

Controller’s Office – Travel and Expense

Approving Expense Transactions - Approvers

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I. Objectives

By the end of this procedure, you should be able to:

- Access email or worklist to approve expense transactions
- Review chartfield string using the Related Content
- Approve expense transactions (Travel Authorizations, Travel Advances, and Expense Reports)
- Send back expense transactions

II. Tips and Tricks

Here are few tips and tricks that will help when approving transactions prepared on your behalf:

- Make sure Email User and/or Worklist is checked on your **My System Profile** page to receive notification that an expense transaction needs your approval.
- If you plan to be out of the office for a several days please remember to select an alternate user to review and approve transactions using the **My System Profile** page in PeopleSoft.

III. Scenario

A proxy within your department created expense transactions for a traveler that require your approval.

IV. Prerequisites

Before approving expense transactions be sure to have the following:

- The approval role in PeopleSoft.
- Email User and/or Worklist User checked on your **My System Profile** page to receive emails asking you to approve expense transactions prepared on your behalf.

V. Approving Travel Authorizations Using Email

Use email to approve a Travel Authorization. Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Authorizations are required for:

- a. Expenses \$5000 or greater
- b. All Foreign Travel
- c. All Travel Advances

As an approver:

- Verify the traveler
- Review attachments
- Review Notes
- Review the expense lines and amounts
- Review the accounting details
- Add comments when necessary
- Approve the transaction

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the **link**.

Approval requested for travel authorization Sus Urb Conf Hong Kong 2/7/18 for TABOR,LLOYD.

J

● **JOANNEC@mailbox.sc.edu** <JOANNEC@mailbox.sc.edu>

● CALLAHAN, JOANNE; ● CALLAHAN, JOANNE

Wednesday, February 7, 2018 at 5:42 PM

[Show Details](#)

A travel authorization request has been submitted that requires your attention:

Employee ID:	1060632
Employee Name:	TABOR,LLOYD
Submission Date:	2018-02-07
Travel Auth Description:	Sus Urb Conf Hong Kong 2/7/18
Travel Auth ID:	100000226
Business Purpose:	Employee Travel
Reimbursement Amount:	2700.00 USD

You can navigate directly to the page for more information by clicking the link below:

https://fms-trn.ps.sc.edu/psp/FTRN/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS_EX_TAUTH_APPR.GBL?Action=U&TRAVEL_AUTH_ID=100000226

Step 3: Now you can see the details of the Travel Authorization. On this page, you can view:

- The name of the traveler
- Travel Authorization ID
- Travel dates
- Details of anticipated expenses
- The actions you can take such as Approve, Send Back, and Hold

UNIVERSITY OF SOUTH CAROLINA

Approve Travel Authorization
Travel Authorization Summary

LLOYD TABOR

General Information

Description: Sus Urb Conf Hong Kong 2/7/18 Authorization ID: 100000226

Business Purpose: Employee Travel

Status: Approvals in Process

Date From: 02/07/2018 To: 02/07/2018 Updated on: 02/07/2018 5:42:13PM By: MARKT

Attachments (1) Notes

3 More Options ...Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Details Personalize | Find |

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	<input checked="" type="checkbox"/>
Ground Transportation	02/07/2018	200.00	USD	Attachments	<input checked="" type="checkbox"/>
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	<input checked="" type="checkbox"/>
Meal Expenses	02/07/2018	400.00	USD	Attachments	<input checked="" type="checkbox"/>

Totals

Total 2,700.00 USD

Less Non-Approved 0.00 USD

Total Authorized 2,700.00 USD

Approval History

Comments

Budget Status Valid

Budget Options

Approve Send Back Hold Save Changes

Return to Approval List Next in List Previous in List

Step 4: Click the **Related Content** link to review the accounting details for this transaction.

Step 5: Click the **Accounting Details** option.

Approve Travel Authorization
Travel Authorization Summary
LLOYD TABOR

General Information

Description: Sus Urb Conf Hong Kong 2/7/18 Authorization ID: 100000226
 Business Purpose: Employee Travel
 Status: Approvals in Process
 Date From: 02/07/2018 To: 02/07/2018 Updated on: 02/07/2018 5:42:13PM
 By: MARKT Attachments (1) Notes

More Options: ...Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Details Personalize | Find | [2]

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	<input checked="" type="checkbox"/>
Ground Transportation	02/07/2018	200.00	USD	Attachments	<input checked="" type="checkbox"/>
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	<input checked="" type="checkbox"/>
Meal Expenses	02/07/2018	400.00	USD	Attachments	<input checked="" type="checkbox"/>

Totals

Total	2,700.00	USD
Less Non-Approved	0.00	USD
Total Authorized	2,700.00	USD

Step 6: Review the Accounting Details for this transaction.

Approve Travel Authorization
Travel Authorization Summary
LLOYD TABOR

General Information

Description: Sus Urb Conf Hong Kong 2/7/18 Authorization ID: 100000226
 Business Purpose: Employee Travel
 Status: Approvals in Process
 Date From: 02/07/2018 To: 02/07/2018 Updated on: 02/07/2018 5:42:13PM
 By: MARKT Attachments (1) Notes

Related Content Accounting Detail

SC_EX_TAUTH_ACCTG_DETAILS- Travel Auth Accounting Details

Download results in: Excel Spreadsheet CSV Text File XML File (3 kb)

View All First 1-4 of 4 Last

Travel Auth ID	Travel Auth Descr	Line	Distribution LI	Expense Type	Long Descr	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	GL Distrib Status	Created	From	To	Advance ID
1 100000226	Sus Urb Conf Hong Kong 2/7/18	1	1	AIRFARE	Columbia to Hong Kong	USC01	CL071	100670	E1012	52024	202				1200.000	N	02/07/2018	02/07/2018	02/07/2018	6
2 100000226	Sus Urb Conf Hong Kong 2/7/18	2	1	GROUND	Taxis from hotel to conference center	USC01	CL071	100670	E1012	52024	202				200.000	N	02/07/2018	02/07/2018	02/07/2018	
3 100000226	Sus Urb Conf Hong Kong 2/7/18	3	1	LODGING	Hyatt Regency	USC01	CL071	100670	E1012	52024	202				900.000	N	02/07/2018	02/07/2018	02/07/2018	
4 100000226	Sus Urb Conf Hong Kong 2/7/18	4	1	MEALS	Meals for all days away	USC01	CL071	100670	E1012	52024	202				400.000	N	02/07/2018	02/07/2018	02/07/2018	

Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

Step 8: Click the **Close** option.

Approve Travel Authorization

Travel Authorization Summary

LLOYD TABOR

General Information

Description Sus Urb Conf Hong Kong 2/7/18 Authorization ID 100000226

Business Purpose Employee Travel

Status Approvals in Process

Date From 02/07/2018 To 02/07/2018 Updated on 02/07/2018 5:42:13PM By MARKT

Attachments (1) Notes

Related Content Accounting Detail

SC_EX_TAUTH_ACCTG_DETAILS- Travel Auth Accounting Details

Download results in : Excel Spreadsheet CSV Text File XML File (3 kb)

View All First 1-4 of 4 Last

Travel Auth ID	Travel Auth Descr	Line	Distribution LI	Expense Type	Long Descr	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	GL Distrib Status	Created	From	To	Advance ID
1 100000226	Sus Urb Conf Hong Kong 2/7/18	1	1	AIRFARE	Columbia to Hong Kong	USC01	CL071	100670	E1012	52024	202				1200.000	N	02/07/2018	02/07/2018	02/07/2018	
2 100000226	Sus Urb Conf Hong Kong 2/7/18	2	1	GROUND	Taxis from hotel to conference center	USC01	CL071	100670	E1012	52024	202				200.000	N	02/07/2018	02/07/2018	02/07/2018	
3 100000226	Sus Urb Conf Hong Kong 2/7/18	3	1	LODGING	Hyatt Regency	USC01	CL071	100670	E1012	52024	202				900.000	N	02/07/2018	02/07/2018	02/07/2018	
4 100000226	Sus Urb Conf Hong Kong 2/7/18	4	1	MEALS	Meals for all days away	USC01	CL071	100670	E1012	52024	202				400.000	N	02/07/2018	02/07/2018	02/07/2018	

Step 9: To view all important documentation, click the **Attachments** link. (Quotes if needed.)

Approve Travel Authorization

Travel Authorization Summary

LLOYD TABOR

General Information

Description Sus Urb Conf Hong Kong 2/7/18 Authorization ID 100000226

Business Purpose Employee Travel

Status Approvals in Process

Date From 02/07/2018 To 02/07/2018 Updated on 02/07/2018 5:42:13PM By MARKT

Attachments (1) Notes

More Options ...Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Details Personalize | Find |

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	<input checked="" type="checkbox"/>
Ground Transportation	02/07/2018	200.00	USD	Attachments	<input checked="" type="checkbox"/>
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	<input checked="" type="checkbox"/>
Meal Expenses	02/07/2018	400.00	USD	Attachments	<input checked="" type="checkbox"/>

Totals

Total	2,700.00	USD
Less Non-Approved	0.00	USD
Total Authorized	2,700.00	USD

Step 10: Click the **File Name** to view.

