

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

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*URI Office of the Controller*

*March 2021*

**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.*

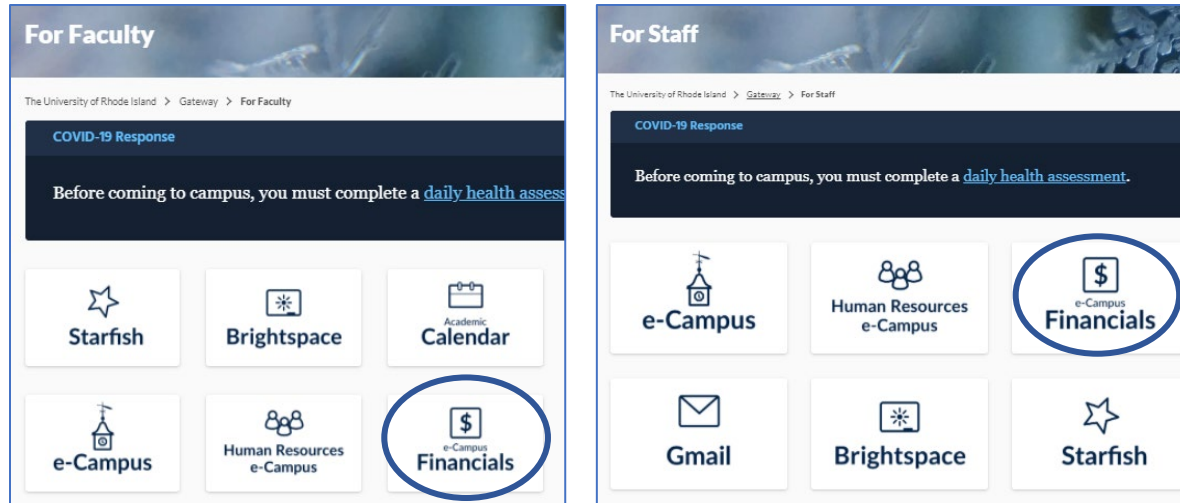
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# 1. Accessing the PeopleSoft Expense Module on e-Campus Financials

