

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**.

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

 ● JOANNEC@mailbox.sc.edu <JOANNEC@mailbox.sc.edu>
● CALLAHAN, JOANNE
Wednesday, February 7, 2018 at 3:38 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
- Current status of the Travel Authorization
- Travel dates
- General Information identifying the Travel Authorization
- Details of anticipated expenses

Favorites ▾ Main Menu ▾ > Worklist ▾ > Worklist

UNIVERSITY OF SOUTH CAROLINA FTRN 9.2.22 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

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

Business Purpose Employee Travel

Status Submitted for Approval

Date From 02/07/2018 To 02/07/2018 Updated on 02/07/2018 3:38:02PM By JOANNEC 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 Not Budget Checked

Budget Options

Approve Send Back Hold Save Changes

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

Step 5: Click the **Accountg 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 Submitted for Approval
Date From 02/07/2018 To 02/07/2018 Updated on 02/07/2018 3:38:02PM By JOANNEC
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 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 Submitted for Approval
Date From 02/07/2018 To 02/07/2018 Updated on 02/07/2018 3:38:02PM By JOANNEC
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.

General Information
Description Sus Urb Conf Hong Kong 2/7/18 **Authorization ID** 100000226
Business Purpose Employee Travel
Status Submitted for Approval
Date From 02/07/2018 **To** 02/07/2018 **Updated on** 02/07/2018 3:38:02PM **By** JOANNEC
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.)

General Information
Description Sus Urb Conf Hong Kong 2/7/18 **Authorization ID** 100000226
Business Purpose Employee Travel
Status Submitted for Approval
Date From 02/07/2018 **To** 02/07/2018 **Updated on** 02/07/2018 3:38:02PM **By** JOANNEC
Attachments (1) **Notes**

Details Personalize | Find | [2]

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

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

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	Date	Amount	Attachments	Approved
Air Travel Expenses	02/07/2018	0.00 USD		
Ground Transportation	02/07/2018	0.00 USD		
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 11: Review the sample attachment and **close** to continue approving the Travel Authorization.

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

Approve Travel Authorization

Travel Authorization Summary

LLOYD TABOR

General Information

Travel Auth Attachments

Worklist

Hotel_Quote.jpg (JPEG Image, 104...)

https://fms-trn.ps.sc.edu/psc/FTRN/view/sAbHdoRO6PeKPJPUNMwzq:

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

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

Buttons: Add Attachment, OK (12), Cancel

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

General Information

Description: Sus Urb Conf Hong Kong 2/7/18 | Authorization ID: 100000226
 Business Purpose: Employee Travel
 Status: Submitted for Approval
 Date From: 02/07/2018 To: 02/07/2018 | Updated on: 02/07/2018 3:38:02PM | By: JOANNEC
 Attachments (1) | **Notes 13**

Details

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 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.

Travel Authorization Notes

Use this area to add important information.

Add Notes

Notes	Name	Role	Date/Time
Use this area to add important information.	JOANNE CALLAHAN	Employee	02/07/2018 3:37PM

OK Cancel

Step 17: Notice the note is added.

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

Travel Authorization Notes

Use this area to add important information.

Add Notes

Notes	Name	Role	Date/Time
Use this area to add important information.	JOANNE CALLAHAN	Employee	02/07/2018 3:37PM
Use this area to add important information.	LLOYD TABOR	Employee	02/07/2018 3:55PM

OK Cancel

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.

Approve Travel Authorization
Travel Authorization Summary
LLOYD TABOR

General Information

Description	Sus Urb Conf Hong Kong 2/7/18	Authorization ID	1000000226
Business Purpose	Employee Travel		
Status	Submitted for Approval		
Date From	02/07/2018	To	02/07/2018
		Updated on	02/07/2018 3:38:02PM
		By	JOANNEC
		Attachments (1)	Notes

More Options ...Choose an Action

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 Not Budget Checked
Budget Options

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

University of South Carolina FTRN 9.2.22 interface. The 'Approve' button is highlighted with a red circle and the number 20.

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

Budget Status: Not Budget Checked

Buttons: Approve (highlighted), Send Back, Hold, Save Changes

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

University of South Carolina FTRN 9.2.22 interface. A 'Save Confirmation' dialog box is open, showing the 'OK' button highlighted with a red circle and the number 21.

Save Confirmation

Approve Travel Authorization

Submit Confirmation

LLOYD TABOR Authorization ID 100000226

Travel Authorization Totals			
Total	2,700.00 USD	Total	2,700.00USD
Less Non-Approved	0.00 USD	Authorized	

This report will be approved.

Buttons: OK (highlighted), Cancel

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](#).

Approval Request for USC travel advance for Sus Urb Con Hong Kong 1/10 for TABOR,LLOYD.