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve Travel Authorization

Travel Authorization Summary

LLOYD TABOR

General Information

Travel Auth Attachments

Travel Authorization ID 100000226

Details

File Name	Description	User	Name	Date/Time Stamp
Hotel_Quote.jpg		JOANNEC	JOANNE CALLAHAN	02/07/2018 3:38:02PM

Add Attachment

OK Cancel

You can deny individual expenses. Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Expense Type

Air Travel Expenses

Ground Transportation

Hotel and Lodging 02/07/2018 900.00 USD Attachments

Step 11: Review the sample attachment.

Step 12: After reviewing the sample attachment, **close** to continue approving the Travel Authorization.

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve Travel Authorization

Travel Authorization Summary

LLOYD TABOR

General Information

Travel Auth Attachments

Travel Authorization ID 100000226

Details

File Name	Description	User	Name	Date/Time Stamp
Hotel_Quote.jpg		JOANNEC	JOANNE CALLAHAN	02/07/2018 3:38:02PM

Add Attachment

OK Cancel

You can deny individual expenses. Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Expense Type

Air Travel Expenses

Ground Transportation

Hotel and Lodging 02/07/2018 900.00 USD Attachments

Hotel_Quote.jpg (JPEG Image)

Executive Queen

Enjoy some extra space with this 450 square foot Executive Room featuring two queen beds, an oversized balcony and outdoor sitting.

More Details

\$419 Avg/Night (USD)

SELECT

VIEW PHOTOS

Step 13: Click **OK** to return to the Travel Authorization approval page.

University of South Carolina
Approve Travel Authorization
Travel Authorization Summary
LLOYD TABOR

Travel Auth Attachments

Travel Authorization ID 100000226

File Name	Description	User	Name	Date/Time Stamp
Hotel_Quote.jpg		JOANNEC	JOANNE CALLAHAN	02/07/2018 3:38:02PM

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Buttons: Add Attachment, OK, Cancel

Red circle with '13' highlights the OK button.

Step 14: Click the **Notes** link to view and add notes.

University of South Carolina
Approve Travel Authorization
Travel Authorization Summary
LLOYD TABOR

General Information

Description: Sus Urb Conf Hong Kong 2/7/18 Authorization ID: 100000226
Business Purpose: Employee Travel
Status: Approvals in Process
Date From: 02/07/2018 To: 02/07/2018 Updated on: 02/07/2018 5:42:13PM
By: MARKT Attachments (1) **Notes** (14)

More Options: ...Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	✓
Ground Transportation	02/07/2018	200.00	USD	Attachments	✓
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	✓
Meal Expenses	02/07/2018	400.00	USD	Attachments	✓

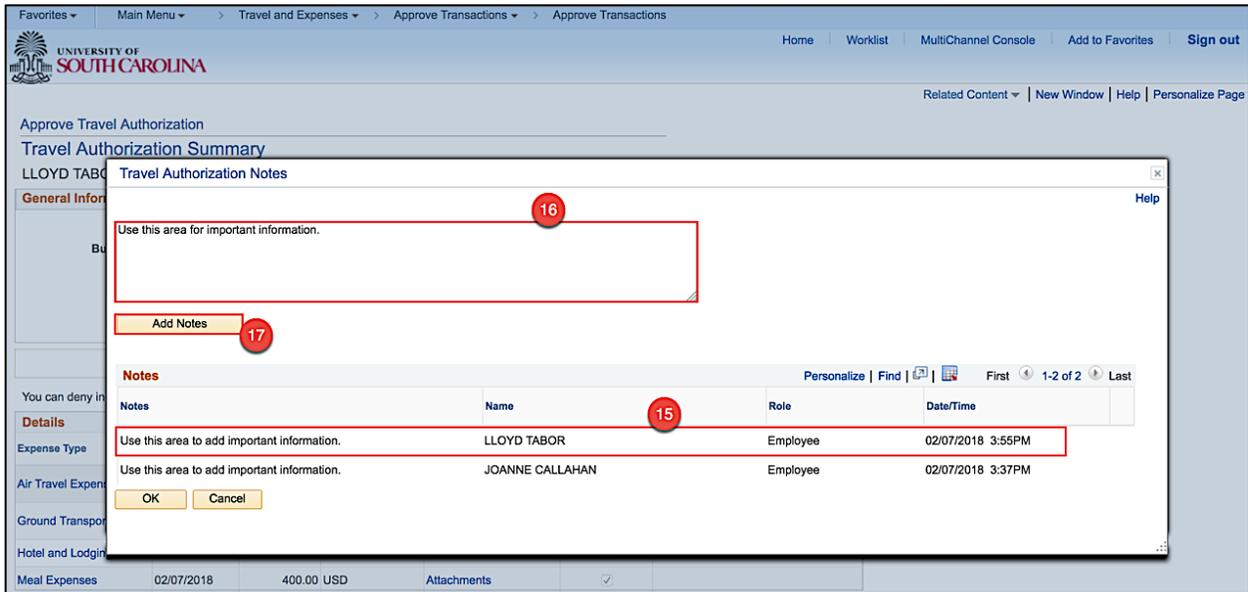
Totals

Total	2,700.00	USD
Less Non-Approved	0.00	USD
Total Authorized	2,700.00	USD

Step 15: Review any notes already added by the proxy or other approvers.

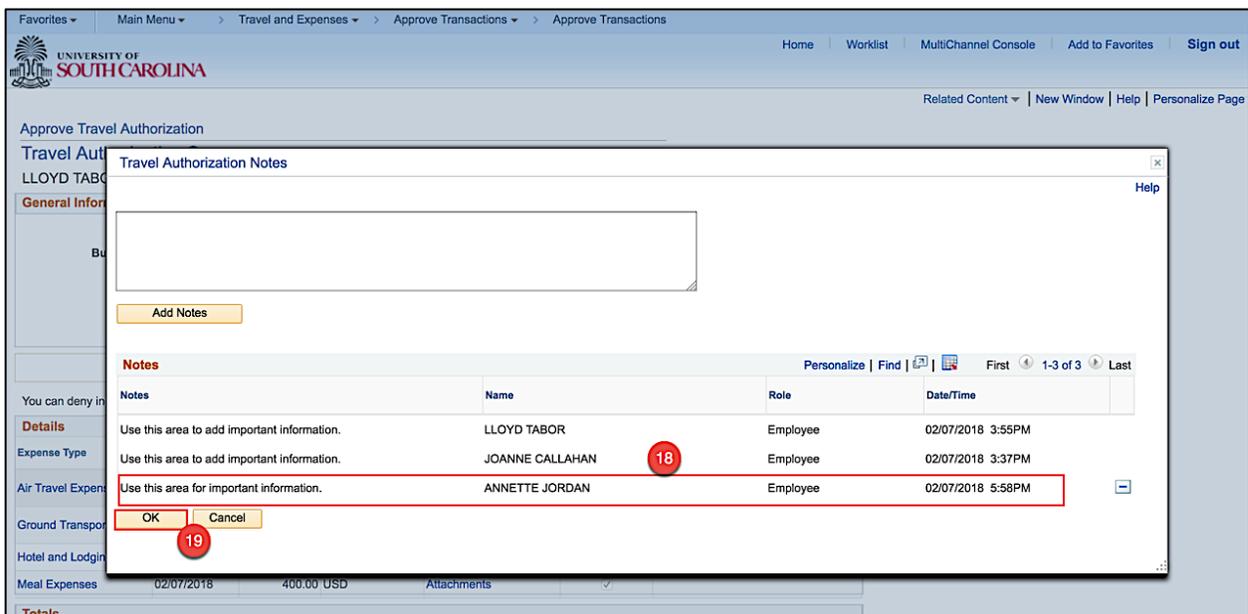
Step 16: Click in the **Text field** to add a new note.

Step 17: Click the **Add Notes** button.



Step 18: Notice the note is added.

Step 19: Click the **OK** button to return to the Travel Authorization approval page.



Step 20: Click the **Expand Section Approval History** button to review the approval workflow.

The screenshot displays the 'Approval History' section of a web application. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Travel and Expenses', 'Approve Transactions', and 'Approve Transactions'. The University of South Carolina logo is visible on the left, and 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out' are on the right. The main content area is titled 'Approval History' and contains four expandable sections:

- Travel Authorization Employee**: TRAVEL_AUTH_ID=1000000226:Approved. Status: Approved. Employee Approval Required. Approved by Mark Tabor (Employee) on 02/07/18 - 5:42 PM.
- Travel Auth. Approval 1**: TRAVEL_AUTH_ID=1000000226:Pending. Status: Pending. Travel Auth. Approval 1. Skipped by Mark Tabor (Department Approver) on 02/07/18 - 5:42 PM. Pending by Multiple Approvers (Department Approver).
- Travel Auth. Approval 2**: TRAVEL_AUTH_ID=1000000226:Awaiting Further Approvals. Status: Awaiting Further Approvals. Travel Auth. Approval 2. Not Routed by Multiple Approvers (Level 2 Approver).
- Travel Department Approval**: TRAVEL_AUTH_ID=1000000226:Awaiting Further Approvals. Status: Awaiting Further Approvals. Travel Approval Required. Not Routed.

