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](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](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](http://directdeposit.ucdavis.edu)

### Logging Into MyTravel

1. In your web browser, go to [http://mytravel.ucdavis.edu](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)
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.
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

➤ General travel help: http://travel.ucdavis.edu/

➤ Travel policy: http://manuals.ucdavis.edu/ppm/300/300-10.htm


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