JOANNEC@mailbox.sc.edu

To: CALLAHAN, JOANNE

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

Employee ID:	1060632
Employee Name:	TABOR, LLOYD
Submission Date:	2018-01-10
Advance Description:	Sus Urb Con Hong Kong 1/10
Advance ID:	2000000029
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=2000000029

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

UNIVERSITY OF SOUTH CAROLINA

FTRN 9.2.22

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

Approve USC Travel Advance

LLOYD TABOR

Business Purpose Employee Travel

Advance ID 2000000029 Submitted for Approval

Advance Description Sus Urb Con Hong Kong 1/10

Travel Authorization ID 1000000047

Post State Not Applied

Created 01/10/2018 JOANNE CALLAHAN

Last Updated 01/10/2018 JOANNE CALLAHAN

User Defaults

USC Travel Advance

View Printable Version

Notes

Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Con Hong Kong 1/10	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.

FTRN 9.2.22 | Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out
 UNIVERSITY OF SOUTH CAROLINA

Approve USC Travel Advance
 LLOYD TABOR
 Business Purpose: Employee Travel | Advance ID: 2000000029 | Submitted for Approval
 Advance Description: Sus Urb Con Hong Kong 1/10 | Travel Authorization ID: 1000000047
 Post State: Not Applied | Created: 01/10/2018 | JOANNE CALLAHAN
 Last Updated: 01/10/2018 | JOANNE CALLAHAN
 User Defaults

USC Travel Advance | View Printable Version | Notes | Attachments (1)

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Con Hong Kong 1/10	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.

FTRN 9.2.22 | Home | Worklist | MultiChannel Console | Performance Trace | Add to Favorites | Sign out
 UNIVERSITY OF SOUTH CAROLINA

USC Travel Advance | View Printable Version | Notes | Attachments (1)

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	2000000029	1	SUB	01/10/2018	01/10/2018	USC01	CL071	100670	E1012	10206	202	1180.000	N			1180.000	Sus Urb Con Hong Kong 1/10

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

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

The screenshot shows the 'USC Travel Advance' page. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Performance Trace, Add to Favorites, and Sign out. The page title is 'FTRN 9.2.22'. Below the header, there is a section for 'USC Travel Advance' with a 'View Printable Version' link, 'Notes', and 'Attachments (1)'. A table shows the advance details:

*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Con Hong Kong 1/10	1,180.00	USD

Below the table, there is a 'Totals' section showing 'Advance Amount 1,180.00 USD'. There are also sections for 'Approval History' and 'Comments'. At the bottom, there is a 'Related Content' section with a tab for 'Accounting Detail' and a link for 'SC_EX_ADV_ACCTG_DTL- TRAVEL ADVANCE ACCTG DETAILS'. A 'Download results in:' section offers 'Excel Spreadsheet', 'CSV Text File', and 'XML File (1 kb)'. A table below shows the accounting details for the advance.

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	2000000029	1	SUB	01/10/2018	01/10/2018	USC01	CL071	100670	E1012	10206	202		1180.000	N			1180.000	Sus Urb Con Hong Kong 1/10

Annotations 7 and 8 are red circles. Annotation 7 points to the Pagelet Settings icon (a small square with a minus sign) in the top right corner of the pagelet. Annotation 8 points to the 'Close' button in the top right corner of the 'Related Content' section.

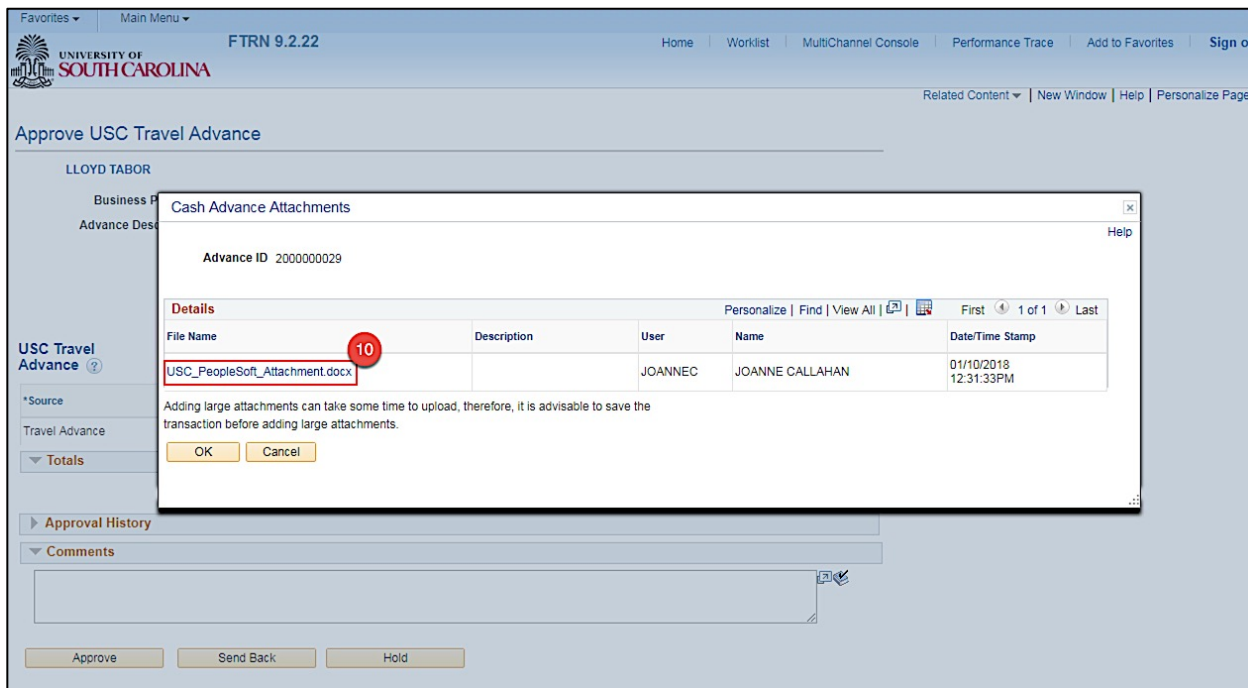
Step 9: To view all important documentation, click the **Attachments** link.

