Controller's Office – Travel and Expense

Approving Expense Transactions - Traveler

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I. Objectives

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

- Access email to approve expense transactions
- Approve expense transactions (Travel Authorizations, Travel Advances, and Expense Reports)

II. Tips and Tricks

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

- Update banking information and email. Be sure to make changes when necessary.
- Make sure Email User is checked on your **My System Profile** page to receive notification that an expense transaction needs your approval.

III. Scenario

A proxy created a Travel Authorization, Expense Report, or a Travel Advance on your behalf. All expense transactions created on your behalf, require your approval before moving on to department and travel office approval.

IV. Prerequisites

Before approving expense transactions prepared on your behalf be sure to have the following:

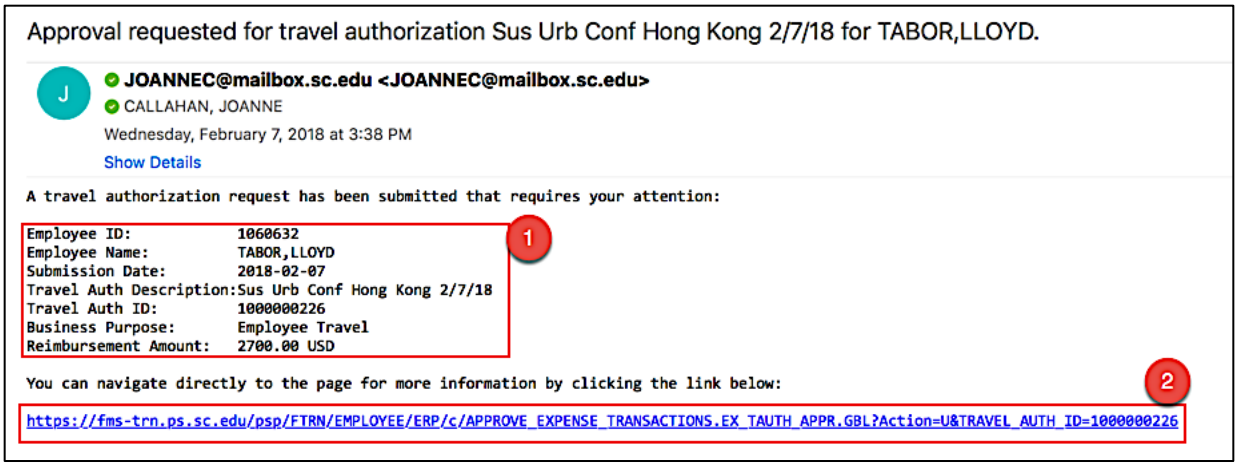
- Bank account information entered **validating** you as a traveler in PeopleSoft. Allowing you or a Proxy to create an expense transaction on their behalf.
- Email User checked on your **My System Profile** page to receive emails asking you to approve expense transactions prepared on your behalf.

V. Approving Travel Authorizations

Use email to approve a Travel Authorization created by a Proxy on your behalf.

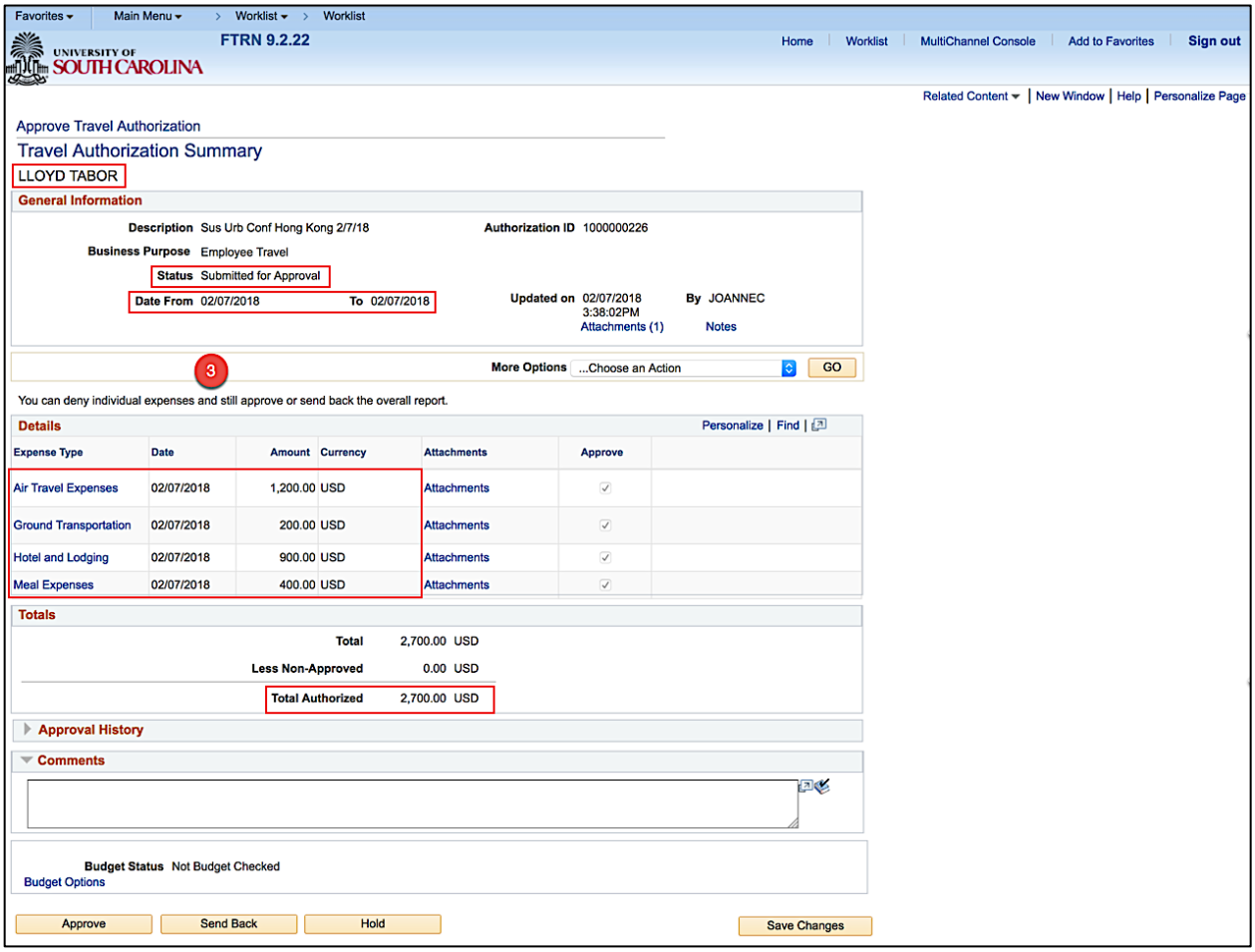
Step 1: Open and review the Approval Request in your email.

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



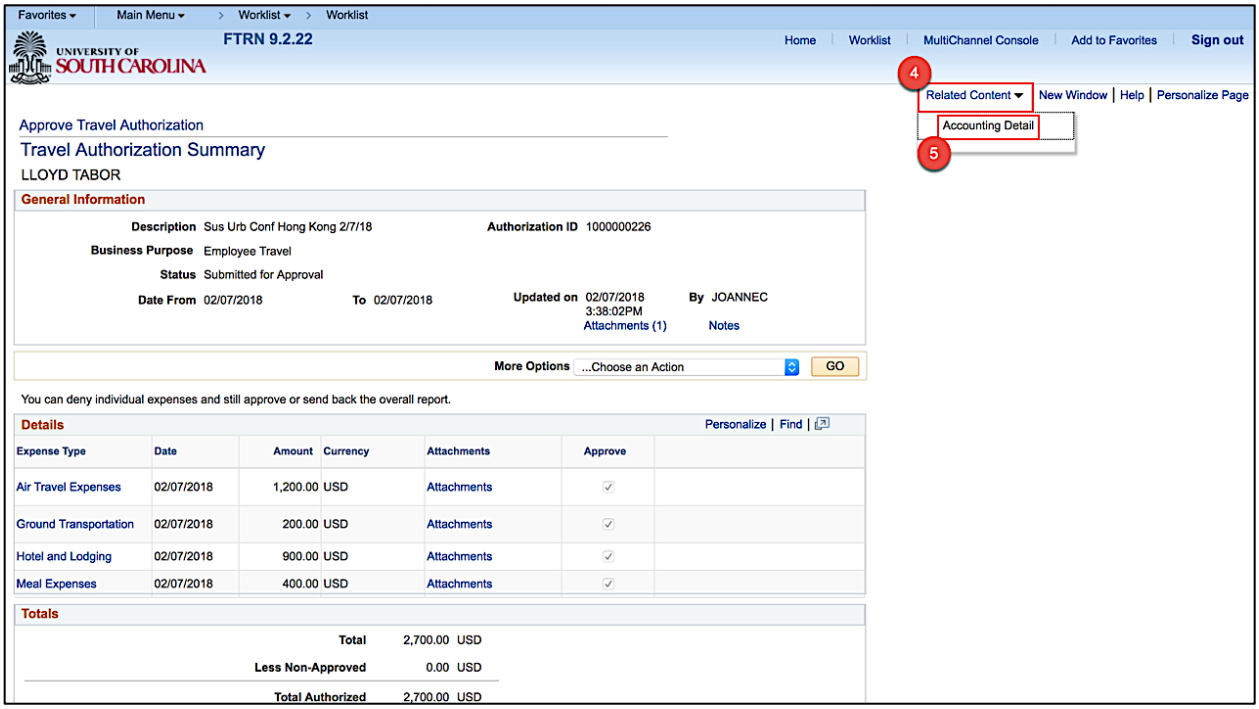
Step 3: Now you can see the details of the Travel Authorization. On this page, you can view:

- The name of the traveler
- Current status of the Travel Authorization
- Travel dates
- General Information identifying the Travel Authorization
- Details of anticipated expenses

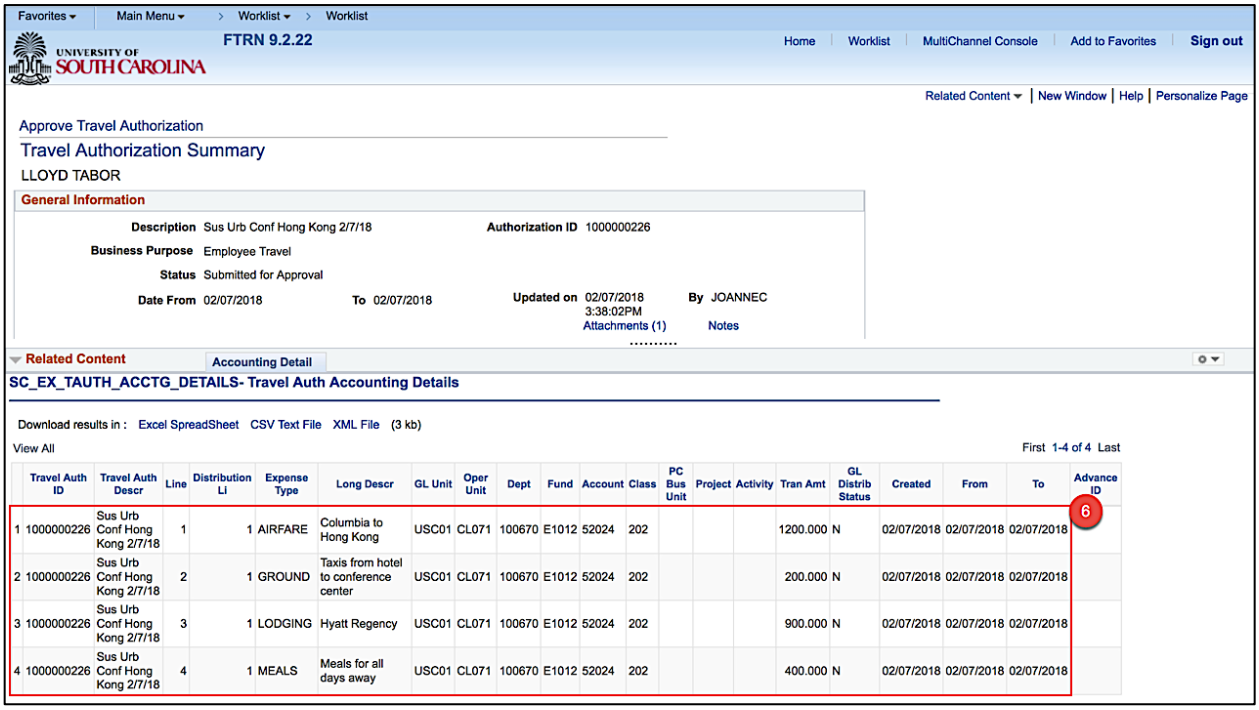


Step 4: Click the **Related Content** link to review the accounting details for this transaction.

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

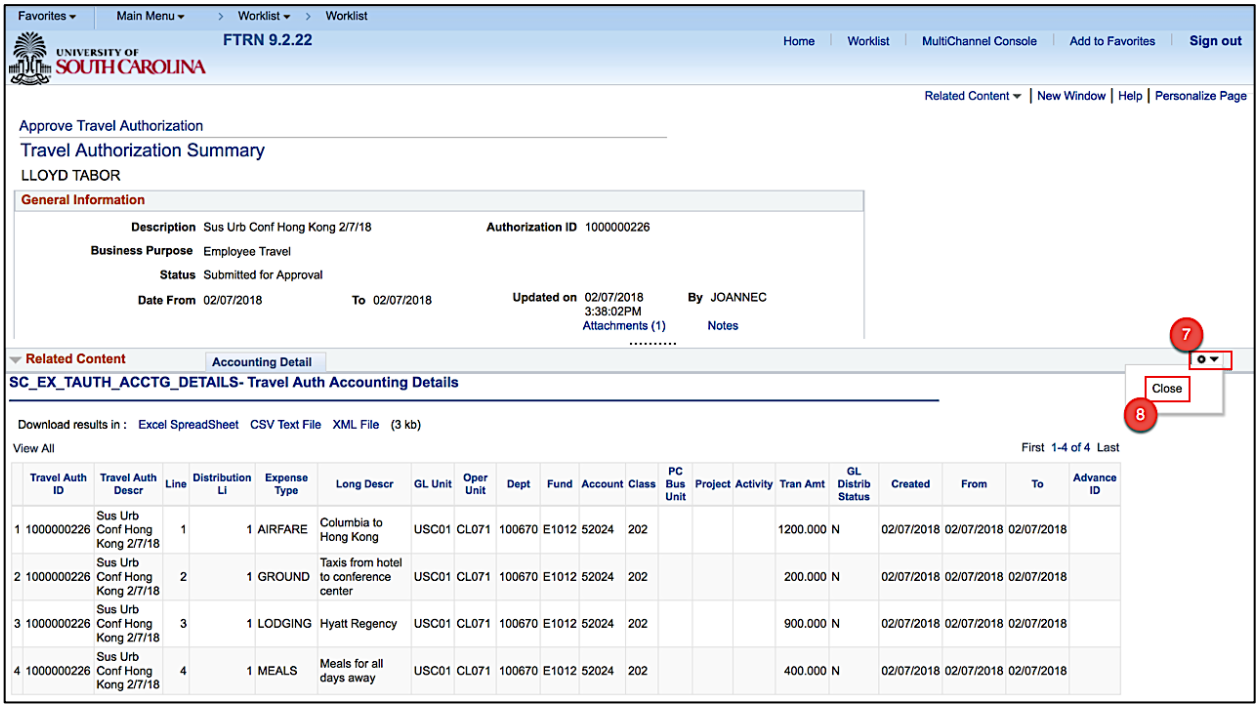


Step 6: Review the Accounting Details for this transaction.



