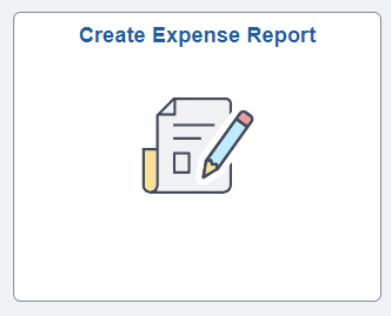
Entering Expense Reports as a Delegate

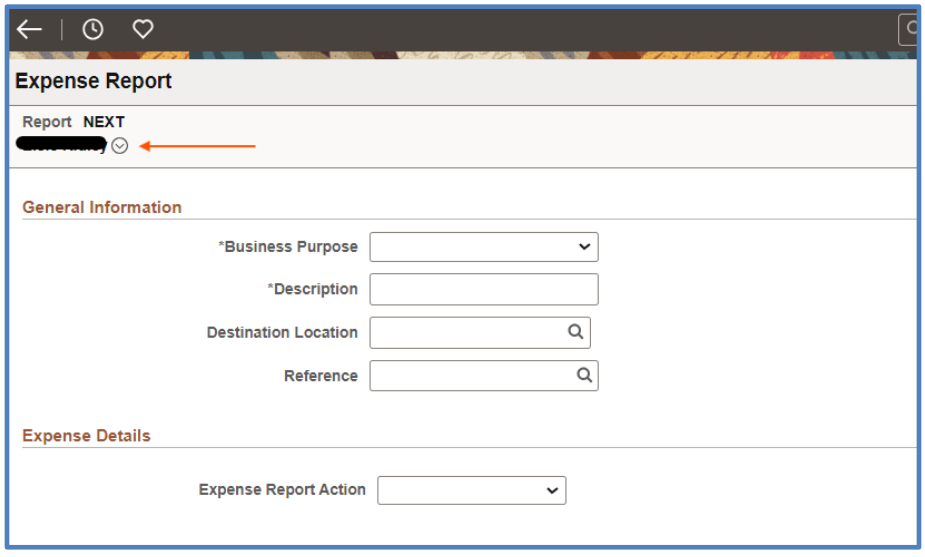
This job aid is designed to provide instructions on how to enter Expense Reports as a delegate using the Georgia*FIRST* PeopleSoft Financials Travel and Expense module. Fluid Navigation is shown first and Classic Navigation directions start on page 5.

Fluid Navigation

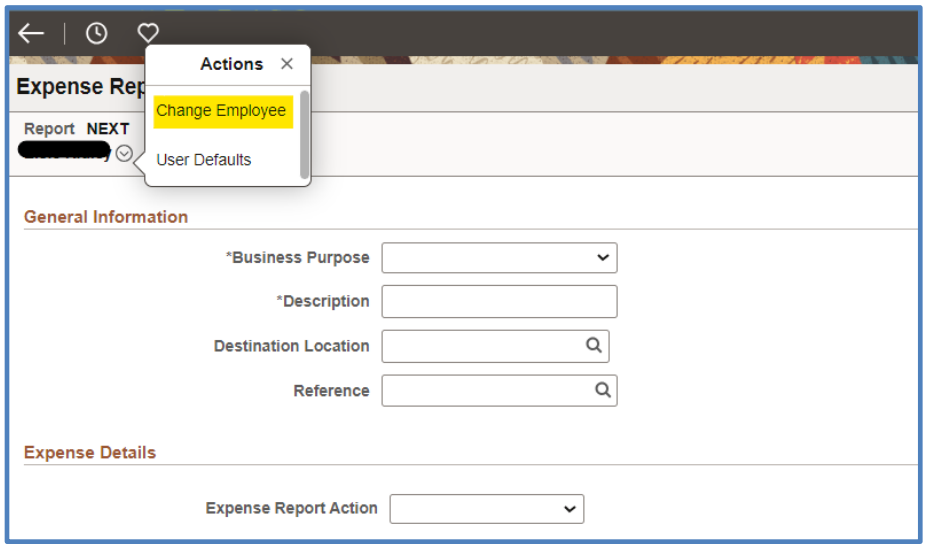
1. Select the **Create Expense Report** tile found on your Employee Self Service homepage.