## a. Logging into PeopleSoft on e-Campus Financials

1. Navigate to the [Faculty](#) or [Staff](#) gateway page and click on e-Campus Financials



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

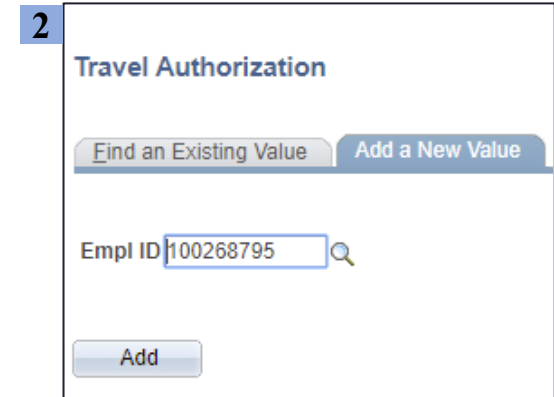
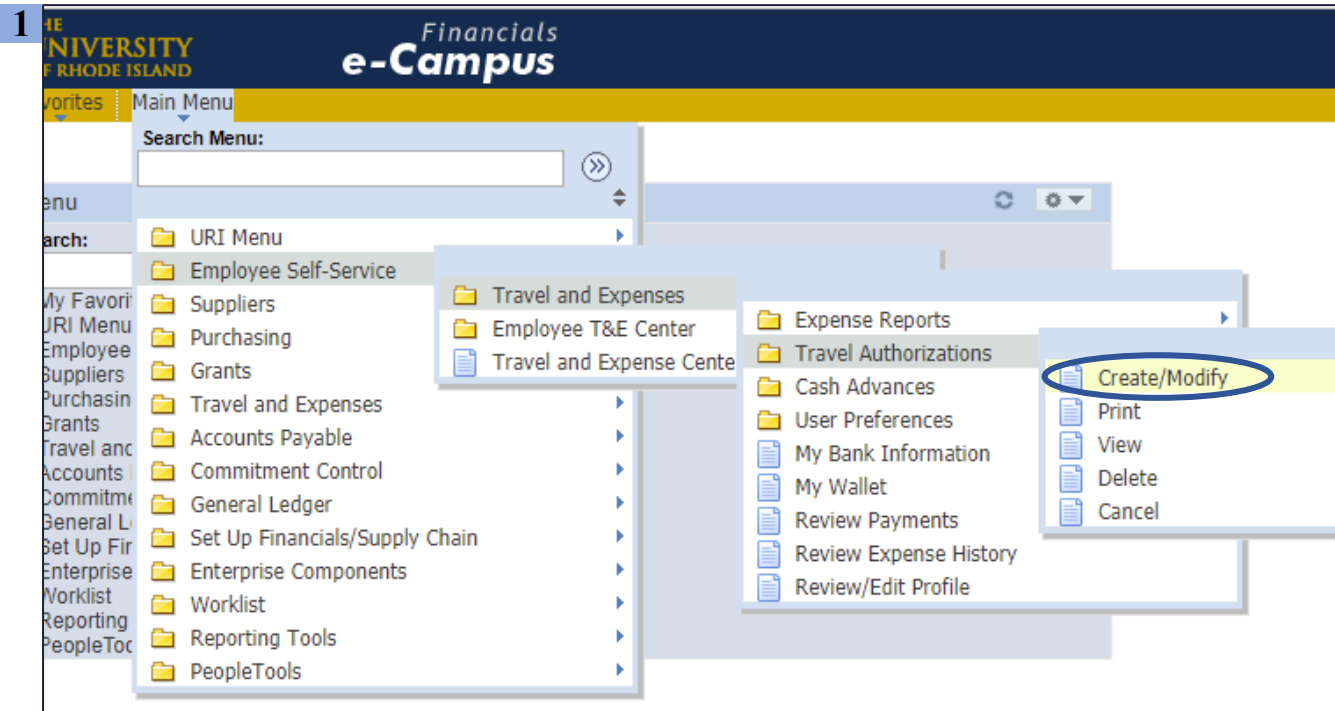
The image shows the login page for e-Campus Financials. At the top, it displays 'THE UNIVERSITY OF RHODE ISLAND' and 'e-Campus Financials'. Below this, there are two input fields: 'User ID' with the text 'username' and 'Password' with masked characters. A yellow 'Sign In' button is positioned below the fields. Below the button are links for 'Forgot Your Password?' and 'Enable Accessibility Mode'. The footer contains the copyright notice: 'Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved.'

## 2. Creating a New Travel Authorization


### a. Navigating within PeopleSoft

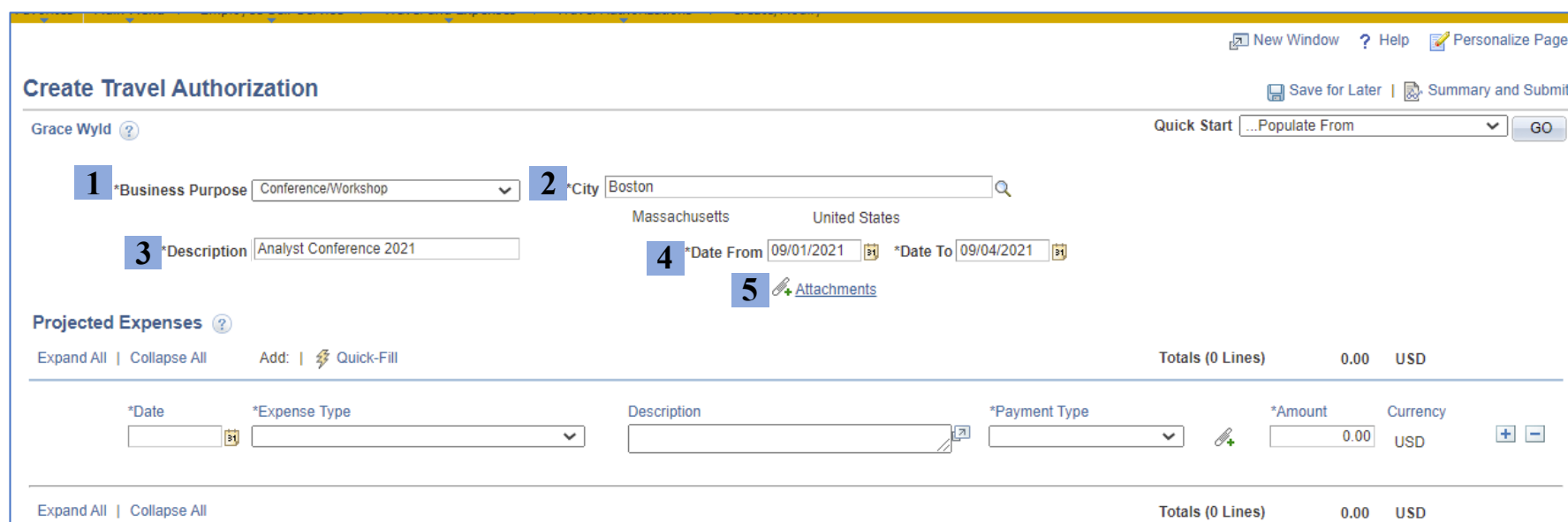
1. From the main menu, go to: *Employee Self-Service* → *Travel and Expenses* → *Travel Authorizations* → *Create/Modify*
2. Under *Add a New Value*, enter the Employee ID number of the person who will be traveling, and click *Add*