Step 21: Now that you have reviewed the travel authorization details and all is good, click the **Approve** button.

The screenshot shows the 'Approve Transactions' page in the University of South Carolina system. The page displays a table of expenses with columns for Expense Type, Date, Amount, Currency, Attachments, and Approve. The 'Approve' column contains checkmarks for all listed expenses. Below the table is a 'Totals' section showing a Total of 2,700.00 USD and a Total Authorized of 2,700.00 USD. At the bottom of the page, the 'Approve' button is highlighted with a red circle containing the number 21. Other buttons include 'Send Back', 'Hold', 'Save Changes', 'Return to Approval List', 'Next in List', and 'Previous in List'.

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	<input checked="" type="checkbox"/>
Ground Transportation	02/07/2018	200.00	USD	Attachments	<input checked="" type="checkbox"/>
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	<input checked="" type="checkbox"/>
Meal Expenses	02/07/2018	400.00	USD	Attachments	<input checked="" type="checkbox"/>

Totals

Total	2,700.00	USD
Less Non-Approved	0.00	USD
Total Authorized	2,700.00	USD

Step 22: Click the **OK** button to confirm the approval.

The screenshot shows the same 'Approve Transactions' page as in Step 21, but with a 'Save Confirmation' dialog box open. The dialog box contains the following information:

Save Confirmation

Approve Travel Authorization

Submit Confirmation

LLOYD TABOR Authorization ID 1000000226

Travel Authorization Totals

Total	2,700.00	USD	Total	2,700.00	USD
Less Non-Approved	0.00	USD	Authorized		

This report will be approved.

At the bottom of the dialog box, the 'OK' button is highlighted with a red circle containing the number 21. Other buttons include 'Cancel' and 'Help'.

Now that you have approved the Travel Authorization, it is ready to move to the next level in the approval workflow.

VI. Approving Travel Authorizations Using the Worklist

Use the Worklist to approve a Travel Authorization. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Authorizations are required for:

- d. Expenses \$5000 or greater
- e. All Foreign Travel
- f. All Travel Advances

As an approver:

- Verify the traveler
- Review attachments
- Review Notes
- Review the expense lines and amounts
- Review the accounting details
- Add comments when necessary
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the **Worklist** link.

The screenshot shows the Oracle system interface for the University of South Carolina. The top navigation bar includes 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'. The 'Worklist' link is highlighted with a red box and a red circle containing the number '1'. Below the navigation bar, a 'Top Menu Features Description' window is open, displaying a message: 'Our menu has changed! The menu is now located across the top of the page. Click on Main Menu to get started.' The window also lists 'Highlights' such as 'Recently Used pages now appear under the Favorites menu', 'Breadcrumbs visually display your navigation path', and 'Menu Search, located under the Main Menu, now supports type ahead'.

Step 2: Click the **Date From** link to view most recent. You may need to click this a couple of times to see the most recent at the top.

Worklist for TRAVEL_OFFICE: Travel Office

Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
Mark Tabor	01/17/2018	Approval Routing	Approval Workflow	2-Medium	TAAApproval_118_USC01_1901-01-12_N_0_TRAVEL_AUTH_ID:1000000094_RDC:RA,0,A	Mark Worked	Reassign

Step 3: Click the **link** for the Travel Authorization you would like to approve.

Worklist for TRAVEL_OFFICE: Travel Office

Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
Mark Tabor	01/17/2018	Approval Routing	Approval Workflow	2-Medium	TAAApproval_118_USC01_1901-01-12_N_0_TRAVEL_AUTH_ID:1000000094_RDC:RA,0,A	Mark Worked	Reassign

Step 4: Now you can see the details of the Travel Authorization. On this page, you can view:

- The name of the traveler
- Travel Authorization ID
- Travel dates
- Details of anticipated expenses
- The actions you can take such as Approve, Send Back, and Hold

[Favorites](#) | [Main Menu](#) | [Worklist](#) | [Worklist](#)

[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Performance Trace](#) | [Add to Favorites](#) | [Sign out](#)

[Related Content](#) | [New Window](#) | [Help](#) | [Personalize Page](#)

Approve Travel Authorization
 Travel Authorization Summary

LLOYD TABOR

General Information

Description: Sus Urb Conf Hong Kong 1/17/18 Authorization ID: 1000000094
 Business Purpose: Employee Travel
 Status: Approvals in Process
 Date From: 01/17/2018 To: 01/17/2018 Updated on: 01/17/2018 12:08:07PM By: MARKT
 Attachments Notes

4

More Options: ...Choose an Action

You can deny individual expenses and still approve or send back the overall report.

Details [Personalize](#) | [Find](#) | [Print](#)

Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	01/17/2018	1,200.00	USD	Attachments	<input checked="" type="checkbox"/>
Ground Transportation	01/17/2018	200.00	USD	Attachments	<input checked="" type="checkbox"/>
Hotel and Lodging	01/17/2018	900.00	USD	Attachments	<input checked="" type="checkbox"/>
Meal Expenses	01/17/2018	400.00	USD	Attachments	<input checked="" type="checkbox"/>

Totals

Total	2,700.00	USD
Less Non-Approved	0.00	USD
Total Authorized	2,700.00	USD

[Approval History](#)
[Comments](#)

Budget Status: Valid
Budget Options

Follow **Steps 4 thru 22** in the **Approving a Travel Authorization Using Email** section, to finish reviewing the transaction details and approve.

VII. Approving Travel Advances using Email

Use email to approve a Travel Advance. Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Advances can be created for 70% of total estimated expenses for Hotel/Lodging and Meals but cannot exceed \$3000.00 per policy.

As an approver:

- Verify the traveler
- Review Travel Advance details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the **link**.

Approval Request for USC travel advance for Sus Urb Conf Hong Kong 1/17/18 for TABOR,LLOYD.

J

JOANNEC@mailbox.sc.edu <JOANNEC@mailbox.sc.edu>

CALLAHAN, JOANNE; CALLAHAN, JOANNE; CALLAHAN, JOANNE

Wednesday, January 17, 2018 at 1:48 PM

[Show Details](#)

A USC travel advance request has been submitted that requires your attention:

Employee ID:	1060632
Employee Name:	TABOR,LLOYD
Submission Date:	2018-01-17
Advance Description:	Sus Urb Conf Hong Kong 1/17/18
Advance ID:	2000000032
Business Purpose:	Employee Travel
Reimbursement Amount:	1180.00 USD

You can navigate directly to the page for more information by clicking the link below:

https://fms-trn.ps.sc.edu/psp/FTRN/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS_EX_ADV_APPR.GBL?Action=U&ADVANCE_ID=2000000032

Step 3: Now you can see the details of the Travel Advance. On this page you can view:

- The name of the traveler
- Advance description
- Travel Advance ID and status
- Travel Authorization ID and status
- Travel Advance details
- The actions you can take such as Approve, Send Back, and Hold

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel

Advance ID 2000000032 Approvals in Process

Advance Description Sus Urb Conf Hong Kong 1/17/18

Travel Authorization ID 1000000094

Post State Not Applied

Created 01/17/2018 JOANNE CALLAHAN

Last Updated 01/17/2018 LLOYD TABOR

User Defaults

3

USC Travel Advance [View Printable Version](#) [Notes](#) [Attachments \(1\)](#)

*Source	Description	*Amount Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00 USD
Totals		
	Advance Amount	1,180.00 USD

Approval History

Comments

Approve Send Back Hold

Step 4: Click the **Related Content** link to review the accounting details for this transaction.

Step 5: Click the **Accounting Details** option.

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel Advance ID 2000000032 Approvals in Process
Advance Description Sus Urb Conf Hong Kong 1/17/18 Travel Authorization ID 1000000094
Post State Not Applied
Created 01/17/2018 JOANNE CALLAHAN
Last Updated 01/17/2018 LLOYD TABOR
User Defaults

USC Travel Advance View Printable Version Notes Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD
Totals			
Advance Amount		1,180.00	USD

Approval History

Comments

Approve Send Back Hold

Step 6: Review the Accounting Details for this transaction.

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel Advance ID 2000000032 Approvals in Process
Advance Description Sus Urb Conf Hong Kong 1/17/18 Travel Authorization ID 1000000094
Post State Not Applied
Created 01/17/2018 JOANNE CALLAHAN
Last Updated 01/17/2018 LLOYD TABOR
User Defaults

USC Travel Advance View Printable Version Notes Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD

Related Content Accounting Detail

SC_EX_ADV_ACCTG_DTL- TRAVEL ADVANCE ACCTG DETAILS

Download results in : Excel Spreadsheet CSV Text File XML File (1 kb)

View All First 1-1 of 1 Last

ID	Adv ID	Line	Distribution LI	Status	Acctg Date	Created	GL Unit	Oper Unit	Dept	Fund	Account Class	Project	Amount	Status	Travel Auth ID	Report ID	Total	Descr
1	1080632	2000000032	1	PAR	01/17/2018	01/17/2018	USC01	CL071	100670	E1012	10206	202	1180.00	N			1180.00	Sus Urb Conf Hong Kong 1/17/18

Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

Step 8: Click the **Close** option.