The screenshot shows the 'Approve USC Travel Advance' page. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Performance Trace, Add to Favorites, and Sign out. The page title is 'FTRN 9.2.22'. Below the header, there is a section for 'Approve USC Travel Advance' with a 'View Printable Version' link, 'Notes', and 'Attachments (1)'. A table shows the advance details:

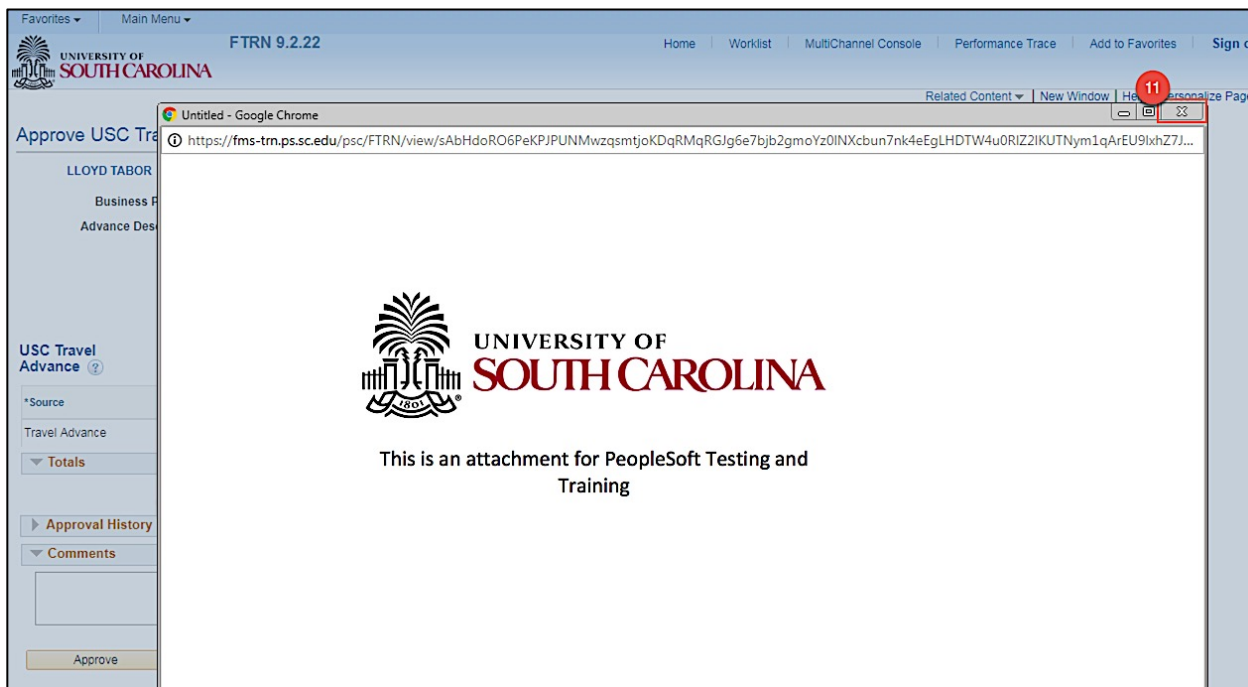
*Source	Description	*Amount	Currency
Travel Advance	Sus Urb Con Hong Kong 1/10	1,180.00	USD

Below the table, there is a 'Totals' section showing 'Advance Amount 1,180.00 USD'. There are also sections for 'Approval History' and 'Comments'. At the bottom, there are three buttons: 'Approve', 'Send Back', and 'Hold'. Annotation 9 is a red circle pointing to the 'Attachments (1)' link.

