

Creating an in-state travel authorization

Overview

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

Procedure

Step 1. Log in to PeopleSoft.

A. From the Employee Self Service homepage, select the **Travel Authorizations** tile (Figure 1).

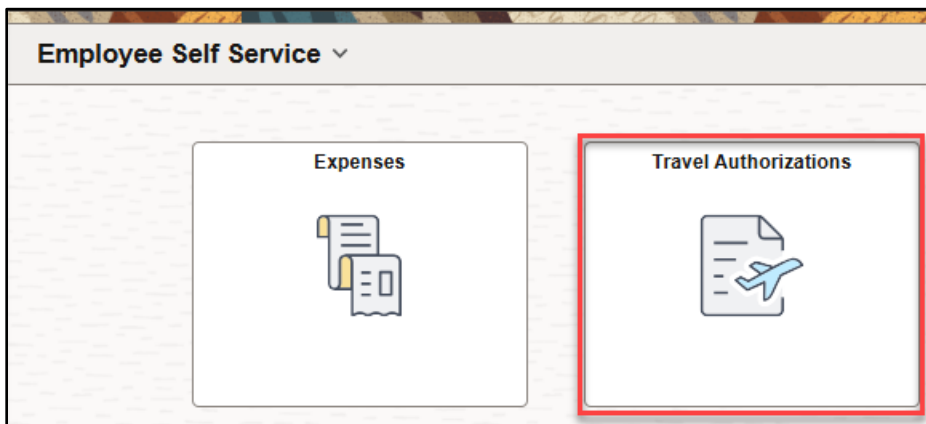


Figure 1. Employee Self Service homepage.

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

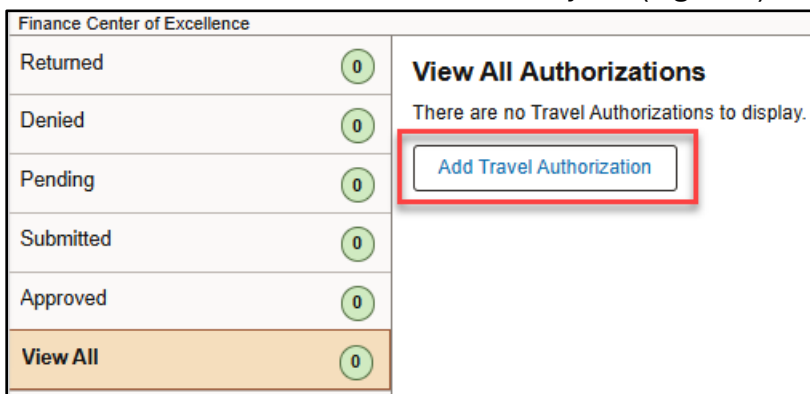


Figure 2. Add Travel Authorization button.

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

A. Description: Enter a brief description of the purpose of travel.

1. Think of this field as the name of your travel authorization.

The screenshot shows the 'Travel Authorization' form. At the top, it says 'Report NEXT Pending' and 'Stephanie Brown'. The main form area has several fields: '*Description' with the value 'Travel to Tulsa' (highlighted with a red box), '*Business Purpose' with a dropdown menu set to 'In State Travel', a 'Comments' text area, and a 'Billing Type' dropdown menu. There is also an 'Attachments' button. Below the form, there are links for 'Create A Cash Advance', 'View Printable Version', and 'Notes'. At the bottom, there is a 'Details' section with buttons for 'Accounting Default', 'Populate from Travel Authorization', 'Populate from Template', and 'Quick-Fill'. Below that is a table header with columns for 'Date', 'Expense Type', and 'Description'.

Figure 3. Travel Authorization Form.

B. Business Purpose: Select the drop-down arrow and select the appropriate option: **In State Travel** or **Out of State of Travel** (Figure 4).

This is a close-up of the '*Business Purpose' field. The dropdown menu is open, showing 'In State Travel' as the selected option. The field is highlighted with a red box.