\*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.)




**Create Travel Authorization**

Grace Wyld ? Quick Start ...Populate From GO Save for Later Summary and Submit

**1** \*Business Purpose: Conference/Workshop **2** \*City: Boston  
 Massachusetts United States

**3** \*Description: Analyst Conference 2021 **4** \*Date From: 09/01/2021 \*Date To: 09/04/2021 **5** [Attachments](#)

**Projected Expenses** ?

Expand All | Collapse All Add:  Quick-Fill Totals (0 Lines) 0.00 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency
				0.00	USD

Expand All | Collapse All Totals (0 Lines) 0.00 USD

**1** \*Business Purpose

- Admissions Recruiting
- Athletics
- Athletics Recruiting
- Athletics-Team Travel
- Business Meeting
- Cancelled due to COVID-19
- Candidate Travel
- Conference/Workshop
- Field Trip
- Guest Speaker
- Reimbursement Non-Travel
- Research
- Study Abroad

**2** Look Up

Search by: City begins with Boston

Look Up Cancel Advanced Lookup

**Search Results**

View 100 First 1-6 of 6 Last

City	State Name	Country
Boston	Massachusetts	United States
Boston	New York	United States
Boston	Indiana	United States
Boston	Georgia	United States
Boston	Kentucky	United States
Boston	Virginia	United States

**4** \*Date From: 09/01/2021 \*Date To: 09/04/2021

[Attachments](#)

June 2021

S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Current Date

## 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

THE UNIVERSITY OF RHODE ISLAND Financials e-Campus

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

New Window ? Help Personalize Page

### Create Travel Authorization

Save for Later | Summary and Submit

Grace Wyld ? Actions ...Choose an Action GO

\*Business Purpose Conference/Workshop \*City Boston  
 Massachusetts United States

\*Description Analyst Conference 2021 \*Date From 09/01/2021 \*Date To 09/04/2021  
[Attachments](#)

**Projected Expenses** ?

Expand All | Collapse All Add: Quick-Fill

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	
09/01/2021	Domestic Trvl-Train/Bus	Train to/from Boston for conference	Employee's Personal Crec	50.00	USD	+ -
					<b>Totals (1 Line)</b>	50.00 USD

1 2 3 4 5

1

\*Date

\*Expense Type

May 2019

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Current Date

2

- Domestic Trvl-RI PerDiem
- Domestic Trvl-RI PerDiem 1/2 Day
- Domestic Trvl-Registration
- Domestic Trvl-Taxi
- Domestic Trvl-Tolls
- Domestic Trvl-Train/Bus

4

- Cash (Paid By Employee)
- Employee's Personal Credit Card
- Paid By URI
- Personal Travel Owed URI
- Redistribution Travel Exp
- URI Employee Travel Visa

## 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

### 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”

**Projected Expenses** ?

Expand All | Collapse All    Add: Quick-Fill    Totals (2 Lines)    50.00    USD

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\*Date: 09/01/2021 📅    \*Expense Type: Domestic Trvl-Train/Bus ▼    Description: Train to/from Boston for conference 🔍    \*Payment Type: Employee's Personal Crec ▼    \*Amount: 50.00    Currency: USD + -

1 \*Billing Type: Internal ▼

2 ▼ Accounting Details ?

