

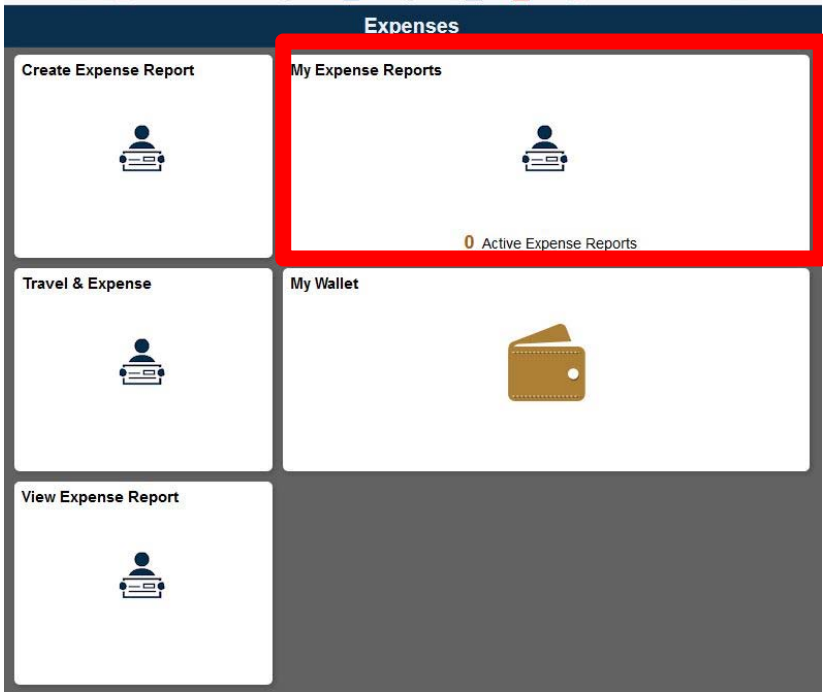
PeopleSoft – How to Modify a Travel & Expense Report

Concept

This business process explains how to modify a travel request.

Procedure

Navigate to the Expenses tile and then the My Expense Reports tile



David Elliott

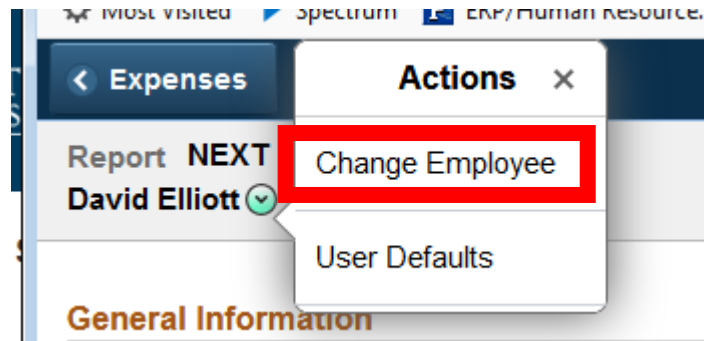
ERP Office	
Returned	0
Not Submitted	15
Awaiting Approval	2
Pending Payment	0
View All	17

Not Submitted 15 rows

Create Expense Report

Actions	Description	Business Purpose	Report ID	Updated Date	Amount
	Test	Athletic Department Travel	0000202159	08/03/2020	57.50 USD
	Test	Athletic Department Travel	0000202158	07/31/2020	257.50 USD
	Test	Conference of Services	0000202145	05/12/2020	1,250.00 USD

1. A list of Expense Reports for the user logged in will be displayed.
2. To modify the report for another individual: Select the Green Arrow Next to the name.



3. Select the new individual by name or EMPLID

Employee Search ×

Search Employee »

300 rows

EmplID	Name
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4. Reports are filtered by the status. Users can change the filters.

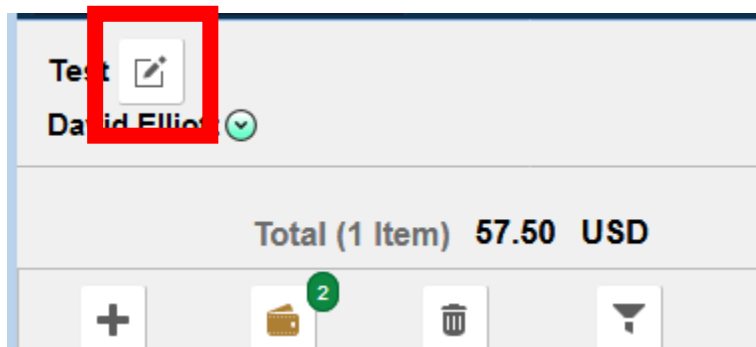
Returned	0
Not Submitted	16
Awaiting Approval	1
Pending Payment	0
View All	17

5. Select the report you would like to modify.

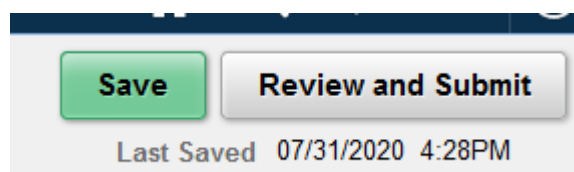
6. The report will default to the expense entry screen.

The screenshot shows the 'Expense Entry' interface. At the top, there's a header with 'My Expense Reports' and 'Expense Entry'. Below that, the user's name 'David Elliott' is displayed with a pencil icon for editing. The main area is divided into two columns. The left column shows a summary of the expense: 'Total (1 Item) 57.50 USD' and a list of items for 'Monday, April 27, 2020', including a 'Mileage' entry for 'Test' valued at 57.50 USD. The right column contains the detailed entry form for 'Mileage - 04/27/2020'. This form includes fields for 'Date' (04/27/2020), 'Expense Type' (Mileage), and 'Description' (Test). Below these are sections for 'Mileage' (100 miles at 0.5750), 'Payment Details' (Personal Out of Pocket Expense, 57.50 USD), 'Additional Information' (Billing Type: Employee (Faculty & Staff), Accounting: 1 >), and 'Exceptions' (Personal Expense: No, No Receipt: No). At the top right of the form, there are 'Save' and 'Review and Submit' buttons, and a 'Last Saved' timestamp of 05/12/2020 1:33PM.

- 7. Expense details can be updated or added from this screen.
- 8. To update the header of the report (including the **attachments, Notes and the Student Department for approval**): Select the Pencil icon at the top near the name.



9. Once updates are complete select the Review and Submit button.



10. You will have the same options on the Review Page as when reports are submitted.
11. To obtain a printer friendly PDF select the **Printer Friendly Summary** line.
12. When completed select the **Submit** button to submit the report for approval.
13. The Submission Confirmation box will appear, select Submit if ready
14. You will be returned to the **My Expenses Summary Screen**
15. The Summary screen shows reports that are associated with you.
16. The left side menu allows users to filter by the status of the report.

Returned	0
Not Submitted	16
Awaiting Approval	1
Pending Payment	0
View All	17

17. To view the report that was just created click on the report.

Awaiting Approval

	Create Expense Report		
Actions	Description	Report ID	Status
	Training	0000202161	Submitted for Approval

18. The summary screen will show the status of the report including the approval workflow.

Approval Status	
Report ID	0000202161
Submitted for Approval	
	<p>Submitted</p> <p>David Elliott Employee</p> <p style="text-align: right;">08/03/2020 3:59:07PM</p>
	<p>Pending Approval</p> <p>John Approver</p>
	<p>Not Routed</p> <p>(Pooled)</p> <p>Prepay Auditor</p>
	<p>Not Routed</p> <p>Payment</p>