Creating a Travel Authorization in the PeopleSoft Travel & Expense Module on e-Campus Financials

URI Office of the Controller
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**IMPORTANT:**

Prior to creating a travel authorization, be sure you have gathered the required information, including the correct chartfield string (funding source) to be used, and any supporting details describing the business purpose of travel.

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**Table of Contents**

1. Accessing the PeopleSoft Expense Module on e-Campus Financials .................................................................1
   a. Existing users – Logging in ...............................................................................................................................1
2. Creating a New Travel Authorization ..................................................................................................................2
   a. Navigating within PeopleSoft Expense Module ..........................................................................................2
   b. Travel authorization header .........................................................................................................................3
   c. Entering projected expenses .......................................................................................................................4
   d. Adding the accounting details ......................................................................................................................5
3. Saving, Modifying, and Submitting Travel Authorizations .......................................................................................6
   a. Saving TA’s ..................................................................................................................................................6
   b. Modifying TA’s .........................................................................................................................................6
   c. Submitting TA’s .......................................................................................................................................7
1. Accessing the PeopleSoft Expense Module on e-Campus Financials

a. Logging into PeopleSoft on e-Campus Financials

1. Navigate to the Faculty or Staff gateway page and click on e-Campus Financials

![Faculty Gateway](image1)

![Staff Gateway](image2)

2. Enter your e-Campus username and password and click Sign In

![Login Page](image3)
2. Creating a New Travel Authorization

a. Navigating within PeopleSoft

1. From the main menu, go to: Employee Self-Service  →  Travel and Expenses  →  Travel Authorizations  →  Create/Modify

2. Under Add a New Value, enter the Employee ID number of the person who will be traveling, and click Add

*NOTE: if you are creating a travel authorization for a guest/non-employee who will have expenses on a URI Travel Credit Card (TCard), create a TA under the URI ID of the cardholder
b. Travel authorization header

1. Select travel category from the Business Purpose drop-down menu
2. Enter the “City” by clicking the magnifying glass, searching for the city, and selecting the correct City, State combination
3. Enter a trip description (e.g. Conference or event title, candidate name, field trip or course name, traveler name if not self, related TA#, etc.)
4. Enter the travel dates using the calendar icons and clicking on the correct date
5. Attach any relevant documentation using the Attachments link (e.g. screenshot of airfare/hotel estimates, conference page showing registration cost, approval emails etc.)
c. Entering projected expenses

1. Select the date – *NOTE: date must be within header dates rather than purchase date, i.e. if train will be booked in July, but the departure date is in September, enter the departure date*

2. Choose the correct expense type

3. Enter the expense details and purpose in the “Description” field

4. Select “Payment Type” and enter the estimated amount

5. To add or delete an expense line, click the + or – icons on the right
d. Adding the accounting details

1. **Billing Type** will be “Internal” for all funds except **fund 500**. For fund 500 chartfield strings, select “Billable”

2. Click the arrow next to “Accounting Details”

3. Enter the chartfield string that will be used to fund each expense – see note on chartfield strings below

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**Chartfield String Notes**

- Enter the *Account* by entering the number or clicking the magnifying glass to open the option list.
- For chartfield strings that do not have a specific project #, enter only the *Acct–Fund–Dept–Program* fields.
- Chartfield strings that do have a project # require a *PC Bus Unit* and *Activity*. *PC Bus Unit* is always “URIPS,” and *Activity* is always “Research.”
3. Saving, Modifying, and Submitting the Travel Authorization

a. Saving travel authorizations

1. Click *Save for Later* at the top right, above the TA header

2. Look for the *Save* confirmation in the top right corner

3. Saving generates an Authorization ID, shown beneath the *Actions* menu

b. Modifying saved travel authorizations

1. Follow the steps on Page 7 to navigate to the *Create/Modify* option

2. Click on *Find an Existing Value* and search by a value in the drop-down menu

3. Select the correct travel authorization from the results by clicking on the *Authorization ID* number
c. Submitting travel authorizations

1. Click Summary and Submit in the top right corner

2. On the submission page, check the box certifying the TA details

3. Click Submit Travel Authorization

4. On the Submit Confirmation page, click Ok