2. Select the action arrow next to the employee's name.



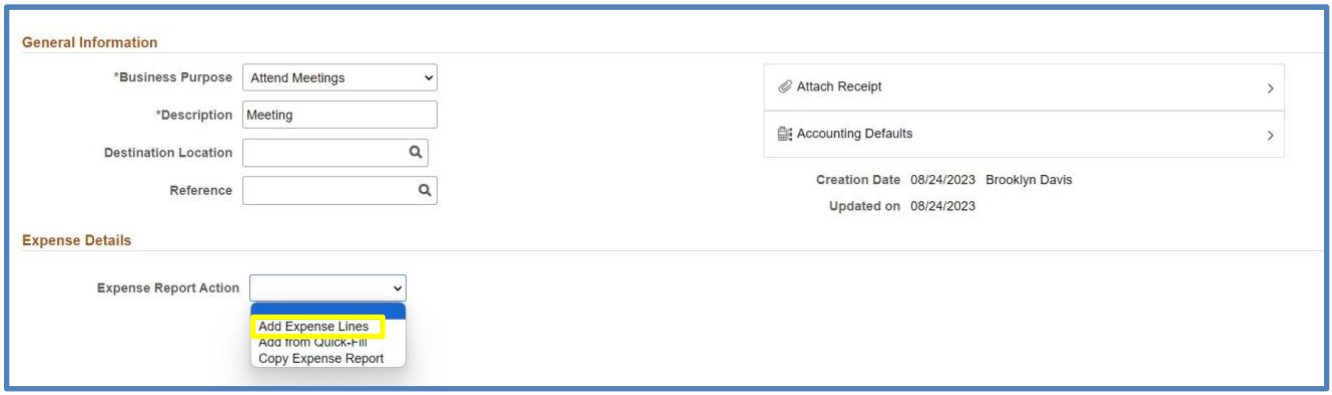
3. Select **Change Employee** from the Actions menu.



4. In the Employee Search box, choose an employee to create a report for.
   Note: Only employees for whom you are an authorized delegate will appear.

5. Enter the following information on the Expense Report header:

   a. *Business Purpose
   b. *Report Description
   c. Destination Location
   d. Select **Add Expense Lines** from the Expense Report Action menu



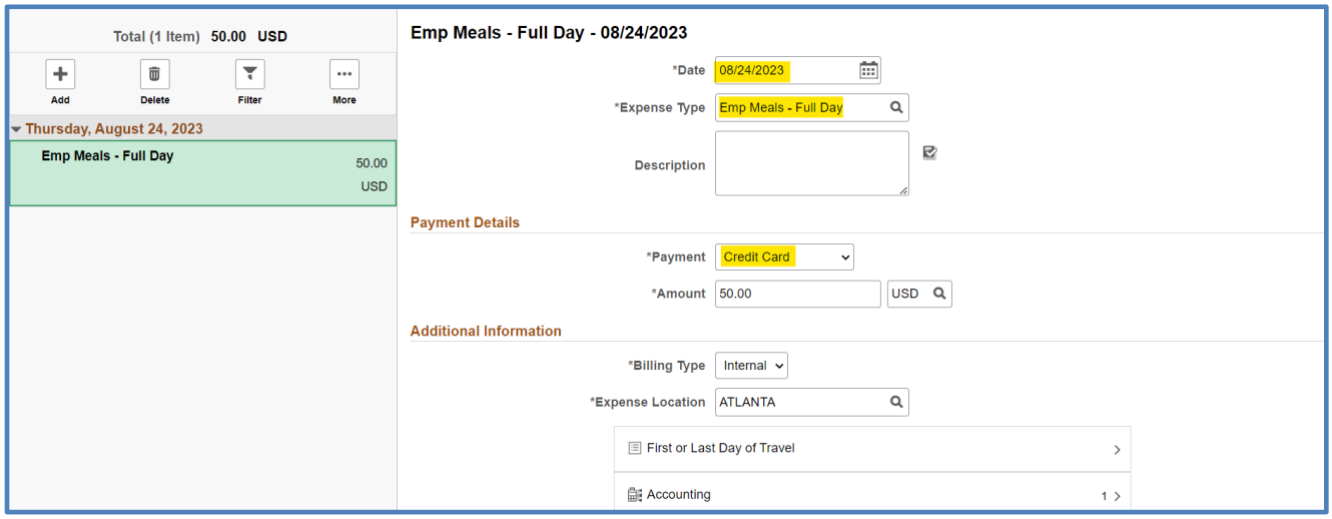
6. Next, enter your Expenses. Enter the following information on the Expense line:

