

# MyTravel & Entertainment Quick Start Guide

MyTravel is the employee reimbursement and corporate card payment system for travel and entertainment related transactions at UC Davis. MyTravel provides the following features:

- Electronic routing for approvals
- Imbedded business rules based upon UC policy
- Electronic capturing of receipts

**Note:** Transactions within MyTravel cannot be used to pay a vendor, with the exception of the **Pre-Trip Payment** application that is accessible from the **Related Forms and Processes** menu.

This guide is meant to assist you in getting started with MyTravel. The back page includes a list of resources for more detailed information or assistance with MyTravel.

## Before You Log In

- ▶ Do you have a campus login ID with Kerberos password?
  - You need a campus login ID to access MyTravel
  - Go to <http://computingaccounts.ucdavis.edu> to create, confirm, or get assistance with your login ID
- ▶ Do you have a Corporate Card?
  - While not required for MyTravel, the Corporate Card (CC) makes reporting your expenses much easier
  - CC transactions are downloaded daily; you simply drop them into your report
  - Get more information on the Corporate Card, including how to apply for one, at <http://travel.ucdavis.edu/corpcard.cfm>
- ▶ Have you signed up for Direct Deposit?
  - Also not required, but Direct Deposit of your reimbursements makes the process seamless
  - Sign up for Direct Deposit of your reimbursements at <http://directdeposit.ucdavis.edu>

## Logging Into MyTravel

1. In your web browser, go to <http://mytravel.ucdavis.edu>
2. You will be redirected to the campus authentication service (as seen here)
3. Log in using your campus login ID and Kerberos password
4. After logging in, you will be redirected to MyTravel Center (as seen on page 2)



### Secure Login

You have requested a secure UC Davis Web page. For access, type your UC Davis LoginID and Kerberos password below.

	LoginID: <input type="text"/>
	Password: <input type="password"/>
	<input type="button" value="Login"/> <input type="button" value="Login help"/>

For information about UC Davis Secure Login, see [Secure Login FAQ](#)

MyTravel @ UC Davis - Mozilla Firefox  
 File Edit View History Bookmarks Tools Help  
 https://mytravel-test.ucdavis.edu/

MyTravel Welcome James G Hewlett

MyTravel Center & Entertainment

UCDAVIS UNIVERSITY OF CALIFORNIA

These icons are, in order:

- MyInfo - set your personal preferences
- Help - click on this anywhere within the system to access the help screens
- Log Out - click on this icon to leave MyTravel

MyTravel Forms and Processes

Travel & Entertainment Expense Reports

- [Create an Expense Report](#)
- [Edit & View Expense Reports](#)
- [Approve Expense Reports](#)
- [Imported Expenses](#)
- [Act as a Delegate](#)
- [View Cash Advances](#)

Travel Planning

- [Create a Travel Request](#)
- [Edit & View Travel Requests](#)
- [Approve Travel Requests](#)

Per Diem Itineraries

- [Create a Per Diem Itinerary](#)
- [Edit & View Per Diem Itineraries](#)

My Pending Approvals

Item Description
<a href="#">Class field study marine life</a> Expense Report Report Total: <b>450.00 USD</b> Purpose: <b>Field trip to Bodega Bay to receive from marine life experts</b> Last Updated: <b>3/22/2006 3:20 PM</b> Requested by: <b>James O. Seibert</b>

My Status List

Item Description
<a href="#">tulare expo</a> Expense Report Report Total: <b>106.80 USD</b> Purpose: <b>I presented a demonstration of how to use PowerPoint effectively as a training tool.</b> Last Updated: <b>10/15/2007 11:45 AM</b> Status: <b>Account Manager Review - Kristine M. Carpenter</b>

Related Forms and Processes

- [Make a Pre-Trip Payment](#)
- [Setup a Non-Employee Traveler](#)
- [Download a Mileage Log Form](#)
- [Sign Up for Direct Deposit](#)

Help Resources

- [Getting Started](#)
- [Creating an Expense Report](#)
- [Registering a Vehicle](#)
- [Setting Your E-Mail Preferences](#)
- [Navigation Tips & Hints](#)
- [Travel@UCDavis Web Site](#)
- [UC Davis Entertainment Policies](#)
- [UC Davis Travel Policies](#)
- [Corporate Card Guidelines and Best Practices](#)
- [MyTravel Online Tutorials](#)
- [MyTravel Help Resources](#)
- [Still Need Help?](#)

©2007 Concur Technologies, Inc., Redmond, WA U.S.A. All rights reserved.  
 Version : 7.1.1.21

## Forms and Processes

- ▶ **Expense Reports:** Select this to report travel, entertainment and Corporate Card related expenses.
- ▶ **Travel Requests:** Can be used to request approval for a trip; it provides a summary of expected expenses.
- ▶ **Per Diem Itineraries:** Create a detailed itinerary for per diem (foreign or long-term domestic) travel.
- ▶ **Pre-Trip Payment:** Used to request payment prior to an approved trip, either to the traveler or to a vendor on the traveler's behalf. *Should not be used* to request payment to the Corporate Card.
- ▶ **Setup Non-Employee Traveler:** Used to create a traveler profile for a non-employee traveler. The person requesting the traveler profile can prepare on behalf of the traveler, or give other delegates that ability.
- ▶ **Mileage Log Form:** Use as supporting documentation for mileage-only travel expense reports.