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel **Advance ID** 2000000032 Approvals in Process
Advance Description Sus Urb Conf Hong Kong 1/17/18 **Travel Authorization ID** 1000000094
Post State Not Applied
Created 01/17/2018 JOANNE CALLAHAN
Last Updated 01/17/2018 LLOYD TABOR
 User Defaults

USC Travel Advance View Printable Version Notes Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD

Related Content Accounting Detail

SC_EX_ADV_ACCTG_DTL- TRAVEL ADVANCE ACCTG DETAILS

Download results in: Excel Spreadsheet CSV Text File XML File (1 kb)

View All First 1-1 of 1 Last

ID	Adv ID	Line	Distribution LI	Status	Acctg Date	Created	GL Unit	Oper Unit	Dept	Fund	Account Class	Project	Amount	Status	Travel Auth ID	Report ID	Total	Descr
1	1060632	2000000032	1	PAR	01/17/2018	01/17/2018	USC01	CL071	100670	E1012	10206	202	1180.000	N			1180.000	Sus Urb Conf Hong Kong 1/17/18

Step 9: To view all important documentation, click the **Attachments** link.

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel **Advance ID** 2000000032 Approvals in Process
Advance Description Sus Urb Conf Hong Kong 1/17/18 **Travel Authorization ID** 1000000094
Post State Not Applied
Created 01/17/2018 JOANNE CALLAHAN
Last Updated 01/17/2018 LLOYD TABOR
 User Defaults

USC Travel Advance View Printable Version Notes Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD

Totals

Advance Amount 1,180.00 USD

Approval History

Comments

Approve Send Back Hold

Step 13: Click **OK** to return to the Travel Advance approval page.

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel Advance ID 200000032 Approvals in Process

Advance Description Sus Urb Conf Hong Kong 1/17/18 Travel Authorization ID 1000000094

Post State Not Applied

Created 01/17/2018 JOANNE CALLAHAN

Last Updated 01/17/2018 LLOYD TABOR

User Defaults

Cash Advance Attachments

Advance ID 200000032

File Name	Description	User	Name	Date/Time Stamp
USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	01/17/2018 1:44:24PM

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

OK Cancel

13

Approve Send Back Hold

Step 14: Click the **Notes** link to view and add notes.

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel Advance ID 200000032 Approvals in Process

Advance Description Sus Urb Conf Hong Kong 1/17/18 Travel Authorization ID 1000000094

Post State Not Applied

Created 01/17/2018 JOANNE CALLAHAN

Last Updated 01/17/2018 LLOYD TABOR

User Defaults

View Printable Version

Notes Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD

Totals

Advance Amount 1,180.00 USD

Approve Send Back Hold

14

Step 15: Review any notes already added by the proxy or other approvers.

Step 16: Click in the **Text field** to add a new note.

Step 17: Click the **Add Notes** button.

Expense Notes for Cash Advance

Use this area to add important information.

Add Notes

Notes	Name	Role	Action Date/Time
Use this area to add important information.	JOANNE CALLAHAN	Employee	01/17/2018 1:44PM

OK Cancel

Step 18: Notice the note is added.

Step 19: Click the **OK** button to return to the Travel Advance approval page.

Expense Notes for Cash Advance

Use this area to add important information.

Add Notes

Notes	Name	Role	Action Date/Time
Use this area to add important information.	JOANNE CALLAHAN	Employee	01/17/2018 1:44PM
Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM

OK Cancel

Step 20: Click the **Expand Section Approval History** button.

The screenshot displays a web interface for the University of South Carolina. At the top, there is a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'. Below this is a 'Favorites' and 'Main Menu' section. A red circle with the number '20' highlights the 'Approval History' button. The main content area shows a list of approval requests:

- USC Travel Advance Employee**: ADVANCE_ID=2000000032:Approved. Status: Employee Approval Required. Approved by Mark Tabor on 01/17/18 at 1:48 PM.
- USC Travel Advance Approval 1**: ADVANCE_ID=2000000032:Pending. Status: Level 1 Approval. Skipped by Mark Tabor on 01/17/18 at 1:48 PM. Pending by Multiple Approvers on 01/17/18.
- USC Travel Advance Approval 2**: ADVANCE_ID=2000000032:Awaiting Further Approvals. Status: Level 2 Approval. Not Routed by Multiple Approvers on 01/17/18.
- Travel Department Approval**: ADVANCE_ID=2000000032:Awaiting Further Approvals. Status: Travel Approval Required. Not Routed by Multiple Approvers on 01/17/18.

At the bottom, there is a 'Comments' section with a text input field and three buttons: 'Approve', 'Send Back', and 'Hold'.

Step 21: Now that you have reviewed the Travel Advance details and all is good, click the **Approve** button.

The screenshot displays the University of South Carolina's Travel Advance Approval system. The top navigation bar includes 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'. The main content area shows a 'Pending' status for 'Department Approvers' (01/17/18 - 1:48 PM) and 'Level 2 Approvers'. Below this, there are sections for 'USC Travel Advance Approval 2' and 'Travel Department Approval', both marked as 'Not Routed' and 'Awaiting Further Approvals'. At the bottom, there is a 'Comments' text area and three buttons: 'Approve', 'Send Back', and 'Hold'. A red circle with the number '21' is placed over the 'Approve' button.

Step 22: Click the **OK** button to confirm the approval.

The screenshot displays the University of South Carolina's Travel Advance Approval system with a 'Save Confirmation' dialog box open. The dialog box contains the following information: 'Travel & Expenses - Cash Advance Report', 'Submit Confirmation', 'LLOYD TABOR', 'Advance ID 200000032', and a table showing 'Totals' with 'Advance Amount' of '1,180.00 USD'. Below the table, there is a checkmark and the text 'This report will be approved.' and two buttons: 'OK' and 'Cancel'. A red circle with the number '22' is placed over the 'OK' button.

Now that you have approved the Travel Advance, it is ready to move to the next level in the approval workflow.

VIII. Approving Travel Advances using the Worklist

Use the Worklist to approve a Travel Advance. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

Travel Advances can be created for 70% of total estimated expenses for Hotel/Lodging and Meals but cannot exceed \$3000.00 per policy.

As an approver:

- Verify the traveler
- Review Travel Advance details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the **Worklist** link.

The screenshot shows the Oracle system interface for the University of South Carolina. The top navigation bar includes 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'. The 'Worklist' link is highlighted with a red box and a red circle containing the number '1'. Below the navigation bar, a 'Top Menu Features Description' window is open, displaying a message: 'Our menu has changed! The menu is now located across the top of the page. Click on Main Menu to get started.' The window also lists 'Highlights' such as 'Recently Used pages now appear under the Favorites menu', 'Breadcrumbs visually display your navigation path', and 'Menu Search, located under the Main Menu, now supports type ahead'.

Step 2: Click the **Date From** link to view most recent. You may need to click this a couple of times to see the most recent at the top.

The screenshot shows the University of South Carolina Worklist interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out'. Below this, the page title is 'Worklist' and the subtitle is 'Worklist for TRAVEL_OFFICE: Travel Office'. There is a 'Worklist Filters' dropdown and a 'Feed' dropdown. The main content area is a table with the following columns: 'From', 'Date From', 'Work Item', 'Worked By Activity', 'Priority', and 'Link'. The 'Date From' column header is highlighted with a red box, and a red circle with the number '2' is placed above it. The table contains one row with the following data: 'Mark Tabor', '01/17/2018', 'Approval Routing', 'Approval Workflow', '2-Medium', and a link containing 'CAApproval_45_USC01_1901-01-12_N_0_ADVANCE_ID:2000000032_RDC:RA_0_A'. To the right of the table are 'Mark Worked' and 'Reassign' buttons.

Step 3: Click the **link** for the Travel Advance you would like to approve.

The screenshot shows the same University of South Carolina Worklist interface as above. In this view, the 'Link' column header is highlighted with a red box, and a red circle with the number '3' is placed below it. The table data remains the same as in the previous screenshot.

Step 4: Now you can see the details of the Travel Advance. On this page, you can view:

- The name of the traveler
- Advance description
- Travel Advance ID and status
- Travel Authorization ID and status
- Travel Advance details
- The actions you can take such as Approve, Send Back, and Hold

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel

Advance ID 200000032 **Approvals in Process**

Advance Description Sus Urb Conf Hong Kong 1/17/18

Travel Authorization ID 1000000094

Post State Not Applied

Created 01/17/2018 JOANNE CALLAHAN

Last Updated 01/17/2018 LLOYD TABOR

User Defaults

USC Travel Advance [View Printable Version](#) [Notes](#) [Attachments \(1\)](#)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Conf Hong Kong 1/17/18	1,180.00	USD
Totals			
	Advance Amount	1,180.00	USD

Approval History

Comments

Approve Send Back Hold

Follow **Steps 4 thru 22** in the **Approving a Travel Advance Using Email** section, to finish reviewing the transaction details and approve.

