

Travel and Expense Module

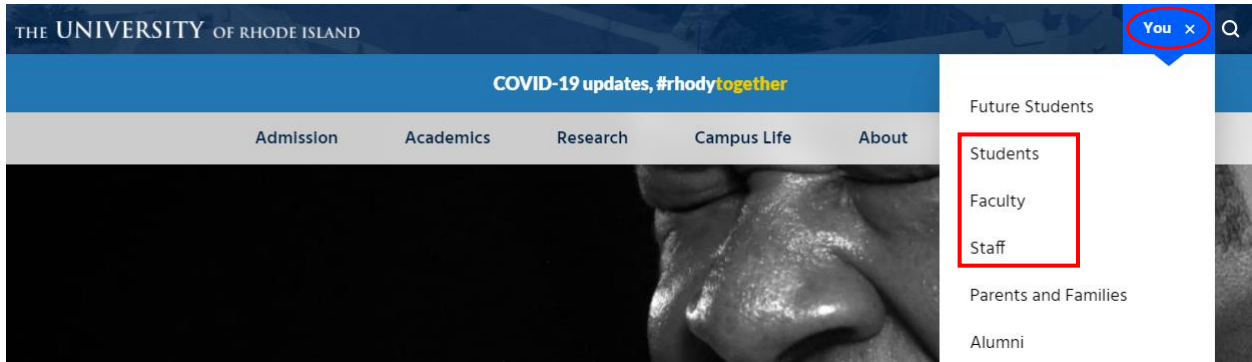
Instructions for In-State Auto-Mileage Reimbursement

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Registration and Login

In-state Auto-Mileage is reimbursed via PeopleSoft Financials. The portal can be found on the [URI website](#). Open the “You” dropdown and select “Students”, “Faculty”, or “Staff”, whichever is appropriate.



First-time users should first register. This will create a User ID and password in Financials that matches your User ID and password in e-Campus.

You should then submit the PeopleSoft Financials Security Access Request Form. Copy the link below into your browser to access the form. Once the form is submitted per the instructions on the form, you will be notified that you have access to Financials.

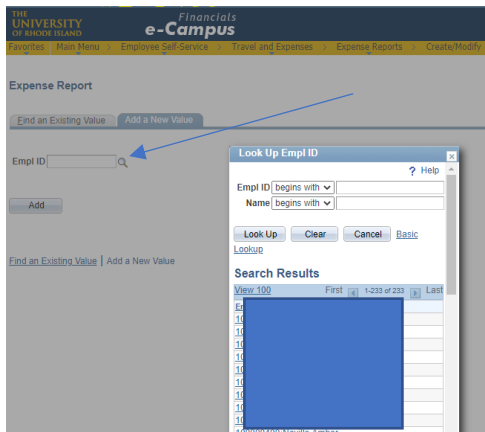
<http://web.uri.edu/controller/files/PS-Fin-Access-Form-Oct2016.pdf>

Note: A Travel Authorization is not required for In-state travel. So, the traveler only needs to create an Expense Report for AutoMileage reimbursement.

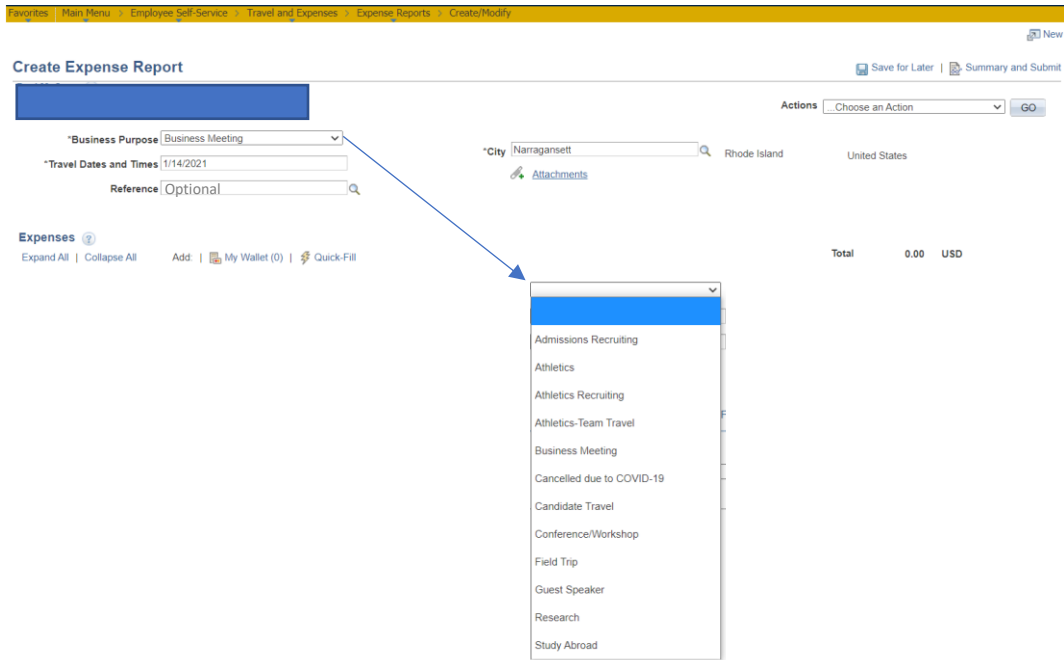
Create an Expense Report for AutoMileage