Figure 4. Business Purpose field.

C. Comments: Enter the justification for travel (Figure 5).

This is a close-up of the 'Comments' and 'Billing Type' fields. The 'Comments' text area contains the text 'To attend annual meeting' and is highlighted with a red box. The 'Billing Type' dropdown menu is set to 'Internal' and is also highlighted with a red box. The '*Description' and '*Business Purpose' fields are visible above.

Figure 5. Comments and Billing Type fields.

D. Billing Type: Select the drop-down arrow and then select the billing type, either **Internal** or **Billable**, as appropriate (Figure 5).

E. Travel From (Figure 6).

1. Select the **Travel From** search box and enter your departure city.

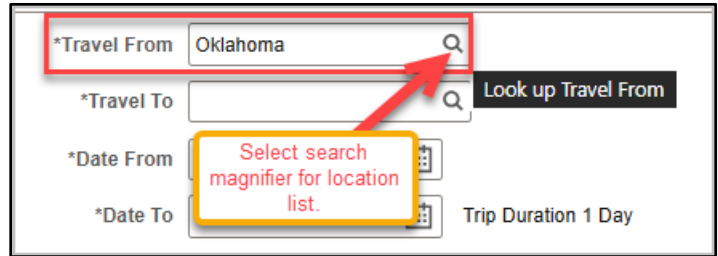


Figure 6. Travel From field.

2. Select the search magnifier icon.
3. The location description is divided into three parts – city, county and state.
4. Confirm the displayed selection represents the correct city name.
5. When the correct city displays, click anywhere on the desired Expense Location row to confirm the city (Figure 7).

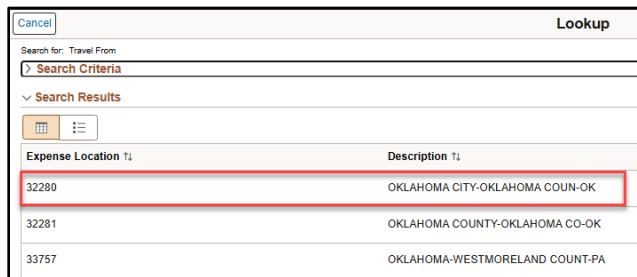


Figure 7. Select Expense Location row (Travel From).

- a. If the correct city does not display, search the county the city is in and use that as the departure location.

F. Travel To (Figure 8).

1. Select the **Travel To** search magnifier icon and enter the partial location of the location to where you'll be traveling.

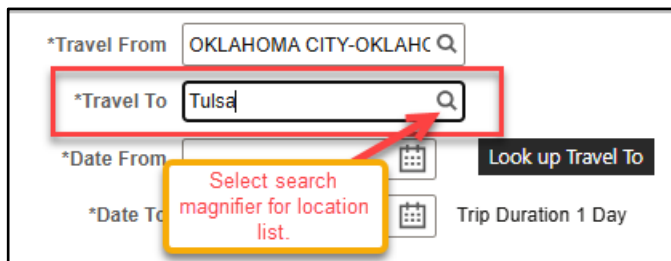


Figure 8. Travel To field.

2. Select the search magnifier icon.
3. The location description is divided into three parts – city, county and state.
4. Confirm the first part that you select represents the city name.

5. When the correct city displays, click anywhere on the desired Expense Location row to confirm the city (Figure 9).
 - a. If the correct location does not display, enter the county where the city is located and select that as the desired Expense Location.

Expense Location	Description
32457	TULSA COUNTY-TULSA COUNTY-OK
32456	TULSA-TULSA COUNTY-OK

Figure 9. Select Expense Location row (Travel To).

G. Travel dates (Figure 10).

1. Select the **Date From** field and enter the departure date or use the calendar to select the departure date.
2. Select the **Date To** field and enter the return date or use the calendar to select the return date.

Figure 10. Travel dates and Attachments.

