Create a Travel Authorization (TA)

- Login to mybyuh
- Enter CES net ID and password
- Click on PeopleSoft Finance

**IMPORTANT NOTE:**
In order to create Travel Authorization for a non-BYUH employee, students or group of students travelling, please contact BYU-H Travel office at 5-3950 before creating the TA.
Click on Employee Self-Service

Click on Travel and Expense Center
<table>
<thead>
<tr>
<th>Expense Report</th>
<th>Time Report</th>
<th>Travel Authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create, modify, print,</td>
<td>Create, modify, print</td>
<td>Create, modify, print,</td>
</tr>
<tr>
<td>view or delete an</td>
<td>view and delete a</td>
<td>view, cancel or</td>
</tr>
<tr>
<td>Expense Report</td>
<td>Time Report</td>
<td>delete a Travel</td>
</tr>
<tr>
<td>Create</td>
<td>Create</td>
<td>Authorization</td>
</tr>
<tr>
<td>Modify</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Print</td>
<td></td>
</tr>
<tr>
<td>2 More...</td>
<td>3 More...</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cash Advance</th>
<th>Forecast Time</th>
<th>Print Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create, modify, print,</td>
<td>Create, modify or</td>
<td>Print any one of your</td>
</tr>
<tr>
<td>view and delete a</td>
<td>view forecast data</td>
<td>expense transactions.</td>
</tr>
<tr>
<td>Cash Advance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create</td>
<td>Forecast Time</td>
<td></td>
</tr>
<tr>
<td>Modify</td>
<td>Review Forecasted</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Time</td>
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<tr>
<td>2 More...</td>
<td>3 More...</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profiles and Preferences</th>
<th>Review Payments</th>
<th>Other Expense Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage your personal,</td>
<td>Review history of</td>
<td>View contents in My</td>
</tr>
<tr>
<td>organizational and</td>
<td>expense payments</td>
<td>Wallet, create your</td>
</tr>
<tr>
<td>financial details for</td>
<td></td>
<td>own template, or</td>
</tr>
<tr>
<td>travel and expense</td>
<td>Review Expense History</td>
<td>modify and existing</td>
</tr>
<tr>
<td>reporting.</td>
<td>Review Payments</td>
<td>template.</td>
</tr>
<tr>
<td></td>
<td>Review Payroll</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Payments</td>
<td></td>
</tr>
<tr>
<td>Review/Edit Profile</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Travel Services          |                        |                        |
| View My Reservations,    |                        |                        |
| Change your passwords,   |                        |                        |
| and log on to Travel     |                        |                        |
| Partner sites            |                        |                        |
| My Reservations          |                        |                        |
| Travel Partner Password  |                        |                        |
| Travel Partner Logon     |                        |                        |

Click on Create
CASE #1 – Create your own TA.
Your ID # should appear under Empl ID so just click on Add.

CASE #2 – Create a TA for another employee -
Click on the magnifier glass and click on Search.
All user IDs that you have proxy right for should appear.
If not, contact the Travel Office at 5-3395 to request proxy rights.
Click on the employee name and click on Add when returning to this page.
Description - Enter a short but relevant business purpose for Travel. Including dates of travel is helpful as well.

Comment - Enter a description of your travel purpose. Any personal stops should be mentioned as well.

Default Location – Click on the magnifying glass and search by description for your destination.

Date From and Date To – Click on the Calendar Icon to enter the dates or type it in.
Expense Type – Click on the arrow to select an expense type

Payment Type – Select:
• JP Morgan Visa Card – employee will use his/her corporate credit card to pay for this travel expense.
• Pay Employee – employee will use his/her personal fund.

Date – Enter date of the trip
Amount – Enter estimate amount

Billing Type – is always Internal

Add expense type:
• Airfare
• Baggage Fee
• Car Rental
• Conference Fee
• Gas
• Hotel
• Mileage on-island
• Meals
• Parking & Tolls
• Taxi/shuttle
• SUBMIT the TA

Add a new line or several lines – Click on the plus sign +…. A pop-up box will open. Enter the number of line you want to add and press OK

Add a new line – Click on Add to enter a new line
### Add Airfare

<table>
<thead>
<tr>
<th>Select</th>
<th>Expense Type</th>
<th>Date</th>
<th>Amount</th>
<th>Currency</th>
<th>Payment Type</th>
<th>Billing Type</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Airfare</td>
<td>09/01/2011</td>
<td>550.00</td>
<td>USD</td>
<td>JP Morgan VISA Card I</td>
<td>Internal</td>
<td></td>
</tr>
</tbody>
</table>

**Create Travel Authorization**

**Authorization Detail for Airfare (Line 1)**

- Vaiana Nakamitsu
- Authorization ID: NEXT

**Please enter or update the following information:**
- Merchant (Preferred or Non-Preferred)

**Airfare**—Enter the date, quoted amount, payment type and click on **Detail**

**Under Detail**—Click on the arrow and select **BYUH Travel Office**

**Policy Tips:**

Travelers must book all air transportation through the University Travel Services office.