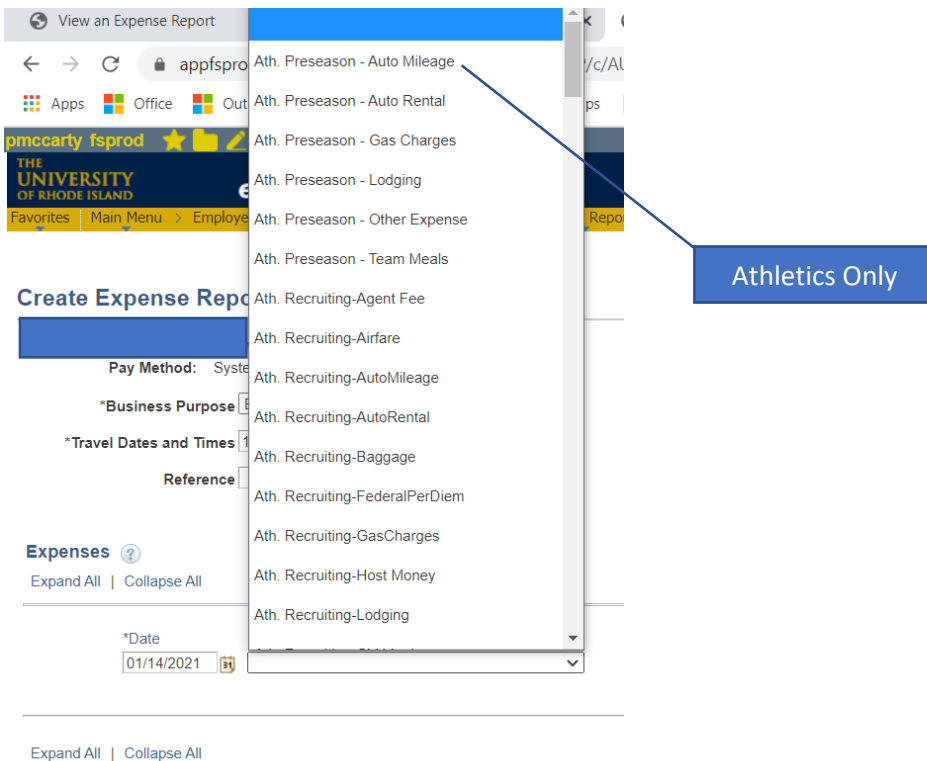
Confirm the Empl ID is the traveler’s Employee ID and click “Add”. If creating an Expense Report as a delegate for someone else, remove the Employee ID and click the magnifying glass to choose the traveler. Click “Add”.



This will bring up the Create Expense Report page. Choose the most relevant option for the Business Purpose. (See available options on the next page.)



Remember when selecting the Expense Type that the first choices in the dropdown are for **Athletics only** (“Athl. Preseason”). Scroll further down to the appropriate Expense Type, “In State-AutoMileage”.



AutoMileage Form

After selecting “In State-AutoMileage”, the AutoMileage form is displayed.

Expenses [?]
Expand All | Collapse All Add: | My Wallet (0) | Quick-Fill Total 3.92 USD

*Date: 01/14/2021 *Expense Type: In State-AutoMileage Description: Set up with desktop and two... *Payment Type: Cash (Paid By Employee) *Amount: 3.92 *Currency: USD +

*Billing Type: Internal *Originating Location: Kingston, Rhode Island, United States *Destination City: Narragansett, Rhode Island, United States *Miles: 7 x 0.5600

Default Rate *Exchange Rate: 1.00000000 Base Currency Amount: 3.92 USD
 Non-Reimbursable No Receipt

Odometer Start: 99635 Odometer End: 99642
Car Registration #: Make/Model/Year: Auto Ins. Carrier: GEICO Auto Policy Exp. Date: 05/22/2021

Complete all information in this section before proceeding. Dollar amounts and number of miles will be calculated based on the Odometer Start/End and cannot be modified by the user.

