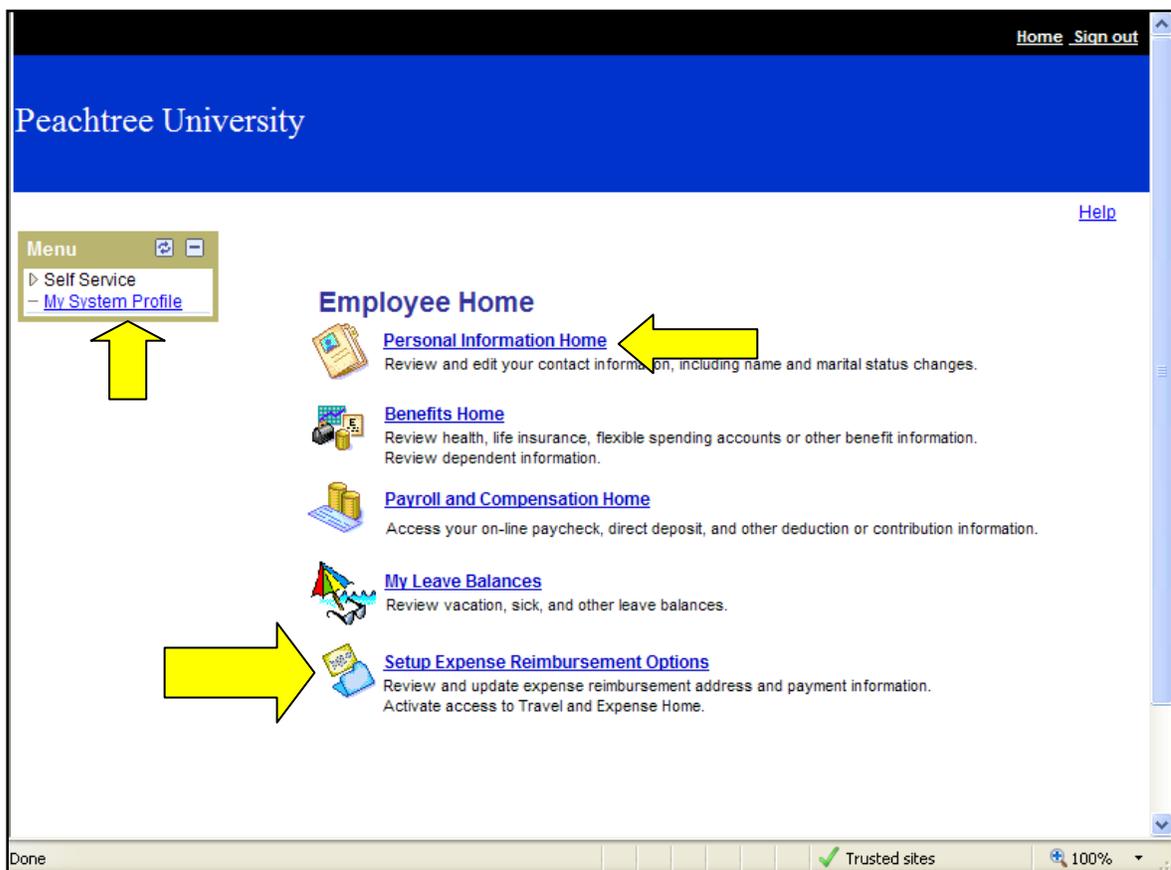


Enabling Your Access to the PeopleSoft Travel and Expense Module

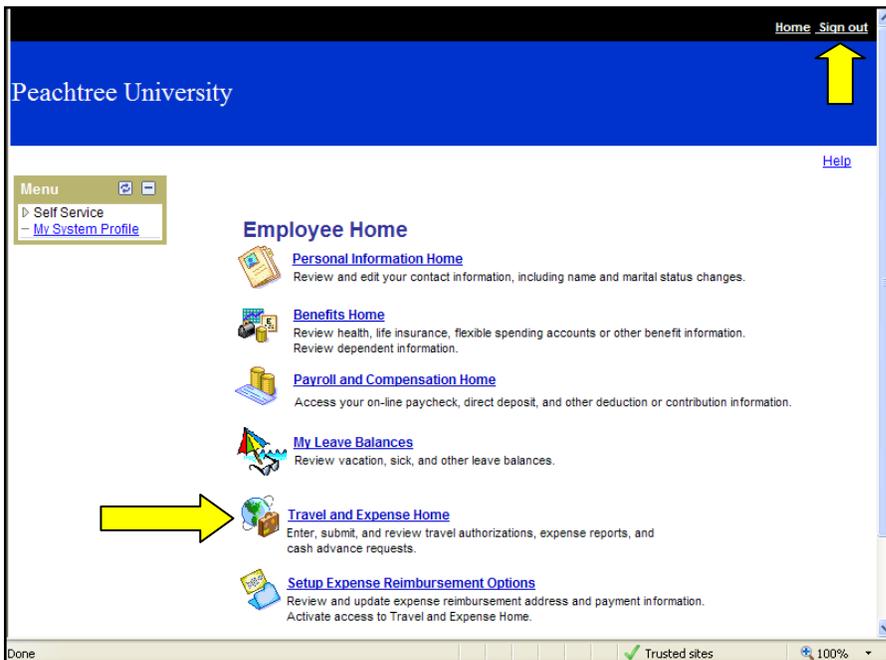
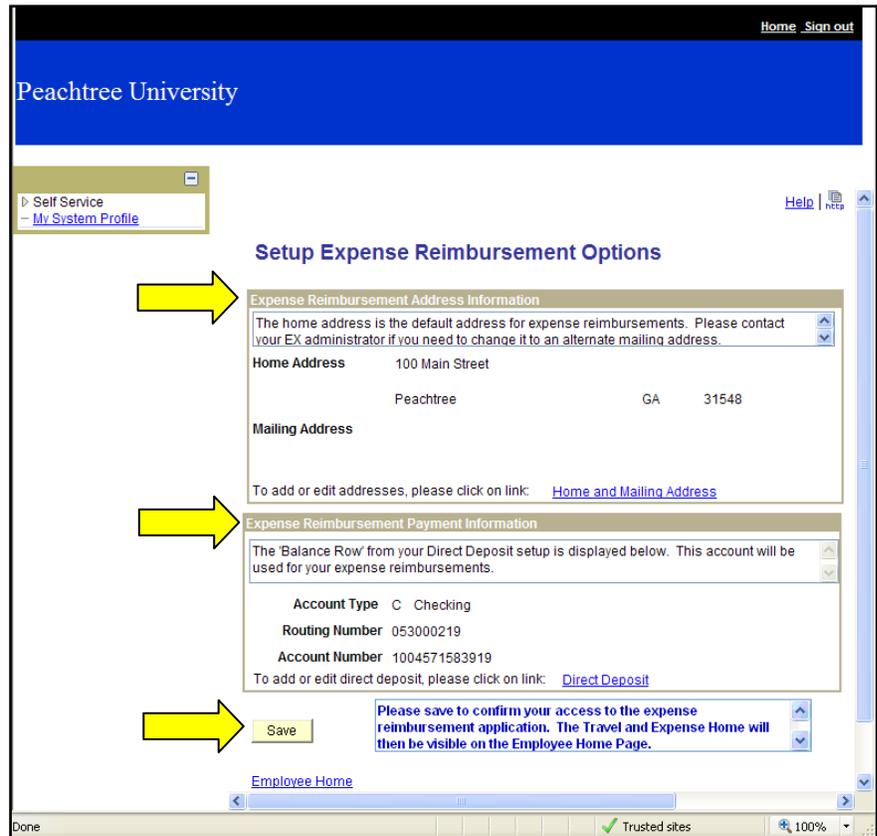
Review your information in HRMS My system profile

1. Log into **PeopleSoft HRMS** website.
2. Click on **My System Profile** 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