3

Amount	*GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Sc Ty
50.00	URIPS <span>🔍</span>	5742 <span>🔍</span>	100 <span>🔍</span>	4002 <span>🔍</span>	0000 <span>🔍</span>	<span>🔍</span>	<span>🔍</span>	<span>🔍</span>	<span>🔍</span>	<span>🔍</span>

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09/01/2021 📅    Domestic Trvl-Registration ▼    Conference registration fee 🔍    Employee's Personal Crec ▼    250.00    USD + -

\*Billing Type: Billable ▼

▼ Accounting Details ?

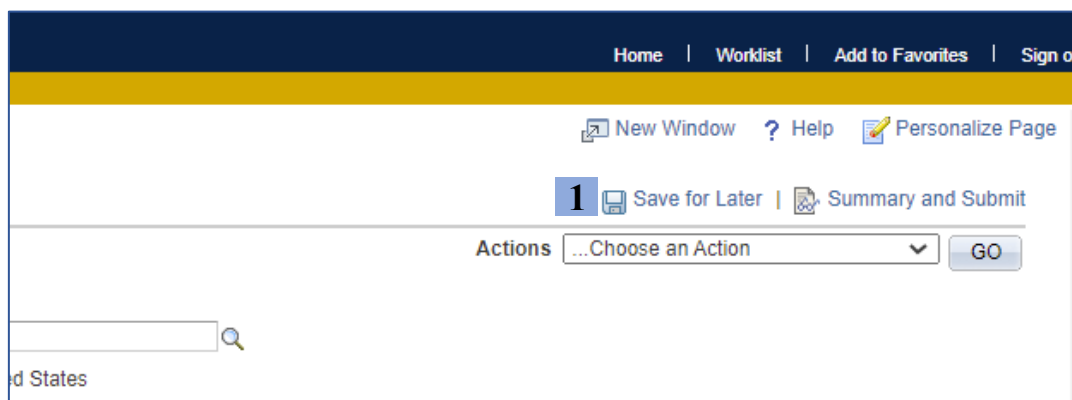
Amount	*GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Sc Ty
250.00	URIPS <span>🔍</span>	5742 <span>🔍</span>	500 <span>🔍</span>	4002 <span>🔍</span>	0000 <span>🔍</span>	<span>🔍</span>	URIPS <span>🔍</span>	0001111 <span>🔍</span>	RESEARCH <span>🔍</span>	<span>🔍</span>

Expand All | Collapse All    Totals (2 Lines)    300.00    USD

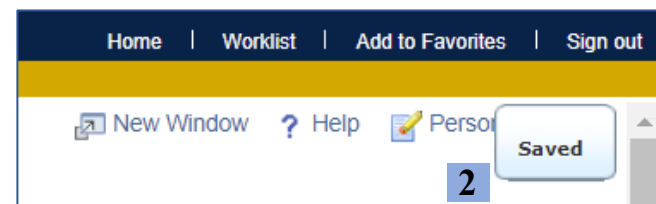
## 3. Saving, Modifying, and Submitting the Travel Authorization

### a. Saving travel authorizations

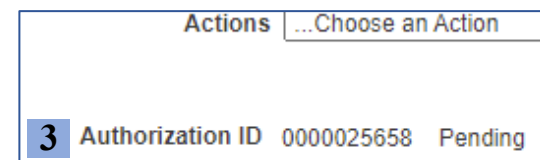
1. Click *Save for Later* at the top right, above the TA header