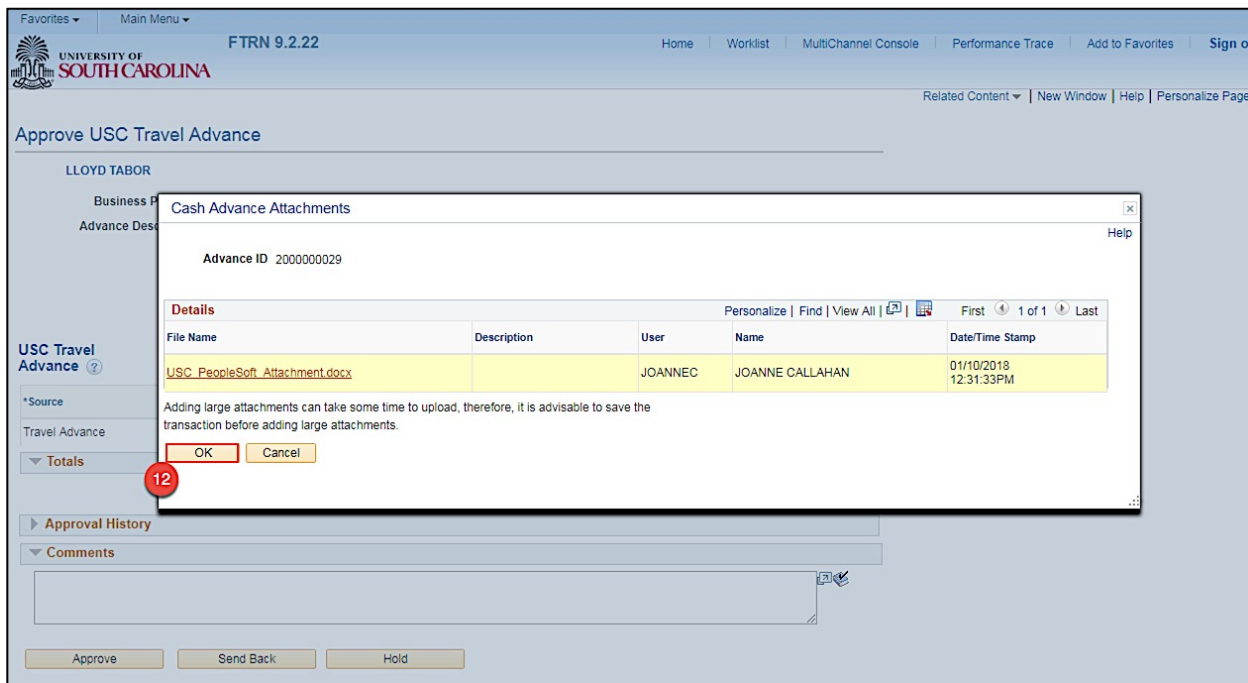
Step 10: Click the **File Name** to view.



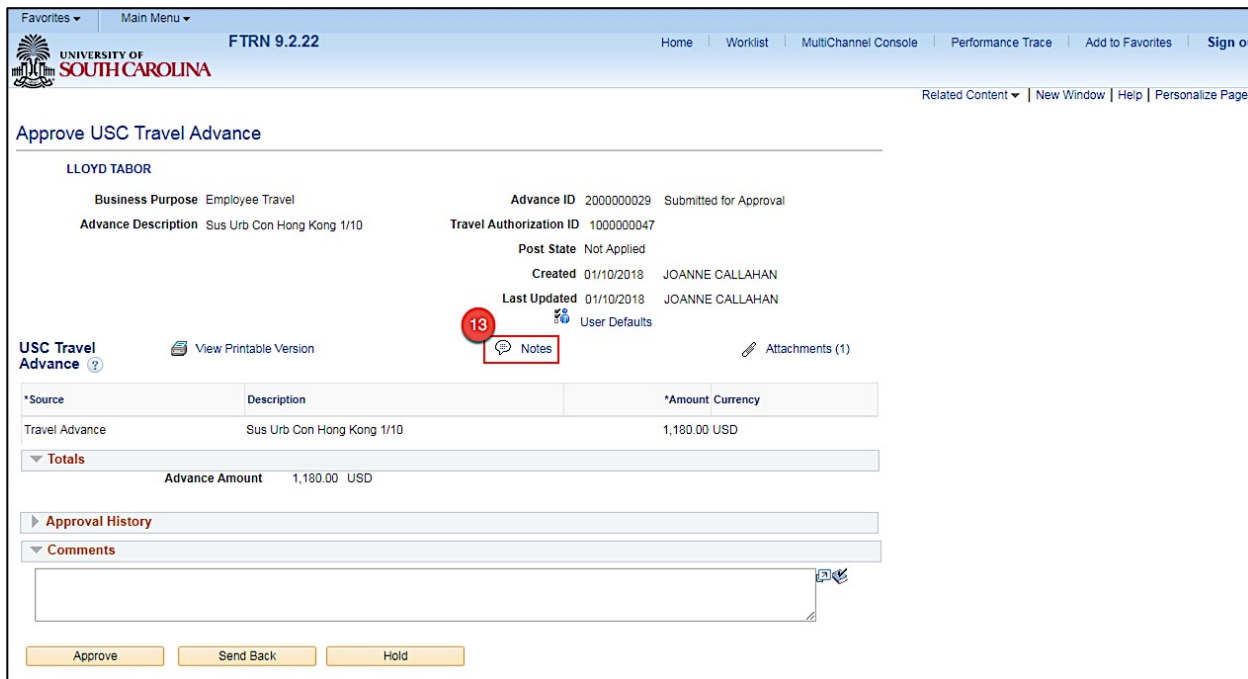
Step 11: Review the sample attachment and close the attachment.



