⋮ 🔄

TA-Travel-Auth-Encumbrance-Amt

The **Approver Comments** section is found at the bottom left corner of the **Travel Authorization** screen.

Approver Comments

Note: Any action other than approval of the document will require that comments be entered in the **Approver Comments** section of the document. In addition, you may also optionally enter comments when you are approving the document prior to clicking the **Approve** button.

Below the **Approver Comments** section is the **Approval Chain** section.

Click anywhere in the box to access the **Approver Chain** popup window.

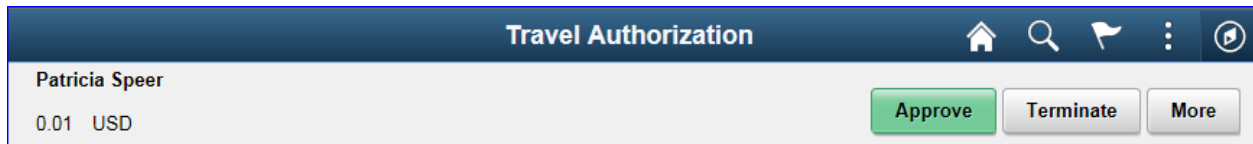
The **Approver Chain** section shows who has already Approved, taken action and/or written **Comments** about the **Travel Authorization**.

Click the “X” to close the popup window for the **Approver Chain** information.

Approvers in the workflow routing path may not make any changes to a **Travel Authorization**. If changes or corrections must be made to the **Travel Authorization**, the document must be **Sent Back** to the document creator.

Approvers have four actions to choose from when reviewing a **Travel Authorization**.

In the top right corner of the **Travel Authorization** page, the **Approve** and **Terminate** buttons are located.



Click the **More** button to see the other two action options.



- **Approve:** Document is approved and routed to the next workflow approver.
- **Sendback:** Document is sent back to the creator for changes or corrections from any workflow approver in the routing path. Action requires a **Comment**. Documents sent back generate an email for the creator.
- **Terminate:** Travel is not approved and the **Travel Authorization** is removed from workflow entirely. Action requires a **Comment**.
- **Hold:** Document is placed on Hold by the approver pending further review. The approver must take the document off Hold to move the document forward or back.

Clicking any of the action buttons navigates the Approver to a confirmation screen.

<p><input type="button" value="Cancel"/> Approve <input type="button" value="Submit"/></p> <p>You are about to approve this request.</p> <p>Approver Comments</p> <input type="text"/>	<p><input type="button" value="Cancel"/> Deny <input type="button" value="Submit"/></p> <p>You are about to deny this request.</p> <p>Approver Comments</p> <input type="text"/>
<p><input type="button" value="Cancel"/> Sendback <input type="button" value="Submit"/></p> <p>You are about to send back this request.</p> <p>Approver Comments</p> <input type="text"/>	<p><input type="button" value="Cancel"/> Hold <input type="button" value="Submit"/></p> <p>You are about to put this request on hold.</p> <p>Approver Comments</p> <input type="text"/>

Click the **Submit** button to proceed with the action or click the **Cancel** button to return to the **Travel Authorization** screen for further review or to click a different action button.

Note: You may add **Comments** prior to clicking Submit for any of the actions.

Note: An employee Supervisor who is also the Budget Authority for the document will only be required to electronically approve the Travel Authorization one time.

You may briefly see a notification highlighted across the top of the screen such as the below example.

The screenshot shows the 'Travel Authorization' screen with a dark blue header. A green notification bar at the top reads 'You have approved the request.' Below the notification, there is a status bar with a checkmark icon and the text 'Approved on 06/08/2019'. Underneath, a 'Summary' section is visible, showing 'Name Patricia Speer' and 'Authorization ID 0000125137'.

If so, the highlighted bar will quickly disappear resulting in the Travel Authorization screen.

The screenshot shows the 'Travel Authorization' screen with the notification bar removed. The header is dark blue. The main content area shows 'Patricia Speer' at the top, followed by '0.01 USD' and 'Approved on 06/08/2019' with a checkmark icon.

Both the notification and the updated **Travel Authorization** screen will indicate that the document is in “**Approvals in Process** or **Approved**” status until it has been final approved.

Please note: If a **Travel Authorization** is funded with Grant funds, the Travel Authorization will route to the Grants Central Office for review and approval.

To return to the document **Worklist**, first click on the **Home** icon at the top right corner of the screen, then click on the **Worklist** hyperlink.

