Creating Personal Templates in the PeopleSoft Travel and Expense Module

1. Sign into **PeopleSoft HRMS Self Service** website.
2. Click the **Travel and Expense Home** link.
3. Click the **Employee Self Service** link.
4. Click the **Other Expense Functions** link.
5. Click the **Create/Update User Template** link.
6. Click the **Add a New Value** tab.
7. In the **Document Template** field, enter a short name for your template.
8. In the **Template Type** drop-down box, select either Expense Report or Travel Authorization, depending on the type of template you are creating.
9. Click the **Add** button.
10. In the **Description** field, enter a description for your template.
11. In the **Short Description** field, enter an abbreviated description for your template. This field only holds 10 characters.
12. In the first row, click the **Expense Type** drop-down list and select the expense type you want to add to your template.
13. To add additional rows, click the **Add multiple new rows button (+)**.
14. Enter the number of rows you want to add and click the **OK** button.
15. In each row, select the **Expense Type** you want to add from the Expense Type drop-down list.
16. When finished adding Expense Types to your template, click the **Save** button.