

PeopleSoft Financials Employees Self-Service for Travel and Expenses Claims Quick Trip Reimbursement

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: DLBOUDRE
 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

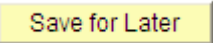
Step 1: Quick Start Drop down
 Template Go: Select Mileage
 One day/All days and OK

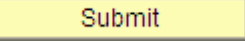
Step 2: Complete Report Header
 Description: Month Year
 Select: Business Purpose
 Comment: purpose

Step 3: Select Date & Expense Type
 Date: Date of service
 Click + if more rows are needed
 Enter \$ amount
 Select: Payment Type & Billing Type

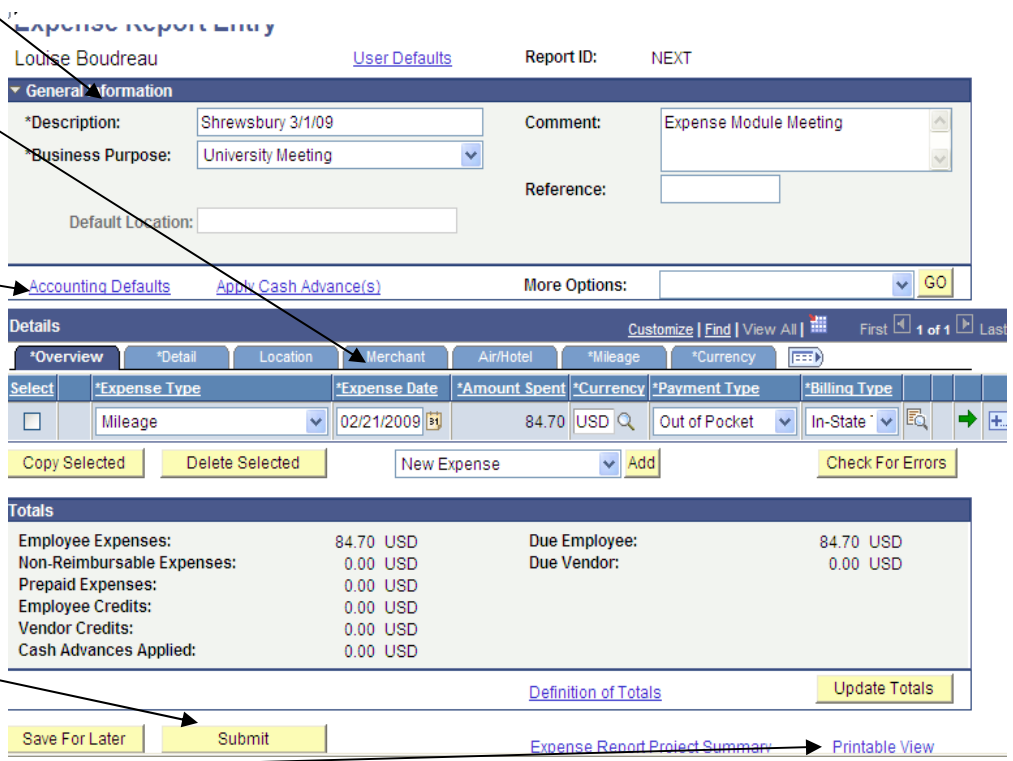
Step 4: Confirm that Speedchart /Chartfields are correct on lines;
 Click the [Accounting Defaults](#) link to make adjustments or view chartfields.

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.



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