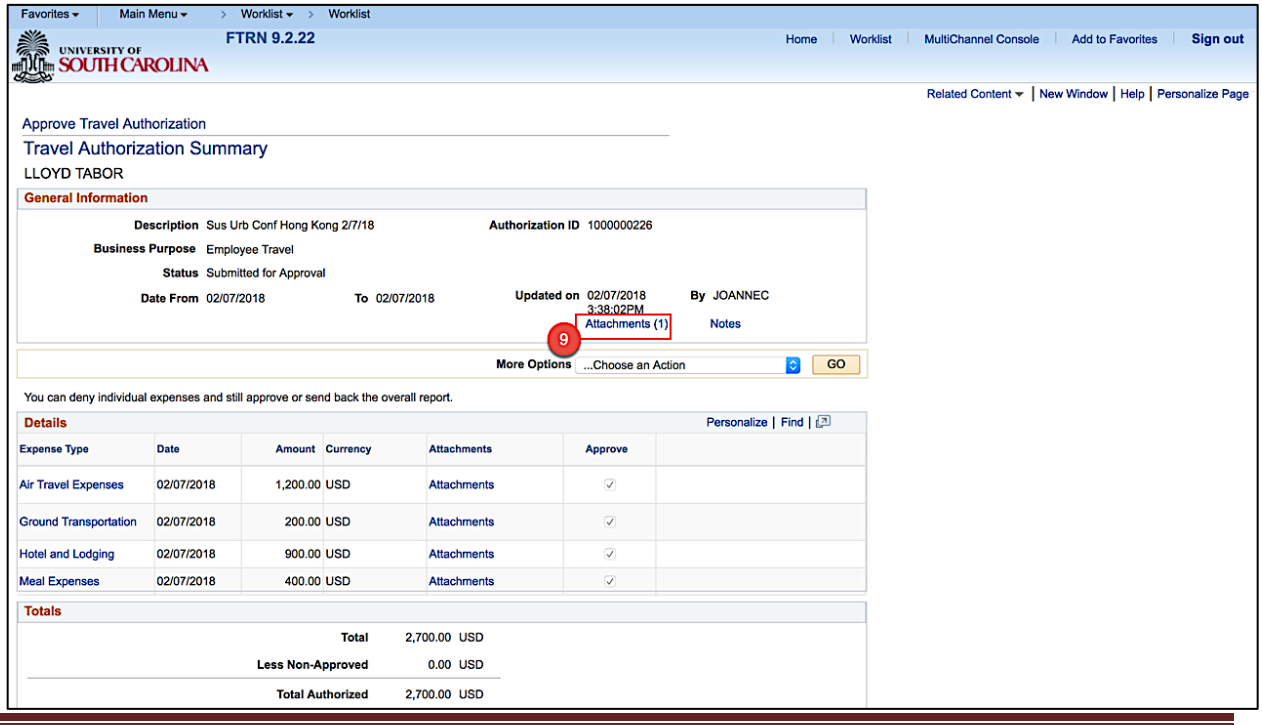
Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

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



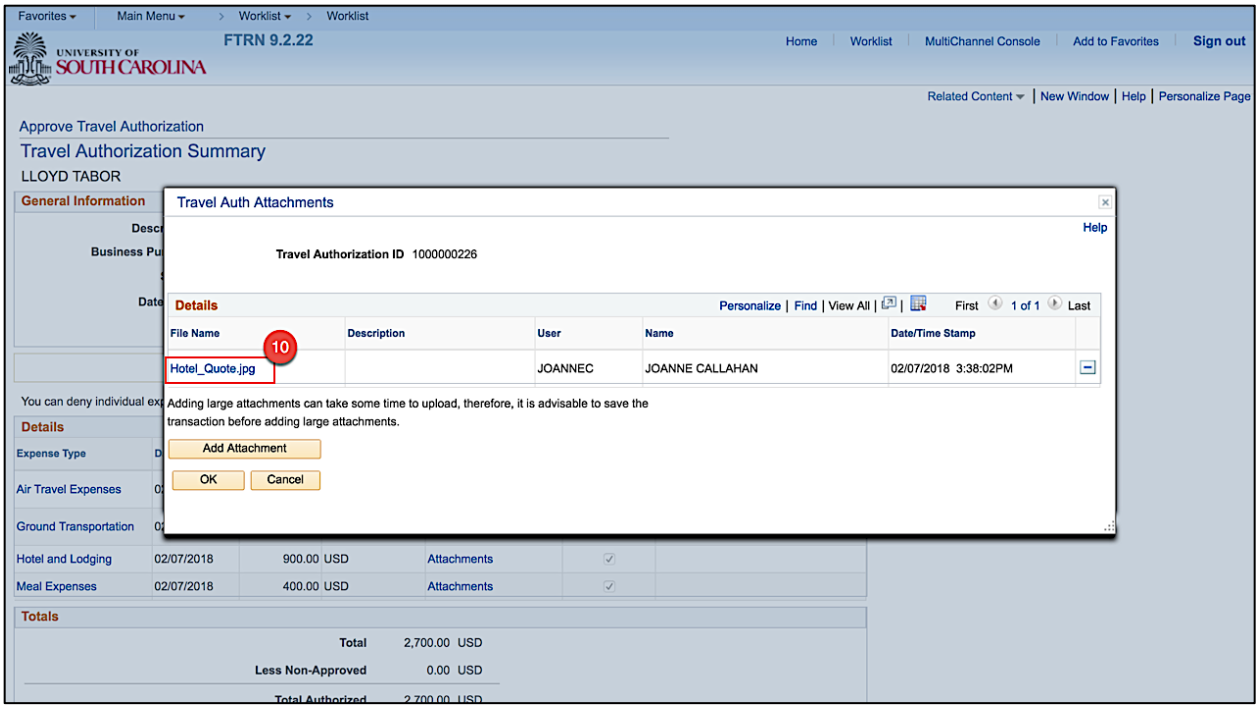
	Travel Auth ID	Travel Auth Descr	Line	Distribution Li	Expense Type	Long Descr	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	GL Distrib Status	Created	From	To	Advance ID
1	1000000226	Sus Urb Conf Hong Kong 2/7/18	1	1	AIRFARE	Columbia to Hong Kong	USC01	CL071	100670	E1012	52024	202				1200.000	N	02/07/2018	02/07/2018	02/07/2018	
2	1000000226	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	1000000226	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	1000000226	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.)

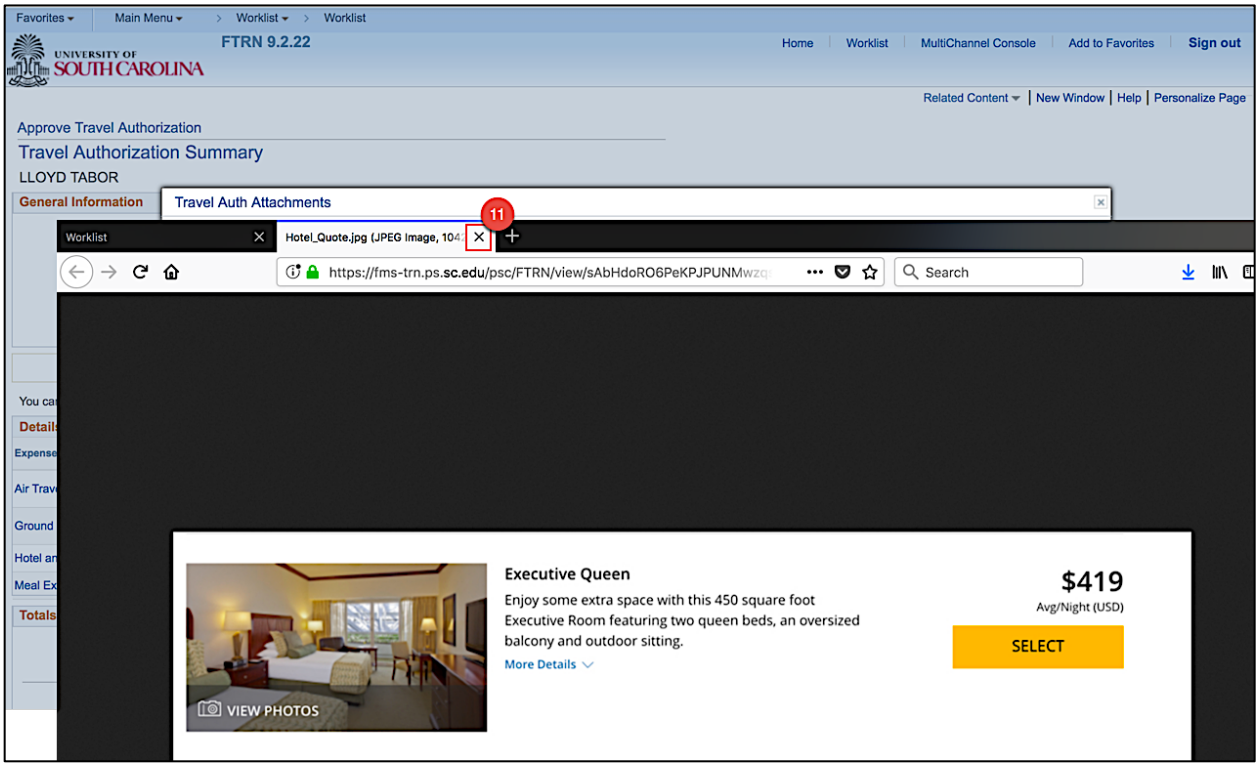


Expense Type	Date	Amount	Currency	Attachments	Approve
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	✓
Ground Transportation	02/07/2018	200.00	USD	Attachments	✓
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	✓
Meal Expenses	02/07/2018	400.00	USD	Attachments	✓

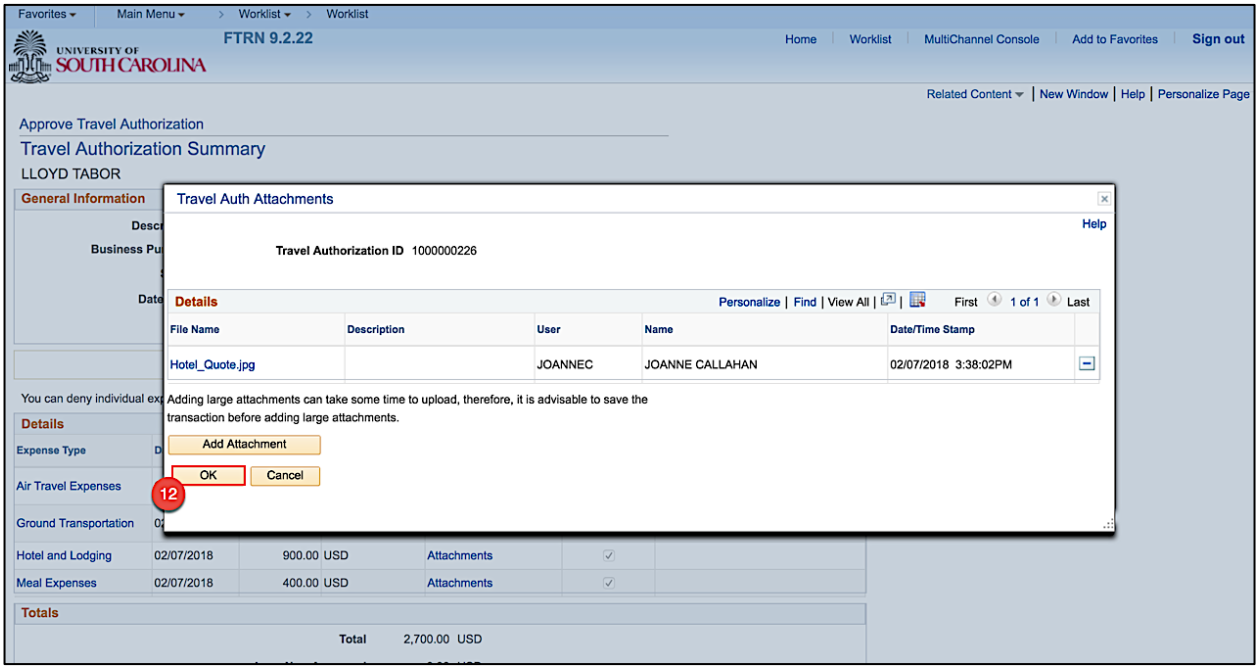
Step 10: Click the **File Name** to view.



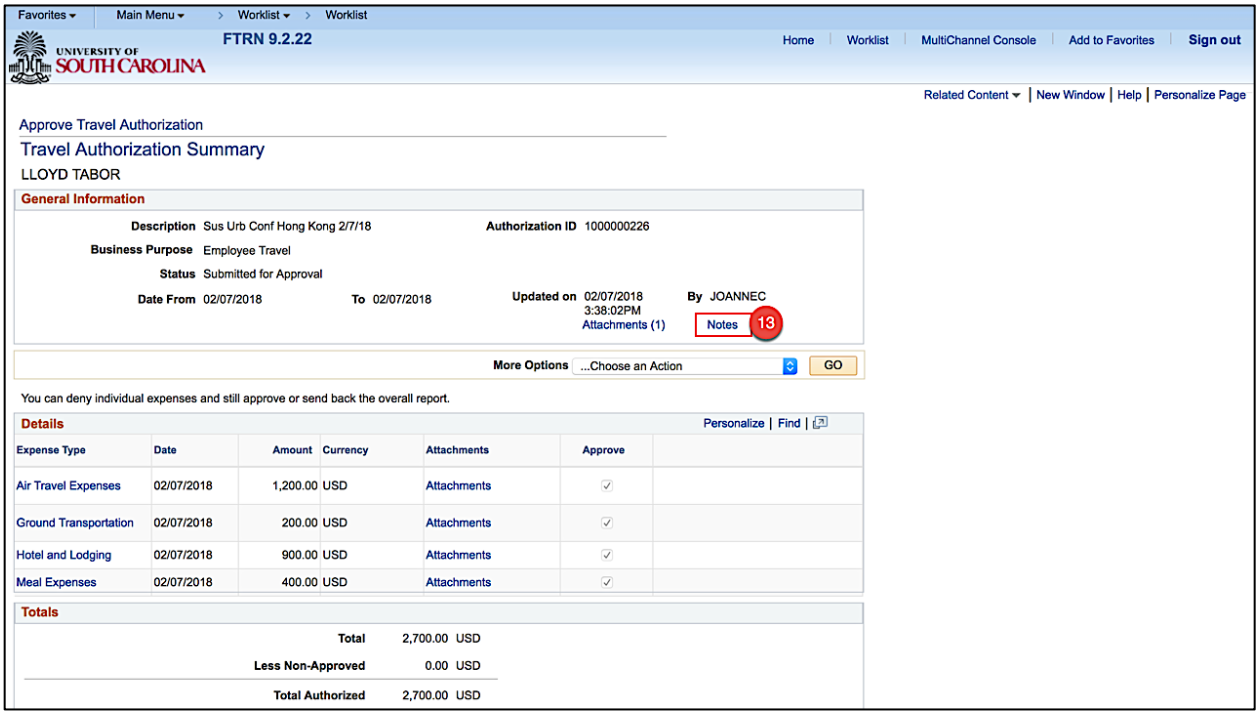
Step 11: Review the sample attachment and **close** to continue approving the Travel Authorization.



Step 12: Click **OK** to return to the Travel Authorization approval page.



