

# Enabling Your Access to the PeopleSoft Travel and Expense Module

## Review your information in HRMS My system profile

- 1. Log into PeopleSoft HRMS website.
- 2. Click on <u>My System Profile</u> link in Main Menu.
  - a. Can change Password
  - b. Can review email used for HRMS notifications

#### 3. Click on **Personal Information Home**

a. Can review/change address

Peachtree University	<u>Home_Siqn o</u>	<u>ut</u> ^
Menu       Employee Home         My System Profile       Mercondent formation Home         Mercondent for the profile       Review and edit your contact information.         Mercondent for the profile       Review health, life insurance, flexible spending accounts or other benefit information.         Review health, life insurance, flexible spending accounts or other benefit information.       Review dependent information.         Mercondent for the profile       Parrol and Compensation Home       Access your on-line paycheck, direct deposit, and other deduction or contribution information, sick, and other leave balances.         Mercondent for the profile       Review vacation, sick, and other leave balances.         Mercondent for the profile       Review vacation, sick, and other leave balances.         Mercondent for the profile       Review and update expense reimbursement Address and payment information.         Activate access to Travel and Expense Home.       Activate access to Travel and Expense Home.	Help	
Done 🗸 Trusted sites	100%	•



# Steps to activate the access to Travel and Expense Module

- 1. Click on <u>Setup Expense</u> <u>Reimbursement Options</u>
- 2. Verify Expense Reimbursement Address Information
- 3. Verify Expense Reimbursement Payment Information
- 4. Click the **Save** button.
- 5. Click the <u>OK</u> button to confirm.
- 6. Return to Employee Home page.





- 7. Sign out of the application
- 8. Sign back into the PeopleSoft HRMS web page.
- 9. Click on the <u>Travel</u> and Expense Home link.
- 10. You are now in the Travel and Expense Module.



# **Review information in FIN My System Profile**

1. Click the **My System Profile** link in the Main Menu after clicking the **Travel and Expense Home** link.







## Review navigation in Travel and Expense Module

- 1. Employee Self Service: The link you will use most often; see page 7
- 2. **Manager Self Service:** For those employees who are also Approvers in the Travel and Expense Module
- 3. Worklist: For those employees who are Approvers
- 4. Reporting Tools: Access to Report Manager; should not need to access unless you are an Approver
- 5. **Process Monitor:** Do not need to access
- 6. Change My Password: Allows you to change your password to the system
- 7. My System Profile: See page 3
- 8. Return to Self Service Home: Takes you back to the PeopleSoft HRMS Self Service site



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## **Employee Self Service Menu**

- 1. **Profiles and Preferences:** Can review your own profile to see your settings and expense reimbursement options
- 2. Review Payments: Can review your history of expense transactions and payments
- 3. **Other Expense Functions:** Allows you to create template for Expense Reports and Travel Authorizations
- 4. Expense Report: Create, modify, print, view or delete an Expense Report
- 5. Travel Authorization: Create, modify, print, view or delete a Travel Authorization
- 6. Cash Advance: Create, modify, print, view or delete a Cash Advance



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### Review employee profile

- 1. Click Profiles and Preferences link.
- 2. Click Review/Edit Profile.
- 3. Review tabs to see your information:
  - a. **Employee Data:** Read only information; make changes to address through PeopleSoft HRMS Self Service site



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■ Search: © Employee Self- Service ■ Employee T&E	New Window   Helo   Customize Employee Data Y Organizational Data V User Defaults Y Bank Accounts	Page   🖷 🤷
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Profile Delegate Entry Authority Review Payments Other Expense Eunctions Expense Report Travel Authorization	HR Information     Supervisor Information       Employee Status: Active     Name:     Doe IV, John       Hire Date:     07/15/2008     ID:     000054       GL Unit:     40000     Peachtree University     Telephone:       Department:     UATDPT1     UAT Department #1     Hours Per Period: ☑ Use Business Unit Default     Designated Approver:	a
Cash Advance     Manager Self-Service     Worklist     Reporting Tools     Process Monitor     Change My Password     Mis System Frofile     Return to Self Service Home	Default ChartField Values           GL Unit         Fund         Program         Class         Project         Bud Ref         Dept           40000         10000 Q         16300 Q         11000 Q         2009 Q         UATDPT1           Cash Advance Level	
	Expense Role Expense Processing Role:	

b. **Organizational Data:** Read only information; Can review your HR information and default Chartfield values



Home Worklist Sign out

**PSFIN V8.9 Training** 

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Peachtree University c. User Defaults: New Window | Help | Customize Page | http arch  $\otimes$ Can set up your Employee Data Organizational Data User Defaults Employee Self-Travel and John Parker Service Employee T&E Expense defaults to maximize Preferences Review/Ec \*Expense Report: Copy From a Template ~ Expense Report: Open a Blank Report efficiency when Open a Blank Report ~ \*Time Report: Time Report: Open a Blank Report Delegate Entry Authority Copy From a Template ~ \*Travel Authorization: entering expense Review Payments
Other Expense transactions Occasional Use Functions Entry Method: ▶ Expense Report Report Description: Per Diem Range: ⊳ <u>Travel</u> Authorization Business Purpose: ~ Billing Type: Internal ~ Cash Advance Originating Location: GAATL Q Expense Locatio Q Manager Self-Service Payment Type: Credit Card: **Q** Worklist <u>Reporting Tools</u> <u>Process Monitor</u> Change My Password <u>Iv System Profile</u> Cotum to Soff Service 1 Transportation ID: Number of Nights: Expense Type Defaults ize | Find | 🗮 🛛 First 🗹 1 of 1 🕑 Last \*Expense Type Payment Type **Billing Type** urn to Self Serv Auto Mileage - Tier1 N/A (e.g. Mileage) Internal ▼ ± -Project Defaults for E v All | 🗮 🛛 First 🗹 1 of 1 🕩 Last Customize | Find | Vi Activity PC Business Unit Enabled Project Description Description Q Q + -2 🗸 Trusted site 100%



d. Bank Accounts: Read only information; can review your reimbursement selections for expense transactions