

Log into PeopleSoft at myportal.sdccd.edu using the username & password that you use to log into your SDCCD computer

Navigate to the Travel Authorization screen from the home page by selecting: Menu/Finance Service Center/Travel & Expense/Travel Authorization

The screenshot shows the myPortal website interface. At the top, there is a navigation bar with a 'MENU' button (indicated by a red arrow labeled '1.'). Below the menu bar is the San Diego Community College District logo and several college logos: San Diego City College, San Diego Mesa College, San Diego Miramar College, and San Diego Continuing Education. The main content area features a 'Welcome to myPortal' header and an 'Employee Service Center' section. A large central banner reads 'New HCM and Finance Portal!' and provides instructions: 'PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Options.' A 'Read More' button is visible below the banner. On the left side, a teal sidebar menu is open, showing options like 'Employee Service Center', 'Finance Service Center' (highlighted in yellow and indicated by a red arrow labeled '2.'), 'Training (How To)', 'Procurement', 'Travel & Expense' (highlighted in green and indicated by a red arrow labeled '3.'), and 'Travel Authorization' (highlighted in green and indicated by a red arrow labeled '4.'). Below the menu, there are links for 'Expense Report', 'Cash Advance', 'Request a Payment', 'Travel and Expense Center', 'Manager Self Service', and 'Reports'. On the right side, there are 'Employee Quick Links' for 'MY PAY', 'TIMESH', 'BENEFIT', and 'PERSON', and a 'Training (How to)' section with 'FINANCE' and 'HUMAN R' options.

Be sure that the “Add a New Value” tab is highlighted and then click the “Add” button to create a new Travel Authorization. *If you are inputting travel as a delegate for another person, be sure that the ID # shown in the Employee ID field is the ID # of the traveler.

Navigation breadcrumb: Favorites > Main Menu > Employee Self Service > Finance > Travel and Expenses > Travel Authorizations > Create/Modify

San Diego Community College District logo and text: SAN DIEGO COMMUNITY COLLEGE DISTRICT, CITY COLLEGE • MESA COLLEGE • MIRAMAR COLLEGE • CONTINUING EDUCATION

Home Worklist Add To Favorites Sign out

Menu Search

Finance

New Window | Help

Travel Authorization

Find an Existing Value | **Add a New Value**



Empl ID 0002065116

Add

Find an Existing Value | Add a New Value

Input information into the "Description" field, select the appropriate "Business Purpose," and choose the "Date From" & "Date To"

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse User Defaults

Quick Start |

General Information

*Description

*Business Purpose

- Accreditation
- Governance / Administration
- Mileage Reimbursement - ONLY
- Professional Development
- Student Activities

Default Location

*Date From

Authorization ID NEXT

Comment

Attachments

Accounting Defaults More Options

Details ? Personalize | Find | | | | First | 1-4 of 4 | Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>

Totals

Authorized Amount	0.00 USD
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Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

Quick Start

General Information

*Description Authorization ID
*Business Purpose Comment
Default Location
*Date From *Date To Attachments

Accounting Defaults

Details ?

Select	*Expense Type
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>

Calendar

November 2015

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Current Date

More Options

Personalize | Find | First 1-4 of 4 Last

Currency	*Payment Type	*Billing Type	
		Internal Dist	<input type="button" value="+"/>
		Internal Dist	<input type="button" value="+"/>
		Internal Dist	<input type="button" value="+"/>
		Internal Dist	<input type="button" value="+"/>

Totals

Authorized Amount	0.00 USD
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[Create A Cash Advance](#) [View Printable Version](#)

Select the "Accounting Defaults" link to identify the budget number that should be charged for this travel. Input the correct Fund, Department & Activity Budget number information in the fields provided.