H. Attachments.

1. Select the **Attachments** (Figure 10) button to upload all required documentation (flight comparison, itinerary, lodging cost, etc.).
 - a. Ensure all required documentation is attached here, not on the expense lines.
2. When prompted, select the **+Add Attachment** button (Figure 11).

Figure 11. Add Attachment button.

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



Figure 12. My Device.

4. Select necessary documents to attach.
5. Select the **Upload** button (Figure 13).

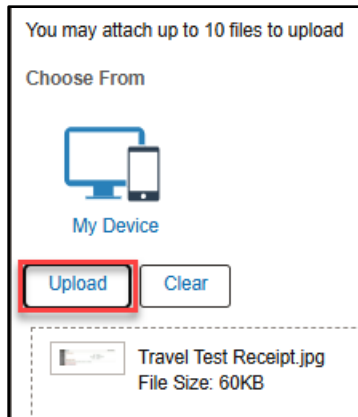


Figure 13. Upload button.

6. The Upload Complete status displays indicating file(s) successfully attached (Figure 14).

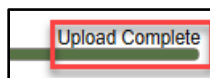


Figure 14. Upload Complete.

7. Enter a description for the uploaded attachment (Figure 15).
8. Select **Done**.

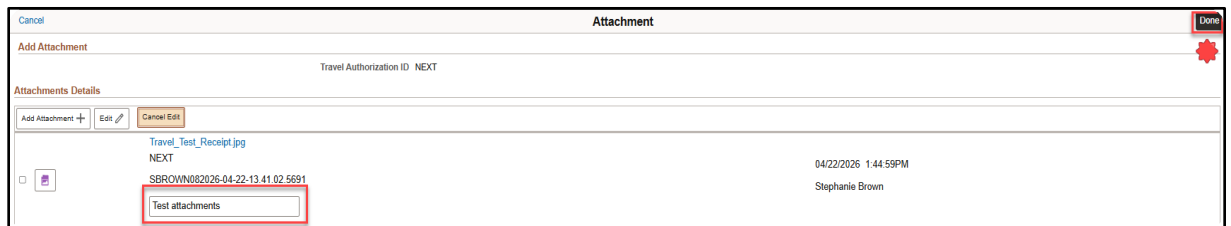


Figure 15. Add Attachment Description.

- I. Add account default information.
 1. Select the **Accounting 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.

The screenshot shows the 'Travel Authorization' form. At the top, it says 'Report NEXT Pending' and 'Stephanie Brown'. The form contains several fields: '*Description' (Travel to Tulsa), '*Business Purpose' (In State Travel), 'Comments' (To attend annual meeting), and 'Billing Type' (Internal). There are also links for 'Create A Cash Advance', 'View Printable Version', and 'Notes'. In the 'Details' section, the 'Accounting Default' button is highlighted with a red box and a red arrow. Other buttons in this section include 'Populate from Travel Authorization', 'Populate from Template', and 'Quick-Fill'. Below the details section, there are fields for 'Date' (05/18/2026) and 'Expense Type' (OoS Mileage-Airfare Cost Comp).

Figure 16. Accounting Default.

2. Select the **GL ChartFields** button and provide necessary information (Figure 17).

The screenshot shows the 'Travel Authorization Defaults' dialog box. The title is 'Travel Authorization Defaults' and it has 'Cancel' and 'Done' buttons. The description is 'Travel to Tulsa'. Under 'Accounting Details', the 'GL ChartFields' button is highlighted with a red box. Below this, there is a table with columns: '%', '*GL Unit', 'Oper Unit', 'Fund Type', 'Dept', 'Program', 'Class-Funding', and 'Bud Ref'. The table contains one row of data: 100.00, 09000, CAR10005, 1000, 1000014, D0102, 20000, and 26.

Figure 17. GL ChartFields.