   a.*Date

   b.*Expense Type,

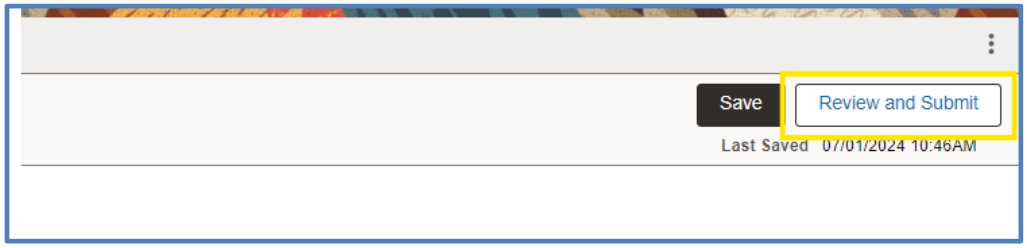
   c. Select a *Payment Type.

Example:



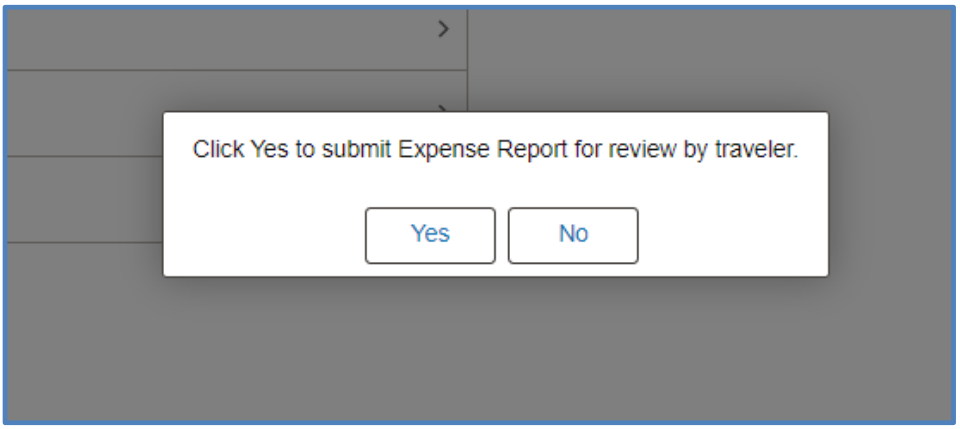
7. Review accounting details and or add any other expense lines needed by selecting the + Add button.