IX. Approving Expense Reports using Email

Use email to approve an Expense Report created by a Proxy on your behalf.

An Expense Report in PeopleSoft makes it easy to transform a handful of receipts into a final document for expense reimbursement(s).

As an approver:

- Verify the traveler
- Review Expense Report details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the **link**.

Expense report 3000000386 for TABOR,LLOYD requires your attention



JOANNEC@mailbox.sc.edu <JOANNEC@mailbox.sc.edu>
 CALLAHAN, JOANNE; CALLAHAN, JOANNE
 Thursday, February 8, 2018 at 7:17 AM
[Show Details](#)

An expense report has been submitted that requires your action:

Employee ID:	1060632
Employee Name:	TABOR,LLOYD
Submission Date:	2018-02-08
Report Description:	Sus Urb Conf Hong Kong 1/23-31
Report ID:	300000386
Business Purpose:	Employee Travel
From Date:	2018-01-23
To Date:	2018-01-31
Trip Location:	Hong Kong
Total Amount:	6152.00 USD
Reimbursement Amount:	6152.00 USD

You can navigate directly to the approval page by clicking the link below:

https://fms-trn.ps.sc.edu/psp/FTRN/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_SHEET_APPR.GBL?Action=U&SHEET_ID=300000386

Step 3: Now you can see the details of the Expense Report. On this page, you can view:

- The name of the traveler
- Report ID
- Identify the Travel Authorization, if associated to the Expense Report
- Travel Dates
- Trip Location
- Details of expenses
- The actions you can take such as Approve, Send Back, and Hold

[Favorites](#) > [Main Menu](#) > [Travel and Expenses](#) > [Approve Transactions](#) > [Approve Transactions](#)

[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)



[Related Content](#) | [New Window](#) | [Help](#) | [Personalize Page](#)

Approve Expense Report - Expense Summary

LLOYD TABOR Actions [Choose an Action](#)

Business Purpose Employee Travel **Report** 3000000386 Approvals in Process
Description Sus Urb Conf Hong Kong 1/23-31 **Created** 02/08/2018 JOANNE CALLAHAN
Reference **Last Updated** 02/08/2018 LLOYD TABOR **From Date** 01/23/2018
To Date 01/31/2018
Trip Location Hong Kong
Authorization ID 1000000116

Budget Status Not Budget Checked **Budget Options**

Totals View Analytics Notes Attachments (1) Expense Report

Employee Expenses (6 Lines)	6,152.00 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 6,152.00 USD		Amount Due to Supplier 0.00 USD			

[Approval History](#)
[Comments](#)

Receipt Information
 Receipts Received

Expense Line

Date	Expense Type	Description	Reimburse Amt	Currency	Approve
01/23/2018	Air Travel Expenses	Columbia to Hong Kong	1,200.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Ground Transportation	Taxis from hotel to conference center	200.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Hotel and Lodging	Hyatt Regency	900.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Departed at 6am	428.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Meals for all days in between	2,996.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Returned at 8pm	428.00	USD	<input checked="" type="checkbox"/>

[Return to Approval List](#) [Next in List](#) [Previous in List](#)

Step 4: Click the **Related Content** link to review the accounting details for this transaction.

Step 5: Click the **Accounting Details** option.

Approve Expense Report - Expense Summary

LLOYD TABOR

Business Purpose: Employee Travel
 Description: Sus Urb Conf Hong Kong 1/23-31
 Reference: [Blank]
 Budget Status: Not Budget Checked | Budget Options

Report: 3000000386 Approvals in Process
 Created: 02/08/2018 JOANNE CALLAHAN
 Last Updated: 02/08/2018 LLOYD TABOR
 Authorization ID: 1000000116

From Date: 01/23/2018
 To Date: 01/31/2018
 Trip Location: Hong Kong

Totals

Employee Expenses (6 Lines)	6,152.00 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 6,152.00 USD		Amount Due to Supplier 0.00 USD			

Approval History

Comments

Approve Send Back Hold Save Changes

Step 6: Review the Accounting Details for this transaction.

Approve Expense Report - Expense Summary

LLOYD TABOR

Business Purpose: Employee Travel
 Description: Sus Urb Conf Hong Kong 1/23-31
 Reference: [Blank]
 Budget Status: Not Budget Checked | Budget Options

Report: 3000000386 Approvals in Process
 Created: 02/08/2018 JOANNE CALLAHAN
 Last Updated: 02/08/2018 LLOYD TABOR
 Authorization ID: 1000000116

From Date: 01/23/2018
 To Date: 01/31/2018
 Trip Location: Hong Kong

Related Content | Accounting Details | Approval History

SC_EXP_RPT_ACCTG_DETAILS- Expense Rpt Accounting Details

Download results in: Excel Spreadsheet CSV Text File XML File (5 kb)

View All First 1-6 of 6 Last

Report ID	Report Descr	Line	Distribution LI	Type	Long Descr	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	Status	Created	Travel Auth ID	Adv ID	Applied
1 3000000386	Sus Urb Conf Hong Kong 1/23-31	1	1	AIRFARE	Columbia to Hong Kong	USC01	CL071	100670	E1012	52024	202				1200.000	N	02/08/2018	1000000116		
2 3000000386	Sus Urb Conf Hong Kong 1/23-31	2	1	GROUND	Taxis from hotel to conference center	USC01	CL071	100670	E1012	52024	202				200.000	N	02/08/2018	1000000116		
3 3000000386	Sus Urb Conf Hong Kong 1/23-31	3	1	LODGING	Hyatt Regency	USC01	CL071	100670	E1012	52024	202				900.000	N	02/08/2018	1000000116		
4 3000000386	Sus Urb Conf Hong Kong 1/23-31	4	1	MEALS	Departed at 6am	USC01	CL071	100670	E1012	52024	202				428.000	N	02/08/2018	1000000116		
5 3000000386	Sus Urb Conf Hong Kong 1/23-31	5	1	MEALS	Meals for all days in between	USC01	CL071	100670	E1012	52024	202				2996.000	N	02/08/2018	1000000116		
6 3000000386	Sus Urb Conf Hong Kong	6	1	MEALS	Returned at 8pm	USC01	CL071	100670	E1012	52024	202				428.000	N	02/08/2018	1000000116		

Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

Step 8: Click the **Close** option.

Approve Expense Report - Expense Summary

LLOYD TABOR Actions [...Choose an Action](#)

Business Purpose Employee Travel **Report** 3000000386 Approvals in Process **From Date** 01/23/2018
Description Sus Urb Conf Hong Kong 1/23-31 **Created** 02/08/2018 JOANNE CALLAHAN **To Date** 01/31/2018
Reference **Last Updated** 02/08/2018 LLOYD TABOR **Trip Location** Hong Kong
Authorization ID 1000000116

Related Content Accounting Details Approval History

SC_EXP_RPT_ACCTG_DETAILS- Expense Rpt Accounting Details

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (5 kb)

View All First 1-6 of 6 Last

Report ID	Report Descr	Line	Distribution Li	Type	Long Descr	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	Status	Created	Travel Auth ID	Adv ID	Applied
1 3000000386	Sus Urb Conf Hong Kong 1/23-31	1		1 AIRFARE	Columbia to Hong Kong	USC01	CL071	100670	E1012	52024	202				1200.000	N	02/08/2018	1000000116		
2 3000000386	Sus Urb Conf Hong Kong 1/23-31	2		1 GROUND	Taxis from hotel to conference center	USC01	CL071	100670	E1012	52024	202				200.000	N	02/08/2018	1000000116		
3 3000000386	Sus Urb Conf Hong Kong 1/23-31	3		1 LODGING	Hyatt Regency	USC01	CL071	100670	E1012	52024	202				900.000	N	02/08/2018	1000000116		
4 3000000386	Sus Urb Conf Hong Kong 1/23-31	4		1 MEALS	Departed at 6am	USC01	CL071	100670	E1012	52024	202				428.000	N	02/08/2018	1000000116		
5 3000000386	Sus Urb Conf Hong Kong 1/23-31	5		1 MEALS	Meals for all days in between	USC01	CL071	100670	E1012	52024	202				2996.000	N	02/08/2018	1000000116		
6 3000000386	Sus Urb Conf Hong Kong	6		1 MEALS	Returned at 8pm	USC01	CL071	100670	E1012	52024	202				428.000	N	02/08/2018	1000000116		

Step 9: To view all important documentation, click the **Attachments** link.