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

The screenshot shows the 'Travel Authorization Defaults' dialog box. The title is 'Travel Authorization Defaults' and it has 'Cancel' and 'Done' buttons. The description is 'Travel to Tulsa'. Under 'Accounting Details', the 'Project ChartFields' button is highlighted with a red box. Below this, there is a table with columns: '%', 'PC Bus Unit', 'Project', 'Activity', 'Source Type', 'Category', and 'Subcategory'. The table contains one row of data: 100.00, 09000, 0900000000, 090, 38284, and empty fields for Category and Subcategory.

Figure 18. Project Chartfields.

4. Select **Done** when finished.

J. Expense Type (Figure 19).

1. Update the date to reflect the expense date, if necessary.
2. Select the drop-down arrow under Expense Type and then select **In-State Lodging**.
 - a. Lodging expenses can be combined into one line (the number of nights stayed will be entered at a later step).
3. Enter the Description.

The screenshot shows the 'Travel Authorization' form for Stephanie Brown. The form includes fields for Description, Business Purpose, Comments, Billing Type, Travel From, Travel To, Date From, and Date To. The 'Expense Type' dropdown menu is set to 'In-State Lodging' and the 'Description' field contains 'Overnight Stay'. The 'Date' field is set to '05/18/2026'. The 'Amount' is '110.00' and the 'Currency' is 'USD'. The 'Accounting' section is highlighted in red.

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OK	110.00	USD		

Figure 19. Expense Type field.

4. 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.

The screenshot shows the 'Travel Authorization' form for Stephanie Brown. The form includes fields for Description, Business Purpose, Comments, Billing Type, Travel From, Travel To, Date From, and Date To. The 'Expense Type' dropdown menu is set to 'In-State Lodging' and the 'Description' field contains 'Overnight Stay'. The 'Date' field is set to '05/18/2026'. The 'Amount' is '110.00' and the 'Currency' is 'USD'. The 'Accounting' section is highlighted in red.

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OK	110.00	USD		

Figure 20. Accounting and Line Detail.

5. Complete the Line Details screen when prompted (Figure 21).
 - a. Select the appropriate **Payment Type** from the drop-down menu.
 - b. Select the **Internal Billing Type** from the drop-down menu based on the Payment Type chosen.
 - c. Enter the number of nights for in-state lodging expense type. Select **Done** when finished.
 - d. Select **Save** often to avoid loss of information.

Line Detail

Expense Type: In-State Lodging
 Description: Overnight Stay
 Amount: 110.00
 Currency: USD
 Payment Type: Agency Paid - NOT REIMBURSABLE
 *Billing Type: Internal
 Number of Nights: 2

Figure 21. Line Detail.

K. In-State Per Diem Meal.

1. Add an expense line for in-state per diem meal.

Travel Authorization
 Report: 0000000277 Pending
 Stephanie Brown

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

*Travel From: OKLAHOMA CITY-OKLAHO Q
 *Travel To: TULSA-TULSA COUNTY-OK Q
 *Date From: 05/18/2026
 *Date To: 05/20/2026 Trip Duration 2 Days

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OK Q	110.00	USD		Details + -
05/18/2026	In-State Per Diem Meal		TULSA-TULSA COUNTY-OK Q	63.00	USD		Details + -

Total Expenses 173.00 USD

Figure 22. Expense line added for In-State Per Diem Meal.

2. Select the **plus** icon to add an additional expense line (Figure 22).
 - a. Select the drop-down arrow under Expense Type and select **In-State Per Diem Meal**.
3. Enter the per diem meal Description in the field (Figure 23).
 - a. For in-state per diem meal, the amount is defaulted.
 - b. The amount will change depending on the location allowable per diem amount.

