

Approving Travel Authorizations

Purpose: Use this document as a reference for budget checking and approving travel authorizations in ctcLink.

Audience: Finance and Business Office staff

 You must have at least one of these local college managed security roles:

- ZZ Expenses Approval <this is a dynamic role that is automatically applied to the user profiles of Supervisors and Travel & Expenses Assigned Approvers>
- ZZ Expenses Manager
- ZZ Expenses Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Approving Travel Authorizations

Navigation: Travel and Expenses > Approve Transactions > Approve Expense Transactions

1. On the **Approve Expense Transactions** page, select the **Travel Authorizations** tab to review and approve multiple Travel Authorizations. The **Travel Authorizations** tab will display.

Overview | Expense Reports | Time Reports | Time Adjustments | **Travel Authorizations** | Cash Advances | Errors

Search Pending Transactions ?

Change Sort Order ?

☒ Select All ☐ Clear All

Transactions to Approve ?

Select	Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
<input type="checkbox"/>	Cash Advance	275.00	USD	Xoan	101007145	Need It	0000000854	02/06/2019	Submitted for Approval	HR SUPERVISOR
<input type="checkbox"/>	Travel Authorization	18.00	USD	Xoan	101007145	PeopleSoft HEUG Conference	0000004064	03/26/2019	Submitted for Approval	HR SUPERVISOR

☒ Select All ☐ Clear All

Comments

[Return to Approval List](#)
[Employee Expense History](#)

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors

- On the **Travel Authorizations** tab, select the **Description** link or **Transaction ID** link to navigate to the **Travel Authorization Summary** page. The **Travel Authorization Summary** page will display.

Overview | Expense Reports | Time Reports | Time Adjustments | **Travel Authorizations** | Cash Advances | Errors

Search Pending Transactions ?

Change Sort Order ?

☒ Select All ☐ Clear All

Transactions to Approve ?

Select	Total	Curr	Budget Status	Name	Employee ID	Description	Transaction ID	Trip Date	Date Submitted	Status	Role
<input type="checkbox"/>	18.00	USD	Not Budget Checked	Xoan	101007145	PeopleSoft HEUG Conference	0000004064	04/01/2019	03/26/2019	Submitted for Approval	HR SUPERVISOR

☒ Select All ☐ Clear All

Comments

Overview | Expense Reports | Time Reports | Time Adjustments | Travel Authorizations | Cash Advances | Errors




Use the **Travel Authorization Summary** page to review a summary of travel authorization expenses. Managers and project managers who have authority to approve travel authorizations use this page.

3. On the **Travel Authorization Summary** page, select the **Expense Type** link to access the **Expense Detail** page to view information about each expense line. The **Expense Detail** page will display.

Approve Travel Authorization

Travel Authorization Summary

Xoan  [User Defaults](#)

General Information

Description	PeopleSoft HEUG Conference	Authorization ID	0000004064
Business Purpose	User Conference	Reference	8675309
Status	Submitted for Approval		
Date From	04/01/2019	To	04/05/2019
Updated on	03/20/2019 9:10:36AM	By	101007145
	Notes		

Accounting Defaults [More Options](#) [Choose an Action](#) [GO](#)

You can deny individual expenses and still approve or send back the overall report.

Details

[1-1 of 1](#)

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Approve
Meal outside of WA Lunch	04/01/2019				18.00	USD	<input checked="" type="checkbox"/>

Totals

Total	18.00	USD
Less Non-Approved	0.00	USD
Total Authorized	18.00	USD

Pending Actions

[1-2 of 2](#)

Rule	Name	Action	DateTime
HR Supervisor	Paul		
Proxy Auditor	(Pooled)		

Action History

[1-1 of 1](#)

Role	Name	Action	DateTime
Employee	Xoan	Submitted	03/20/2019 9:10:36AM

Comments

[1-1 of 1](#)

Budget Checking is required before the Travel Authorization can be Approved. Please click on the Budget Options hyperlink.

Budget Status: [Not Budget Checked](#)

[Budget Options](#)


[Approve](#) [Send Back](#) [Hold](#) [Deny](#)

[Return to Approval List](#)

4. On the **Expense Detail** page, review the expense line.

Approve Travel Authorization

Expense Detail for Meal outside of WA Lunch (Line 1)

Xoan  [User Defaults](#) Authorization ID 0000004064

About This Expense

Date	04/01/2019
Payment Type	Employee
Expense Billing Code	Nonbillable
Location	Portland
Description	Lunch at Conference
Amount	18.00 USD

Accounting Summary

[1-1 of 1](#)

Amount	GL Unit	Account	Oper Unit	Fund	Dept	Class	State Purpose	PC Bus Unit	Project	Activity	Source Ty
18.00	WA220	1000070	7220	149	31000	064	N				

Update Accounting Detail

☒ Approve Authorization

[Previous Expense](#) [Next Expense](#)

[Return to Travel Authorization Summary](#)

i If you have finished reviewing the information on the Travel Authorization and are ready to make an approval action, you may need to **Budget Check** the transaction first. Whether budget checking is needed depends on local BU configuration and the stage of approvals the Travel Authorization is in.