Approve Expense Report - Expense Summary

LLOYD TABOR Actions [...Choose an Action](#)

Business Purpose Employee Travel **Report** 3000000386 Approvals in Process **From Date** 01/23/2018
Description Sus Urb Conf Hong Kong 1/23-31 **Created** 02/08/2018 JOANNE CALLAHAN **To Date** 01/31/2018
Reference **Last Updated** 02/08/2018 LLOYD TABOR **Trip Location** Hong Kong
Authorization ID 1000000116

Budget Status Not Budget Checked **Budget Options**

Totals [View Analytics](#) [Notes](#) [Attachments \(1\)](#) [Expense Report](#)

Employee Expenses (6 Lines)	6,152.00 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	6,152.00 USD	Amount Due to Supplier	0.00 USD		

Approval History

Comments

[Approve](#) [Send Back](#) [Hold](#) [Save Changes](#)

Step 10: Click the **File Name** to view.

The screenshot shows the 'Expense Report Attachments' dialog box. The 'Details' section contains a table with the following data:

File Name	Description	User	Name	Date/Time Stamp
USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	02/08/2018 7:14:37AM

A red circle with the number '10' is placed over the file name 'USC_PeopleSoft_Attachment.docx'.

Step 11: Review the sample attachment.

Step 12: After reviewing the sample attachment, close to continue approving the Expense Report.

The screenshot shows the 'Expense Report Attachments' dialog box with a Microsoft Word document open over it. The document content is highlighted with a red circle with the number '11'. The document content is:



UNIVERSITY OF SOUTH CAROLINA

This is an attachment for PeopleSoft Testing and Training

A red circle with the number '12' is placed over the 'Add Attachment' button in the dialog box.

Step 13: Click **OK** to return to the Expense Report approval page.

Expense Report Attachments

Report ID 3000000386

File Name	Description	User	Name	Date/Time Stamp
USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	02/08/2018 7:14:37AM

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Step 14: Click the **Notes** link to view and add notes.

Approve Expense Report - Expense Summary

LLOYD TABOR

Business Purpose: Employee Travel

Description: Sus Urb Conf Hong Kong 1/23-31

Reference:

Budget Status: Not Budget Checked

Report: 3000000386

Created: 02/08/2018

Last Updated: 02/08/2018

Authorization ID: 1000000116

Approvals in Process: JOANNE CALLAHAN

LLOYD TABOR

From Date: 01/23/2018

To Date: 01/31/2018

Trip Location: Hong Kong

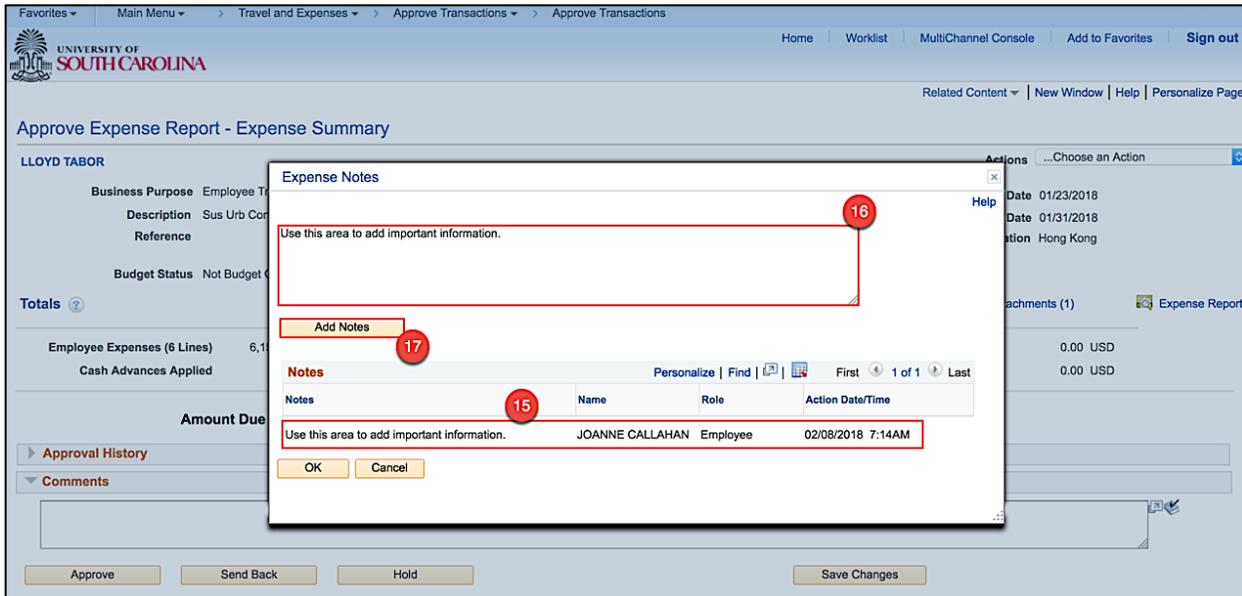
Totals

Employee Expenses (6 Lines)	6,152.00 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	6,152.00 USD	Amount Due to Supplier	0.00 USD		

Step 15: Review any notes already added by the proxy or other approvers.

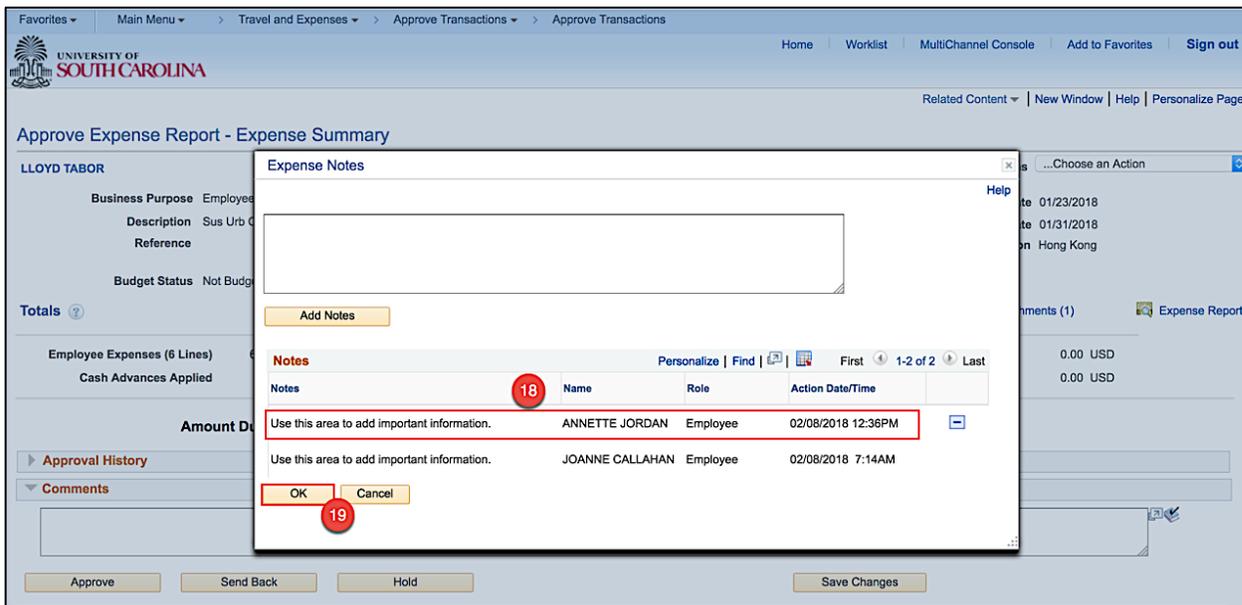
Step 16: Click in the **Text field** to add a new note.

Step 17: Click the **Add Notes** button.



Step 18: Notice the note is added.

Step 19: Click the **OK** button to return to the Expense Report approval page.



Step 20: Click the **Expand Section Approval History** button.

The screenshot displays the 'Approval History' section of a web application. At the top, there is a navigation bar with the University of South Carolina logo and the text 'UNIVERSITY OF SOUTH CAROLINA'. The page title is 'Approval History'. Below the title, there are four main sections, each representing a different type of approval:

- Expense Report Employee:** SHEET_ID=3000000386:Approved. Status: Employee Approval Required. Approved by Mark Tabor (Employee) on 02/08/18 - 7:17 AM.
- Expense Report Approval 1:** SHEET_ID=3000000386:Pending. Status: Level 1 Approval. Includes 'Skipped' (Mark Tabor, Department Approvers, 02/08/18 - 7:17 AM) and 'Pending' (Multiple Approvers, Department Approvers) entries. A 'Comments' section is also visible.
- Expense Report Approval 2:** SHEET_ID=3000000386:Awaiting Further Approvals. Status: Level 2 Approval. Includes a 'Not Routed' entry (Multiple Approvers, Level 2 Approvers).
- Travel Department Approval:** SHEET_ID=3000000386:Awaiting Further Approvals. Status: Travel Approval Required. Includes a 'Not Routed' entry (Multiple Approvers, Travel Department).

Step 21: Now that you have reviewed the Expense Report details and all is good, click the **Approve** button.