Steps to activate the access to Travel and Expense Module

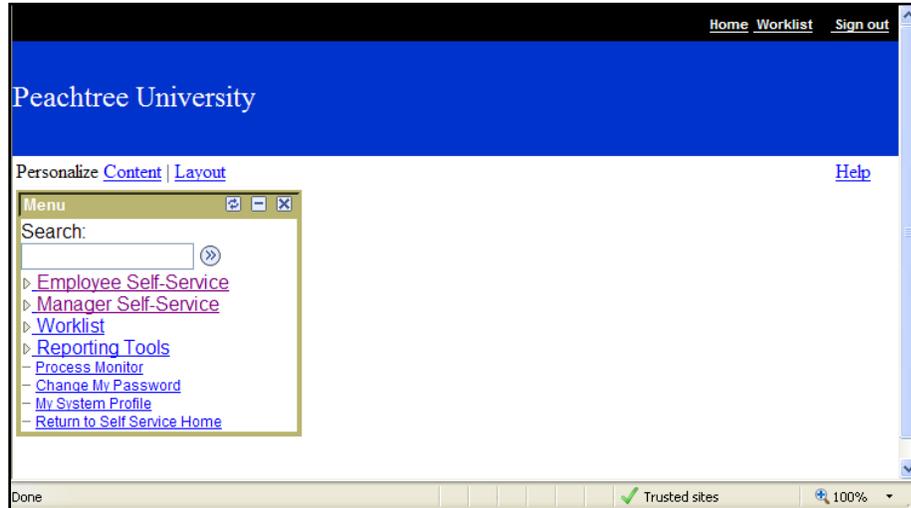
1. Click on **Setup Expense Reimbursement Options**
2. Verify Expense Reimbursement Address Information
3. Verify Expense Reimbursement Payment Information
4. Click the **Save** button.
5. Click the **OK** button to confirm.
6. Return to Employee Home page.



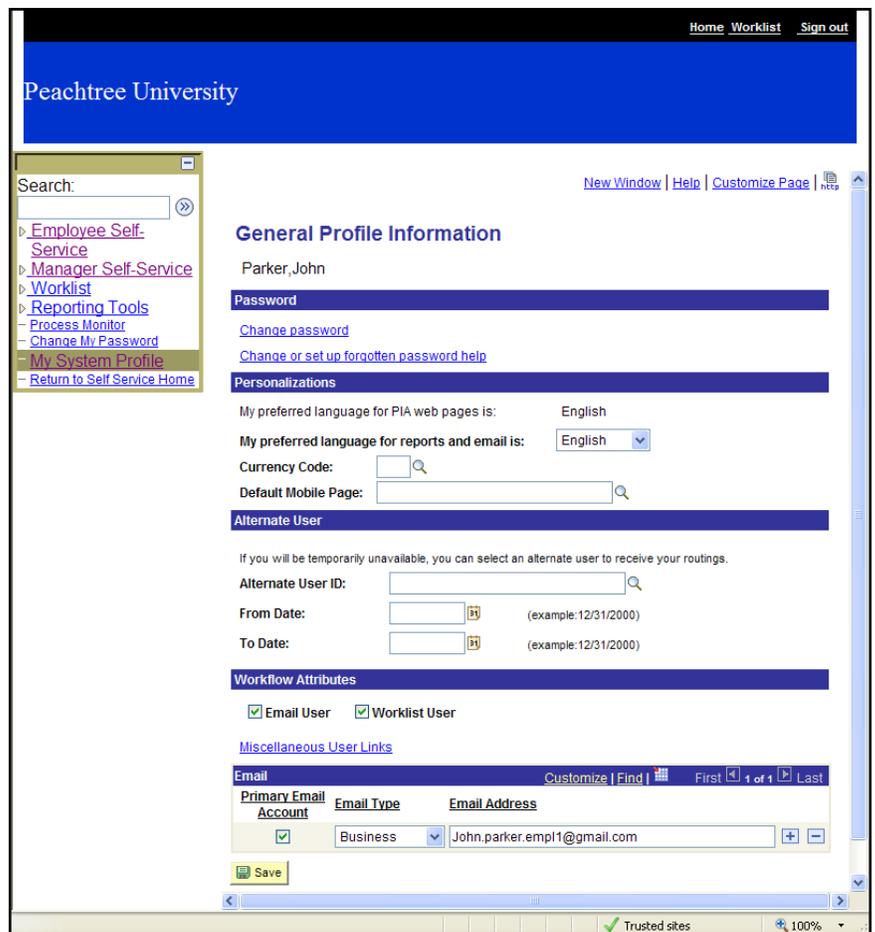
7. Sign out of the application
8. Sign back into the PeopleSoft HRMS web page.
9. Click on the **Travel and Expense Home** link.
10. You are now in the Travel and Expense Module.