5. On the **Travel Authorization Summary** page, select the **Budget Options** link. The **Commitment Control Details** pagelet will display.

Approve Travel Authorization

Travel Authorization Summary

Xoan [User Defaults](#)

General Information

Description	PeopleSoft HRUG Conference	Authorization ID	0000004004
Business Purpose	User Conference	Reference	8879309
Status	Submitted for Approval	Updated on	03/28/2019 9:10:36AM
Date From	04/01/2019	To	04/05/2019
		By	101007145

[Print](#) [Notes](#)

Accounting Defaults [More Options](#) [Choose an Action](#) [GO](#)

You can deny individual expenses and still approve or send back the overall report.

Details

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Approve
Meal outside of WA Lunch	04/01/2019				18.00	USD	<input checked="" type="checkbox"/>

Totals

Total	18.00	USD
Less Non-Approved	0.00	USD
Total Authorized	18.00	USD

Pending Actions

Role	Name	Action	DateTime
HR Supervisor	Paul		
Prepay Auditor	(Pooled)		

Action History

Role	Name	Action	DateTime
Employee	Xoan	Submitted	03/28/2019 9:10:36AM

Comments

Budget Checking is required before the Travel Authorization can be Approved. Please click on the Budget Options hyperlink.

[Budget Status](#) [Not Budget Checked](#)

[Budget Options](#)

[Approve](#) [Send Back](#) [Hold](#) [Deny](#)

[Return to Approval List](#)

6. On the **Commitment Control Details** pagelet, select **Budget Check** to initiate the Travel Authorization budget check.

Approve Transactions

Commitment Control [X] [Help](#)

Commitment Control Details

Source Transaction Type: Travel Authorization
 Budget Checking Header Status: Not Budget Checked
 Commitment Control Amount Type: Encumbrance

☐ Override Transaction

Budget Check ⓘ

[Go to Transaction Exceptions](#) [Go To Activity Log](#)

OK **Cancel**

Submitted: 03/26/2019 9:10:36AM

7. On the **Commitment Control Details** pagelet, note that the **Budget Checking Header Status** has changed and additional fields are displayed.
8. Select **OK** after the budget check has completed to close the **Commitment Control Details** pagelet.

Approve Transactions

Commitment Control [X] [Help](#)

Commitment Control Details

Source Transaction Type: Travel Authorization
 Budget Checking Header Status: Valid
 Commitment Control Amount Type: Encumbrance
 Commitment Control Tran ID: 0000254669
 Commitment Control Tran Date: 03/27/2019

☐ Override Transaction


Budget Check ⓘ

[Go to Transaction Exceptions](#) [Go To Activity Log](#)

OK **Cancel**

Action: Date/Time

9. If you are ready to make an approval action for the Travel Authorization, select the desired approval action button at the bottom of the screen. In this example, **Approve** was selected. The **Save Confirmation** pagelet will display.
10. Select the **Return to Travel Authorization Summary** link to return to the summary page.

 The buttons available depend on local BU configuration and the stage of approvals the Travel Authorization is in.

Approve Travel Authorization

Travel Authorization Summary

Xoan [User Defaults](#)

General Information

Description	PeopleSoft HEDUG Conference	Authorization ID	0000004004
Business Purpose	User Conference	Reference	8875309
Status	Submitted for Approval	Updated on	03/27/2019 9:11:01 AM
Date From	04/01/2019	To	04/05/2019
		By	101025875

[Details](#)

Accounting Defaults [More Options](#) [Choose an Action](#) [GO](#)

You can deny individual expenses and still approve or send back the overall report.

Details [1:1 of 1](#)

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Approve
Meal outside of WA Lunch	04/01/2019				18.00	USD	<input checked="" type="checkbox"/>

Totals

Total	18.00	USD
Leaves Non-Approved	0.00	USD
Total Authorized	18.00	USD

Pending Actions [1:2 of 2](#)

Role	Name	Action	Date/Time
HR Supervisor	Paul		
Payroll Auditor	(Pooled)		

Action History [1:1 of 1](#)

Role	Name	Action	Date/Time
Employee	Xoan	Submitted	03/20/2019 9:10:30AM

Comments

Budget Creation complete. Report is ready for Approval/Posting.

Budget Status: Valid

[Budget Options](#)

[Approve](#) [Send Back](#) [Hold](#) [Deny](#)

[Return to Approval List](#)

11. On the **Save Confirmation** pagelet, select **OK**. The Travel Authorization has been successfully approved.

Approve Transactions

Save Confirmation

Approve Travel Authorization

Submit Confirmation

Xoen Hayes

Authorization ID 0000004064

Travel Authorization Totals

Total	18.00 USD	Total	18.00 USD
Less Non-Approved	0.00 USD	Authorized	

✓ This report will be approved.

OK Cancel

- i** If you received an error message and are not able to approve the report, go to the **Comments** section, add the following comments "Error in approving report please review errors and resubmit once fixed". Select the **Send Back** button to sent a report back to the employee to review the error. Once fixed, the employee can submit the report back into the approval list.

12. Process complete.