UNIVERSITY OF SOUTH CAROLINA

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Related Content | New Window | Help | Personalize Page

Approve Expense Report - Expense Summary

LLOYD TABOR Actions: ...Choose an Action

Business Purpose: Employee Travel
 Description: Sus Urb Conf Hong Kong 1/23-31
 Reference: [blank]

Report: 3000000386 Approvals in Process
 Created: 02/08/2018 JOANNE CALLAHAN
 Last Updated: 02/08/2018 ANNETTE JORDAN
 Authorization ID: 1000000116

From Date: 01/23/2018
 To Date: 01/31/2018
 Trip Location: Hong Kong

Budget Status: Not Budget Checked Budget Options

Totals: View Analytics | Notes | Attachments (1) | Expense Report

Employee Expenses (6 Lines)	6,152.00 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		6,152.00 USD		Amount Due to Supplier	
				0.00 USD	

Approval History

Comments

Approve (21) | Send Back | Hold | Save Changes

Receipt Information

Step 22: Click the **OK** button to confirm the approval.

Save Confirmation

Approve Expense Report

Submit Confirmation

LLOYD TABOR Report ID: 3000000386

Totals:

Employee Expenses (6 Lines)	6,152.00 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		6,152.00 USD		Amount Due to Supplier	
				0.00 USD	

Employee Expenses: This report will be approved.

OK (22) | Cancel

Now that you have approved the Expense Report, it is ready to move to the next level in the approval workflow.

X. Approving Expense Reports Using the Worklist

Use the Worklist to approve an Expense Report. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

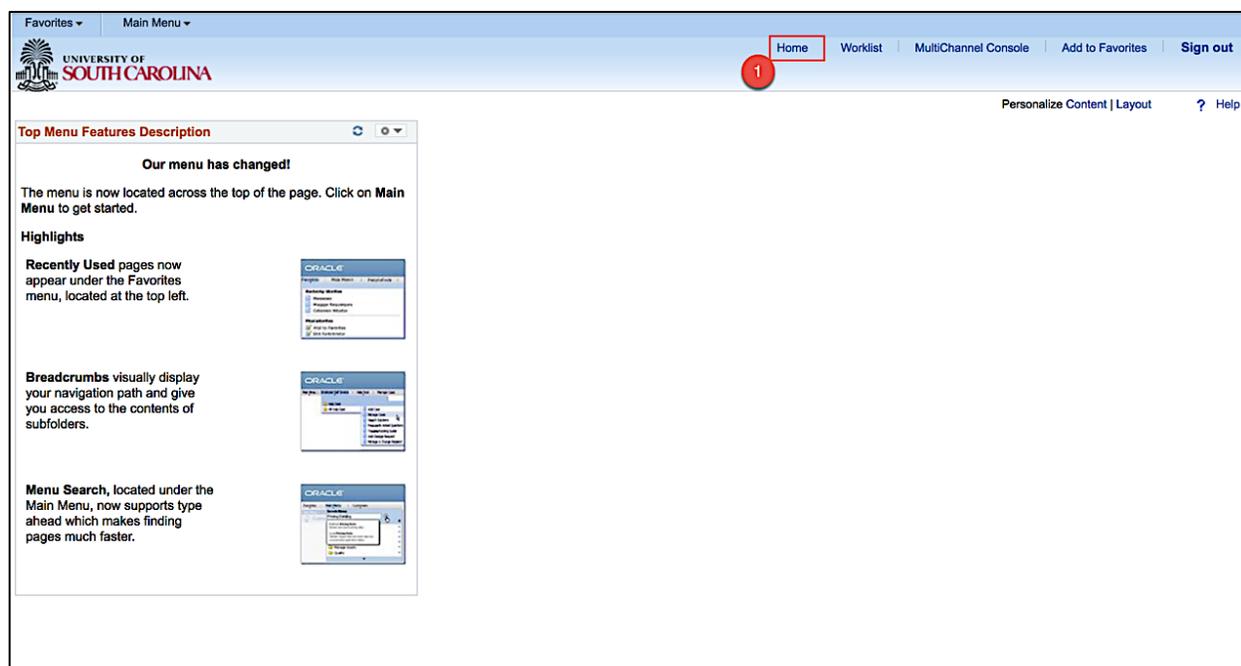
Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

An Expense Report in PeopleSoft makes it easy to transform a handful of receipts into a final document for expense reimbursement(s).

As an approver:

- Verify the traveler
- Review Expense Report details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the **Worklist** link.



Step 2: Click the **Date From** link to view most recent. You may need to click this a couple of time to see the most recent at the top.

Worklist for TRAVEL_OFFICE: Travel Office

Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_212_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000191, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval_124_USC01, 1901-01-12, N, 0, ADVANCE_ID:2000000108, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval_185_USC01, 1901-01-12, N, 0, SHEET_ID:3000000323, RDC:RA,0,A	Mark Worked	Reassign
Proxy 19	02/01/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_216_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000197, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_223_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000204, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval_134_USC01, 1901-01-12, N, 0, ADVANCE_ID:2000000118, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval_197_USC01, 1901-01-12, N, 0, SHEET_ID:3000000342, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_259_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000237, RDC:RA,0,A	Mark Worked	Reassign

Step 3: Click the **link** for the Expense Report you would like to approve.

Worklist for TRAVEL_OFFICE: Travel Office

Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Mark Tabor	02/08/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval_234_USC01, 1901-01-12, N, 0, SHEET_ID:3000000386, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_248_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000228, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_259_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000237, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval_134_USC01, 1901-01-12, N, 0, ADVANCE_ID:2000000118, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval_197_USC01, 1901-01-12, N, 0, SHEET_ID:3000000342, RDC:RA,0,A	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_223_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000204, RDC:RA,0,A	Mark Worked	Reassign
Proxy 19	02/01/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval_216_USC01, 1901-01-12, N, 0, TRAVEL_AUTH_ID:1000000197, RDC:RA,0,A	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval_185_USC01, 1901-01-12, N, 0, SHEET_ID:3000000323, RDC:RA,0,A	Mark Worked	Reassign

Step 4: Now you can see the details of the Expense Report. On this page, you can view:

- The name of the traveler
- Report ID
- Identify the Travel Authorization, if associated to the Expense Report
- Dates of Travel
- Trip Location
- Details of expenses
- The actions you can take such as Approve, Send Back, and Hold

University of South Carolina

Approve Expense Report - Expense Summary

LLOYD TABOR Actions ...Choose an Action

Business Purpose Employee Travel
 Description Sus Urb Conf Hong Kong 1/23-31
 Reference

Report 300000386 Approvals in Process
 Created 02/08/2018 JOANNE CALLAHAN
 Last Updated 02/08/2018 LLOYD TABOR
 Authorization ID 1000000116

From Date 01/23/2018
 To Date 01/31/2018
 Trip Location Hong Kong

Budget Status Not Budget Checked Budget Options

Totals 4 View Analytics Notes Attachments (1) Expense Report

Employee Expenses (6 Lines)	6,152.00 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 6,152.00 USD		Amount Due to Supplier 0.00 USD			

Approval History

Comments

Approve Send Back Hold Save Changes

Receipt Information
 Receipts Received

Expense Line

Date	Expense Type	Description	Reimburse Amt	Currency	Approve
01/23/2018	Air Travel Expenses	Columbia to Hong Kong	1,200.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Ground Transportation	Taxis from hotel to conference center	200.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Hotel and Lodging	Hyatt Regency	900.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Departed at 6am	428.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Meals for all days in between	2,996.00	USD	<input checked="" type="checkbox"/>
01/23/2018	Meal Expenses	Returned at 8pm	428.00	USD	<input checked="" type="checkbox"/>

Return to Approval List Next in List Previous in List

Follow **Steps 4 thru 22** in the **Approving an Expense Report Using Email** section, to finish reviewing the transactions details and approve.