Travel Authorization
 Report: 0000000277 Pending
 Stephanie Brown

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

*Travel From: OKLAHOMA CITY-OKLAHO Q
 *Travel To: TULSA-TULSA COUNTY-OK Q
 *Date From: 05/18/2026
 *Date To: 05/20/2026 Trip Duration 2 Days

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OK Q	110.00	USD		Details + -
05/18/2026	In-State Per Diem Meal	Day 1	TULSA-TULSA COUNTY-OK Q	63.00	USD		Details + -

Total Expenses 173.00 USD

Figure 23. Per Diem Description.

4. Select the **Details** button (Figure 23) and complete the Line Detail screen when prompted (Figure 24).
 - a. Select the appropriate Payment Type from the drop-down.
 - i. Per diem are typically **Employee Paid** payment type.
 - b. Select the appropriate Billing Type from the drop-down based on the Payment Type chosen.
 - c. Provide the Per Diem details.
 - i. Per diem rates are already calculated by the system.
 - ii. Select the First/Last Day slider to display **Yes** for day one and last day of travel for per diem only.
 - iii. Breakfast Provided field: If meal provided, select **Yes**.
 - iv. Lunch Provided field: If meal provided, select **Yes**.
 - v. Dinner Provided field: If meal provided, select **Yes**.

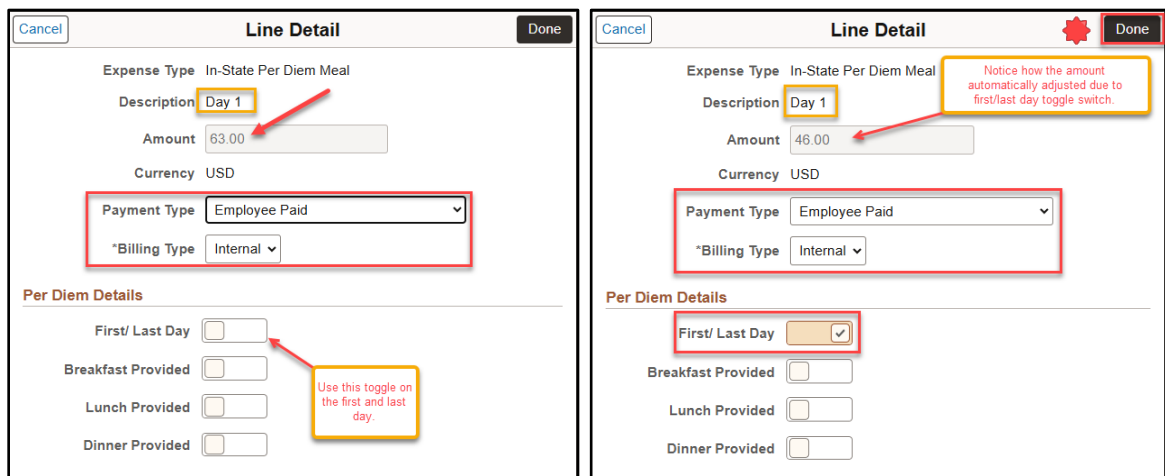


Figure 24. Per Diem Line Details.

- d. Select **Done** when complete.
- e. Select **Save** often to avoid loss of information.

L. In-State Local Incidental.

1. Select the **plus** icon to add an additional expense line (Figure 22).
2. Select the drop-down arrow under Expense Type and select **In-State Local Incidental** (Figure 25).

Date	Expense Type	Description	Location	Amount	Currency
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OF Q	110.00	USD
05/18/2026	In-State Per Diem Meal	Day 1	TULSA-TULSA COUNTY-OF Q	46.00	USD
05/18/2026	In-State Local Incidental	Day 1	TULSA-TULSA COUNTY-OF Q	5.00	USD

Figure 25. Add In-State Local Incidental.

- a. For in state local incidental, the amount is defaulted.
- b. Enter the Description in the field (Figure 25).
- c. Add an Expense Type for In-State Local Incidental Expenses for every day traveled.
- d. Meals and incidentals are only allowed for overnight travel status.

