Mileage Reporting eForm—Create/Update Profile

Introduction

Employees who use their own vehicle for SPPS business may be eligible to have their mileage reimbursed. See the SPPS policy <u>Mileage Reimbursement</u> for criteria and further information.

Login to PeopleSoft and Find the Mileage eForms

- 1) Go to the SPPS PeopleSoft login page
 - a. Enter your User ID
 - b. Enter your Password
 - c. Click HR/Payroll to access the human resources side of PeopleSoft
- 2) Find the Mileage eForms section
 - a. If you haven't customized your home page, this should be in the left column

Create/Update Mileage Profile

If this is your first time using the mileage e-Forms,

you need to create your profile. If you've used the mileage e-Forms but have had a change to your budget codes, you'll need to update your profile.

Open Your Profile

- 1) Click Create/Update Mileage Profile
- 2) If you are updating your existing profile, the form will be populated, and you only need to update the

fields that have changed; for new	< Home	Form Page	∧ ≡ ∅
users, the form will be completely	Create/Update Mileage Profile : Mileage Profile		Form ID 718
blank and required fields are	Employee Information Name Mouse,Minnie	Email Address psoft.workflow@spps.org	
marked with an asterisk	Employee ID 166695 Starting Location Information	Department ACD000PK5 Academics Office - PreK - 5	
3) Select your usual starting location	Please select the starting location that is standard for you, as it will appear on your Mileage Report as the first From location		

 Select your usual starting location from the drop down menu



Report Routing Section

1)	Click in the	Report Routing				
	Manager/	Please click on the lookup icon for both the Manager/Principal ID field and the Budget Administrator ID, expand the Search Criteria section, then search for the name of the appropriate person using the "Description" field.				
	Principal ID field	"Manageri/Principal IB Q "Budget Administrator ID Q				
	to open a search	Budget Codes				
	for your	Please select the budget codes (up to three) that are standard, as they will appear on your Mileage Report as the accounts that will be charged for the reimbursement. If you already have multiple budget codes entered and need to update it to a single budget code, please change the "Add Budget Code" silders to "No".				
	manager/					
	principal					

		User ID			
		Password			
		HR/Payroll Fina	ance		
Ces side of Facultes* Main Mercu * Welcome GT-Milea	age_Form Logged O	n HRTST Hone Wothat Mullec	hannel Console Perf	ormance Trace Add to Far	vorites Si
CRACEC					
W: Penerte	C 47		Dauchacks	Pers	ionalize Conten
My Reports No Reports To Display	0 0*	🗱 Direct Line Reports 🛛 🕫 🕶	Paychecks	Pers	ionalize Conten
My Reports No Reports To Display	0 0*	Direct Line Reports D 0 ** Personalize Find Vier Al (^D) 15 #5	Paychecks View Paychecks	Pers	ionalize Conten
My Reports No Reports To Display	0.04	Direct Line Reports O av Personation (Fred (Ver.Al)(^[2]) Source (Compensation (Tree (Section	Paychecks Vew Paychecks Employee Leave Su	Pers	ionalize Conten
My Reports No Reports To Display Report Manager	0.04	Direct Line Reports 0 e + Personation Fact View A1 (5 ¹⁷)	Paychecks View Paychecks Employee Leave Su Leave Balances	Pers	ionalize Conten D
My Reports No Reports To Display Report Manager	0 0*	Direct Line Reports O	Paychecks View Paychecks Employee Leave Su Leave Balances Absence	Pers immary Duration	ionalize Conten
My Reports No Reports To Disalay Report Manager Manager Action Forms	0.0*	Direct Line Reports C 0 * Presental (Pol (Vec.A1)) The Control Control Control An Time Control Control An Time Control	Paychecks View Paychecks Employee Leave Su Leave Balances Absence Sick	Pers mmary Duration 856.07	onalize Conten
My Reports to Report to Display Report Manager Manager Action Forms Miteage eforms	0 0* 0 0*	Direct Line Reports O e * Fersonice March 100 100 - 31 101 100 - 31 101 100 - 31 101 100 - 31 101 100 - 31 101 1	Paychecks View Paychecks Employee Leave Su Leave Balances Absence Sick Vacation	emmary Duration 656.07 71.51	onalize Conten D
My Reports No Report Sto Daylay Report Manager Manager Action Forms Minager action Forms Minager Forms	0 0*	Direct Line Reports C 0 •	Paychecks View Paychecks Employee Leave Su Leave Balances Absence Sick Vacation Comp Time	Pers commany Duration 656.67 71.51 -0.01	onalize Conten C
My Reports No Humon's To Daylay Report Managar Managar Action Forms Minaga efforms G Crametodans Minaga Protein G Starta Minaga Protein	0 0*	Direct Line Reports Direct Line Reports Presentate Prof View Al (5 ²) 1 - 54 of 5 The Second S	Paychecks Vev Paychecks Employee Leave Su Leave Balances Absence Sick Vacation Cemp Time Employee Action Fil	Pers emmary Duration 856.07 7.151 -0.01 coms	ionalize Content C C
My Reports No Reports To Daview Report Manager Manager Action Forms Minage efforms () Sura Manager Manager Yorkiti () Sura Manager from Control () () Sura Man	0 0* 0 0*	Drect Line Reports Personation find] Veice Al (⁽²⁾) P	Paychecks Vew Paychecks Employee Leave Sa Leave Balances Assesse Sick Vacation Comp Time Employee Action Fr Add a Lane Chan	Pers enumary Duration 456.07 71.51 -0.01 00005 000 000	onalize Conteri D D
No Reports No Reports Report Manager Manager Action Forms Minage Action Forms Minage Action Forms G Cranshington Report G Dates Allenge Argont G Dates a Manage Argont G Dates a Manage Argont G Dates a Manage Argont	0 0*	Direct Line Reports Presentary All Detail Context	Paychecks Vew Psychecks Employee Leave Su Leave Balances Abance Sick Vacaton Corp Time Employee Action Fe Add a Lane Cham	Pers mmary Duration 456.07 71.51 -2.01 on on on Per-Approval	onalize Content T T T
Ny Reports Na Reports to Drugey Report Manager Manager Action Forms Milliolage of orms Created update Milliogra Protect Start Milliogra Format Celebater & Milliogra Format Start Start Start Start Start Celebater & Milliogra of orm	0 0*	Constant Lines Response	Paychecks Vew Psychecks Employee Leave Su Leave Balances Alasme Sick Vecation Comp Time Employee Action Fe f: Add a Lane Chan f: Add a Lane Chan f: Add a Lane Chan	Pers annhary Duration 456.07 7.51 -0.01 orms orm ge Pre.Ageroval amsCCCULGW	onalize Content D D