8. Once you finish the report, select the **Review and Submit** button found in the top right corner of the page.



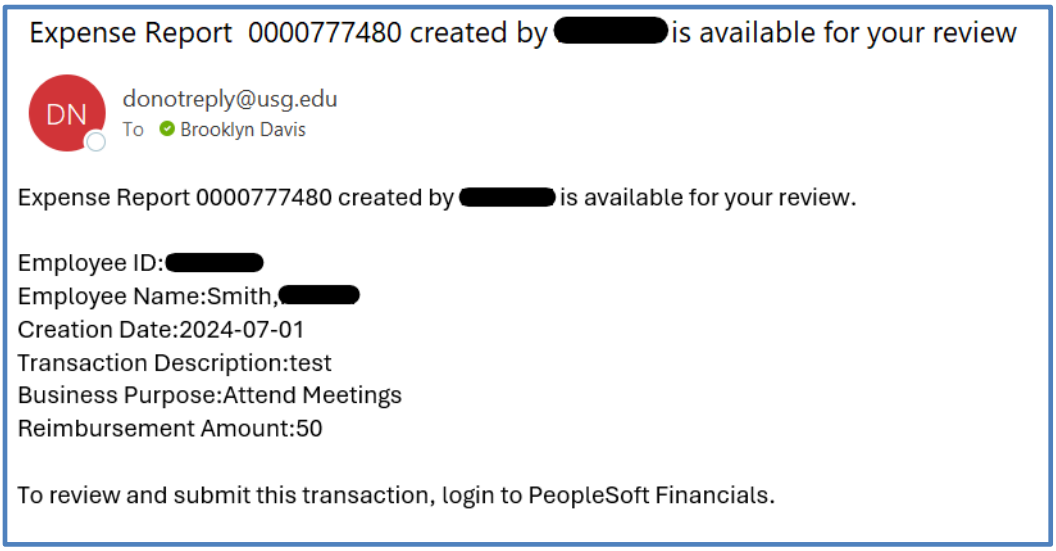
9. Once on the summary page, select the Submit button.

10. A message will appear verifying you would like to submit the report for the traveler to review.



11. Click **Yes** to send an email notification to the traveler.

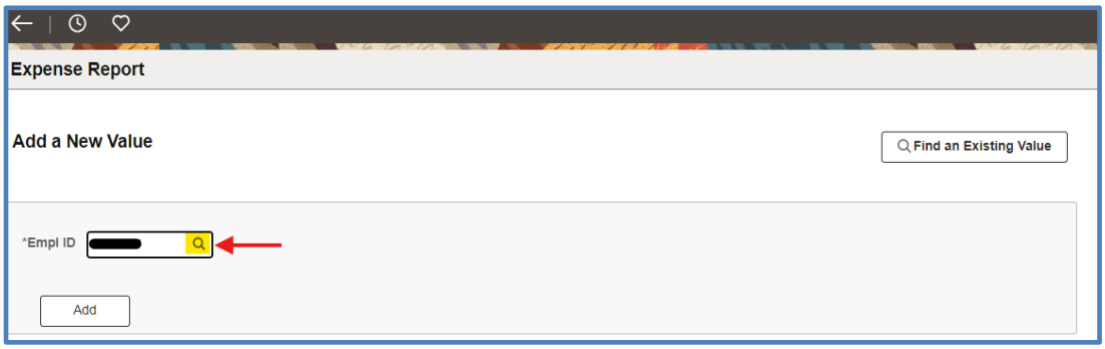
12. The traveler will receive a notification to review the Expense Report.



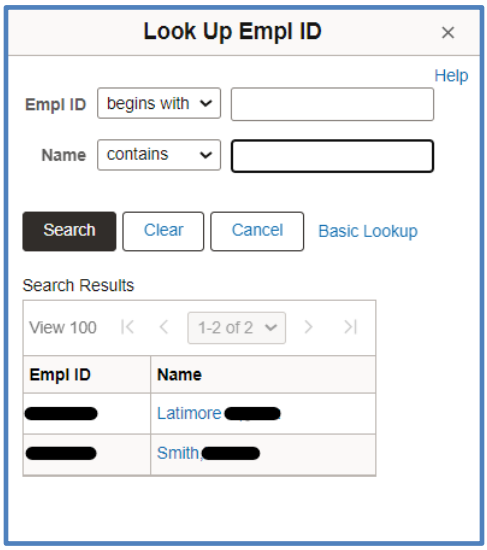
13. The traveler will then log in, review and submit the expense report.

