University of Houston Clear Lake

Travel PO Quick Steps (abbreviated) Instructions

1. Go to Add/Update POs in PeopleSoft Finance

    Enter Business Unit TR759

    Click Add

    Enter Vendor ID

2. Go to Header Details

    Change the PO Type to TRA

    Click OK

3. Go to PO Defaults

    Click Override button at top of page

    Enter Speed Type

    Enter Account Code (use only 1 account code, even if using multiple cost centers)

    Click OK

    Enter Description

    Enter PO Qty: 1

    Enter *UOM: Lot

    Enter Category: 96288

    Enter Price

4. Click on the Attributes tab

    Click on the Amount Only box

    Click Yes

    Click Save (Travel PO# generated - Record Travel PO# on pdf of Approved TA)

5. Go to Documents tab and Review (go back and make any corrections needed)

6. Upload Approved TA and other supporting documentation

7. Use Notify feature to notify your CBA/DBA the Travel PO is ready for Review, Approval & Dispatch

8. When you are notified that the Travel PO has been approved and dispatched, send copy of Travel PO and Approved TA to the Traveler and your CBA/DBA.

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