3. Select the Details icon (Figure 26).

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-OH Q	110.00	USD		Details
05/18/2026	In-State Per Diem Meal	Day 1	TULSA-TULSA COUNTY-OH Q	46.00	USD		Details
05/18/2026	In-State Local Incidental	Day 1	TULSA-TULSA COUNTY-OH Q	5.00	USD		Details

Total Expenses 161.00 USD

Figure 26. In-State Local Incidental Description Details.

4. Select the **Details** button and complete the Line Detail screen when prompted.
 - a. Select the appropriate Payment Type from the drop-down menu (Figure 27).
 - i. Incidentals are typically **Employee Paid** payment type.
 - b. Select the appropriate Billing Type from the drop-down menu based on the Payment Type chosen.
 - c. Select **Done** when complete.
 - d. Select **Save** often to avoid loss of information.

Line Detail

Expense Type In-State Local Incidental

Description Day 1

Amount 5.00

Currency USD

Payment Type Employee Paid

*Billing Type Internal

Figure 27. In-State Local Incidental Line Detail.

M. In-State Mileage.

1. Select the **plus (+)** icon to add an additional expense line (Figure 22).
2. Select the drop-down arrow under Expense Type and select **In-State Mileage-Pri Veh** (Figure 28).

Details

Accounting Default Populate from Travel Authorization

Expense Type In-State Lodging Description Overnight stay

In State Per Diem Meal Day 1

In State Local Incidental Day 1

In-State Mileage-Pri Veh

Figure 28. In-State Mileage Expense Type.

3. Enter what the mileage is for (e.g., duty station to hotel) in the Description field (Figure 29).

Travel Authorization
 Report: 000000277 Pending
 Stephanie Brown

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

*Travel From: OKLAHOMA CITY-OKLAH Q
 *Travel To: TULSA-TULSA COUNTY-O Q
 *Date From: 05/18/2026
 *Date To: 05/20/2026 Trip Duration 2 Days

Attachments (1)

Accounting Default | Populate from Travel Authorization | Populate from Template | Quick-Fill

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Lodging	Overnight Stay	TULSA-TULSA COUNTY-O Q	110.00	USD	Q	Details
05/18/2026	In-State Per Diem Meal	Day 1	TULSA-TULSA COUNTY-O Q	46.00	USD	Q	Details
05/18/2026	In-State Local Incidental	Day 1	TULSA-TULSA COUNTY-O Q	5.00	USD	Q	Details
05/19/2026	In-State Mileage-Pri Veh	Duty station to hotel		74.68	USD	Q	Details
05/19/2026	In-State Per Diem Meal	Day 2	TULSA-TULSA COUNTY-O Q	47.00	USD	Q	Details
05/19/2026	In-State Local Incidental	Day 2	TULSA-TULSA COUNTY-O Q	5.00	USD	Q	Details
05/20/2026	In-State Per Diem Meal	Day 3	TULSA-TULSA COUNTY-O Q	46.00	USD	Q	Details
05/20/2026	In-State Local Incidental	Day 3	TULSA-TULSA COUNTY-O Q	5.00	USD	Q	Details

Figure 29. In-State Mileage Details.

4. Select the **Details** (Figure 29) button and complete the Line Detail screen when prompted (Figure 30).
 - a. Select the appropriate Payment Type from the drop-down menu.
 - i. In-state mileage is typically **Employee Paid** payment type.
 - b. Select the appropriate Billing Type from the drop-down menu based on the Payment Type chosen.
 - i. The Billing Type and Destination Location information defaults from the travel authorization header.
 - ii. The miles must be manually updated.
 - c. Select **Done** when complete.
 - d. Select **Save** often to avoid loss of information.

Cancel
Line Detail
Done

Expense Type In-State Mileage-Pri Veh

Description Duty station to hotel

Amount

Currency USD

Payment Type Employee Paid ▼

***Billing Type** Internal ▼

***Destination Location** TULSA-TULSA COUNTY-OK Q

***Miles** 103

x 0.7250

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).

