GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft 9.2

EX.010.031 - CREATING A PRIVATE EXPENSE REPORT TEMPLATE

Purpose	• Identify the purpose for creating private expense report templates. • Identify who is responsible for creating expense report templates. • Create a private expense report template.
Description	To reduce time and errors in preparing expense reports, users can create templates that reflect typical expenses incurred on a routine basis. Creating a private expense report template will allow employees to customize expense types that are frequently used, eliminating the need to add these expenses each time an expense report is created. Employees can create their own, private templates. Public templates are created by the Expenses Administrator for all employees to use.
Security Role	**BOR PeopleSoft User** **BOR PeopleSoft User – No Tauth**
Assumptions	None
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions for creating a private expense report template.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Employee Self-Service** link.
4.	Click the **Travel and Expenses** link.
5.	Click the **User Preferences** link.
6.	Click the **Create/Update User Template** link.
7.	Click the **Add a New Value** tab.
8.	Enter a short template name in the **Document Template** field. *Note: this field is limited to 8 characters.*
9.	Click the **Template Type** list.
10.	Click the **Expense Report** list item.
11.	Click the **Add** button.
12.	Enter a template description in the **Description** field. *Note: this field is limited to 30 characters.*
13.	Enter a template short description in the **Short Description** field. (optional)
14.	Select an Expense Type to add to the template.
15.	Click the plus (**+**) button to add multiple new rows at row 1.
16.	Enter the number of rows to add.
17.	Click the **OK** button. The rows will be added.
18.	Click the next blank **Expense Type** list.
19.	Select an Expense Type to add to the template.
20.	Repeat these steps to add additional Expense Types to the template.
21.	Click the **Save** button.
22.	Click the **OK** button.