

PeopleSoft Financials Employees Self-Service for Travel and Expenses Claims Expense Report

The Travel and Expenses Center is found in the Employee Self-Service portion of PeopleSoft Financials. A link to PeopleSoft Financials can be found on the UMass Dartmouth website www.umassd.edu under **Quick Links**. Select **Finance 8.9 Production Login** and click on **Finance Production v8.9**.

User ID:
 Password:

Enter your user name
 Enter your password
 Click the Login button

- **Help Resources**
- For assistance with your **password** contact Access Management at ext. 8528
- For **PeopleSoft Help** call Louise Boudreau ext. 8085
- For **Policy and Procedures for Travel Expenses**, go to <http://www.umassd.edu/administrativeservices/assets/travelmanual.pdf> or contact Rebecca Pina ext. 8189

Menu Navigation: **Employee Self-Service**/Travel and Expense Center/**Expense Report Create**

Step 1: Select Template (Quick Start)

Blank (which defaults), Template, Existing Report or Travel Authorization

Step 2: Complete Report Header

Description: City Month Year
 Select: Business Purpose

Step 3: Select Date & Expense Type

Date: Travel Start Date / Expense Date
 Select: Expense Types
 Click + if more rows are needed
 Enter \$ amount
 Select: Payment Type & Billing Type

NOTE: when selecting Payment Type as Paid via Procard Billing Type must be Procard

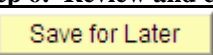
Step 4: Confirm that Speedchart /Chartfields are correct on lines:

Click the [Accounting Defaults](#) link to make adjustments or view chartfields.

Step 5: Check for Errors

If errors click red flag and enter needed information 

Step 6: Review and click Save for Later



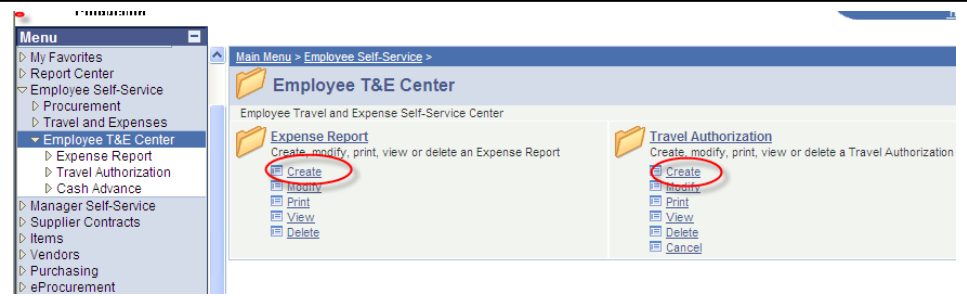
Step 7:



You cannot make changes after you submit

Step 8: Print, Sign & attach receipts

Click [Printable View](#) – generates detailed report including chartfields.



Expense Report Entry

Louise Boudreau [User Defaults](#) Report ID: 000000136

General Information

*Description: Washington 3/1/09
 *Business Purpose: Conference
 Comment:
 Reference:
 Default Location:

[Accounting Defaults](#) [Apply Cash Advance\(s\)](#) More Options:

Details [Customize](#) [Find](#) [View All](#) First 1-4 of 4 Last

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Airfare	02/21/2009	500.00	USD	Paid via Procard	Procard	
<input type="checkbox"/>	Hotel/Lodging	02/21/2009	450.00	USD	Paid via Procard	Procard	
<input type="checkbox"/>	Meals (Per Diem)	02/21/2009	120.00	USD	Out of Pocket	Out-of-St	
<input type="checkbox"/>	Registration-Conf/Training	02/21/2009	75.00	USD	Out of Pocket	Out-of-St	

Copy Selected Delete Selected New Expense Check For Errors

Totals

Employee Expenses: 1,145.00 USD Due Employee: 195.00 USD

[Definition of Totals](#)

[Expense Report Project Summary](#) [Printable View](#)

Budget checking will occur in the nightly batch process. Please monitor for budget errors as nothing in budget error can be approved.