

Creating a Travel Authorization in the 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 **Travel Authorization** link.
5. Click the **Create** link.
6. In the **Description** field, enter a short explanation of your planned trip.
7. Select the most appropriate **Business Purpose** from the drop-down list.
8. Enter or Select the **Location** you are traveling to:
 - a. To enter, type the location in the following format: **City, ST**
 - b. To select the location, click the **Look Up Location** icon (magnifying glass).
 - i. Enter the two-letter state abbreviation in the **Search by** field.
 - ii. Click the **Look Up** button.
 - iii. Locate the correct city in the **Description** field.
 - iv. Click the **Expense Location** code for that city.
9. In the **Date From** field, enter the first date of your travel.
 - a. You can also use the calendar icon to select the date.
10. In the **Date To** field, enter the last date of your travel.
 - a. You can also use the calendar icon to select the date.
11. In the **Comment** field, enter any additional descriptions you wish to add to your Travel Authorization.
12. Click the **Accounting Defaults** link.
13. Verify the **Chartfields**. Make any edits if necessary.
14. Click the **OK** button.
15. In the first row of the **Details** section, select the appropriate **Expense Type** from the drop-down list.
16. In the **Date** field, enter the date you anticipate incurring the expense.
17. In the **Payment Type** field, select your desired form of Payment.
 - a. If the Expense Type is mileage, choose "N/A (i.e., mileage)
18. Verify the **Billing Type** is Internal.
19. Click the **Detail** link at the end of the row.
20. Enter all necessary information. See page 3 for the exact information you need to enter for various expense types.
21. Click the **Check Expense for Errors** button.

22. If there are any errors, make the necessary corrections in the red fields and then click the **Check Expense for Errors** button again. Continue this step until all errors are gone.
23. Click the **Return to Travel Authorization Entry** link.
24. In the next row, select the appropriate **Expense Type** from the drop-down list.
25. Repeat steps 16 – 24 until you have added all of your anticipated expenses.
26. On the Travel Authorization Entry page, click the **Check for Errors** button.
27. If there are any errors on the Travel Authorization, make the necessary corrections for those items flagged in red. Click the **Check for Errors** button again until all errors are gone.
28. Click the **Submit** button.
29. Click the **OK** button to confirm submission.
30. Once you are returned to the Travel Authorization page, note your Travel Authorization ID and click the **Printable View** link.
 - a. The system will open a second window. Do not close this window.
 - b. You will see the report process and go through some of the following stages: Queued, Processing, and Success. This process can take anywhere from 10 to 60 seconds.
 - c. Your Travel Authorization will be displayed in this window.
 - d. Use the Print icon to print a copy of your Travel Authorization.
 - e. Close the report window.
31. Click the **Home** link.

Information Required for any Mileage Expense Type:

- Date
- Payment Type (should be N/A)
- Billing Type
- Miles (estimated)
- Originating Location
- Destination Location
- System will calculate amount based on estimated miles and mileage reimbursement rate

Information Required for any Meal Expense Type:

- Date
- Payment Type
- Billing Type
- Destination Location
- Amount: Click the Refresh Per Diem Amounts button

Information Required for Lodging Expense Type:

- Date
- Payment Type
- Billing Type
- Number of Nights
- Merchant
- Destination Location
- Nightly Rate
- System will calculate the Total Amount based on the number of nights and the nightly rate

Information Required for Parking, Public Transportation, and Tolls Expense Types:

- Date
- Payment Type
- Billing Type
- Destination Location
- Amount