PeopleSoft

Cancel	Lookup	
Search for: Manager/Principal ID • Search Criteria		Show Operators
✓ Search Results	Value (begins with) (begins with) (begins with) Search Clear	
		236 rows
Value O	Description ©	
012907		
017647		
035859	10010	
080018		
142930		

a. To search by first name, type the first few characters or full first name (eg: ste or steve), and click **Search**

b. To search by last name, use the % sign as a wild card to fill in for the first name, immediately followed by the last name (eg: % rogers), and click **Search**

2) Click to select the correct name from the search results

Lookup

3) Repeat steps 4-5 for the budget

administrator

- a. If you only report to one budget code, use the same code as the manager/principal
- b. If you report to two
 budget codes, plug your second

Cancel

manager/principal in the budget administrator field

Budget Codes Section

rch for: Budget Code 1) Click the Budget Code field to search for your Search Criteria Search Results code Only the first 300 results can be display := 300 1 a. You can scroll through the list Value O Description 0 0100501000063660000 0100501000063660000 b. Or click Search Criteria to enter your budget 0100502000063660000 0100502000063660000 code or part of your budget code to search 0100502200063660000 0100502200063660000 for it Cancel Lookup 2) Click to select the correct code Search Cr Show Operator Value egins with a. If you don't see your budget code, contact Description your accountant Clear Enter percentage at this code 4) If you need to use split *Budget Code 1 0121105000063660000 Q "Pct (%) 50.00 budget codes, change the Add 2nd Budget Code? 🔵 No Add 2nd Budget Code? slider Total % Remaining 50.00 Total Percent 50.00 to yes Comments a. The option to add Search Save Submit budget codes will only show

up if the entered total is less than 100%

- b. You can enter up to three budget codes
- c. Whether you use one or more budget codes, all percentages must equal 100



Submit and Wait for Approval

1) Once all budget codes are entered and the percentage totals 100, click Submit

- You will get a submission confirmation notice; if you click on the multiple approvers link, you can see who the profile has been routed to
 - The new profile will be routed to accounting to confirm the budget codes are accurate
- 3) In the *Signature/Action Logs* you'll see the initiated transaction



Note: your profile will not be ready to use until it has been approved by your accountant. If you immediately go back in to the Create/Update Mileage Profile, it will be blank for new users and show the old information for past users.

Approval and Corrections

- 1) The accountant will receive an e-mail or worklist item alerting them of a profile to review and approve
 - a. Accountants have the ability to make code changes if they identify a problem
 - b. Accountants can also add reviewers if different budget codes require different reveiwers
- 2) You will receive an e-mail once the profile has been approved and is ready to use
- If there's a problem with the form, the accountant can recycle returning it to you for revision
 - This will generate an email notice and a worklist item to notify you to address this



- b. Follow the link or navigate to the form (from your PeopleSoft home page, click **View Mileage Form**) to make changes
- c. Click Resubmit to reroute the revised form for approval, or click Withdraw to terminate the form



 Any changes will need to be approved by the accountant before the profile will be active

5) You will receive an email notice once your profile has been approved and is ready to use.