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



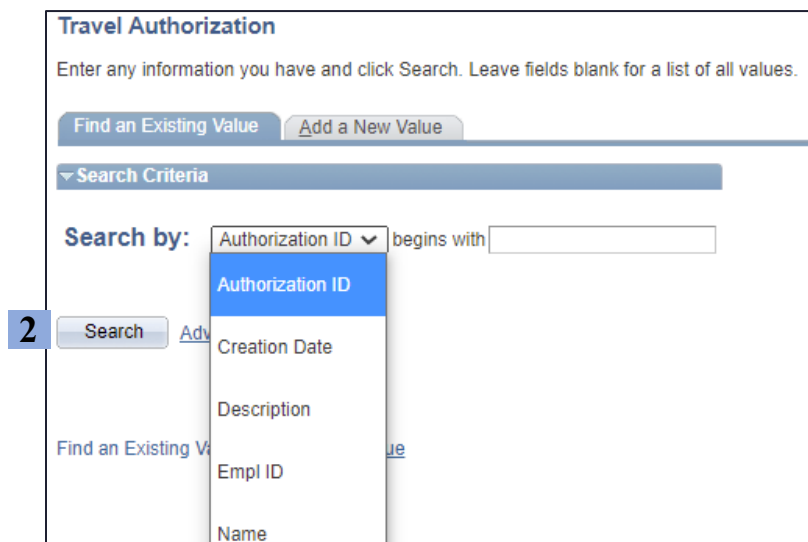
3. Saving generates an Authorization ID, shown beneath the *Actions* menu



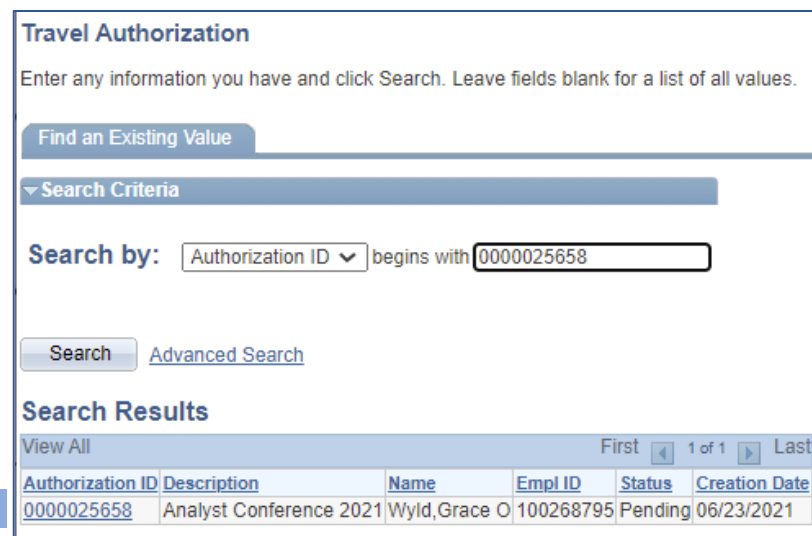
### b. Modifying saved travel authorizations

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



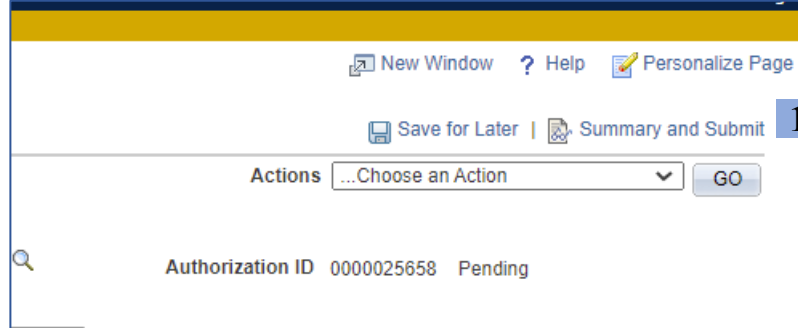
3. Select the correct travel authorization from the results by clicking on the *Authorization ID* number





## 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*

Projected Expenses (2 Lines)	300.00 USD	Denied Expenses	0.00 USD
<b>Total Authorized Amount</b>			<b>300.00 USD</b>
<p><b>2</b> <input checked="" type="checkbox"/> By checking this box, I certify these costs are reasonable estimates and comply with University Travel Policy.</p>			
<p><b>3</b> <input type="button" value="Submit Travel Authorization"/></p>			

4. On the *Submit Confirmation* page, click *Ok*

THE UNIVERSITY OF RHODE ISLAND Financials e-Campus

Favorites | Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

**Travel Authorization**

**Submit Confirmation**

Grace Wyld

**Totals** ?

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**Total Authorized Amount      50.00 USD**

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Click OK to submit, or click Cancel to return to the travel authorization without submitting.

**4**