

PeopleSoft Financials Employees Self-Service for Travel and Expenses Claims Travel Authorization

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 Rina ext. 8189

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

Step 1: Select Template (QuickStart)
 Blank (which defaults), Conference or Existing Authorization

Step 2: Complete Report Header

Quick Start: Enter appropriate 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

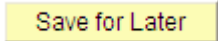
Step 4: Confirm that Speedchart /Chartfields are correct on lines:

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



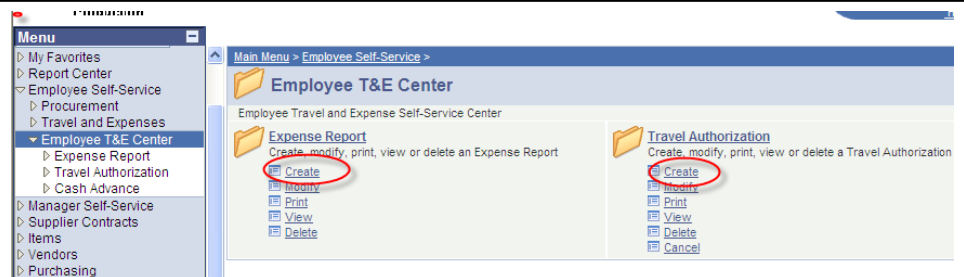
Step 7:



You cannot make changes after you submit

Step 8: Print, Sign & attach receipts

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



Travel Authorization Entry

Louise Boudreau [User Defaults](#) Authorization ID: 0000000007

General Information

*Description: Washington 2/19/09 Comment:
 *Business Purpose: Conference
 Default Location:
 *Date From: 02/19/2009 *Date To: 02/26/2009

[Accounting Defaults](#) More Options:

Select	Expense Type	Date	Amount	Currency	Payment Type	Billing Type	*Detail
<input type="checkbox"/>	Airfare	02/19/2009	560.00	USD	Paid via Proc	Procard	*Detail +
<input type="checkbox"/>	Hotel/Lodging	02/19/2009	460.00	USD	Paid via Proc	Procard	Detail +
<input type="checkbox"/>	Meals (Per Diem)	02/19/2009	180.00	USD	Out of Pocket	Out-of-State T	*Detail +
<input type="checkbox"/>	Registration-Conf/Training	02/19/2009	250.00	USD	Out of Pocket	Out-of-State T	Detail +

Copy Selected Delete Selected New Expense

Totals
 Authorized Amount: 1,450.00 USD

 [Create A Cash Advance](#) [Project Summary](#)

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