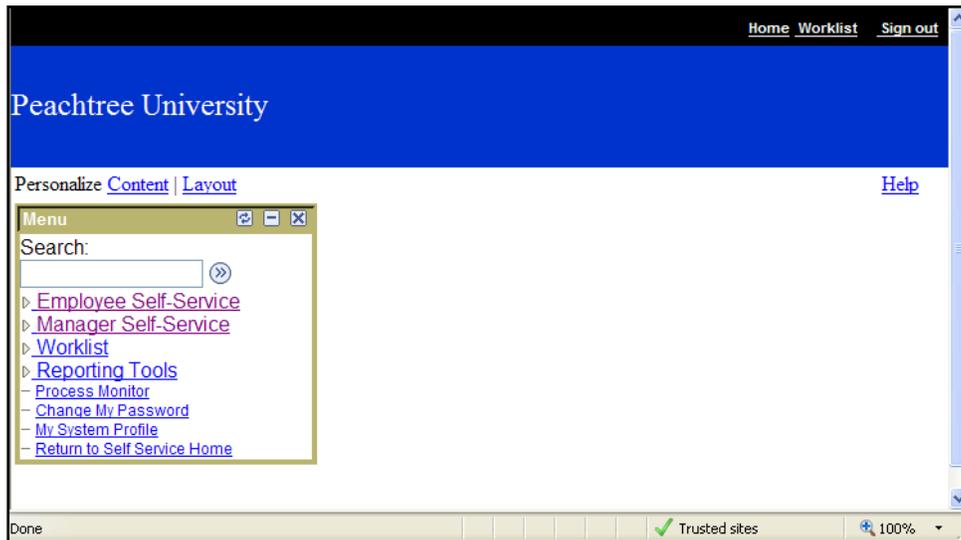
Review information in FIN My System Profile

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



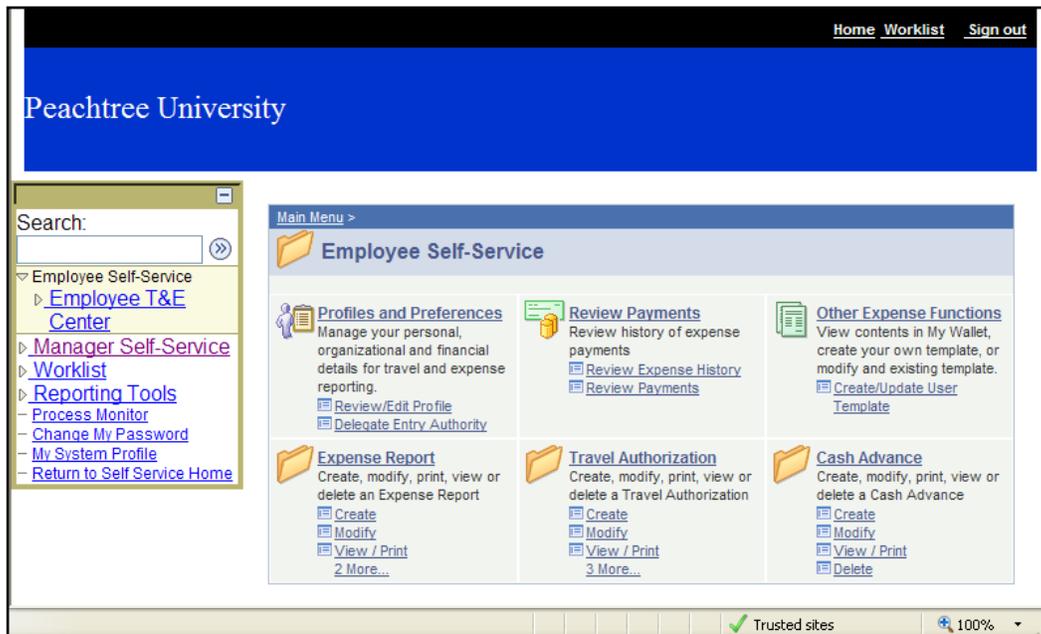
- a. Can change password
- b. Leave both Workflow Attributes selected
- c. Can verify/edit email used for Travel and Expense related messages.