Classic Navigation

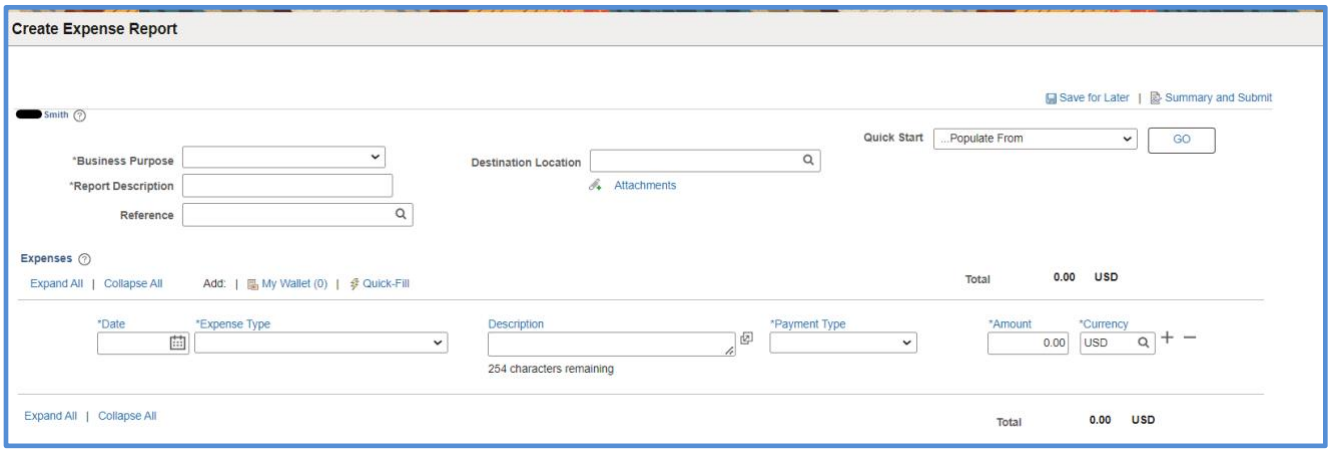
1. Navigate to **Employee-Self Service > Travel and Expenses > Expense Report > Create/Modify**
2. Select the magnifying glass next to the Empl ID field.



3. In the Employee Search box, choose an employee to create a report on behalf of.
   Note: Only employees for whom you are an authorized delegate will appear.