For additional Expense lines (multiple travel dates, multiple Expense Types, etc.), click the plus symbol to add a new line.

Create Expense Report Save for Later Summary and Submit

Pay Method: System Check Actions: ...Choose an Action GO

*Business Purpose: Business Meeting *City: Narragansett, Rhode Island, United States [Attachments](#)

*Travel Dates and Times: 1/14/2021 Reference: [Attachments](#)

Expenses [?]
Expand All | Collapse All Add: | My Wallet (0) | Quick-Fill Total 273.92 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	*Currency
01/14/2021	In State-AutoMileage	Set up computer for user 230 characters remaining	Cash (Paid By Employee)	3.92	USD
01/14/2021	In State-Parking	Parking Garage 240 characters remaining	Cash (Paid By Employee)	20.00	USD
01/14/2021	In State-Registration	Conference 244 characters remaining	Cash (Paid By Employee)	250.00	USD

Expand All | Collapse All Total 273.92 USD

Note: We encourage frequent saving in order to avoid the need to recreate the whole Expense Report. Remember that the page cannot be saved if it contains an error. When clicking “Save for Later”, any errors that are present will be flagged. [See above.] Click on the flag to read the error message.

The error field is highlighted in red and should be addressed before adding additional Expense Types.

Expenses ?
 Expand All | Collapse All | Add: | My Wallet (0) | Quick-Fill

*Date: 01/14/2021 | *Expense Type: In State-AutoMileage | Description: Set up computer for user | *Payment Type: Cash (Paid By Em...
 230 characters remaining

*Billing Type: Internal | *Originating Location: Kingston, Rhode Island, United States | *Destination City: Narragansett, Rhode Island, United States | *Miles: 7 x 0.5600

Default Rate
 Non-Reimbursable
 No Receipt

Odometer Start: 90635 | Car Registration #: [REDACTED] | Auto Ins. Carrier: GEICO

Accounting Details ?

Amount	GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Program	Bu
3.92	URIPS	3.92	USD	1.00000000	5741	100	4001	0000	

Accounting Details

Chartfield String with no project

Accounting Details ?

Amount	GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
20.00	URIPS	20.00	USD	1.00000000	5741	100	4001	0000				

Chartfield String with a project

Accounting Details ?

Amount	GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category
20.00	URIPS	20.00	USD	1.00000000	5741	500	4001	0000		URIPS	0006000	RESEARCH		

Click "Save for Later" and then "Summary and Submit".

|

Actions: Choose an Action

Report: 0000022577 Pending

Rhode Island United States

Summary and Submit

Check the box to certify expenses are accurate and adhere to policy. Click “Submit Expense Report”.

Modify Expense Report Save for Later | Expense Details

Business Purpose Business Meeting Report 0000022577 Pending **Actions** ...Choose an Action **GO**

Description 1/14/2021

Reference

Totals [View Analytics](#) [Notes](#) [Attachments](#)

Employee Expenses (1 Line)	3.92 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		3.92 USD	Amount Due to Supplier		0.00 USD

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

A message confirms that the user has attached a Travel Authorization, if applicable. Again, TA’s are not required for Expense Reports. If one has been created, then you would need to attach it (on the “Actions” drop-down - see above) before submitting. Otherwise, click “OK”.

Expense Report

Submit Confirmation

Totals [View Analytics](#) [Notes](#) [Attachments](#)

Employee Expenses (1 Line)	3.92 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		3.92 USD	Amount Due to Supplier		0.00 USD

Did you associate your Travel Authorization if applicable? If not click cancel to return to the ER and select Associate Travel Authorization under the Actions drop down menu. Then you may submit.

OK **Cancel**

After submitting, the Budget Status will be “Not Chk’d”. This usually Budget Checks within 10 minutes (but no longer than an hour). Once it changes to “Valid”, the Supervisor can approve it. If the Budget Status is “Error”, this error must be resolved before workflow can proceed.

View Expense Report

Expense Details

[Redacted]

Actions

Your expense report 000022577 has been submitted for approval.

Business Purpose Business Meeting

Report 000022577 Submission in Process

Description 1/14/2021

Created 02/08/2021

Reference

Last Updated 02/08/2021

Budget Status Not Chkd

Post State Not Applied

Totals

[View Printable Version](#)

[View Analytics](#)

[Notes](#)

Employee Expenses (1 Line)	3.92 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee

3.92 USD

Amount Due to Supplier

0.00 USD

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.