Travel Authorization
Save
Submit

Report: 0000000277 Pending
Stephanie Brown

***Description** Travel to Tulsa

***Business Purpose** In State Travel ▼

Comments To attend annual meeting

Billing Type Billable ▼

[Attachments \(1\)](#)

***Travel From** OKLAHOMA CITY-OKLAHO Q

***Travel To** TULSA-TULSA COUNTY-OK Q

***Date From** 05/18/2026

***Date To** 05/20/2026 Trip Duration 2 Days

Details

Date	Expense Type	Description	Location	Amount	Currency	Accounting	Attachments
05/18/2026	In-State Mileage-Pri Veh	Duty station to hotel		74.68	USD		Details
05/19/2026	In-State Per Diem Meal	Day 2	TULSA-TULSA COUNTY-OK Q	47.00	USD		Details
05/19/2026	In-State Local Incidental	Day 2	TULSA-TULSA COUNTY-OK Q	5.00	USD		Details
05/20/2026	In-State Per Diem Meal	Day 3	TULSA-TULSA COUNTY-OK Q	46.00	USD		Details
05/20/2026	In-State Local Incidental	Day 3	TULSA-TULSA COUNTY-OK Q	5.00	USD		Details
05/20/2026	In-State Mileage-Pri Veh	Hotel to Duty Station		74.68	USD		Details

Figure 31. Add Expense Type, Descriptions and Detail.

1. 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).
2. Select **Save** 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.
- D.** Error examples:
 - 1.** 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:
 - i.** Go to the accounting default option and correct the accounting information.
 - ii.** Saving the new information should fix all the expense line errors.

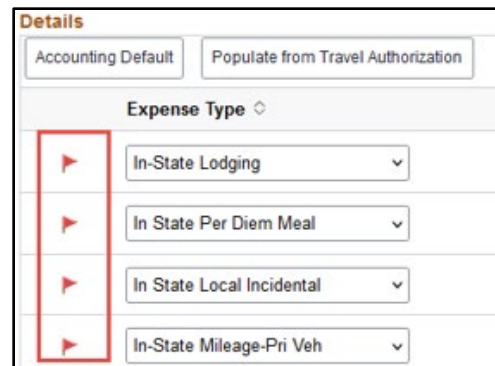


Figure 32. Error flags.

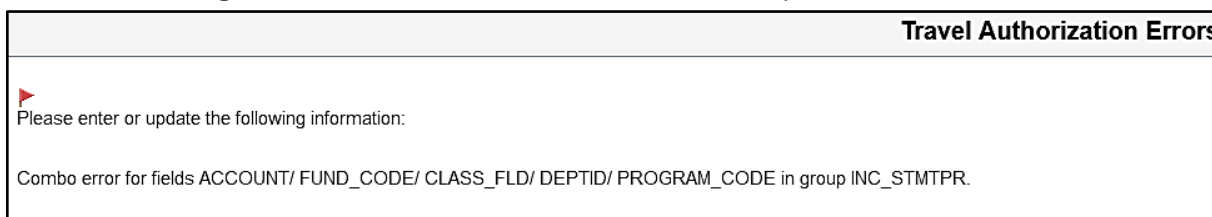


Figure 33. Error example.

- c.** Save the authorization and ensure all error flags resolve (Figure 34).
- d.** Select **Submit** to resubmit the travel authorization.

