Background

This mini-manual contains detailed instructions on how to complete and approve Travel and Expense forms/reports. The content is written for both travelers and their approvers. This document applies to UVM employees who handle their own Travel and Expense forms, as well as their delegates.

NOTE: Departments served by the Administrative Business Services Center (ABSC) follow a different process for expense reports. A complete list of the departments served by ABSC can be found on the ABSC web page. Instructions for the ABSC expense report process, and the expense report form itself, can be found in the Reimbursements section of the ABSC Website. Please contact your department’s assigned ABSC representative if you have questions regarding this expense reporting process.

Delegate Entry Authority to Other Users

Background: Delegating Entry Authority is a feature of PeopleSoft which allows an employee to authorize someone else to enter Travel and Expense forms into PeopleSoft on their behalf. Be aware that colleges or departments within the University may have specific directives on this matter. Check with the departmental business manager.

NOTE: Even though an employee has delegated authority to another to enter Travel and Expense forms, s/he is still responsible for understanding the Travel Policy, and for the accuracy, timeliness, and completion of the reports.

1. Log in to PeopleSoft through the Financials login. (https://www.uvm.edu/~erp/portal/).
2. Navigate to: Main Menu > Employee Self Service > Travel and Expense Center > Profiles and Preferences > Delegate Entry Authority.
3. A page will display showing a list of those authorized to create and/or modify expense forms (expense reports, travel authorizations and cash advances) for the employee. At a minimum, the employee Name and User ID should appear.

4. Click the + (plus) sign to add a blank line.
5. Click the **Look Up** icon to search for the appropriate User ID.

6. In this case, the User ID is equivalent to the UVM Net ID. If an individual’s Net ID is unknown, the easiest place to find it may be at the bottom of their UVM Online Directory listing. It is often, but not always, the first initial of a person’s first name, followed by the first several letters of their last name.

7. Enter the first couple letters of the individual’s NetID and click on **Look Up**. Choose the ID of the person to be authorized by clicking on it within the **Search Results** table.

8. Click the **Save** button.

9. To add additional authorized users, repeat **Steps 7-9** as often as needed.

10. To delete an authorized user, simply click on the – (minus) sign at the end of their line and their name will be removed from the list.

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**Travel Authorization Information**

**Responsibilities**

- The traveler or delegate is responsible for creating and submitting a Travel Authorization if obtaining a cash advance or if required by the department.

- The traveler or delegate is responsible for confirming that the chartstring on the Travel Authorization is correct, since this transaction will create an encumbrance on the chartstring used.

- The traveler or delegate is responsible for ensuring that the Travel Authorization is used when creating the corresponding Expense Report.

- The traveler or delegate is responsible for canceling or deleting unused Travel Authorizations by the end of the fiscal year if the Travel Authorization was not used, to clear the encumbrance from the chartstring.

**Travel Authorization Tips & Reminders**

- Click **Save for Later** button after entering each line.

- To duplicate selected lines on the Travel Authorization (for similar expenses to list on multiple days), click in the box to the left of the expense line(s) to copy in the column marked **Select**, then click on the **Copy Selected** button.

  **NOTE:** Choose whether to copy to one date or to a range of dates and whether to include weekends and/or holidays. When done, click the **OK** button.

- To delete selected lines on the Travel Authorization, click in the box to the left of the expense line(s) in the column marked **Select**, and click the **Delete Selected** button.