# Navigation



Breadcrumbs allow you to navigate back to previous screens, to avoid errors caused by using the “Back” button on your browser.

Many screens have a menu at the top that allows you to navigate to other “subscreens” within that area.

## The First Time You Log In

The first time you use MyTravel you must complete your User Profile, accessed by clicking  (My Info)

- ▶ On the General Information Page:
  - Enter your **Email Address**
  - Review the appropriate **Default Dean/VC**, **Default Department**, and **Default Subdepartment** (if applicable); use the helper screen to change information, if necessary
  - Other fields are optional and are not recommended for initial set up

Other preferences and settings in MyInfo that you might want to use include:

- ▶ Click on **Expense Preferences** to view or change expense preferences
  - Determine what MyTravel e-mails you want to receive
  - Selecting prompts you want within the system
  - Set system display features
- ▶ The **Delegates** link allows you to create delegates who can prepare or approve on your behalf
  - Delegates for preparation are active until you remove them
  - Delegates for approval can be specified indefinitely, or for a specific period of time
- ▶ Use the **Personal Vehicle** link to register your vehicle, if you plan to claim mileage on any of your reports

## Preparing Expense Reports

To create an expense report:

1. From MyTravel Center, click **Create an Expense Report**. The **Create a Report Header** page will appear.
2. Complete all the required fields (marked **\***) and any optional fields necessary for reporting purposes.
3. Click **OK** to complete the report header.
4. Click **Add Expense** to add out of pocket expenses; click **Add Imported Expenses** or **Cash Advance** to add Pre-Trip Payments, Corporate Card or CTS/YCAL transactions.
5. Use the **Assign Accounts** link(s) at either the expense or report level to specify the funding.
6. Check the receipt cover sheet, using the **Print Report** link, to see what receipts are required; print if needed.
7. If receipts are required, fax the cover sheet and applicable receipts to the number on the cover sheet.
8. Confirm that the fax was received by clicking **View Receipts**.
9. Click the **Submit Report** link to complete and route your report; or click **Submit Report and Ad Hoc** to route the report to someone not in your normal approval chain


## What Happens Next

Once your report has been submitted, it will electronically route for approvals.

- ▶ Each approver will receive an e-mail indicating that they have a report to approve, if they set their profile to send e-mail notifications
- ▶ As each approval is made, the report moves to the next level of approval
  - Approvals are based upon report type and any exceptions reported
  - Routing will follow these steps (as applicable): account manager, department head, exception approvals, UCD Travel group
- ▶ Track your reports under My Status List on MyTravel Center or opt to receive status e-mails
  - Reports remain on your My Status List until you remove them; they can be retrieved at any time using the **Edit & View Expense Reports** link
  - E-mail preferences are set on the MyInfo screens
- ▶ Once reimbursement is approved, a check or direct deposit payment will be processed
  - Payment will be made to the traveler based upon the payment method selected on the report
  - In order to receive payment by direct deposit, the employee has to have signed up for direct deposit service at <http://directdeposit.ucdavis.edu>
  - Corporate card payments are made directly to the bank

## Where to Get Help

Need help with MyTravel? Try one or more of these resources:

- ▶ Within MyTravel
  - Use the links in Help Resources on MyTravel Center
  - Click on  from anywhere in MyTravel to get help with that area
- ▶ Other MyTravel help resources: <http://travel.ucdavis.edu/MyTravel/help>
- ▶ MyTravel online tutorials: <http://travel.ucdavis.edu/MyTravel/Help/tutorials>
- ▶ MyTravel Help Desk at (530) 757-8888 or [mytravel@ucdavis.edu](mailto:mytravel@ucdavis.edu)
- ▶ General travel help: <http://travel.ucdavis.edu/>
- ▶ Travel policy: <http://manuals.ucdavis.edu/ppm/300/300-10.htm>
- ▶ Entertainment expense help: <http://accounting.ucdavis.edu/Entertain/>
- ▶ Entertainment policy: <http://manuals.ucdavis.edu/ppm/330/330-80.htm>