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

Quick Start A Blank Authorization ▾

GO

General Information

*Description Fall 2015 SGA Conference Authorization ID NEXT

*Business Purpose Professional Development Comment

Default Location

*Date From [BY] *Date To [BY] Attachments



Accounting Defaults More Options ▾ GO

Details ? Personalize | Find | First 1-4 of 4 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
	▾					Internal Dist ▾	+/-
	▾					Internal Dist ▾	+/-
	▾					Internal Dist ▾	+/-
	▾					Internal Dist ▾	+/-

Copy Selected Delete Selected Check For Errors New Expense ▾ Add

Totals

Authorized Amount 0.00 USD

Update Totals

Save for Later Submit Create A Cash Advance View Printable Version

Create Travel Authorization

Accounting Defaults

Joseph Kruse

Authorization ID NEXT

Accounting Summary Set Personalizations | Find | First 1 of 1 Last

%	*GL Unit	Fund	Dept	Activity	Oper Unit	Project	Affiliate	Fund Affil
100.0	MIR01	1110	32011	672000				

Add ChartField Line Load Defaults



OK

User Defaults

Select an expense type from the drop down menu and click on the "Details" link

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

General Information

*Description: Fall 2015 SGA Conference
Authorization ID: NEXT
*Business Purpose: Professional Development
Comment:
Default Location:
*Date From: *Date To:
Attachments

Accounting Defaults More Options GO

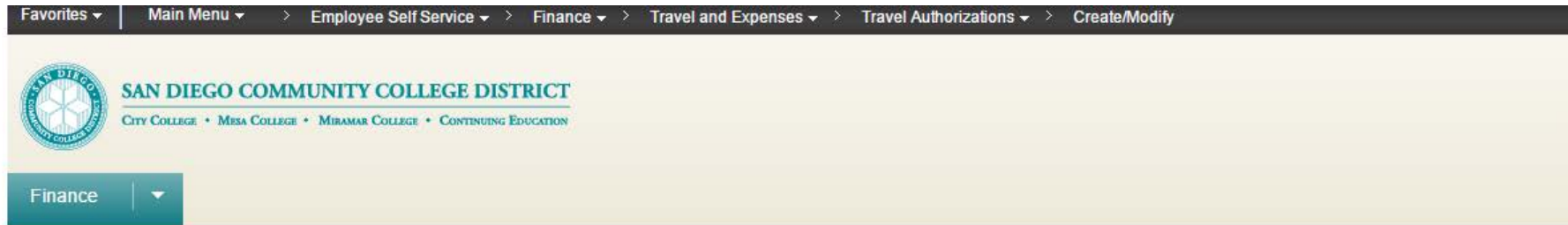
Details ? Personalize | Find | First 1-3 of 3 Last

Select	*Expense Type	*Date	Amount	Currency	*Payment Type	*Billing Type	*Detail
<input type="checkbox"/>	Automobile Mileage	<input type="text"/>	0.00	USD	<input type="text"/>	Internal Dist	<input type="button" value="Detail"/>
<input type="checkbox"/>	Air Travel	<input type="text"/>			<input type="text"/>	Internal Dist	<input type="button" value="Detail"/>
<input type="checkbox"/>	Automobile Mileage	<input type="text"/>			<input type="text"/>	Internal Dist	<input type="button" value="Detail"/>
<input type="checkbox"/>	Automobile Rental	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Gasoline Charges	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Hotel / Lodging	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Internet Charges	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Meals & Incidental Expenses	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Meetings & Conferences	<input type="text"/>			<input type="text"/>		
<input type="checkbox"/>	Miscellaneous	<input type="text"/>			<input type="text"/>		

Copy Selected Check For Errors New Expense Add

Totals Amount 0.00 USD Update Totals

Fill out all required asterisked (*) fields, select "Check Expense Errors," and click "Return to Travel Authorization Entry."



Create Travel Authorization

Authorization Detail for Meetings & Conferences (Line 1)

Joseph Kruse

Authorization ID NEXT

About This Expense

*Date

*Payment Type

*Billing Type

*Description

*Amount USD

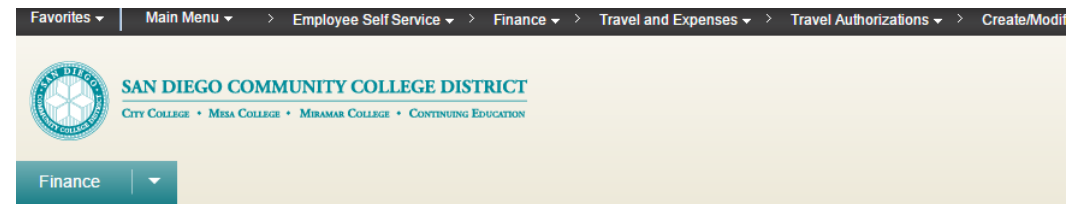
Accounting Detail

[Check Expense For Errors](#)

