

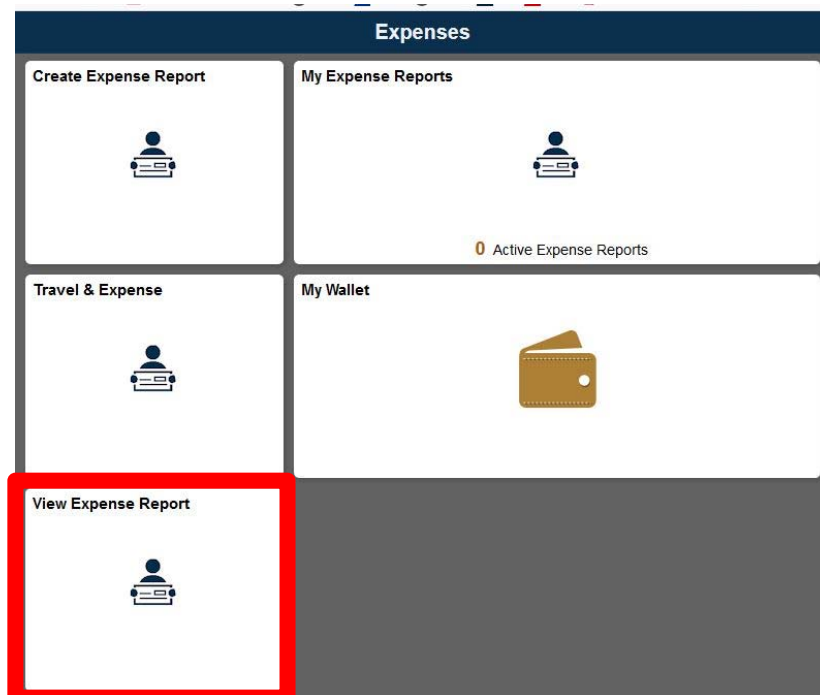
PeopleSoft – How to View a Travel & Expense Report

Concept

This business process explains how to view a travel request. A user can see the current status and the history of a report.

Procedure

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



Expense Report

Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

Search Criteria


Report ID begins with

Report Description begins with

Name begins with

EmplID begins with 

Report Status =

Creation Date = 

Case Sensitive

Search

Clear

Basic Search  Save Search Criteria

1. Users can search for expense reports by many methods:
 - a. Report ID
 - b. Report Description
 - c. Name
 - d. EMPLID
2. Users can only view reports for themselves or users that they are delegated entry individuals for.


Find an Existing Value

Search Criteria


Report ID begins with

Report Description begins with


Name begins with

EmplID begins with 

Report Status =

Creation Date = 

Case Sensitive

Search Clear Basic Search  Save Search Criteria

Search Results

View All First 1 of 1 Last

Report ID	Report Description Name	EmplID	Report Status	Creation Date
0000202161	Training	Elliott,David R 1003507	Submitted	08/03/2020

3. Select the Report to view

View Expense Report [Expense Details](#)

David Elliott Actions ... Choose an Action

Report 0000202161 Submitted for Approval
 Created 08/03/2020 David Elliott
 Last Updated 08/03/2020 David Elliott
 Post State Not Applied

Totals Printer Friendly Summary View Analytics Notes

Employee Expenses (1 Line)	57.50 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 57.50 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 Withdraw Expense Report Submitted On 08/03/2020 Submitted By David Elliott

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	David Elliott	08/03/2020 3:59:07PM

Return to Search Notify

4. User are taken to the Summary Page
5. The header at the top gives the status of the report and who created the report.
6. The **Printer Friendly Summary** is available along with any **Notes** associated with the reports.
7. Reports cannot be modified after by submitted for approval. To modify a report use the **Withdraw Expense Report** button and then the report can be modified.
8. If the report has been submitted for approval the current workflow status will be displayed.
9. To view the expense line details, select the **Expense Details** link in the upper right corner.

View Expense Report

David Elliott

Actions ...Choose an Action

Summary

Business Purpose Athletic Department Travel
Report Description Training

Report 0000202161 Submitted for Approval
Default Location Domestic (USA)

Expenses

Expand All | Collapse All

Total 57.50 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency				
07/15/2020	Mileage	Training 246 characters remaining	Personal Out of Pocket Expense	57.50	USD				
Billing Type Employee (Faculty & Staff)									
Miles	100 x 0.5750		<input checked="" type="checkbox"/> Default Rate	Exchange Rate 1.00000000					
			<input type="checkbox"/> Non-Reimbursable	Base Currency Amount 57.50	USD				
			<input type="checkbox"/> No Receipt						
Accounting Details									
General Ledger ChartFields									
Amount	Monetary Amount	Oper Unit	Speed Type	Account	Project	Event	Fund	Dept	Class
57.50	57.50	231240	OPR231240	534200			97600	231240	10

Expand All | Collapse All

Total 57.50 USD

Return to Search Previous in List Next in List Notify

- 10. The expense details will be displayed.
- 11. To expand the line details select the icon on each line.
- 12. To return to the summary page select the **Summary** link in the upper right corner.
- 13. To return to the search screen select the **Return to Search** button.