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.

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

Expense Notes for Cash Advance

Use this area to add additional information.

Add Notes

Notes	Name	Role	Action Date/Time
Use this area to add additional information.	JOANNE CALLAHAN	Employee	01/10/2018 12:31PM

OK Cancel

Step 17: Notice the note is added.

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

Expense Notes for Cash Advance

Use this area to add additional information.

Add Notes

Notes	Name	Role	Action Date/Time
Use this area to add additional information.	JOANNE CALLAHAN	Employee	01/10/2018 12:31PM
Use this area to add additional information.	LLOYD TABOR	Employee	01/10/2018 12:57PM

OK Cancel

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.

The screenshot shows the 'Approve USC Travel Advance' interface for user LLOYD TABOR. The page includes a header with the University of South Carolina logo and navigation links. The main content area displays the following information:

- Business Purpose:** Employee Travel
- Advance ID:** 2000000029 Submitted for Approval
- Advance Description:** Sus Urb Con Hong Kong 1/10
- Travel Authorization ID:** 1000000047
- Post State:** Not Applied
- Created:** 01/10/2018 JOANNE CALLAHAN
- Last Updated:** 01/10/2018 JOANNE CALLAHAN
- User Defaults:** User Defaults

Below this information is a table with columns for Source, Description, and Amount Currency. The table contains one entry: 'Travel Advance' for 'Sus Urb Con Hong Kong 1/10' with an amount of '1,180.00 USD'. A 'Totals' section shows 'Advance Amount' as '1,180.00 USD'. There are sections for 'Approval History' and 'Comments'. At the bottom, there are three buttons: 'Approve', 'Send Back', and 'Hold'. The 'Send Back' button is highlighted with a red circle containing the number 19.

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

This screenshot is identical to the one above, showing the 'Approve USC Travel Advance' interface for user LLOYD TABOR. The same information and table are displayed. In this view, the 'Approve' button at the bottom is highlighted with a red circle containing the number 20.

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

The screenshot shows the 'Approve USC Travel Advance' interface. A modal dialog titled 'Save Confirmation' is displayed over the main content. The dialog contains the following information:

- Title: Travel & Expenses - Cash Advance Report
- Submit Confirmation
- Name: LLOYD TABOR
- Advance ID: 2000000029
- Table with Totals:

Totals	
Advance Amount	1,180.00 USD
- Message: This report will be approved.
- Buttons: OK (highlighted with a red circle and '21'), Cancel

The background interface shows the 'Approve USC Travel Advance' page for LLOYD TABOR, with sections for Business Purpose, Advance Description, USC Travel Advance, *Source, Travel Advance, Approval History, and Comments. At the bottom of the page are buttons for 'Approve', 'Send Back', and 'Hold'.

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**.

Expense report 3000000343 for TABOR,LLOYD requires your attention

J

● **JOANNEC@mailbox.sc.edu** <JOANNEC@mailbox.sc.edu>
● CALLAHAN, JOANNE

Wednesday, February 7, 2018 at 7:00 AM

[Show Details](#)

An expense report has been submitted that requires your action:

Employee ID:	1060632
Employee Name:	TABOR,LLOYD
Submission Date:	2018-02-07
Report Description:	AICPA Conf Orlando 1/2-1/5
Report ID:	3000000343
Business Purpose:	Employee Travel
From Date:	2018-02-07
To Date:	2018-02-07
Trip Location:	Orlando, Florida
Total Amount:	1009.34 USD
Reimbursement Amount:	1009.34 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=3000000343

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

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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 AICPA Conf Orlando 1/2-1/5
Reference
Budget Status Not Budget Checked **Budget Options**