**Add expense type:**
- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- SUBMIT the TA
Add Baggage Fee

Authorization Detail for Baggage Fee (Line 2)

Vaiana Nakamitsu

About This Expense

*Date: 09/01/2011
*Payment Type: JP Morgan VISA Card
*Billing Type: Internal
*Merchant (Choose One):
Preferred: 
Non-preferred: Delta

Amount: 25.00 USD

Exception Comments

Location Amount:

Accounting Details

Check Expense For Errors

Return to Travel Authorization Entry

Policy Tips:
A traveler may take one check-in and one carry-on luggage on their business trip.

Add expense type:
- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- SUBMIT the TA
Policy Tips: Rental car reservations should be made through the University Travel Services office. Personnel should rent mid-size vehicles and should refuel the rental car before returning.
Add Conference Fee and Taxi/Shuttle

Conference Fee – Enter the date, estimate amount and payment type.

Taxi/Shuttle – Enter the date, estimate amount and payment type.

MENU
Add expense type:  
• Airfare  
• Baggage Fee  
• Car Rental  
• Conference Fee  
• Gas  
• Hotel  
• Mileage on-island  
• Meals  
• Parking & Tolls  
• Taxi/shuttle  
• SUBMIT the TA
**Policy Tips:** Travelers should refuel the rental car before returning it to avoid the high cost of gasoline at the rental agency.

**Gas for Rental Car –** Enter the date, estimate amount, payment type and click on **Detail**

**Under Detail –** Enter a brief explanation in the **Description** section.

---

**Add expense type:**
- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- SUBMIT the TA
**Policy Tips:** Travelers should use standard accommodations in reasonably priced, commercial-class hotels/motels.

**Add Hotel**

Hotel – Enter the date, payment type and click on Detail

Under Detail – Enter the Number of Nights and the Nightly Rate.

Add expense type:
- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- SUBMIT the TA
**Policy Tips:**
There are 2 choices to claim meals during Travel:
1. Meals non-perdiem - Keep all your receipts and get reimbursed up to the allowed daily amount
2. Meals perdiem based - Don’t keep any receipts and received 75% of the allowed daily amount

Only 1 choice can be selected for the whole length of the business trip.

<table>
<thead>
<tr>
<th></th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
<th>Level 5</th>
<th>Level 6</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Breakfast</td>
<td>$ 7.00</td>
<td>$ 5.85</td>
<td>$ 8.00</td>
<td>$ 9.00</td>
<td>$ 7.35</td>
<td>$10.00</td>
</tr>
<tr>
<td>Lunch</td>
<td>$11.00</td>
<td>$ 8.75</td>
<td>$12.00</td>
<td>$13.00</td>
<td>$11.05</td>
<td>$15.00</td>
</tr>
<tr>
<td>Dinner</td>
<td>$21.00</td>
<td>$14.65</td>
<td>$24.00</td>
<td>$27.00</td>
<td>$18.35</td>
<td>$29.00</td>
</tr>
<tr>
<td>Totals</td>
<td>$39.00</td>
<td>$29.25</td>
<td>$44.00</td>
<td>$49.00</td>
<td>$36.75</td>
<td>$54.00</td>
</tr>
</tbody>
</table>

See next page
**Meals Perdiem Based** – Enter the date, payment type should always be pay employee, and PeopleSoft will calculate the daily amount based on your default location.

**Meals Non-Perdiem** – Enter the date, payment type and click on Detail.

**Under Detail** – Enter the Number of Days and the Daily Amount.
**Policy Tips:** Travelers using personal vehicles to travel to and from the airport may request mileage reimbursement for one round trip ($0.51 per mile) plus current airport long-term parking rates (receipts required) OR two round trips, whichever is less. Roundtrip from Laie to Honolulu Airport is 70 miles. Written approvals are needed for special circumstances that require reimbursement for both mileage and long-term parking.

### Add Mileage On-island

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mileage On-island</td>
<td>Enter the date, payment type should always be Pay Employee and click on Detail</td>
</tr>
</tbody>
</table>

Under Detail—Enter the Miles and the Description.

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**Add expense type:**
- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- SUBMIT the TA
### Authorization Detail for Parking & Tolls (Line 12)

#### Vaiana Nakamitsu

Please enter or update the following information:

- **Description**

#### About This Expense

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Date:</em></td>
<td>09/05/2011</td>
</tr>
<tr>
<td><em>Payment Type:</em></td>
<td>JP Morgan VISA Card</td>
</tr>
<tr>
<td><em>Billing Type:</em></td>
<td>Internal</td>
</tr>
<tr>
<td><em>Description:</em></td>
<td></td>
</tr>
<tr>
<td><strong>Amount:</strong></td>
<td>20.00 USD</td>
</tr>
</tbody>
</table>

#### Exception Comments

- **Location Amount:**

#### Accounting Detail

- **Check Expense For Errors**

#### Return to Travel Authorization Entry

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### Add expense type:

- Airfare
- Baggage Fee
- Car Rental
- Conference Fee
- Gas
- Hotel
- Mileage on-island
- Meals
- Parking & Tolls
- Taxi/shuttle
- **SUBMIT the TA**
Click on **Check for Errors**. If any red flags appear, click on them to correct any errors.

Click on **Submit** to send the TA to your approver. Click on **Save for Later** to save the information and come back later to submit.
Click on OK

Your TA number will appear: 000003581