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

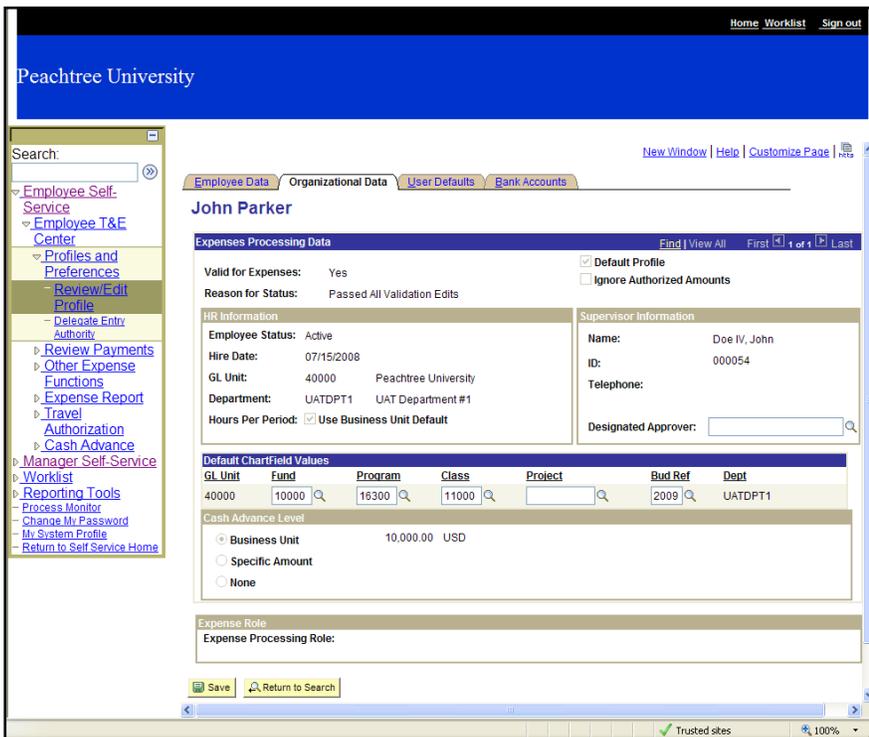
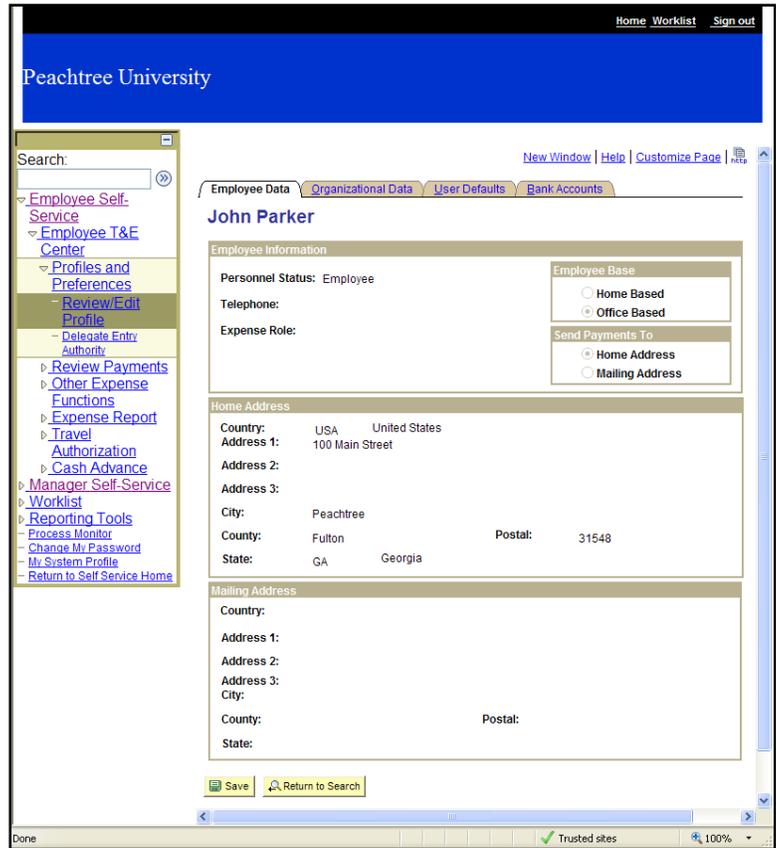


