

## EX.010.035 - Creating a Travel Authorization Template

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| <b>Purpose</b>                  | <ul style="list-style-type: none"><li>• To identify the benefits of creating a travel authorization template.</li><li>• To identify who can set up travel authorization templates.</li><li>• To create a travel authorization template.</li></ul>                                                                                                                                                                                                                       |
| <b>Description</b>              | <p>To reduce time and errors in preparing travel authorizations, templates can be created with typical items that are submitted for reimbursement. Creating templates for expenses encountered on a routine basis will eliminate the need to add them each time a new travel authorization request is created.</p> <p>The Expenses Administrator sets up public templates for all employees to use. Employees can set up user templates for their own personal use.</p> |
| <b>Security Role</b>            | <b>BOR PeopleSoft User</b><br><b>BOR PeopleSoft User – No Tauth</b>                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Dependencies/Constraints</b> | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Additional Information</b>   | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

## Procedure

Below are step by step instructions on how to create a Travel Authorization Template.

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Click the <b>NavBar</b> icon.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 2.   | Click the <b>Menu</b> link.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 3.   | Click the <b>Employee Self-Service</b> link.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 4.   | Click the <b>Other Expense Functions</b> link.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 5.   | Click the <b>Create/Update User Template</b> link.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 6.   | Click the <b>Add a New Value</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 7.   | Enter " <b>MILEAGE</b> ", or a relevant entry in the <b>Document Template</b> field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 8.   | Click the <b>Template Type</b> list pull-down menu.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 9.   | Click the <b>Travel Authorization</b> list item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 10.  | Click the <b>Add</b> button.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 11.  | Enter " <b>Standard Mileage Template</b> ", or a relevant entry in the <b>Description</b> field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 12.  | Enter " <b>STDMILG</b> ", or a relevant entry in the <b>Short Description</b> field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 13.  | <p>There are five options available for mileage reimbursement. The state approved reimbursement rates are automatically populated depending on the mode of transportation selected.</p> <p><b>Aircraft Mileage</b> – Miles traveled for business in a private aircraft. Currently: \$1.76 per mile.</p> <p><b>Automobile Mileage</b> – The standard mileage rate for most employee reimbursements. When it is determined that a personal motor vehicle is the most advantageous form of travel. Currently \$0.67 per mile.</p> <p><b>Automobile Mileage – Tier 2</b> – If a government-owned vehicle is available, and its use is determined to be most advantageous to the state, OR if it is determined that a rental vehicle is the recommended method of travel, but a personal motor vehicle is used, the employee will be reimbursed for business miles traveled at the Tier 2 rate. Currently \$0.21 per mile.</p> <p><b>Motorcycle Mileage</b> – To be used when traveling for business by motorcycle. Currently \$0.65 per mile.</p> |
| 14.  | Click the <b>Expense Type</b> list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 15.  | Click the <b>Automobile Mileage</b> list item, or a relevant entry.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

| Step | Action                                                                                                                          |
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| 16.  | Click the <b>Add multiple new rows</b> button at the end of row 1.<br><br>Add additional mileage types that are routinely used. |
| 17.  | Enter " <b>2</b> ", or a relevant entry in the prompted field.                                                                  |
| 18.  | Click the <b>OK</b> button.                                                                                                     |
| 19.  | Click the <b>Expense Type</b> list for row 2.                                                                                   |
| 20.  | Click the <b>Automobile Mileage - Tier2</b> list item, or a relevant entry.                                                     |
| 21.  | Click the <b>Expense Type</b> list for row 3.                                                                                   |
| 22.  | Click the <b>Automobile Mileage - Tier3</b> list item.                                                                          |
| 23.  | Click the <b>Save</b> button.                                                                                                   |
| 24.  | Click the <b>OK</b> button.                                                                                                     |