Report 300000343 Submitted for Approval
Created 02/07/2018 JOANNE CALLAHAN
Last Updated 02/07/2018 JOANNE CALLAHAN

From Date 01/02/2018
To Date 01/05/2018
Trip Location Orlando, Florida

Totals 3 View Analytics Notes Attachments (1) Expense Report

Employee Expenses (5 Lines)	1,009.34 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 1,009.34 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	Personalize	Find	Approve
01/02/2018	Hotel and Lodging	Hyatt Regency	450.00	USD			✓
01/02/2018	Meal Expenses	Departed at 8am	25.00	USD			✓
01/02/2018	Mileage	Return trip from Columbia to Orlando	438.34	USD			✓
01/02/2018	Meal Expenses	Meals for all days in between	64.00	USD			✓
01/02/2018	Meal Expenses	Returned at 9pm	32.00	USD			✓

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: AICPA Conf Orlando 1/2-1/5
 Reference: [Blank]
 Budget Status: Not Budget Checked

Report: 300000343 Submitted for Approval
 Created: 02/07/2018 JOANNE CALLAHAN
 Last Updated: 02/07/2018 JOANNE CALLAHAN

From Date: 01/02/2018
 To Date: 01/05/2018
 Trip Location: Orlando, Florida

Totals

Employee Expenses (5 Lines)	1,009.34 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		1,009.34 USD		Amount Due to Supplier	
				0.00 USD	

Buttons: 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: AICPA Conf Orlando 1/2-1/5
 Reference: [Blank]
 Budget Status: Not Budget Checked

Report: 300000343 Submitted for Approval
 Created: 02/07/2018 JOANNE CALLAHAN
 Last Updated: 02/07/2018 JOANNE CALLAHAN

From Date: 01/02/2018
 To Date: 01/05/2018
 Trip Location: Orlando, Florida

Totals

Employee Expenses (5 Lines)	1,009.34 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
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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 (4 kb)

View All

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 300000343	AICPA Conf Orlando 1/2-1/5	1		1	LODGING Hyatt Regency	USC01	CL010	620220	A0001	52024	602				450.000	N	02/07/2018			
2 300000343	AICPA Conf Orlando 1/2-1/5	2		1	MEALS Departed at 8am	USC01	CL010	620220	A0001	52024	602				25.000	N	02/07/2018			
3 300000343	AICPA Conf Orlando 1/2-1/5	3		1	MILEAGE Return trip from Columbia to Orlando	USC01	CL010	620220	A0001	52024	602				438.340	N	02/07/2018			
4 300000343	AICPA Conf Orlando 1/2-1/5	4		1	MEALS Meals for all days in between	USC01	CL010	620220	A0001	52024	602				64.000	N	02/07/2018			
5 300000343	AICPA Conf Orlando 1/2-1/5	5		1	MEALS Returned at 9pm	USC01	CL010	620220	A0001	52024	602				32.000	N	02/07/2018			

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

Business Purpose: Employee Travel
Description: AICPA Conf Orlando 1/2-1/5
Reference:
Budget Status: Not Budget Checked [Budget Options](#)

Report: 3000000343 Submitted for Approval
Created: 02/07/2018 JOANNE CALLAHAN
Last Updated: 02/07/2018 JOANNE CALLAHAN

From Date: 01/02/2018
To Date: 01/05/2018
Trip Location: Orlando, Florida

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

Employee Expenses (5 Lines) 1,009.34 USD Non-Reimbursable Expenses 0.00 USD Employee Credits 0.00 USD

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 \(4 kb\)](#)

View All First 1-5 of 5 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 3000000343	AICPA Conf Orlando 1/2-1/5	1		1 LODGING	Hyatt Regency	USC01	CL010	620220	A0001	52024	602			450.000	N	02/07/2018			
2 3000000343	AICPA Conf Orlando 1/2-1/5	2		1 MEALS	Departed at 8am	USC01	CL010	620220	A0001	52024	602			25.000	N	02/07/2018			
3 3000000343	AICPA Conf Orlando 1/2-1/5	3		1 MILEAGE	Return trip from Columbia to Orlando	USC01	CL010	620220	A0001	52024	602			438.340	N	02/07/2018			
4 3000000343	AICPA Conf Orlando 1/2-1/5	4		1 MEALS	Meals for all days in between	USC01	CL010	620220	A0001	52024	602			64.000	N	02/07/2018			
5 3000000343	AICPA Conf Orlando 1/2-1/5	5		1 MEALS	Returned at 9pm	USC01	CL010	620220	A0001	52024	602			32.000	N	02/07/2018			

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

Approve Expense Report - Expense Summary

LLOYD TABOR

Business Purpose: Employee Travel
Description: AICPA Conf Orlando 1/2-1/5
Reference:
Budget Status: Not Budget Checked [Budget Options](#)