4. Click **Add.**

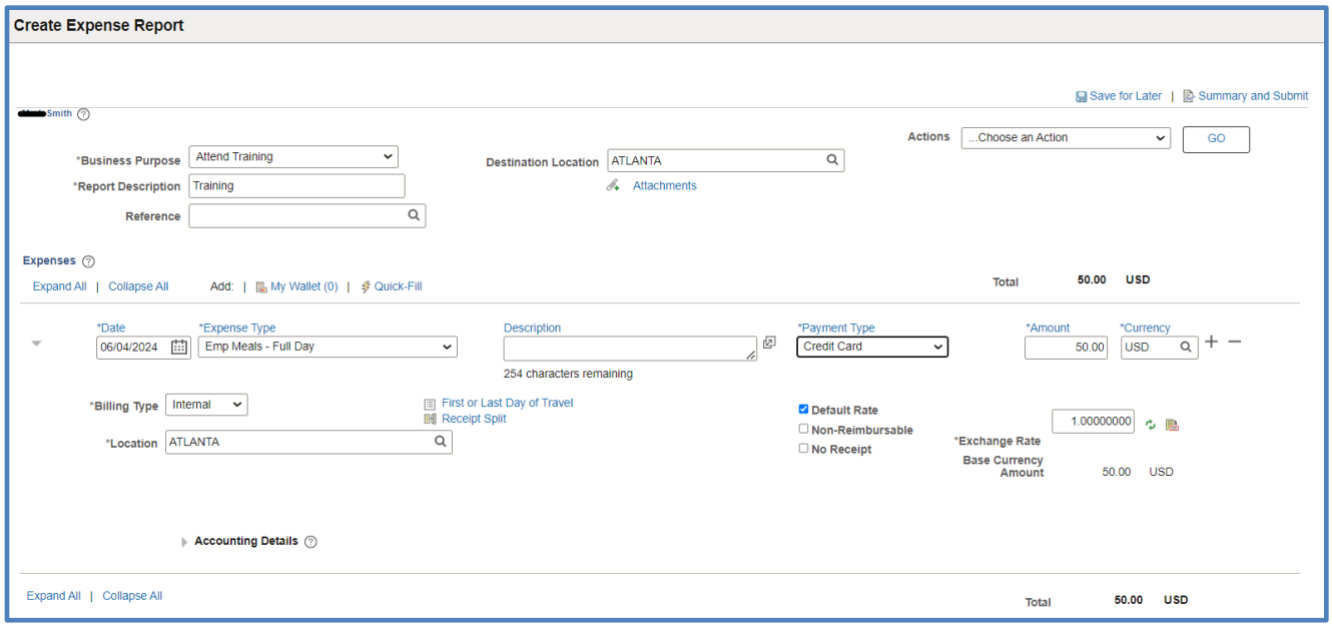


5. Enter the following information on the Expense Report header:

   a. *Business Purpose
   b. *Report Description
   c. Destination Location

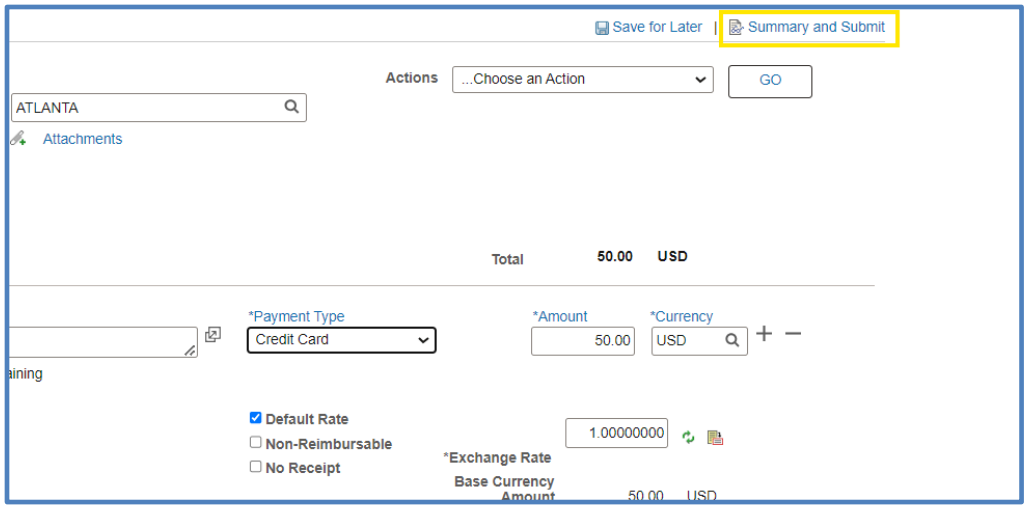
6. Next, enter your Expenses. Enter the following information on the Expense line:

   a.*Date
   b.*Expense Type,
   c. Select a *Payment Type.