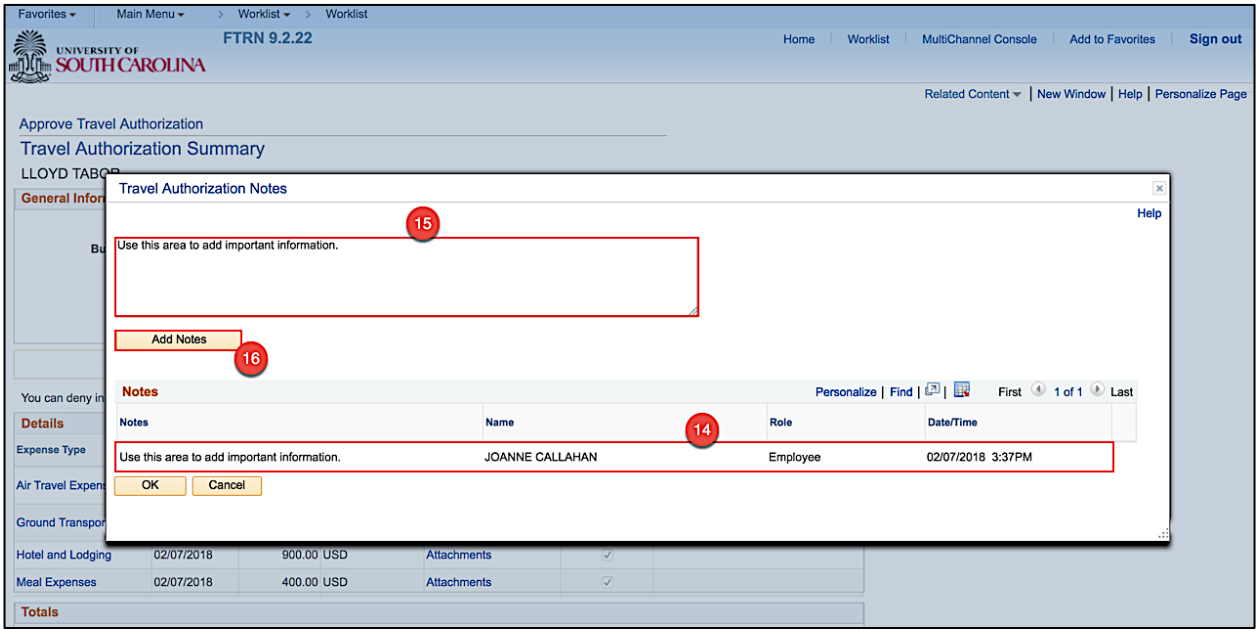
Step 13: Click the **Notes** link to view and add notes.



Step 14: Review any notes already added by the proxy.

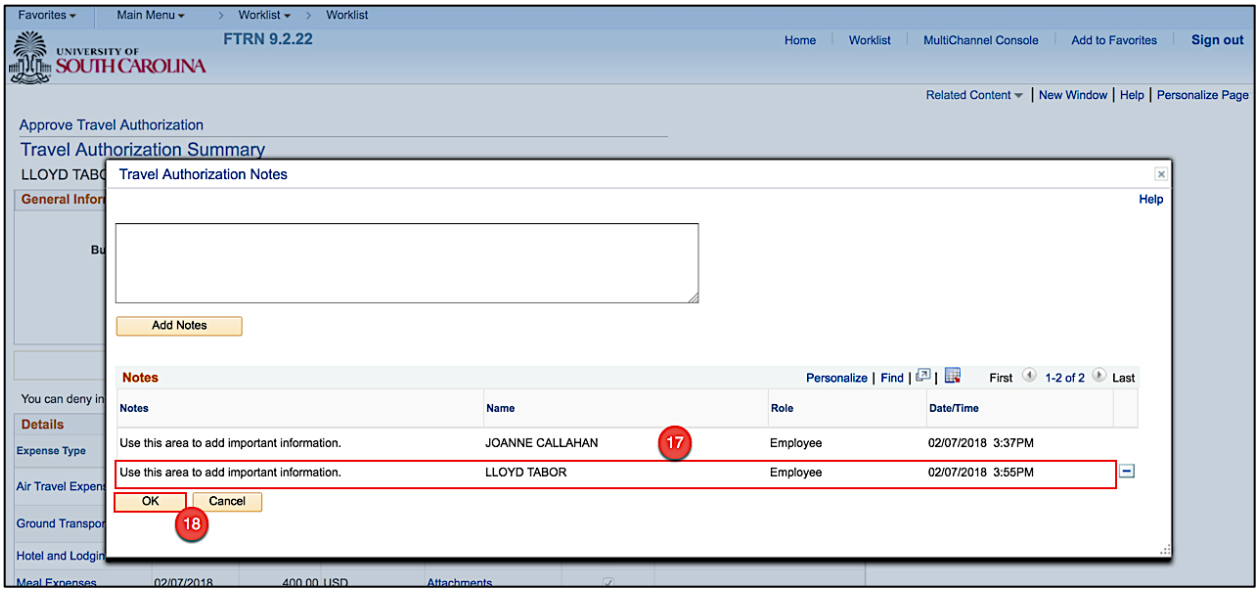
Step 15: Click in the **Text field** to add a new note.

Step 16: Click the **Add Notes** button.

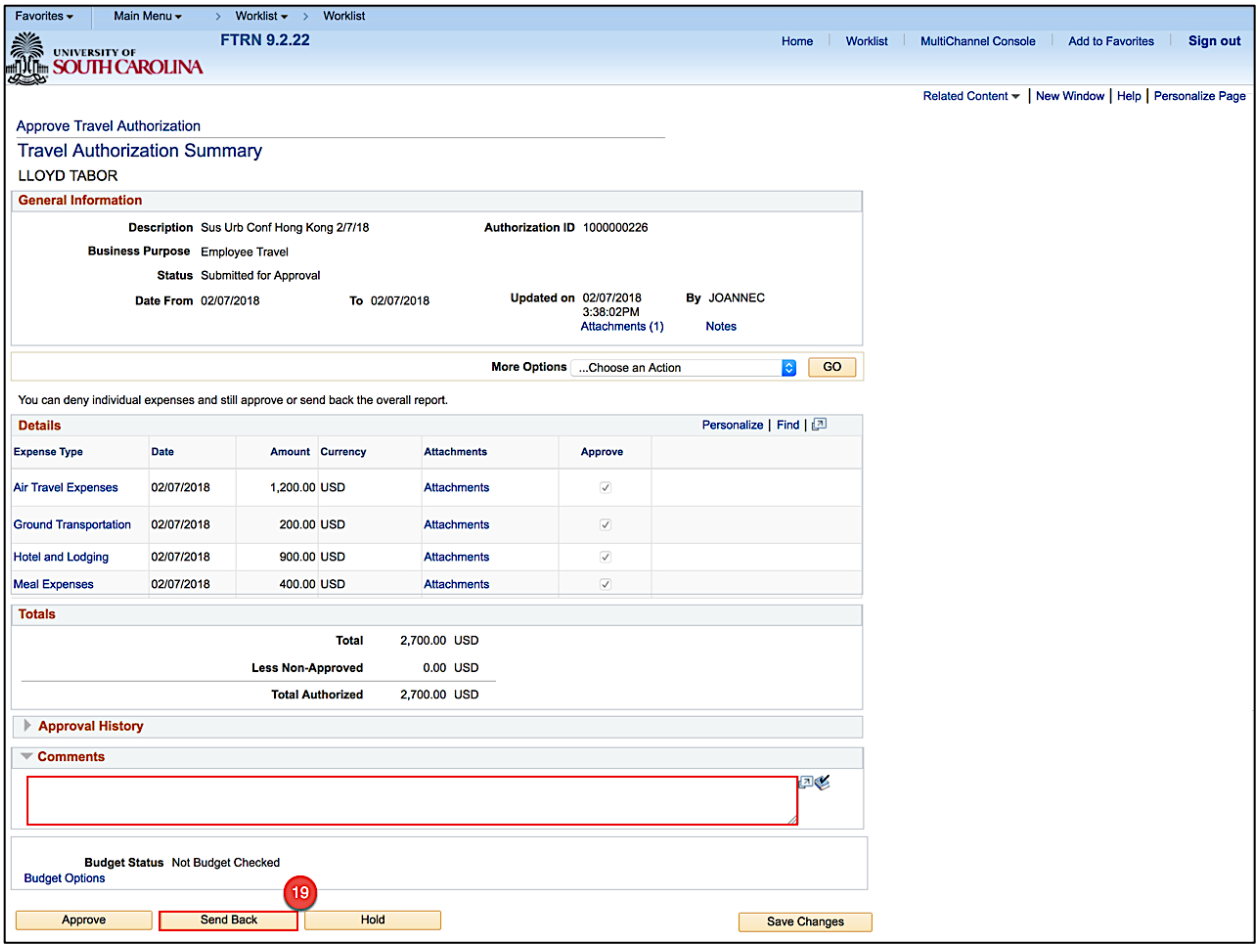


Step 17: Notice the note is added.

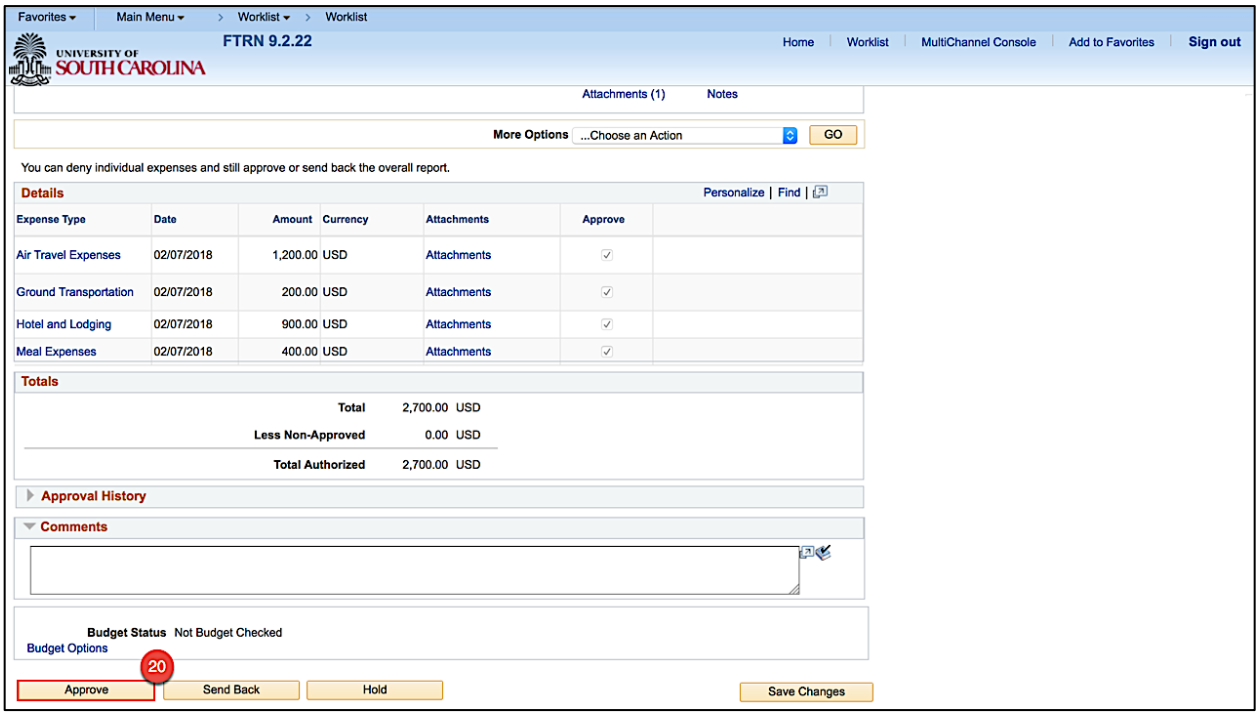
Step 18: Click the **OK** button to return to the Travel Authorization approval page.



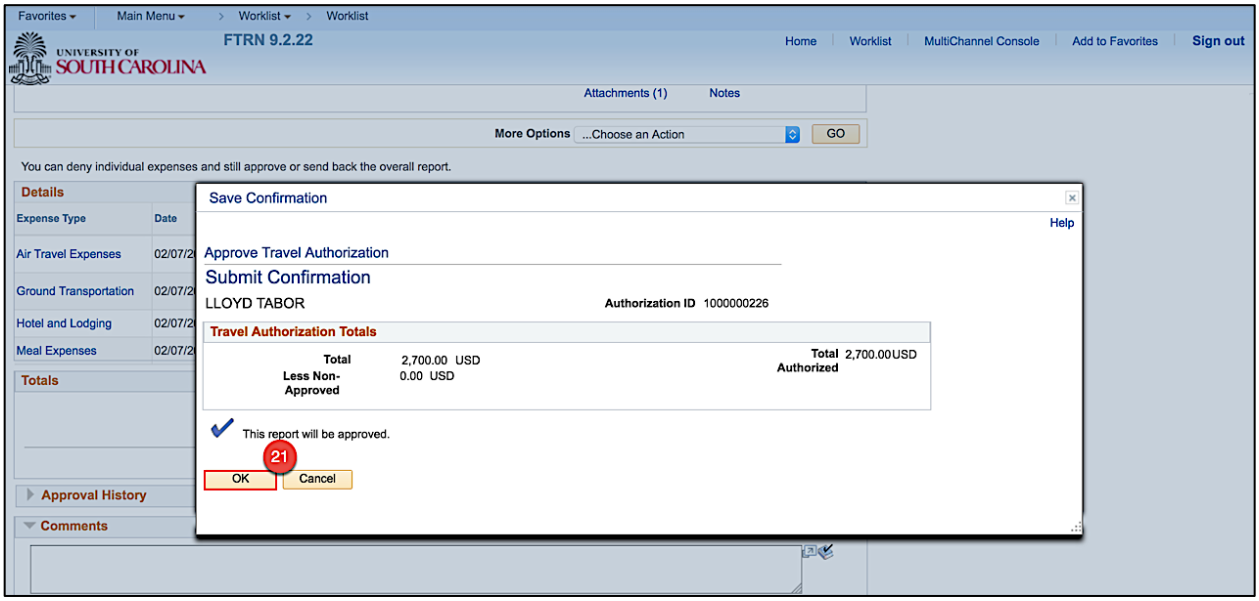
Step 19: If you feel the transaction needs to be sent back to the Proxy for modifications, click the **Send Back** button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.



Step 20: Once you have reviewed the transaction, click **Approve** button.



Step 21: Click the **OK** button to confirm the approval.



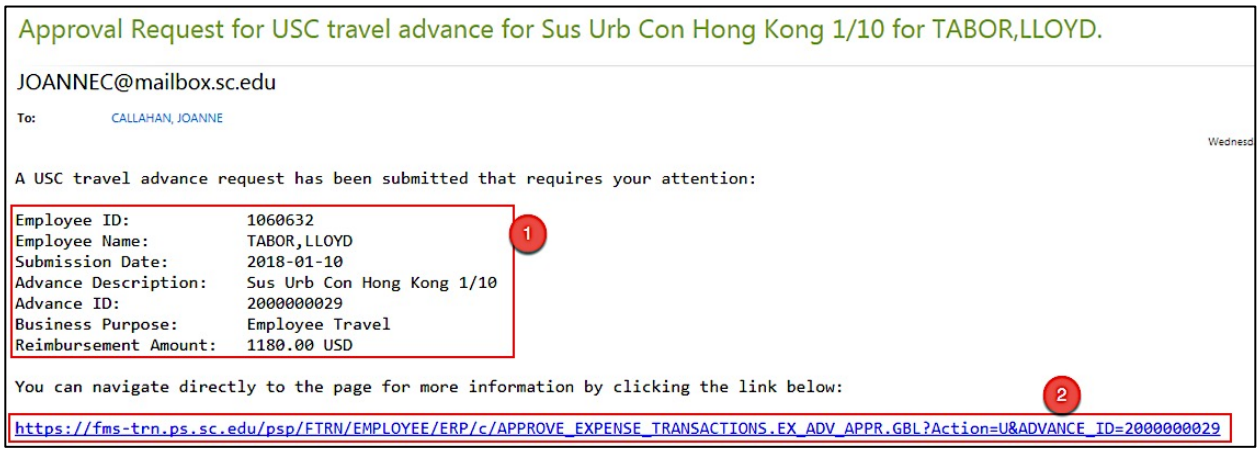
Now that you have approved the Travel Authorization, it is ready to move through workflow for final approval.