Report: 3000000343 Submitted for Approval
Created: 02/07/2018 JOANNE CALLAHAN
Last Updated: 02/07/2018 JOANNE CALLAHAN

From Date: 01/02/2018
To Date: 01/05/2018
Trip Location: Orlando, Florida

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

Employee Expenses (5 Lines) 1,009.34 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

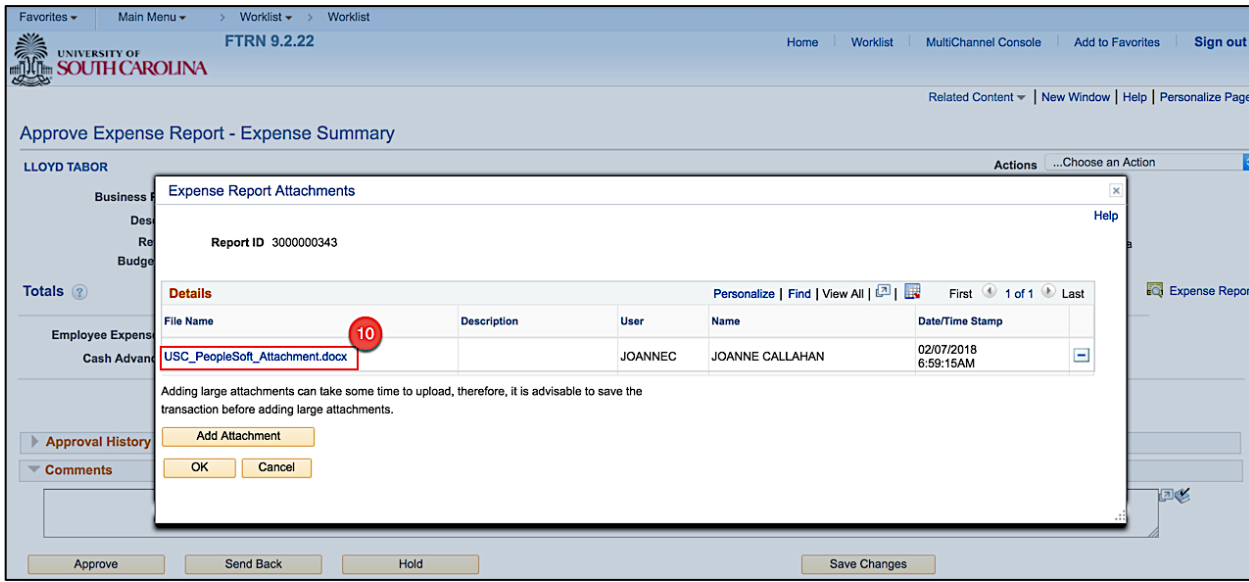
Amount Due to Employee 1,009.34 USD Amount Due to Supplier 0.00 USD

[Approval History](#)

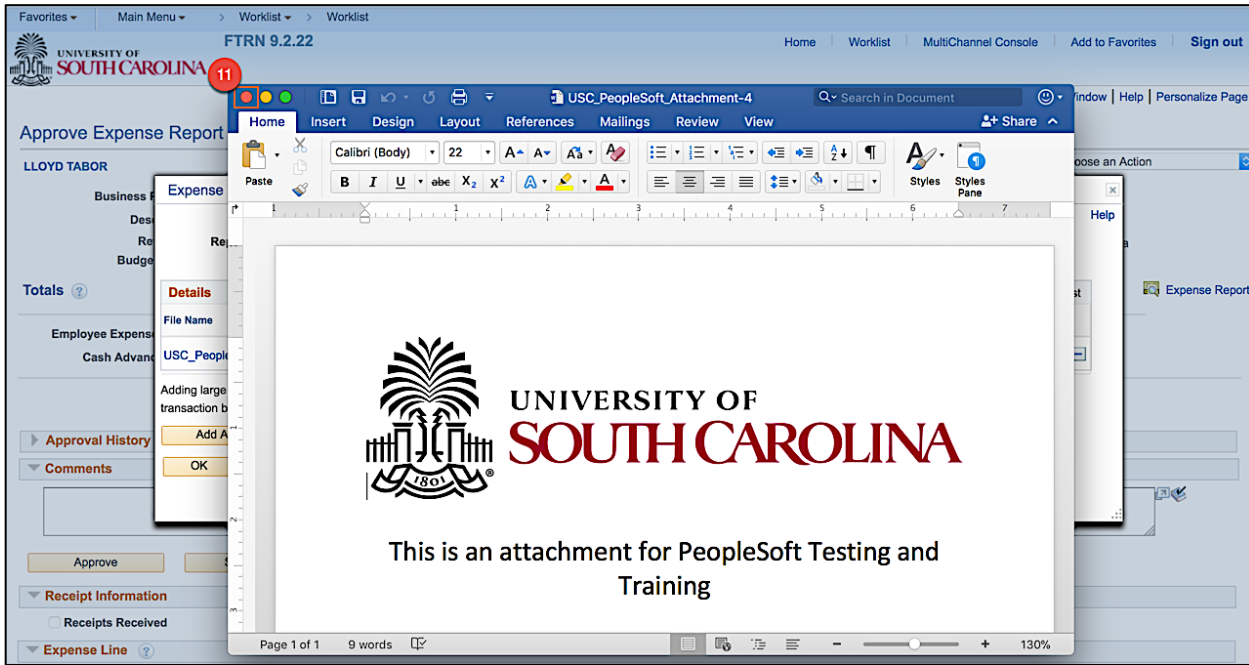
[Comments](#)

