PEOPLESOFTR TRAVEL AUTHORIZATION AND EXPENSE MODULE

1) Open your Internet Browser to the BYUH.EDU website

2) Click on my/byuh on top right of website

3) Log in using your CES ID and your Password

4) Click on PeopleSoft Finance

5) Select Employee Self Service

6) Select Travel and Expense Center
Create a Travel Authorization (TA)

2) Select **Add**: Create a new Travel Authorization

Your Employee ID will automatically be populated with your log-in, or you can select the employee ID you proxy for.
Travel Authorization General Information.

1) Data Entry: Mandatory fields noted with *
   a) Description:
   b) Date From and Date To:
   c) Business Purpose – Default to BYUHawaii

   d) Default Location: Click on the magnifying glass.
   e) Type in the two letter State abbreviation in “begins with” box.
   f) click “Look Up”
g) Select Expense Location, for example “Salt Lake City, UT”

h) Click “Continue” button
2) You will now fill in the “Expense Types” applicable to your trip.

3) Click down arrow for the list of Expense Types. Select “Airfare” Expense Type.

3. Click the “Add” button to add each Expense Type.
Airfare Expense Type:

- Fill in the required fields
- Date: The date is already populated.
- Payment Type: two choices to select from.
  - (i) JP Morgan Visa Card – employee will use his/her corporate credit card to pay for this travel expense.
  - (ii) Pay Employee – employee will use his/her personal credit card or cash to pay for this travel expense

Merchant: Preferred – select BYUH Travel Office

Fill in the amount of the airfare and then click the “Update” button. The amount should show on the left side under the Amount column.

Click down error on Expense Type and select Car Rental and click “Add” button.

(b) Car rental: You will have 2 choices.
Preferred Car rentals – National is primary, Hertz is secondary
Select National rental car, input approximate cost in the amount box and then click “Update”.

Then select Hotel, Off Island Expense Type and click the “Add” button.
Type in the daily hotel rate and click the “Update” button. The total is based on the number of nights and it will reflect under the “Current Expenses” column on the right.

Continue selecting Expense Type and then click “Add” button.

(c) The Meals, Perdiem Based Expense Type.
Payment type: Select Pay Employee if you will be using cash or personal credit card to pay for your meals.
Select JPMorgan card if you will be using the corporate credit card to pay for your meals.

This amount is the daily Perdiem for your travel location. You will need to add more days of applicable Perdiem by clicking “Copy Current Expense”.
For example: If you have 3 days of Perdiem, you will need to click it two more times and it will add 2 more days of $36.00 Perdiem under your “Current Expenses”.
Continue to select Expense Type and then click “Add” button.

Select Expense Type Mileage, On Island.

- **Payment type:** Pay Employee
- **Miles:** type in 140 (70 miles roundtrip from Laie to the airport. Total 140 for both dropoff and pickup. Then click “Calc Mileage” button.
- **Description:** type in “Laie to the airport roundtrip”.

Click “Done” button when finished.
Click “Save for Later” or click “Submit for Approval” if you are done.

Click “Save for Later” button, then click “Ok”.
This is the summary of all the Expense Types that you entered in your Travel Authorization (TA).

Travel authorization status routing, name of traveler, approval status and the date the TA was submitted. You can then “Submit for Approval” if you are done. You will not be able to make any changes once it is submitted for approval.
Click “OK” to submit or click “Cancel” to return to the Travel Authorization without submitting.

Travel Authorization confirmation successful. Click “OK”.
Your Travel Authorization Summary and Travel Auth. ID number. Write down your Travel Authorization number for reference in your Cash Advance and Expense Report.

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Transaction Date</th>
<th>Merchant</th>
<th>Amount</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline</td>
<td>01/07/2008</td>
<td>BYUH Travel Office</td>
<td>459.00</td>
<td>USD</td>
</tr>
<tr>
<td>Car Rental, off island</td>
<td>01/07/2008</td>
<td>National Car Rental</td>
<td>219.00</td>
<td>USD</td>
</tr>
<tr>
<td>Hotel</td>
<td>01/07/2008</td>
<td></td>
<td>369.00</td>
<td>USD</td>
</tr>
<tr>
<td>Meals, Parking, Rent</td>
<td>01/07/2008</td>
<td></td>
<td>144.00</td>
<td>USD</td>
</tr>
<tr>
<td>Meals, on island</td>
<td>01/10/2008</td>
<td></td>
<td>67.90</td>
<td>USD</td>
</tr>
</tbody>
</table>

Total Expenses: 1,231.90 USD
Less Non Approved Expenses: 0.00 USD
Total Travel Authorization: 1,231.90 USD
PRINT TRAVEL AUTHORIZATION

1) Select Employee Self-Service  
2) Select Travel and Expense Center
3) Select Travel Authorization under the heading “Print Reports”.

2) Type in your TA# in the “Travel Authorization ID” box

Click on “Search Button”
Your TA will display on the screen. Click on File and print.