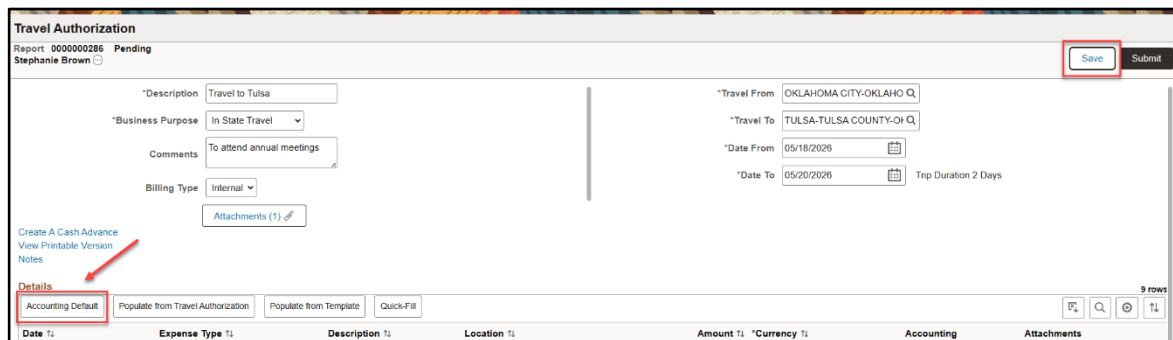


Figure 34. Accounting Default Option. Save and Submit.

- i.** A Submission Confirmation pop-up (Figure 35) will appear. Press **OK** to submit the Travel Authorization.

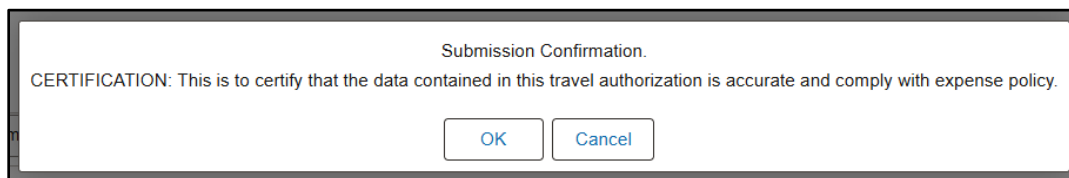


Figure 36. Submission Confirmation.

- ii. An authorization ID will generate for reference and flash across the top of the screen (Figure 36).

Travel Authorization

Your travel authorization 000000286 has been submitted for approval.

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

Travel From: OKLAHOMA CITY-OKLAHOMA COUN-OK
 Travel To: TULSA-TULSA COUNTY-OK
 Date From: 05/18/2026
 Date To: 05/20/2026
 Trip Duration: 2 Days

Approvals

Attachments (1)

View Printable Version
Notes

Details

Date	Expense Type	Description	Line Status	Location	Amount	Currency	Reimbursement	Accounting	Details	Attachments
05/18/2026	In-State Lodging	Overnight Stay	Pending	TULSA-TULSA COUNTY-OK	110.00	USD	Prepaid		Details	
05/18/2026	In-State Per Diem Meal	Day 1	Pending	TULSA-TULSA COUNTY-OK	46.00	USD	Reimbursable		Details	
05/18/2026	In-State Local Incidental	Day 1	Pending	TULSA-TULSA COUNTY-OK	5.00	USD	Reimbursable		Details	
05/18/2026	In-State Mileage-Pri Veh		Pending		74.68	USD	Reimbursable		Details	
05/19/2026	In-State Per Diem Meal	Day 2	Pending	TULSA-TULSA COUNTY-OK	47.00	USD	Reimbursable		Details	
05/19/2026	In-State Local Incidental	Day 2	Pending	TULSA-TULSA COUNTY-OK	5.00	USD	Reimbursable		Details	

Figure 36. Travel Authorization reference.

- iii. On the upper left, the progress now says Submission in Process, and on the upper right, there is a Withdraw button (Figure 37). The request has been submitted.

Travel Authorization

Report: 000000277 Submission in Process
 Stephanie Brown

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

Travel From: OKLAHOMA CITY-OKLAHOMA COUN-OK
 Travel To: TULSA-TULSA COUNTY-OK
 Date From: 05/18/2026
 Date To: 05/20/2026
 Trip Duration: 2 Days

Approvals

Attachments (1)

View Printable Version

Withdraw

Figure 37. Travel Authorization Submission in Process.