XI. Send Back an Expense Transaction

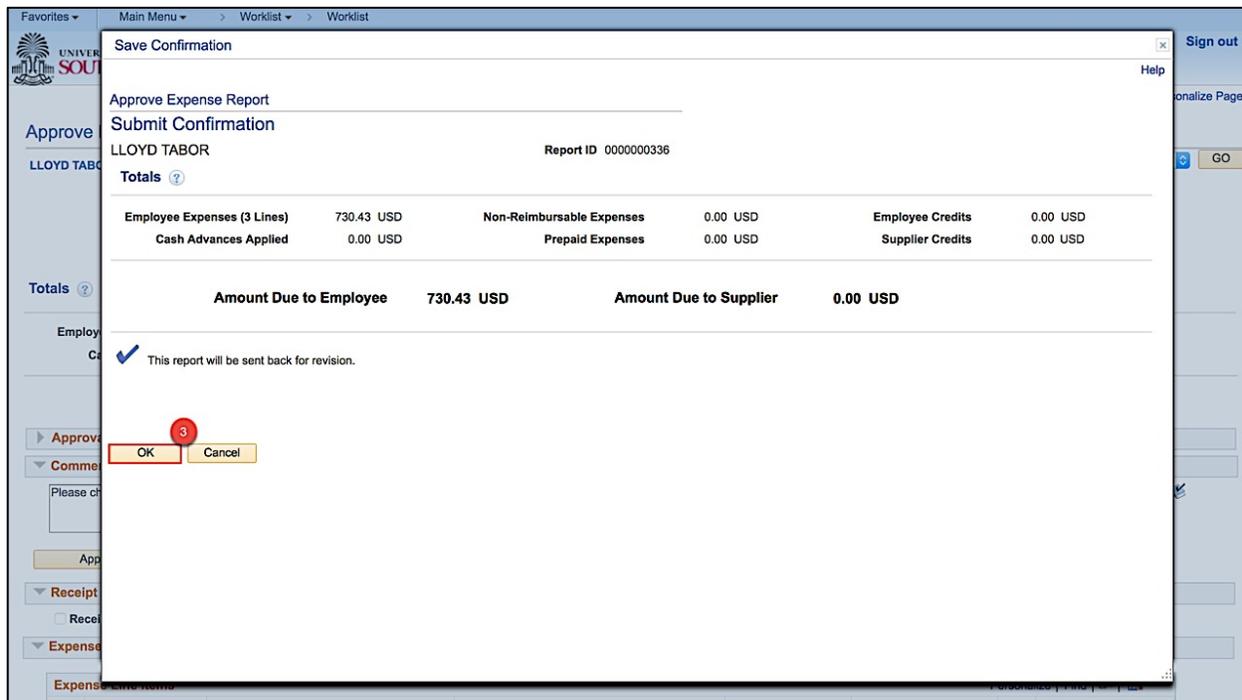
If you want the person who originated (the Proxy) the Expense Report to make a change to it and resubmit it, you can make that happen by clicking the **Send Back** button. **Only by clicking the Send Back** button can you allow the Proxy to gain access to the report again. The following steps walk you through this procedure; they pick up at the point in which you have opened a submitted report from your email and/or worklist.

Step 1: Click in the **Comment** textbox at the bottom of the report and add the reason for sending back. The purpose of this is to inform the Proxy why you are sending the form back, and how you want him/her to edit the form before they resubmit it to you. ***The system will not allow you to send back the report without typing an explanation.***

Step 2: Click the **Send Back** button.

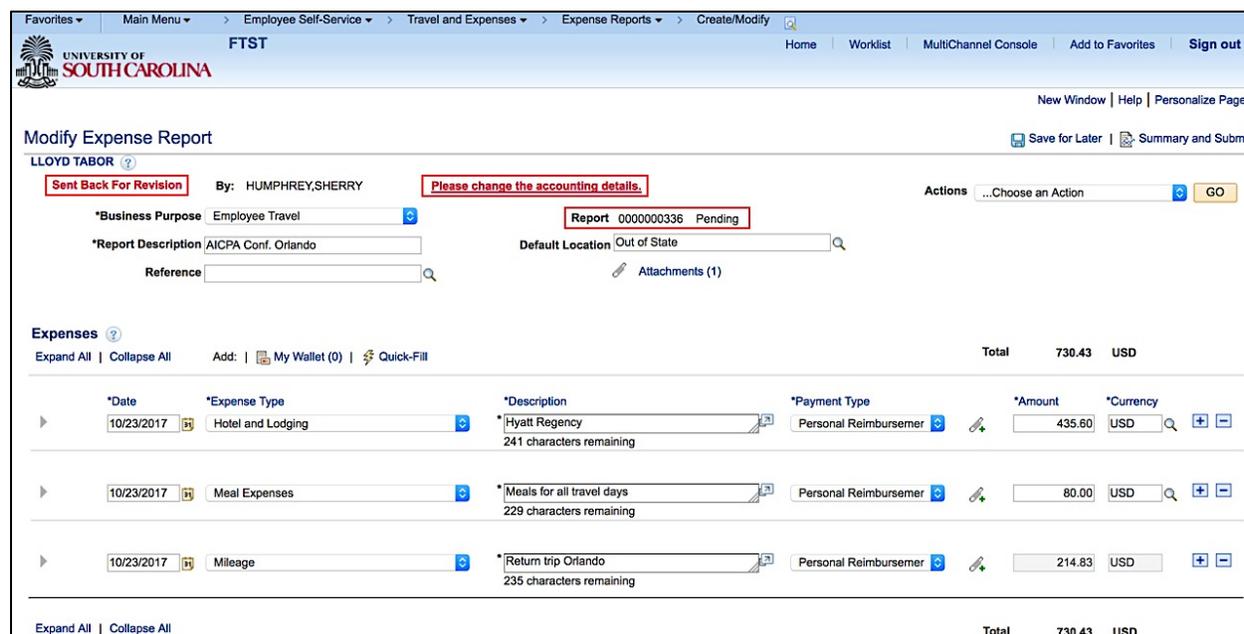
The screenshot displays the 'Approve Expense Report - Expense Summary' page for LLOYD TABOR. The page includes a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. The main content area shows report details for 'Employee Travel' with a total amount of 730.43 USD. Below the totals, there is an 'Approval History' section, a 'Comments' section with a text box containing 'Please change the accounting details.', and a 'Send Back' button highlighted with a red circle and the number '2'. Other buttons include 'Approve' and 'Hold'. The 'Expense Line' section is also visible at the bottom.

Step 3: To complete sending the form back, click the **OK** button on the **Submit Confirmation** page.



When a transaction is sent back for modifications, the Proxy will see the comment.

Note: Pending status indicates the transaction can be modified and submitted again for approval.



XII. Hold an Expense Transaction

Holding an expense report claims the transaction for the approver. If a pool of approvers exists, each of whom can approve a transaction, placing the transaction on hold means that only the holding user can take action on the transaction. The following steps walk you through this procedure; they pick up at the point in which you have opened a submitted report from your email and/or worklist.

Step 1: Click in the **Comment** textbox at the bottom of the report and. The purpose of this is to inform the Proxy why the transaction is being held.

Step 2: Click the **Hold** button.

Approve Expense Report - Expense Summary

JOANNE CALLAHAN

Business Purpose: Employee Travel
Description: HEUG Conf. in Boston
Reference: [blank]

Report: 000000330 Submitted for Approval
Created: 10/16/2017 JESSICA KLIMA
Last Updated: 10/16/2017 JOANNE CALLAHAN
Authorization ID: 000000141

Budget Status: Valid Budget Options: [blank]

Totals		View Analytics		Notes		Attachments	
Employee Expenses (3 Lines)	820.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD	Supplier Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD				
Amount Due to Employee		820.00 USD		Amount Due to Supplier		0.00 USD	

Approval History

Comments

Checking for budget availability.

Approve Send Back Hold

Step 3: Click the **OK** button to complete the **HOLD**.

Save Confirmation

Approve Expense Report

Submit Confirmation

JOANNE CALLAHAN Report ID: 000000330

Totals		View Analytics		Notes		Attachments	
Employee Expenses (3 Lines)	820.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD	Supplier Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD				
Amount Due to Employee		820.00 USD		Amount Due to Supplier		0.00 USD	

Employee Callahan

✓ This report will be saved and held for later.
You can approve, deny, or send back this report at a later time.

Approve OK Cancel

When a transaction is held for further review, the Proxy can see that the Status has been updated to **On Hold** on the view pages.

The screenshot displays the 'View Expense Report' page for user JOANNE CALLAHAN. The report details are as follows:

Business Purpose	Employee Travel	Report	000000330	On Hold
Description	HEUG Conf. in Boston	Created	10/16/2017	JESSICA KLIMA
Reference		Last Updated	10/23/2017	JOANNE CALLAHAN
		Post State	Not Applied	

Totals

Employee Expenses (3 Lines)	820.00 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: 820.00 USD **Amount Due to Supplier: 0.00 USD**

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

Submitted On: 10/16/2017 Submitted By: JESSICA KLIMA

Approval History

Navigation: Previous in List, Next in List

When research complete, click the **Approve** button to remove the Hold allowing the transaction to move to the next level in the approval workflow.

XIII. Assign an Approver When Out of Office

Use the Alternate User section of the My System Profile page to designate an approver. In order to assign someone as an Alternate Approver they **MUST** have the approver role assigned to them.

In situations where you will be unavailable, add a user to the Alternate User ID field and enter a date range for when you are not going to be available. The system uses these dates to forward routings to the alternate user.

To designate an Approver when out of the office begin with the following navigation:

Main Menu → My System Profile

Step 1: Click in the **Alternate User ID** field and enter the name of the approver who will approve in your absence.

Step 2: Enter the date range for when you will not be available.

Step 3: Click the **Save** button.

The screenshot shows the 'My System Profile' page for Joanne Callahan. The 'Alternate User' section is highlighted with a red box and contains the following fields:

- Alternate User ID:** A search field with a red callout '1' pointing to it.
- From Date:** A date picker field with a red callout '2' pointing to it.
- To Date:** A date picker field with a red callout '2' pointing to it.

Below the 'Alternate User' section is the 'Workflow Attributes' section, which includes checkboxes for 'Email User' and 'Worklist User'. At the bottom of the page, there is a 'Save' button with a red callout '3' pointing to it.