Employee Self Service Menu

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

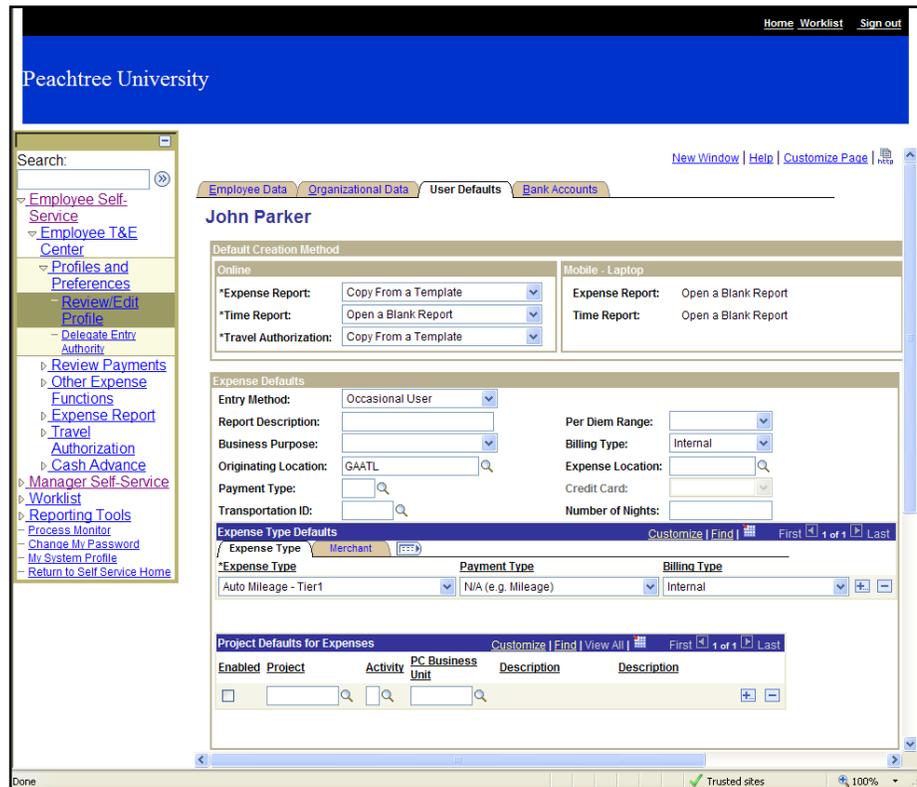
Review employee profile

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



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

- c. **User Defaults:**
Can set up your Travel and Expense defaults to maximize efficiency when entering expense transactions



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