VI. Approving Travel Advances

Use email to approve a Travel Advance created by a Proxy on your behalf.

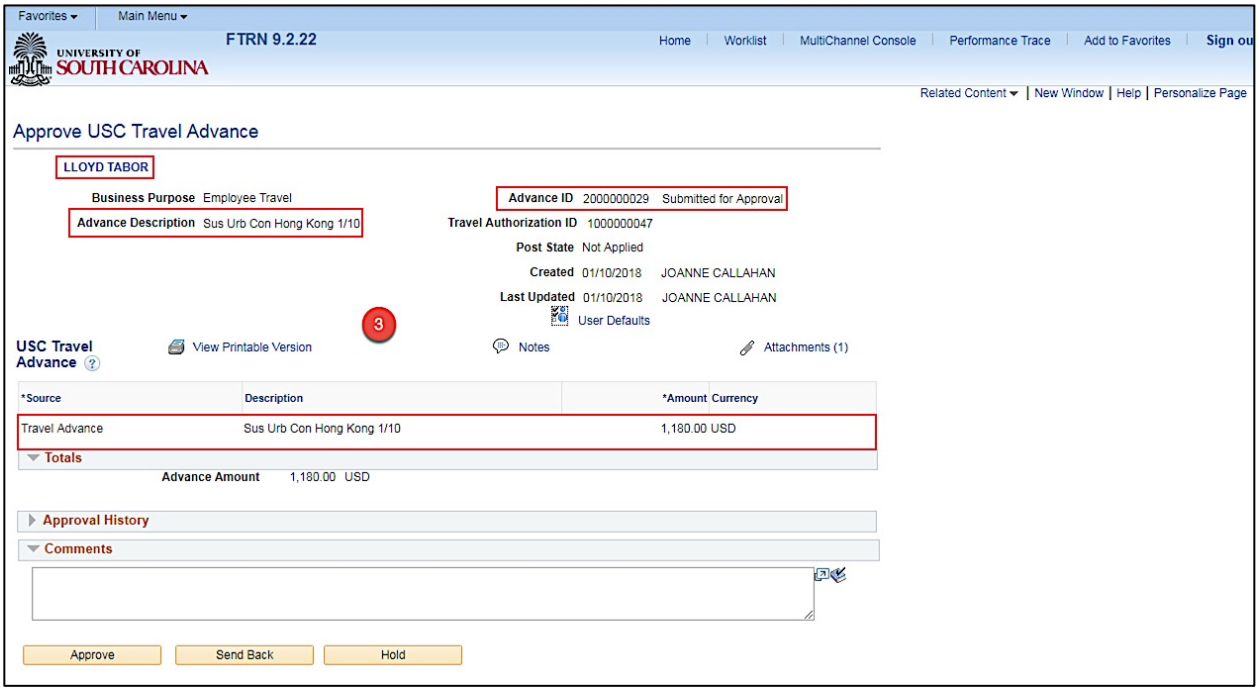
Step 1: Open and review the Approval Request in your email.

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



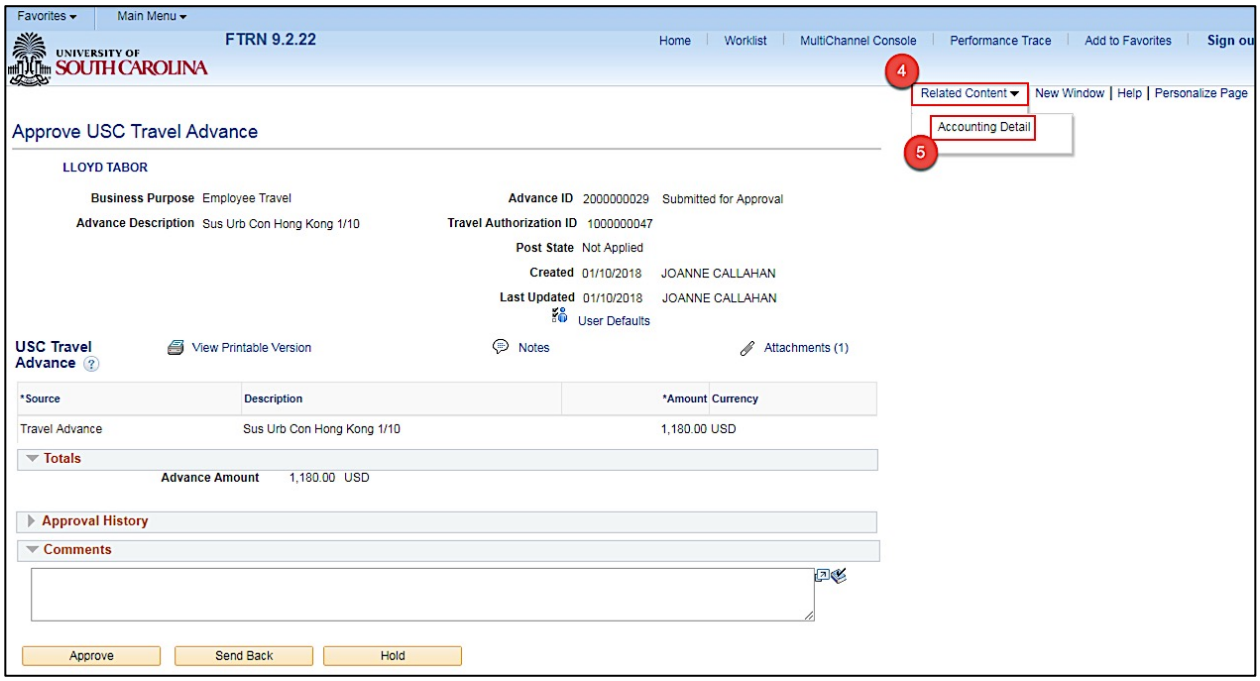
Step 3: Now you can see the details of the Travel Advance. On this page, you can view:

- The name of the traveler
- Advance description
- Travel Authorization ID and status
- Travel Advance details

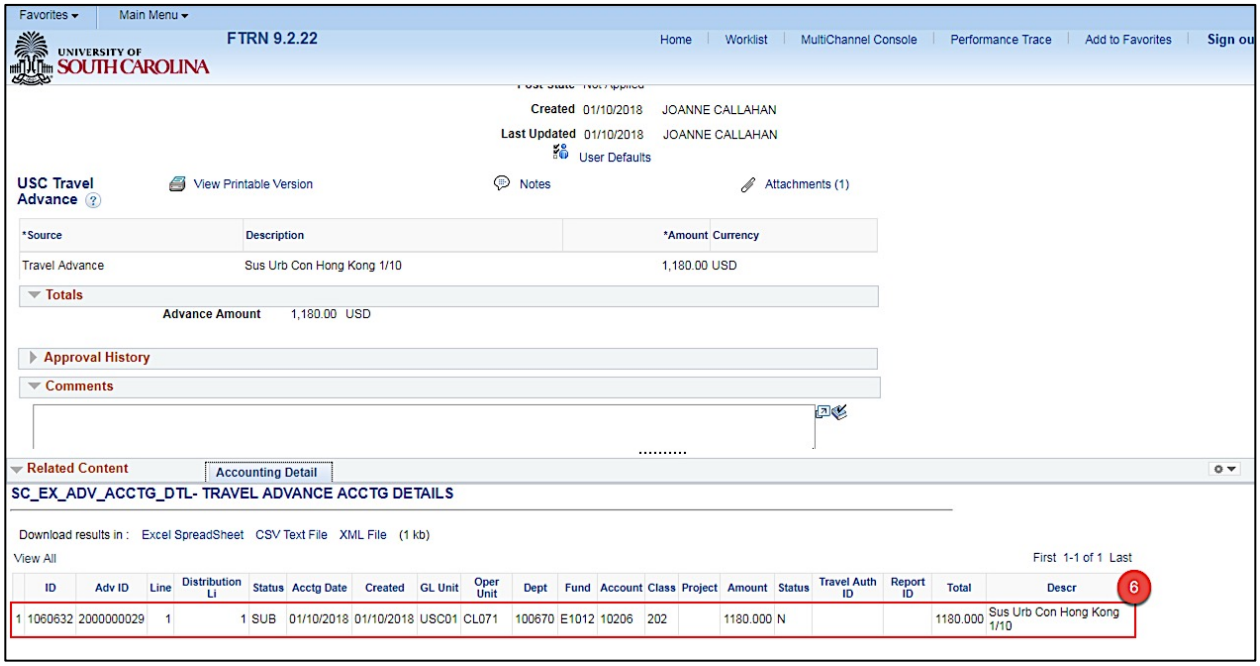


Step 4: Click the **Related Content** link to review the accounting details for this transaction.

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

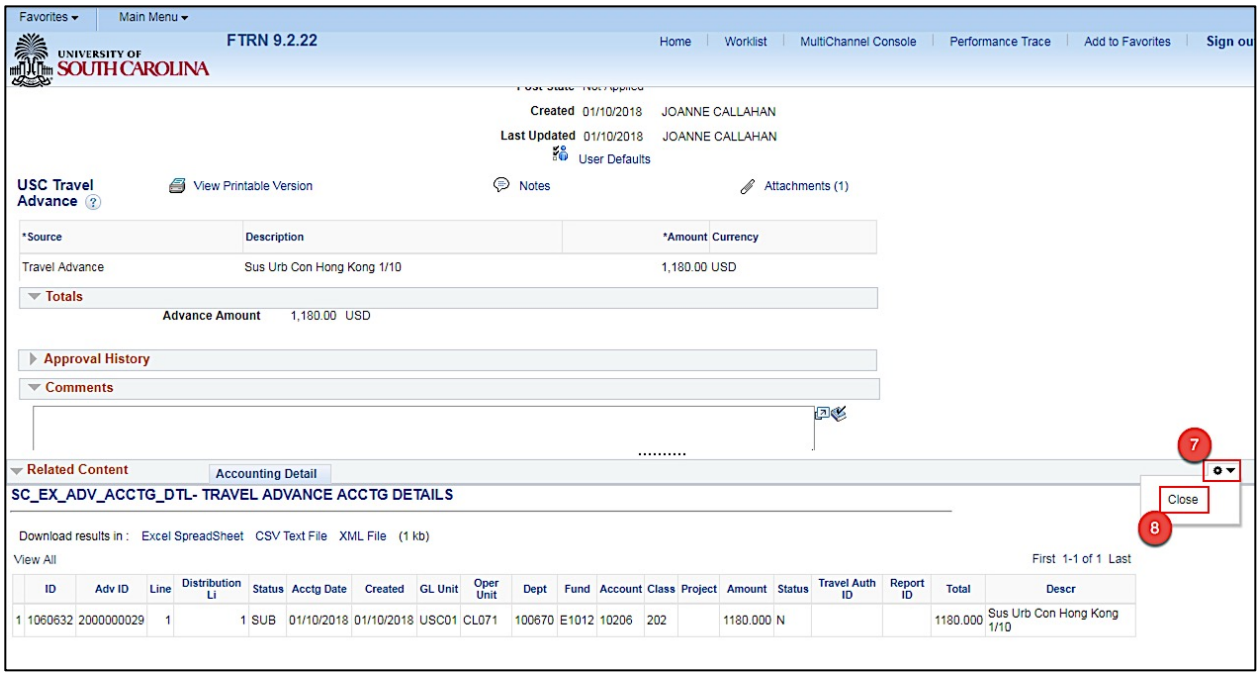


Step 6: Review the Accounting Details for this transaction.

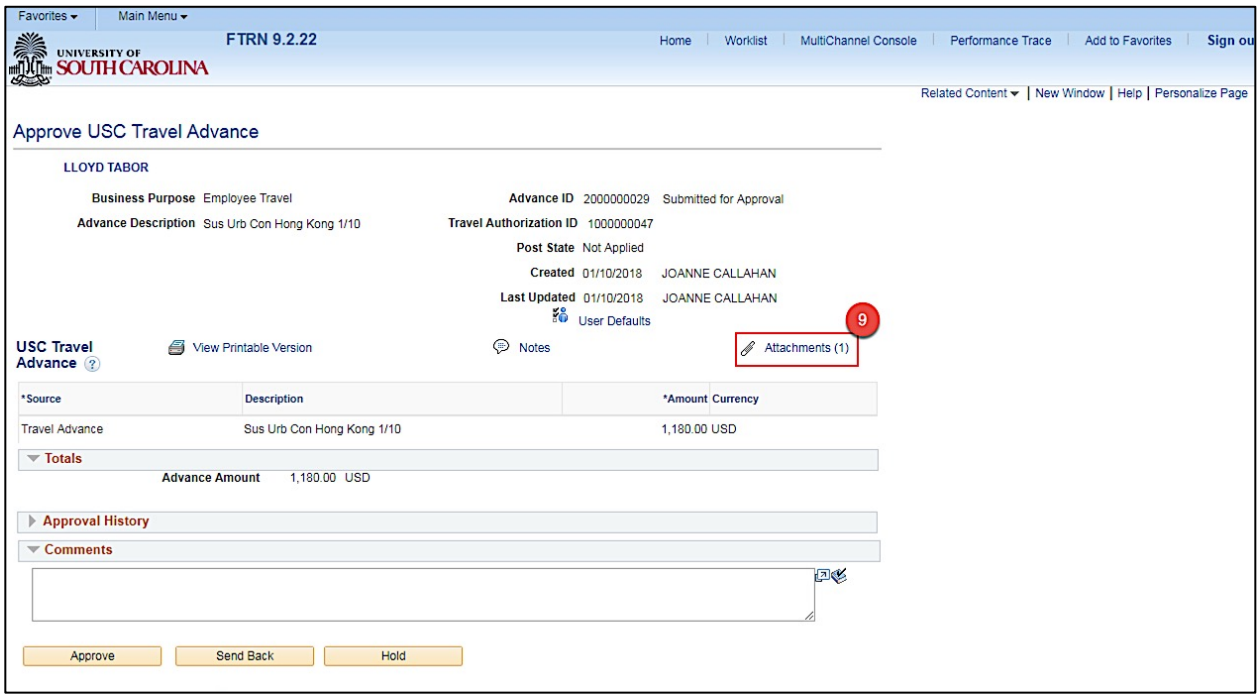


Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

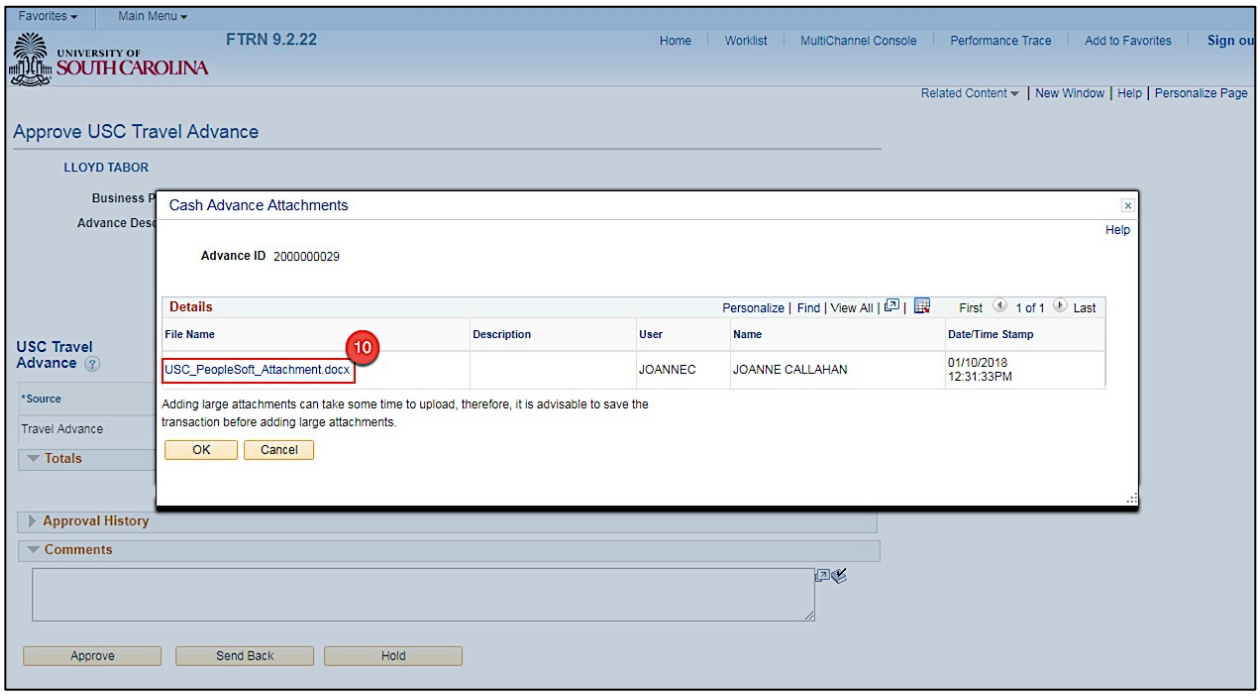
Step 8: Click the **Close** option.