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

Step 10: Click the File Name to view.



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



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

Expense Report Attachments

Report ID : 3000000343

File Name	Description	User	Name	Date/Time Stamp
USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	02/07/2018 6:59:15AM

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

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

Approve Expense Report - Expense Summary

LLOYD TABOR

Business Purpose: Employee Travel

Description: AICPA Conf Orlando 1/2-1/5

Reference

Budget Status: Not Budget Checked

Report: 3000000343 Submitted for Approval

Created: 02/07/2018 JOANNE CALLAHAN

Last Updated: 02/07/2018 JOANNE CALLAHAN

From Date: 01/02/2018

To Date: 01/05/2018

Trip Location: Orlando, Florida

Totals

Employee Expenses (5 Lines)	1,009.34 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: 1,009.34 USD

Amount Due to Supplier: 0.00 USD

Buttons: Approve, Send Back, Hold, Save Changes

Link: Notes (highlighted with red circle 13)

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.

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

The screenshot shows the 'Expense Notes' dialog box overlaid on the 'Approve Expense Report - Expense Summary' page. The dialog contains a text area for adding new notes, an 'Add Notes' button, and a table of existing notes. The table has columns for 'Notes', 'Name', 'Role', and 'Action Date/Time'. The existing notes are:

Notes	Name	Role	Action Date/Time
Sent Back For Revision - Send back to change the dates	LLOYD TABOR	Employee Approval	02/07/2018 3:13PM
Use this area to add important information.	JOANNE CALLAHAN	Employee	02/07/2018 6:53AM

Step 17: Notice the note is added.

Step 18: Click the **OK** button to return to the Expense Report approval page.

The screenshot shows the 'Expense Notes' dialog box after a new note has been added. The table now contains three notes:

Notes	Name	Role	Action Date/Time
Use this area to add important information.	LLOYD TABOR	Employee	02/07/2018 3:29PM
Sent Back For Revision - Send back to change the dates	LLOYD TABOR	Employee Approval	02/07/2018 3:13PM
Use this area to add important information.	JOANNE CALLAHAN	Employee	02/07/2018 6:53AM

The 'OK' button is highlighted, indicating the next step is to confirm the changes.

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.

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Approve Expense Report - Expense Summary

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

Business Purpose Employee Travel	Report 3000000343 Submitted for Approval	From Date 01/02/2018
Description AICPA Conf Orlando 1/2-1/5	Created 02/07/2018 JOANNE CALLAHAN	To Date 01/05/2018
Reference	Last Updated 02/07/2018 JOANNE CALLAHAN	Trip Location Orlando, Florida
Budget Status Not Budget Checked Budget Options		

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

Employee Expenses (5 Lines) 1,009.34 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 1,009.34 USD **Amount Due to Supplier** 0.00 USD

[Approval History](#)

[Comments](#)

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

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Related Content | New Window | Help | Personalize Page

Approve Expense Report - Expense Summary

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

Business Purpose Employee Travel	Report 3000000343 Submitted for Approval	From Date 01/02/2018
Description AICPA Conf Orlando 1/2-1/5	Created 02/07/2018 JOANNE CALLAHAN	To Date 01/05/2018
Reference	Last Updated 02/07/2018 JOANNE CALLAHAN	Trip Location Orlando, Florida
Budget Status Not Budget Checked Budget Options		

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

Employee Expenses (5 Lines) 1,009.34 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 1,009.34 USD **Amount Due to Supplier** 0.00 USD

[Approval History](#)

[Comments](#)

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

The screenshot shows a 'Save Confirmation' dialog box in a web application. The dialog title is 'Save Confirmation'. Below the title, it says 'Approve Expense Report' and 'Submit Confirmation'. The user name 'LLOYD TABOR' and 'Report ID 3000000343' are displayed. A table shows the following data:

Totals					
Employee Expenses (5 Lines)	1,009.34 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		1,009.34 USD	Amount Due to Supplier		0.00 USD

Below the table, there is a checkmark icon and the text 'This report will be approved.' At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. A red circle with the number '21' is placed over the 'OK' button.

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