2. → [Return to Travel Authorization Entry](#)

NOTE REGARDING "PAYMENT TYPE" FIELD:

1. Use the "Employee Paid" option for any personal reimbursement or if you will request a Cash Advance from the District.
2. Use the "Prepaid" option to request that the District issue payment in advance



Create Travel Authorization

Authorization Detail for Meetings & Conferences (Line 1)

Joseph Kruse

Authorization ID NEXT

About This Expense

*Date

*Payment Type

*Billing Type

*Description

*Amount

Accounting Detail

[Check Expense For Errors](#)

[Return to Travel Authorization Entry](#)

Continue entering "Expense Types" until all expenses associated with the travel are listed. To add extra Expense lines, select the "Add" New Expense button.

*NOTE REGARDING MEALS: The District only provides reimbursement for meals that are not provided by the meeting /conference that you plan to attend.
 Breakfast: \$10.00, Lunch: \$15.00, Dinner: \$21.00

*NOTE REGARDING MISCELLANEOUS EXPENSES: Parking, Shuttle, Taxi, Baggage Fees, etc. should all be recorded as the "Miscellaneous" Expense Type

[Favorites](#) > [Main Menu](#) > [Employee Self Service](#) > [Finance](#) > [Travel and Expenses](#) > [Travel Authorizations](#) > [Create/Modify](#)



SAN DIEGO COMMUNITY COLLEGE DISTRICT
 CITY COLLEGE • MESA COLLEGE • MIRAMAR COLLEGE • CONTINUING EDUCATION

Finance

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

General Information

*Description: Authorization ID: NEXT

*Business Purpose: Comment:

Default Location:

*Date From: *Date To:

Attachments

Accounting Defaults More Options

Details Personalize | Find | First 1-5 of 5 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Meetings & Conferences	<input type="text"/>	0.00	USD	<input type="text"/>	Internal Dist	*Detail <input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>

New Expense

Totals

Authorized Amount: 0.00 USD

Scan and attach all supporting documentation for each expense listed in a [single file](#). If available/appropriate, be sure to include: Conference Agenda, Conference Registration, Air Travel reservation receipt/quote, Automobile rental receipt/quote, Hotel receipts/quote, Google Map documents that support any automobile mileage, etc.



Finance

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

General Information

*Description: Authorization ID: NEXT

*Business Purpose: Comment:

Default Location:

*Date From: *Date To:

[Attachments](#)

Accounting Defaults

More Options

Details

Personalize | Find |

First 1-5 of 5 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Meetings & Conferences	<input type="text"/> <input type="button" value="Calendar"/>	0.00	USD	<input type="text"/>	Internal Dist	*Detail <input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>
	<input type="text"/>					Internal Dist	<input type="button" value="+"/>

New Expense

Totals

Authorized Amount 0.00 USD

[Create A Cash Advance](#)

[View Printable Version](#)

When all Expenses have been listed and supporting documentation has been attached, select "Save for Later", note the assigned Authorization ID and click "Submit."



Finance

Create Travel Authorization

Travel Authorization Entry

Joseph Kruse

User Defaults

General Information

*Description: **Authorization ID** **NEXT**

*Business Purpose:

Comment:

Default Location:

*Date From: *Date To:

Attachments

Accounting Defaults

More Options

GO

Details

Personalize | Find | First 1-5 of 5 Last

Select	*Expense Type	*Date	*Amount	Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Meetings & Conferences	<input type="text"/>	0.00	USD	<input type="text"/>	Internal Dist	*Detail
	<input type="text"/>					Internal Dist	
	<input type="text"/>					Internal Dist	
	<input type="text"/>					Internal Dist	
	<input type="text"/>					Internal Dist	

Copy Selected

Delete Selected

Check For Errors

New Expense

Add

Totals

Authorized Amount 0.00 USD

Update Totals

1. Save for Later

2. Submit

Create A Cash Advance

View Printable Version

FINAL NOTE: For any expenses that will be prepaid by the District or if any funds will be advanced directly to the traveler, please continue the travel process by completing a separate “Payment Request” and/or “Cash Advance” in PeopleSoft. Please call Joe Kruse at 619-388-7401 for further instruction.