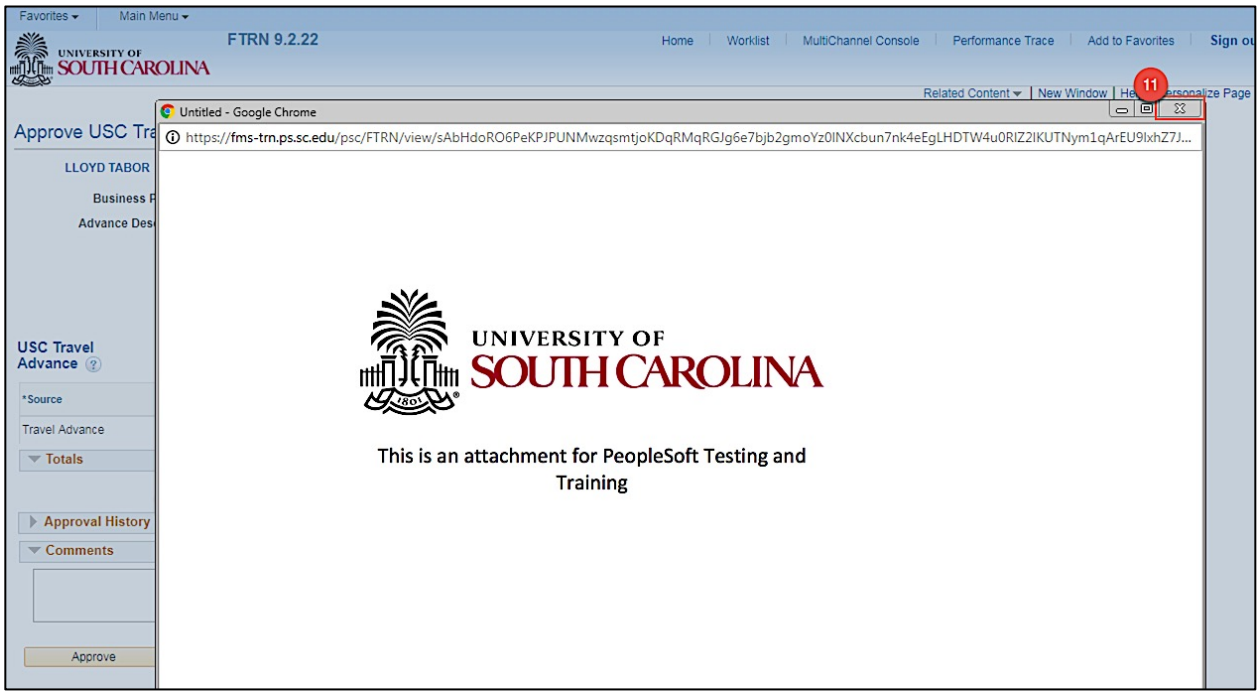
Step 9: To view all important documentation, click the **Attachments** link.



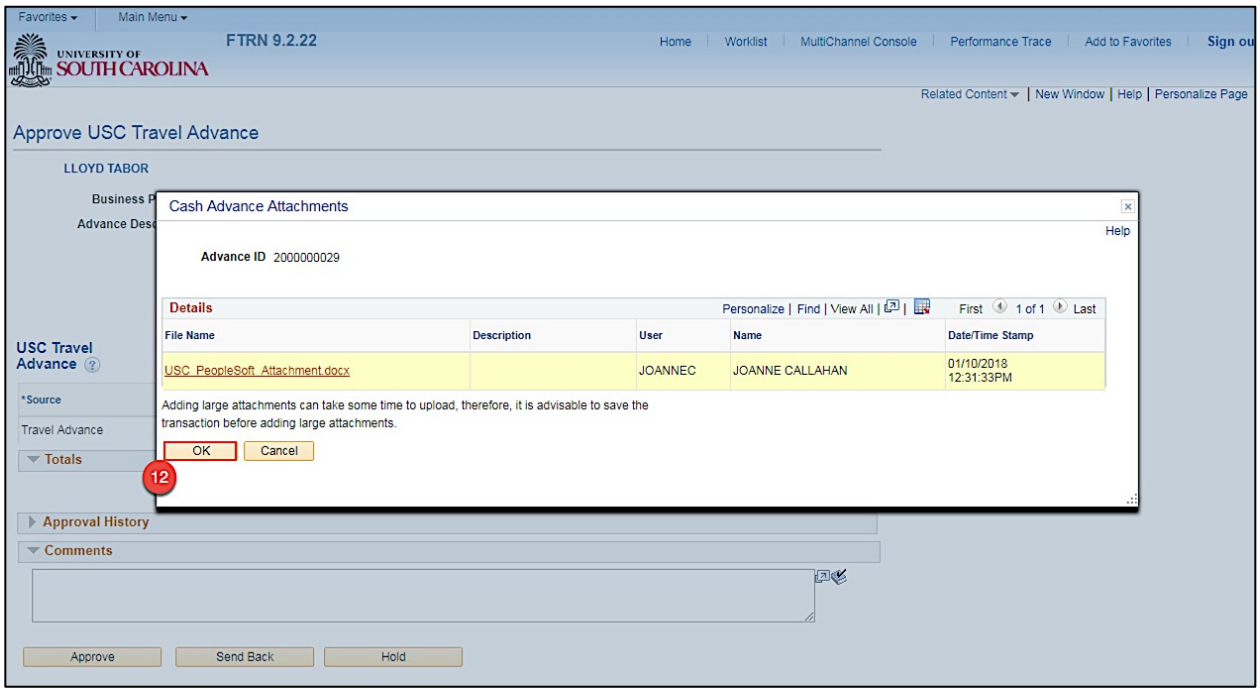
Step 10: Click the **File Name** to view.



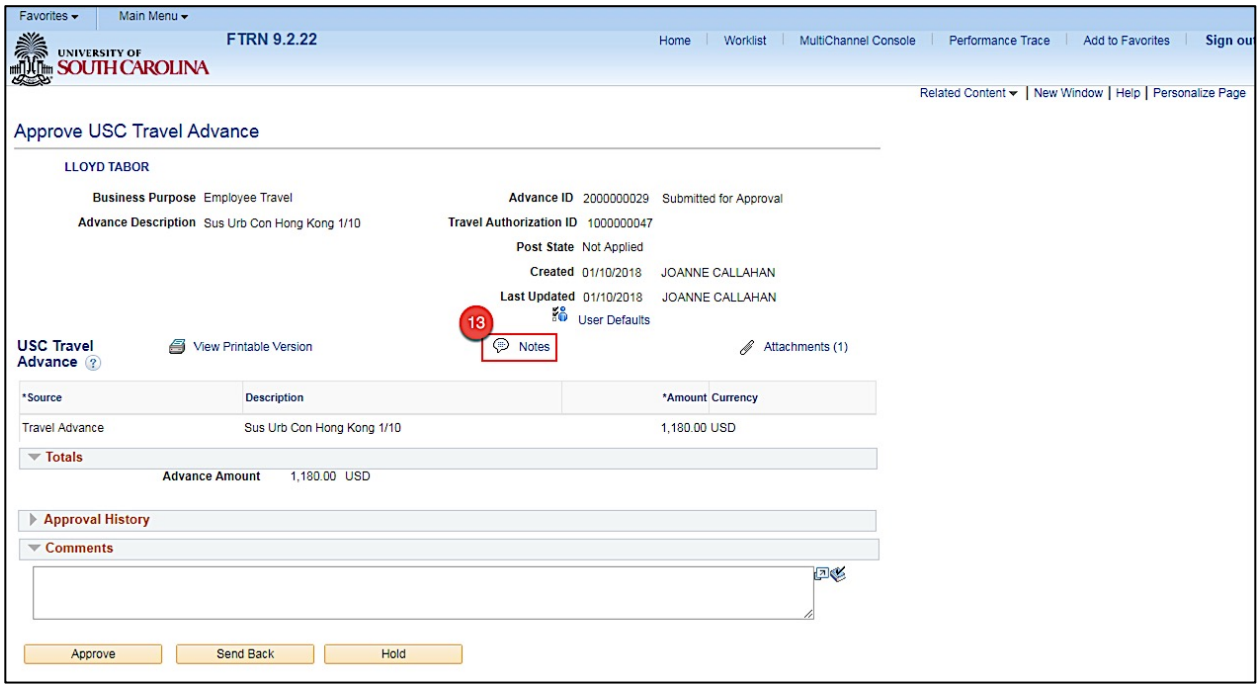
Step 11: Review the sample attachment and close the attachment.



Step 12: Click **OK** to return to the Travel Advance approval page.



Step 13: Click the **Notes** link to view and add notes.



Step 14: Review any notes already added by the proxy or other approvers.

Step 15: Click in the **Text field** to add a new note.

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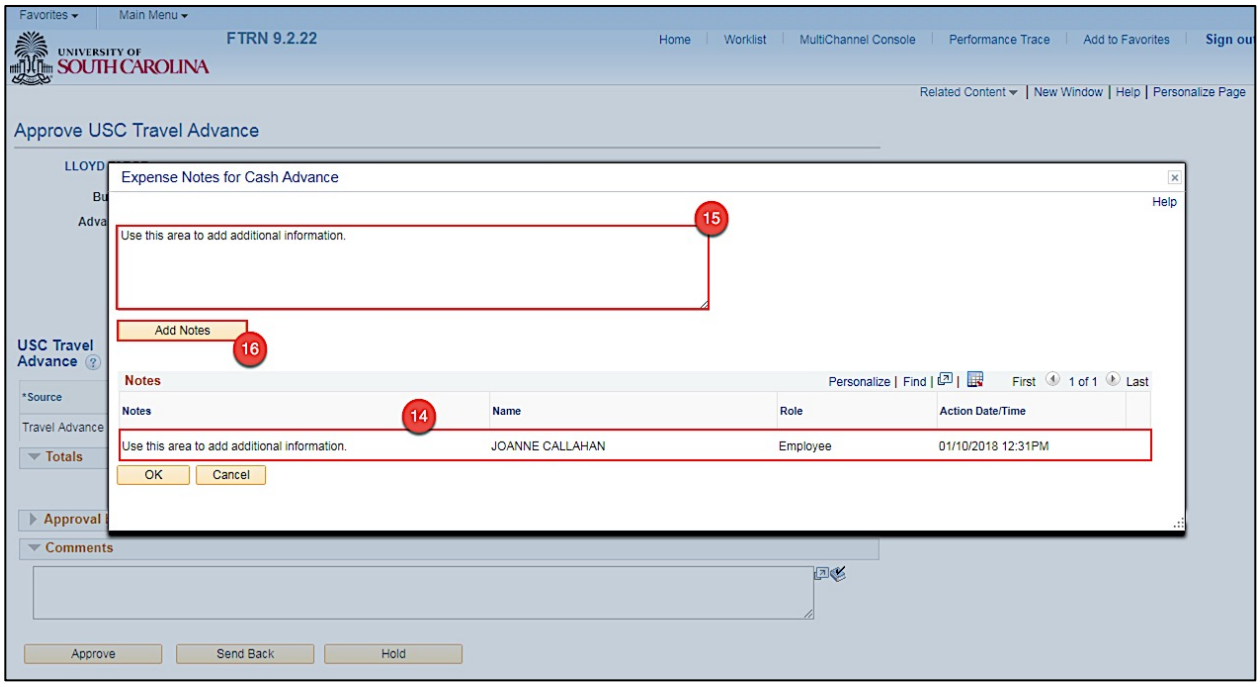
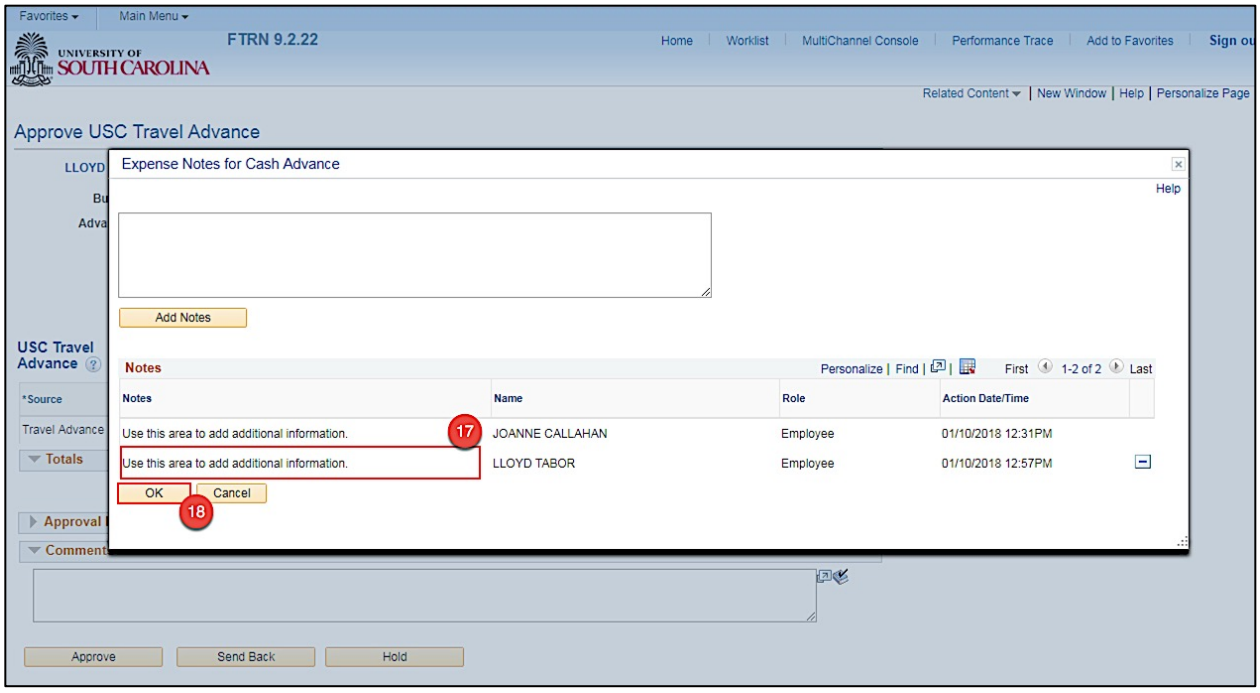
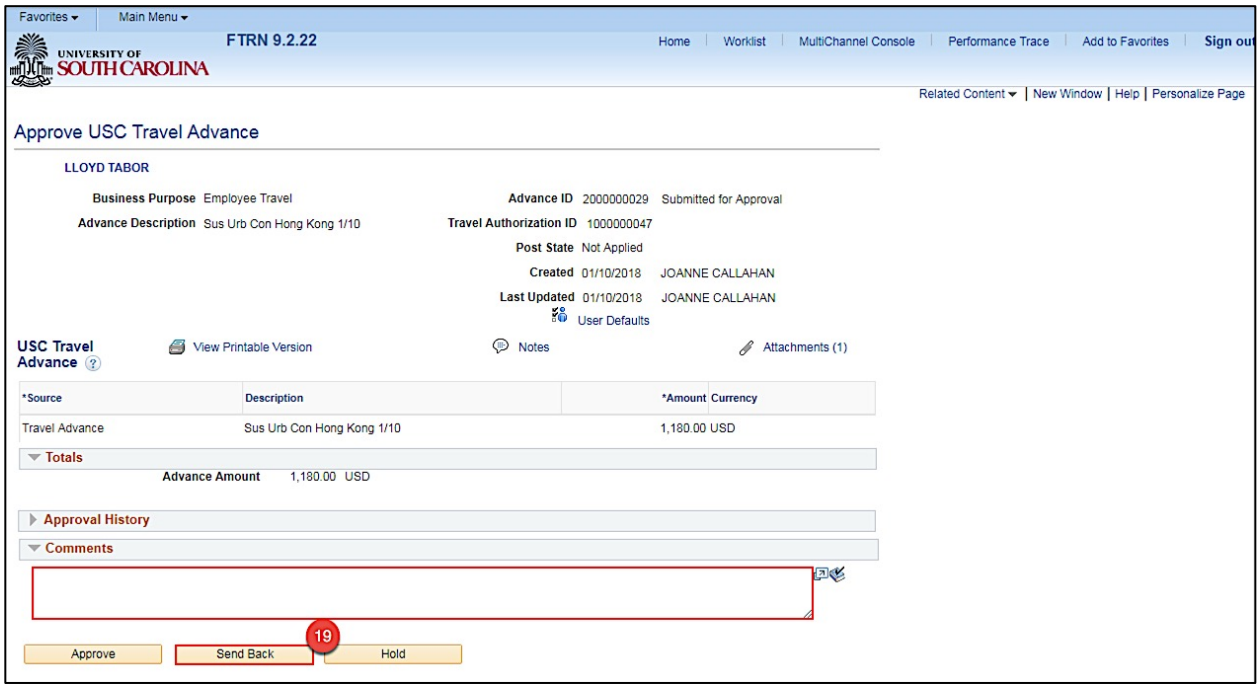


