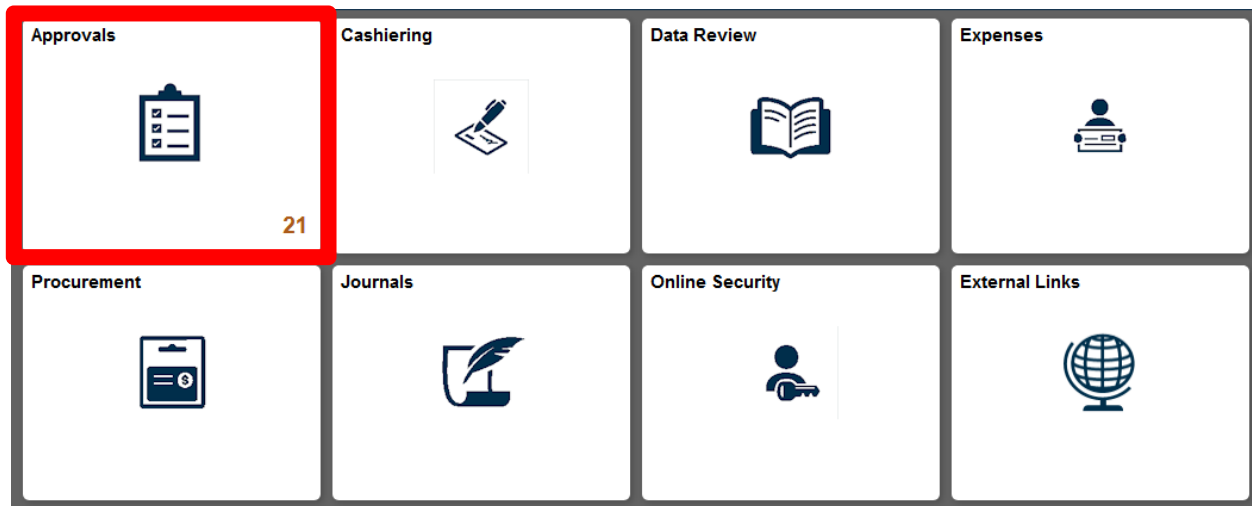


PeopleSoft - Approving a Travel & Expense Report

Concept

This business process explains how to approve a Travel & Expense Report.

Approval will be emailed to an Approver and can be accessed via the link in the **approval email** or through the **approval tile**.



1. If using the tile, select the report from the list.

The screenshot shows an 'Expense Report' interface for David Elliott. At the top, there are navigation icons and a search bar. Below the header, the report details are displayed: Name: David Elliott, Report ID: 000202160, Submitted for Approval. Total Due Employee: 28.75 USD, Reference. Report Description: Training, Submission Date: 08/03/20. Business Purpose: Athletic Department Travel, Updated on: 08/03/20 - 4:17 PM. Location: Domestic (USA). There are buttons for 'Approve', 'Deny', and 'More'. A checkbox indicates 'Header is pending your approval'. Below the summary, there is a 'Printer Friendly Summary' button. A section for 'Attachments and Notes' contains 'View Attachments' and 'View Notes' buttons. A 'Lines' section shows a table with one row: Date/Expense Type: 07/15/20 Mileage, Reimbursement Amount: 28.75 USD. Below the table, there is an 'Approver Comments' text area and an 'Approval Chain' button.

2. Review the basic Travel and Expense information, including Payee and description.
3. The Printer Friendly Version is available.
4. To View attachment(s) select the View Attachment Box.



5. You can review any comments that have been added in the Comment box. If no comments are provided then the box will not be displayed.



6. To view expense line details click on the expense line.

The screenshot shows the details for a 'Mileage' expense line. The amount is 28.75 USD. Below the line, there is a 'Line Detail' section with the following information: Transaction Date: 07/15/20, Expense Type: Mileage, Description: Training, Billing Action: Internal, Payment Method: Personal Out of Pocket Expense, Merchant, Location, Personal Expense: N, Receipt Verified: N. There is an 'Additional Information' section with a 'View Accounting' button.

7. To view speedtype information, select **View Accounting**.

Accounting

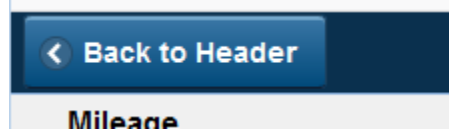
Expense Type Mileage
Amount 28.75 USD

Accounting Details

1 row

Speed Type	Amount	*GL Unit	*Account	Oper Unit	Fund	Dept	Class	Fund Affil	Event
OPR231240	28.75	CASE1	534200	231240	97600	231240	10		

8. After close the accounting information screen use the Return to Header Button to return to the main report screen.



9. To view the approval chain, select the Approval Chain Button.

Approval Chain

Expense Approval -1

▼ SHEET_ID=000202160 Pending

Start New Path

Expense Rpt Expense Apprv 1

⌚ Pending +

John Approver
Expense Report Approver List >

Pre Pay Audit

▼ SHEET_ID=000202160 Awaiting Further Approvals

Start New Path

Expense Report Pre Pay Auditor

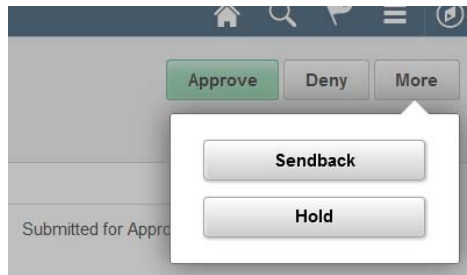
📄 Not Routed +

Multiple Approvers
Expense Report Approver List >

10. To Approve the report Select the Approve button



11. To send the report back for revision select the more button and then the send back button. Make sure comments are provided to inform the user of what needs to be corrected.



12. If needed add Approver Comments and in the approver comment box.

▼ **Payment Request Header Detail - 3**

Approver Comments

Approval Chain >

13. To view the Approval Chain select the Approval Chain box.

Approval Chain ✕

Department Approver

▼ REQUEST_ID=0000013271 Approved

Department Approver

✓ **Approved**

Reagan, Dan
CW_PR_APPR_USER_MGR1
07/15/20 11:03 AM >

Prepay Auditor

▼ REQUEST_ID=0000013271 Pending

Start New Path

Prepay Auditor

⌚ **Pending** +

Multiple Approvers
CW_PR_APPR_USER_PREPAY_AUDITOR >

14. Click the **Approve** button to approve the Payment Request.

15. Click the **Deny** button to deny the Payment Request. This will send the Payment Request back to the creator. They have the choice to update and re-submit the Payment Request or they can cancel it.

16. To put the request on hold: Click the more button and select **Hold** from the drop down list.