Electronic Travel Authorization System

Comptroller’s Office

Created by:
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Ms. Meenal Jain, BS
Ms. Sowmya Andalam, BS
1. Start at: https://forms.latech.edu/

2. Click on “Travel Authorization.”

3. Ignore the security warning.

4. Login with your Moodle credentials.

The warning screen looks different on different browsers. This is a screenshot from Chrome.
Click on "New Form"
The on-line form is based on the paper form...

![Image of the on-line form](image_url)
Add rows to list travelers ... or attach a list

<table>
<thead>
<tr>
<th>TRAVELER(S)</th>
<th>NAME</th>
<th>TITLE</th>
<th>E-MAIL</th>
</tr>
</thead>
</table>

- Listed travelers will get an e-mail informing them that they are listed on a TA.
- The e-mail will have a link that allows travelers to access and print the TA.
- Attached list will not get alerts.
Provide information on who is paying ...

Multiple accounts can be added if the trip is co-funded by more than one account.

Refer to cheat sheet on Budget & Object codes if necessary.
Pick the type of travel

- If “Single Trip (International)” is selected, a memo is required. A TA number is not needed for the memo. TA # is auto-generated at the preview-stage.
Special cases:

- Occasionally, we may travel with no University funds.
  - Trip paid for by someone else
  - Paid from Foundation funds
- In such cases, please use your department’s operating budget code and show $0 as the estimated total cost, and add an explanation in the “Destination” field. See Example below.

<table>
<thead>
<tr>
<th>CLASS</th>
<th>DEPARTMENT</th>
<th>BUDGET &amp; OBJECT</th>
<th>FUND</th>
<th>ESTIMATED TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>4220</td>
<td>2024</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total: $0.00

**TYPE OF AUTHORIZATION:**
- Single Trip (In-State)
- Single Trip (Out-Of-State)
- Single Trip (International)
- Quarterly (For In-State Travel Only)
- Other (Explain in the Destination field below)

**DESTINATION:**
Jackson, MS. Trip covered by Jackson State University (invited speaker in seminar series).
Select people who should approve ... from drop-down lists

- Not all units have a “Acct/Budget Verification” person.
- Add your name in the “Prepared By” field.

NOTE: Reimbursement for all travel expenses will be made in accordance with the Travel Regulations prescribed by the Governor, through the division of Administration. See Policy and Procedure Memorandum No. 45-Travel Regulations.

Athletics should use www.shorttravel.com/latest (i.e., NOT the link provided in the PPM 49 link provided above).

Effective November 1, 2014, non-conference lodging must be reserved through Louisiana Hotel Planner: http://louisiana.hotelpanner.com. Please review the user guide available here.

NOTE: You will get to preview this form before sending it for signatures. Please make a good use of this feature and check each and every field very carefully before sending for approvals.
More on approvals …

- If a grant account is listed, the PI’s info will be requested, and should be added.

- The “Fund” number for a grant will be in the range 40000 – 69999.
- If a grant account is listed, University Research is added automatically to the signature trail.
- If a grant account is listed, the Vice-President for Research should be selected as one of the VP’s.
- Professorships (32-xxxx-17xxx) ARE NOT grants. Travel on professorships and gift accounts that start with “32” should be approved by VP McConathy.
What happens when you send the TA for signatures?

1. Preparer (prepares the form) → PI (reviews and signs) → Acct/Budget Verification (reviews and signs) → University Research (reviews and signs) → Department Head (reviews and signs)

2. Dean(s) (reviews and signs) → Vice-President(s) (reviews and signs)

3. Comptroller (reviews and signs)

4. President (reviews and signs) → Finalized! Preparer informed
You may get revision requests as your submission is being reviewed. Any changes you make will require the form to be signed again.

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**LOUISIANA TECH UNIVERSITY**  
**TRAVEL AUTHORIZATION**

<table>
<thead>
<tr>
<th>DATE OF REQUEST</th>
<th>DATE OF TRIP</th>
<th>TA #</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 28, 2016</td>
<td>From: June 23, 2015</td>
<td>To: June 26, 2015</td>
</tr>
</tbody>
</table>

**TRAVELERS**

<table>
<thead>
<tr>
<th>NAME</th>
<th>TITLE</th>
<th>COMPLETE E-MAIL ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedro Derosa</td>
<td>Associate Professor</td>
<td><a href="mailto:pderosa@latech.edu">pderosa@latech.edu</a></td>
</tr>
<tr>
<td>Benjamin Beach</td>
<td>Student</td>
<td><a href="mailto:bjb050@latech.edu">bjb050@latech.edu</a></td>
</tr>
<tr>
<td>Andrew Stroud</td>
<td>Student</td>
<td><a href="mailto:ajs030@latech.edu">ajs030@latech.edu</a></td>
</tr>
</tbody>
</table>

**CLASS**

<table>
<thead>
<tr>
<th>DEPARTMENT</th>
<th>BUDGET &amp; OBJECT</th>
<th>FUND</th>
<th>ESTIMATED TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>4220</td>
<td>58430</td>
<td>$1,200.00</td>
</tr>
<tr>
<td>32</td>
<td>2205</td>
<td>59242</td>
<td>$400.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$1,600.00</td>
</tr>
</tbody>
</table>
More on form revisions

1. Preparer (prepares the form) → PI (reviews and signs) → Acct/Budget Verification (reviews and signs)
   → University Research (reviews and signs)
   → Department Head (reviews and signs)

2. University Research (reviews and signs) → Dean(s) (reviews and signs)
   → Vice-President(s) (reviews and signs)

3. Vice-President(s) (reviews and signs) → Comptroller (reviews and signs)

4. Comptroller (reviews and signs) → President (reviews and signs)
   → Finalized! Preparer informed

Form is locked from editing if someone at Level 2 signs.

Further amendments to the TA must be made by memo (like it is done now).

• Form can be printed (a printer-friendly version can be generated) or saved as PDF at any stage.
Here you can check on the status of forms submitted, and also view past submissions. Administrators will also see forms that need to be signed.
You will not be able to see all the forms in the system – just the ones you generated or signed.
Substitute signer:

- You can assign someone as your substitute signer by entering the name and e-mail address.
- The substitute will get the same e-mail alerts that you do, and will be able to sign in your signature field.
- If you will depend on administrative staff to file the travel reimbursement, it is strongly recommended that the staff member be added as a substitute. This will allow the staff member to check on the form’s status and to print it when finalized.
- Substitute status can be changed – you can activate (default), de-activate, or delete a substitute at any time.
Please don’t hesitate to ask for help.
Also please provide feedback so we can improve the form.

Disclaimer: This system is in a Beta phase. Please inform us if you encounter any issue or have any feedback.

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