Step 17: Notice the note is added.

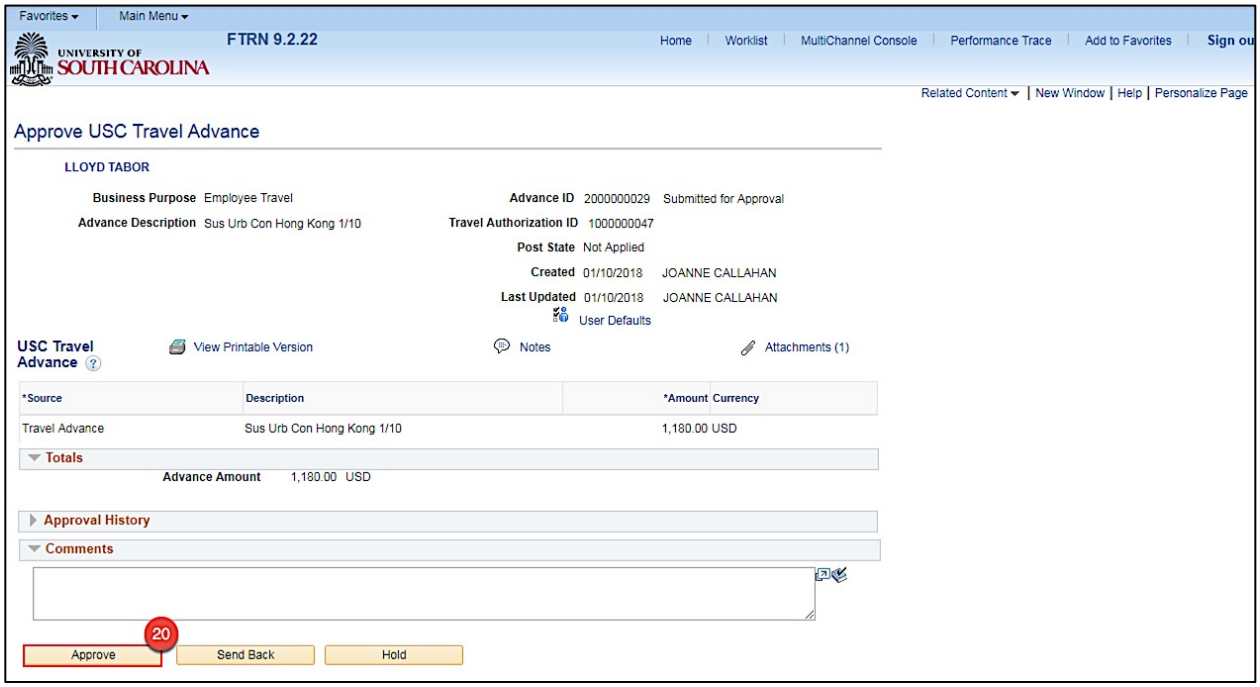
Step 18: Click the **OK** button to return to the Travel Advance approval page.



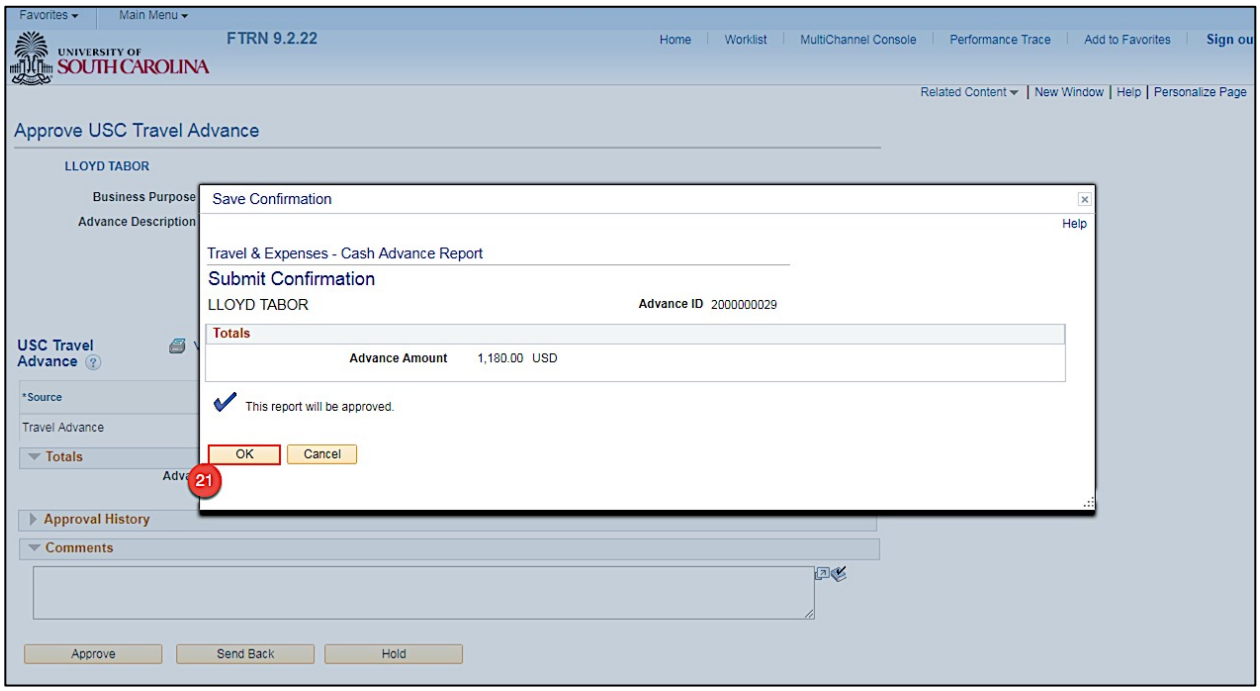
Step 19: If you feel the transaction needs to be sent back to the Proxy for modifications, click the **Send Back** button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.



Step 20: Once you have reviewed the transactions, click **Approve** button.



Step 21: Click the **OK** button to confirm the approval.



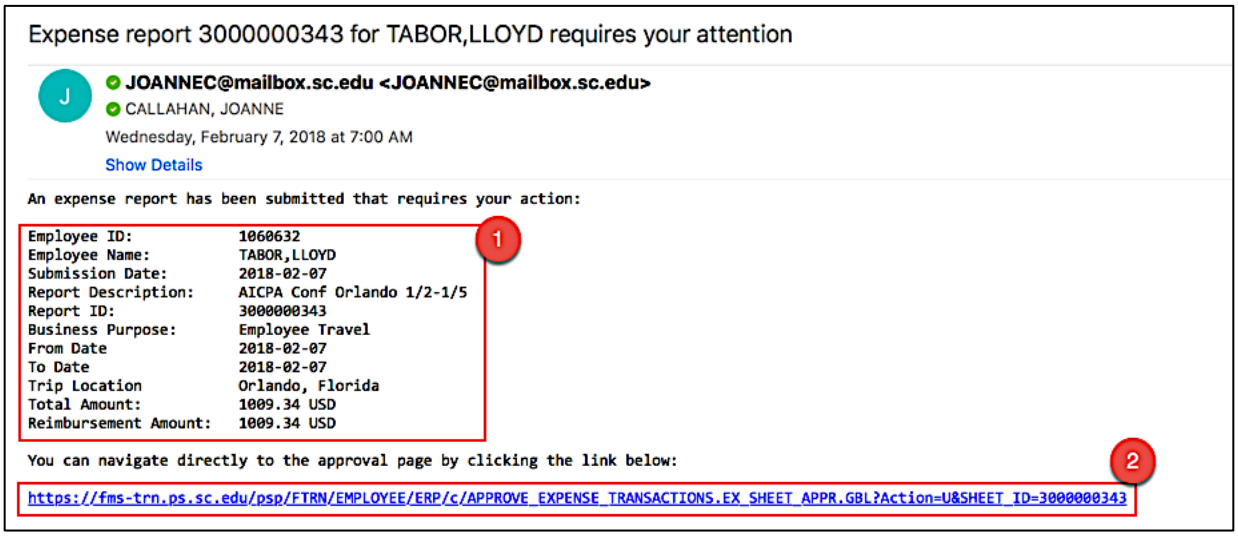
Now that you have approved the Travel Advance, it is ready to move through workflow for final approval.

VII. Approving Expense Reports

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

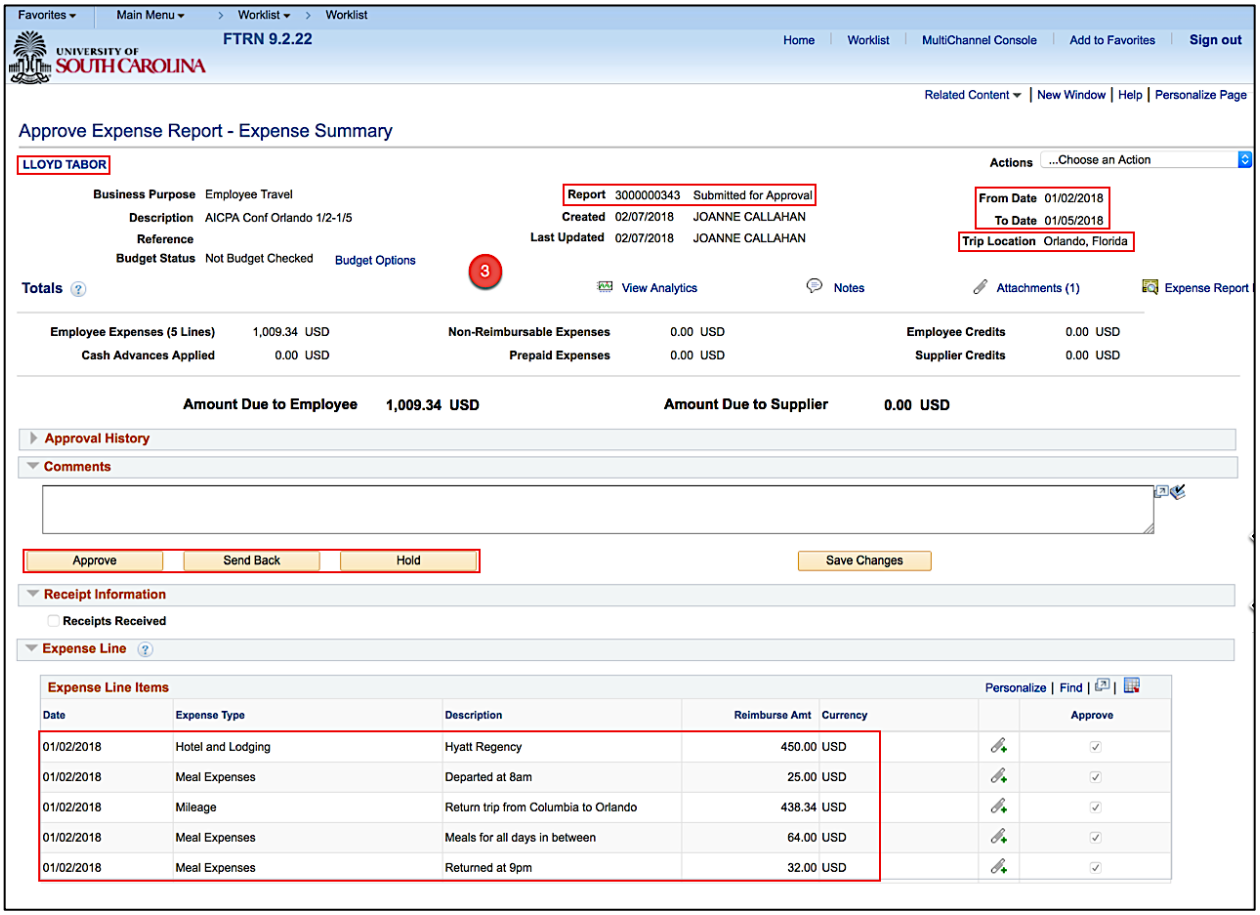
Step 1: Open and review the Approval Request in your email.

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



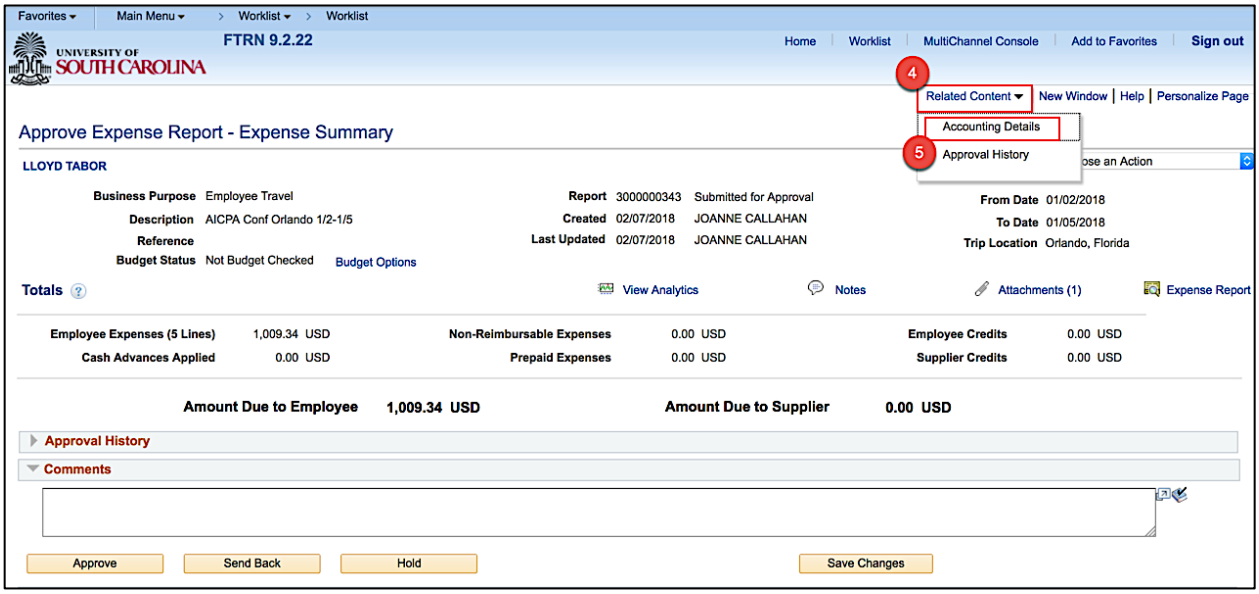
Step 3: Now you can see the details of the Expense Report. On this page, you can view:

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

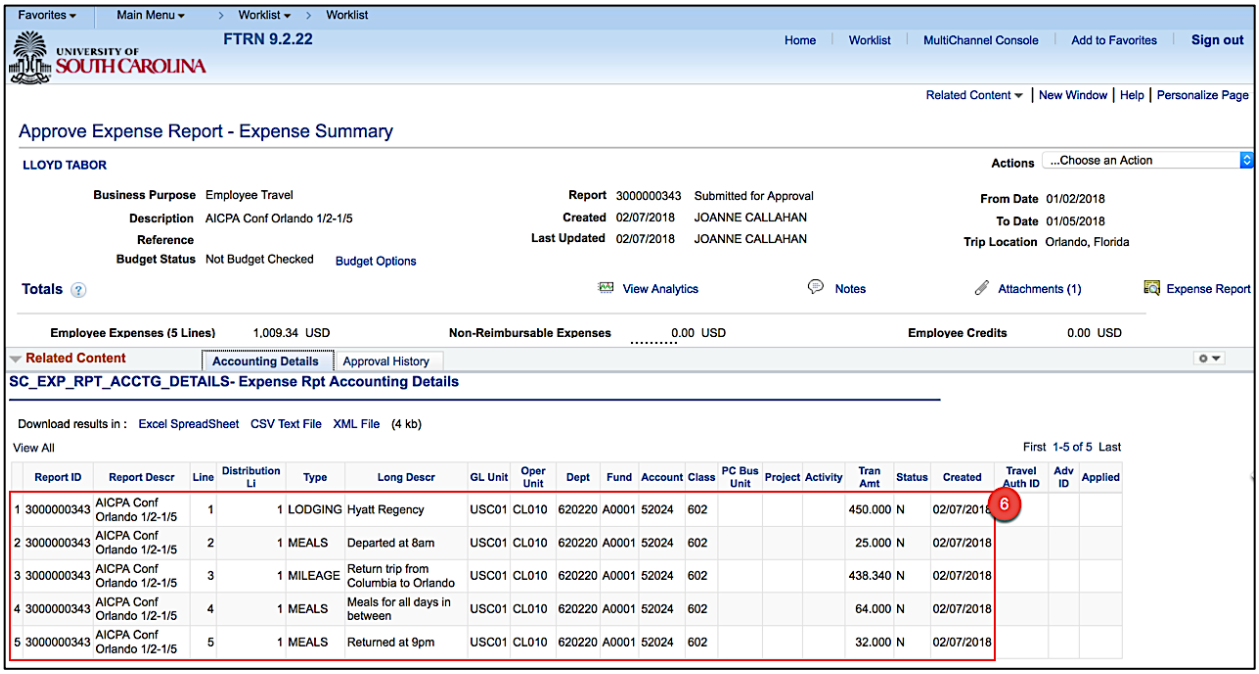


Step 4: Click the **Related Content** link to review the accounting details for this transaction.

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



Step 6: Review the Accounting Details for this transaction.



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

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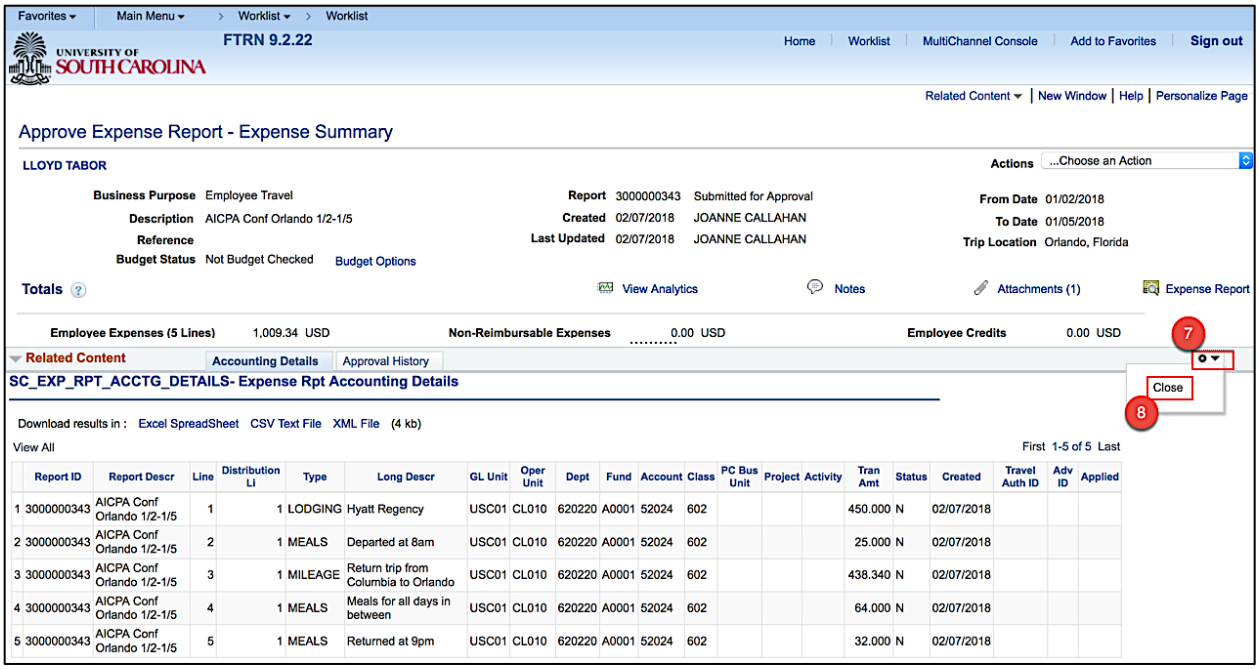

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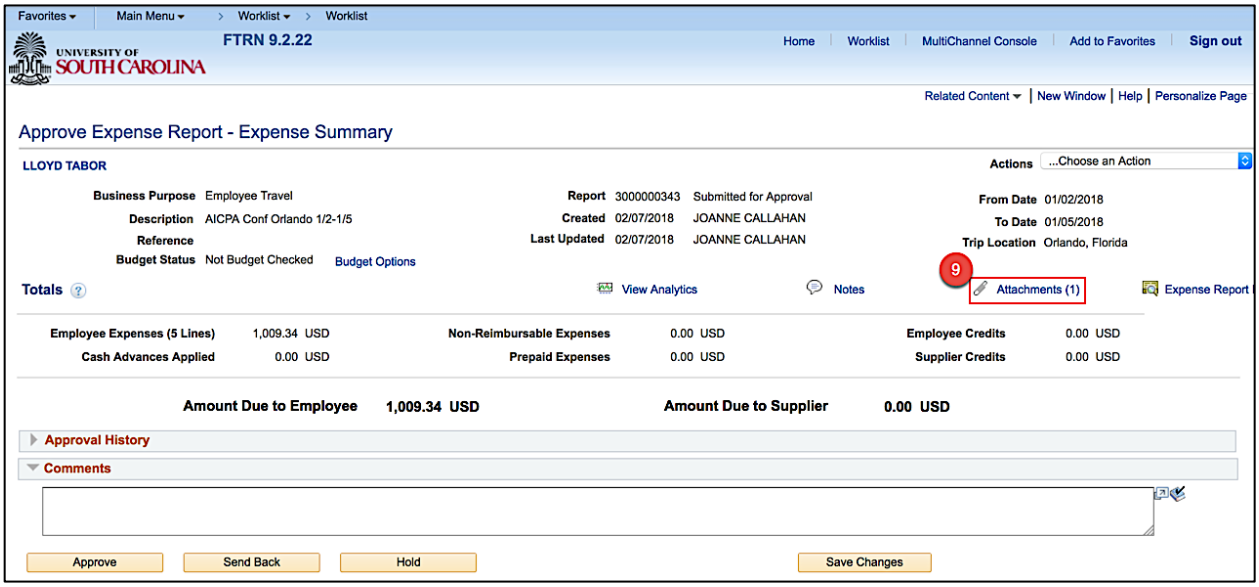
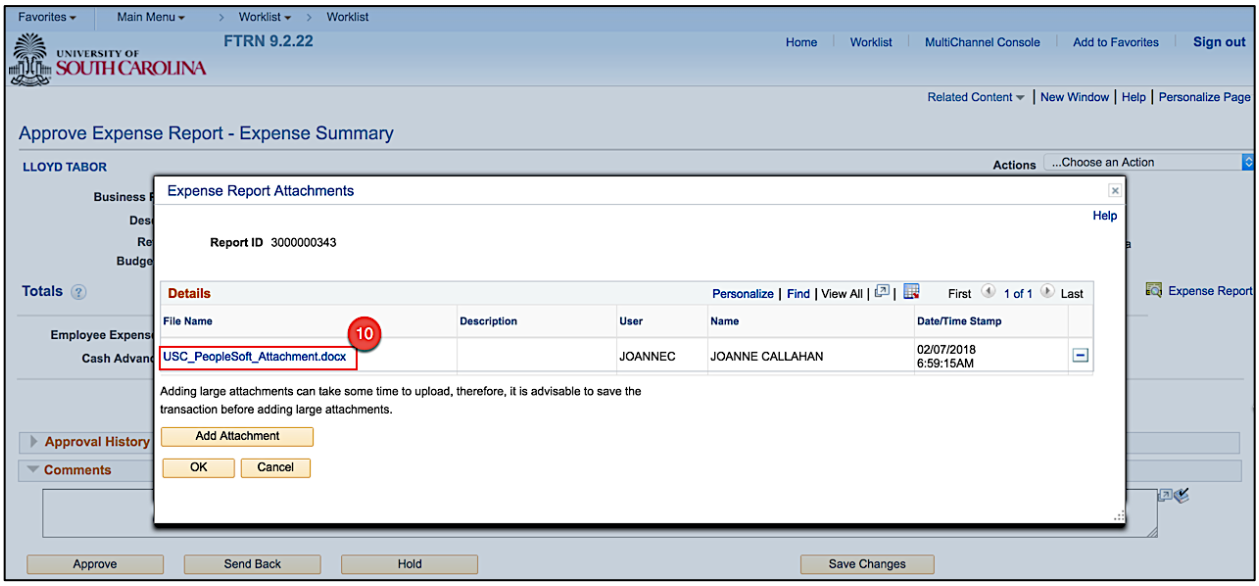
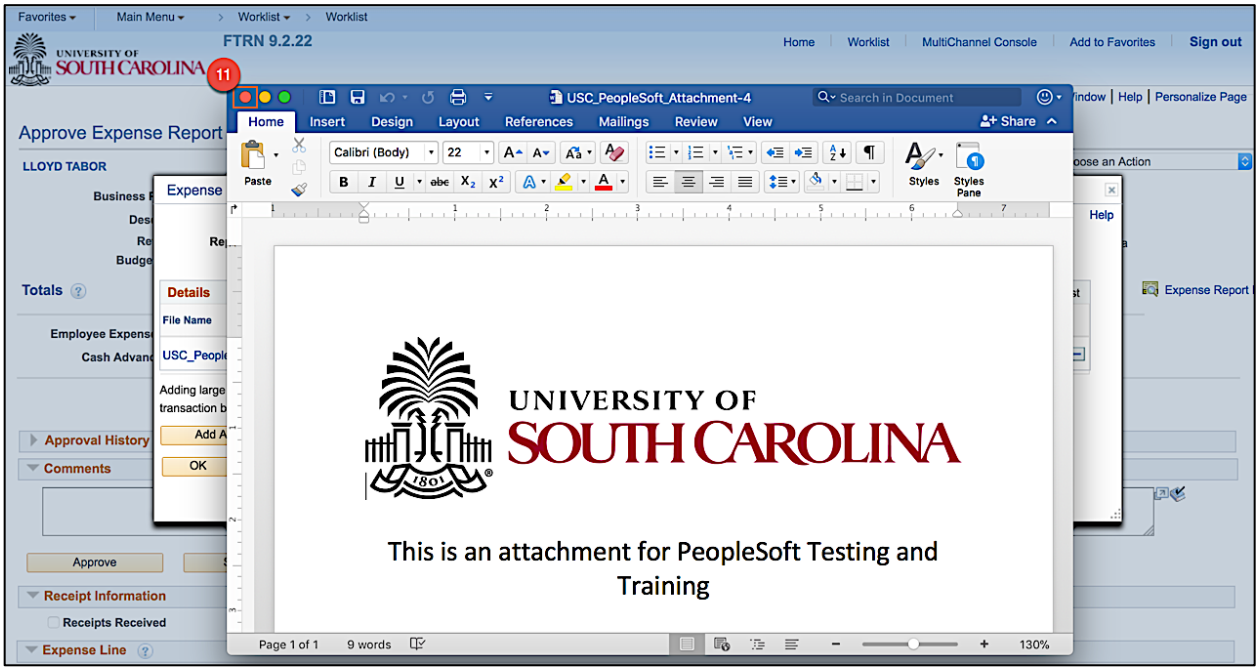


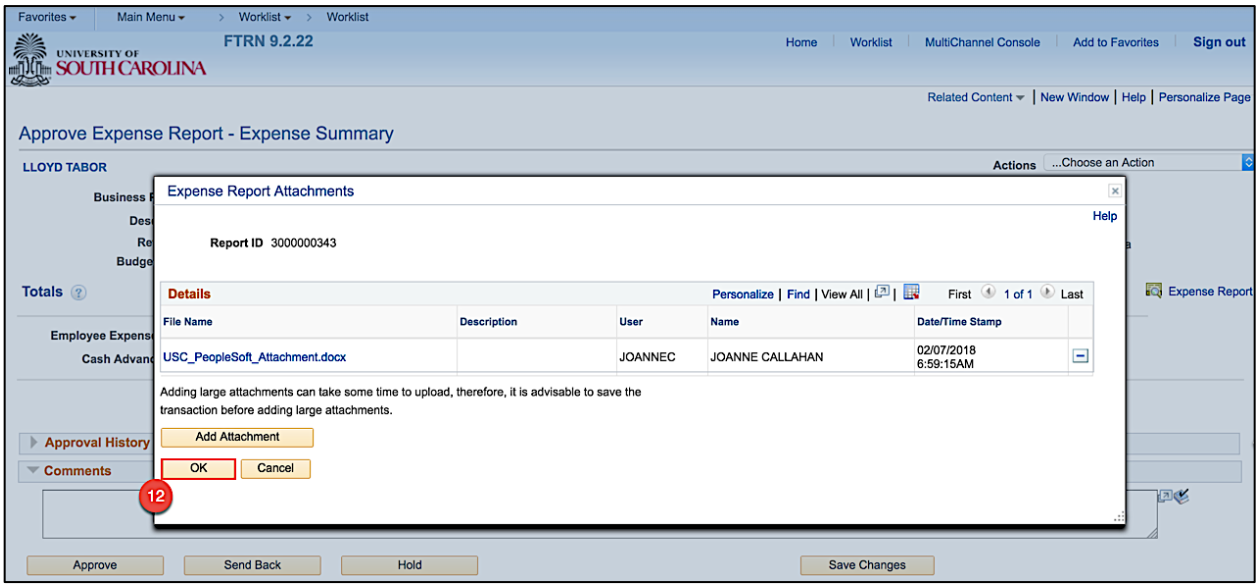
Step 10: Click the **File Name** to view.



Step 11: Review the sample attachment and close the attachment.



Step 12: Click **OK** to return to the Expense Report approval page.



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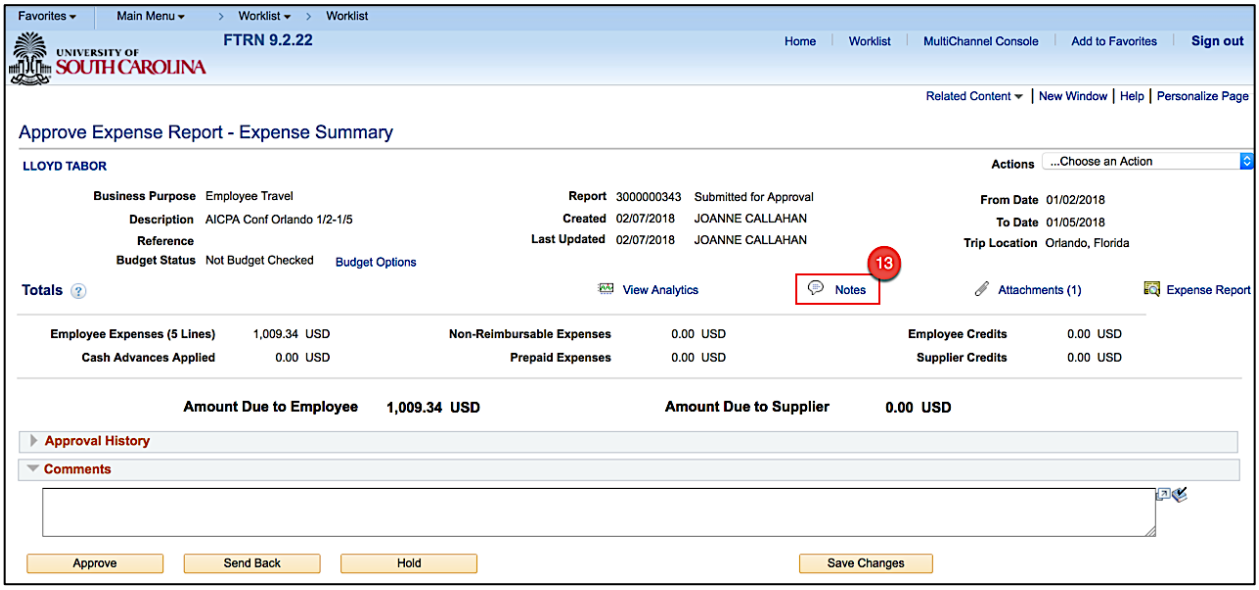

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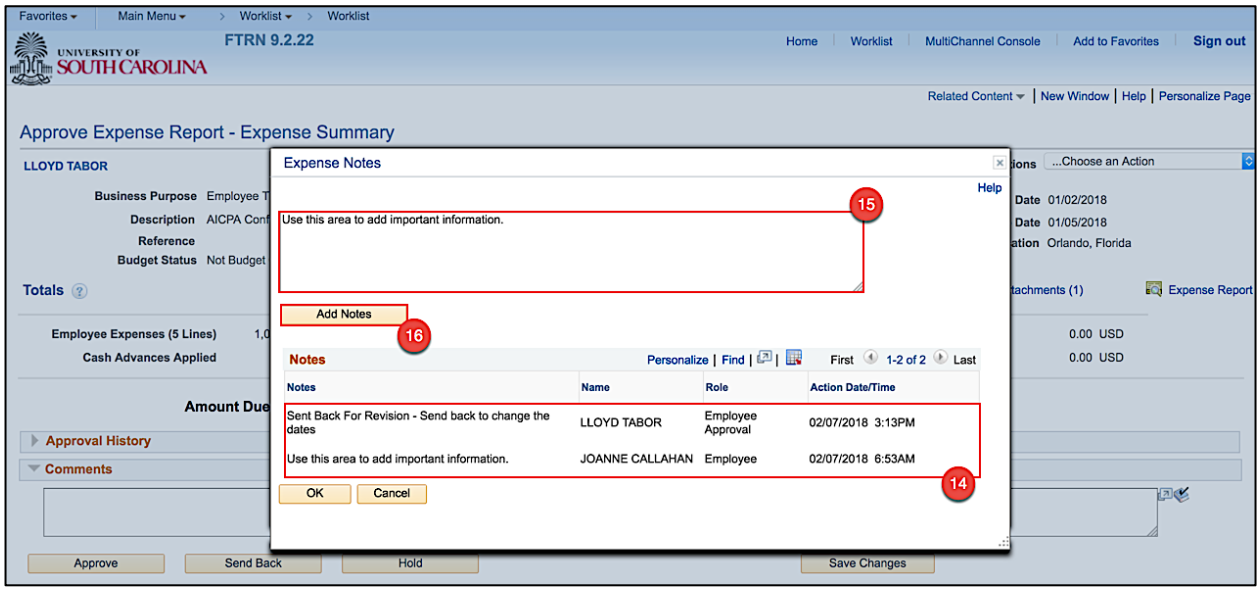

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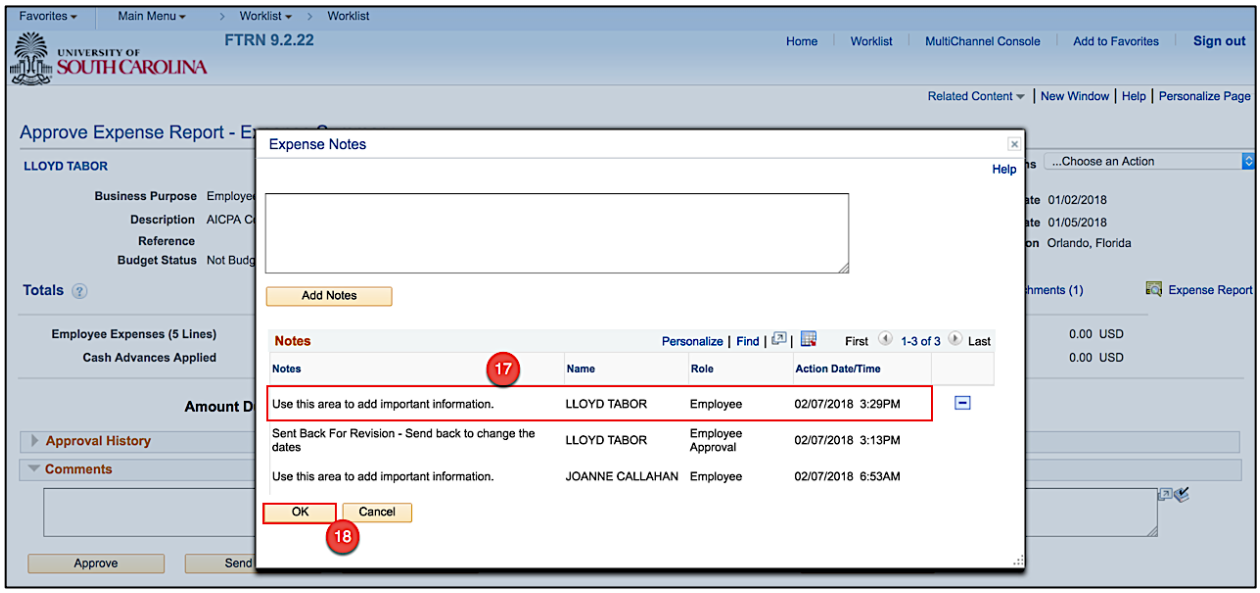
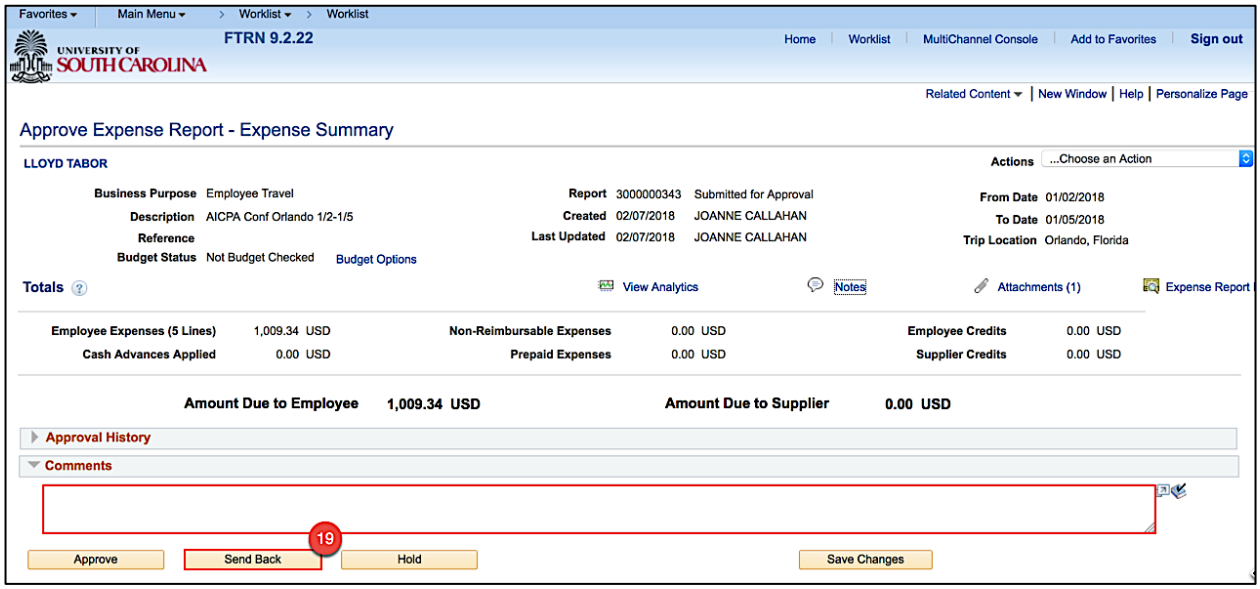
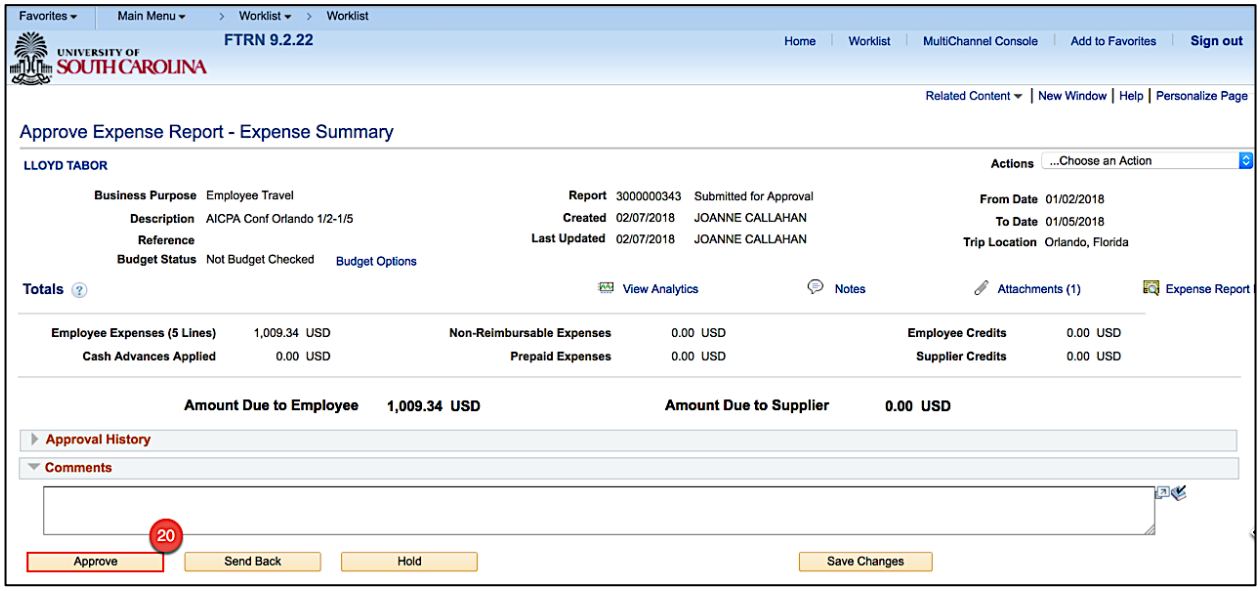


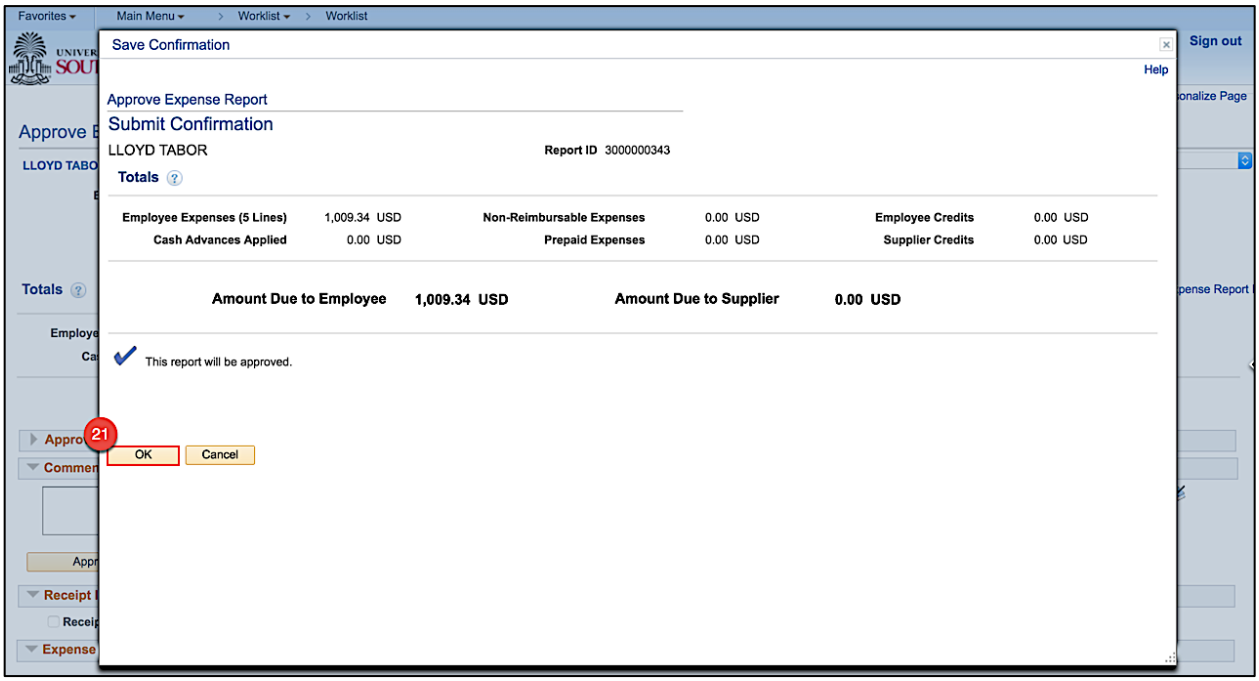
Step 19: If you feel the transaction needs to be sent back to the Proxy for modifications, click the **Send Back** button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.



Step 20: Once you have reviewed the transactions, click **Approve** button.



Step 21: Click the **OK** button to confirm the approval.



Now that you have approved the Expense Report, it is ready to move through workflow for final approval.