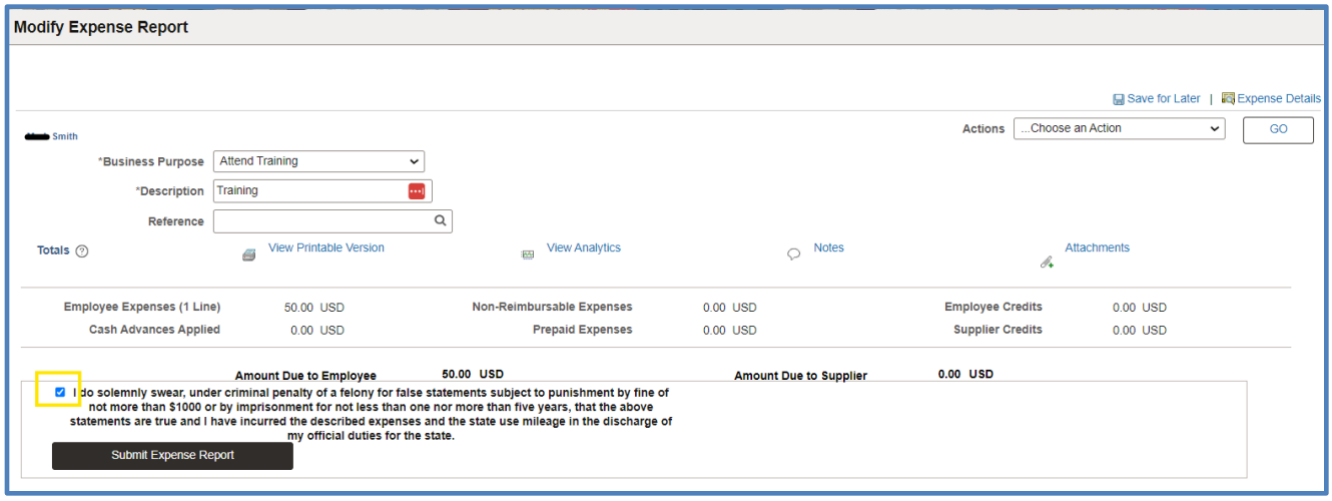


7. Review Accounting details and or add any other expense lines needed by selecting the + Add button

8. Once you finish the report, select the **Summary and Submit** button found in the top right corner of the page.

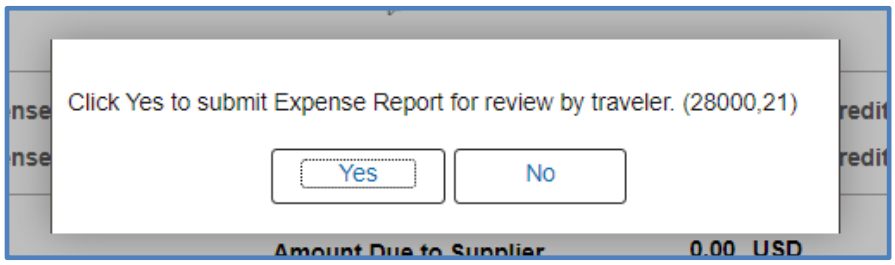


9. Click the checkbox that the Expense Report is accurate.



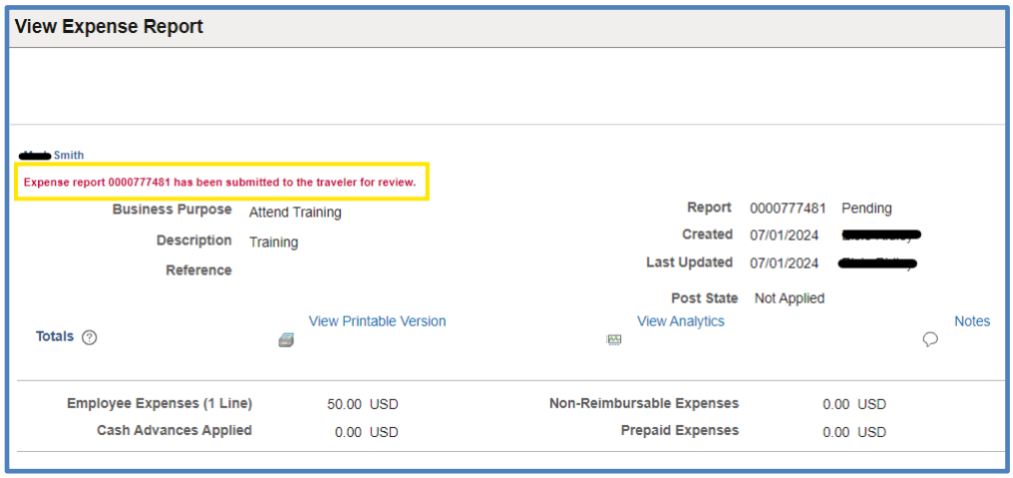
10. Select the Submit Expense Report button.

11. A message will appear verifying you would like to submit the report for the traveler to review.

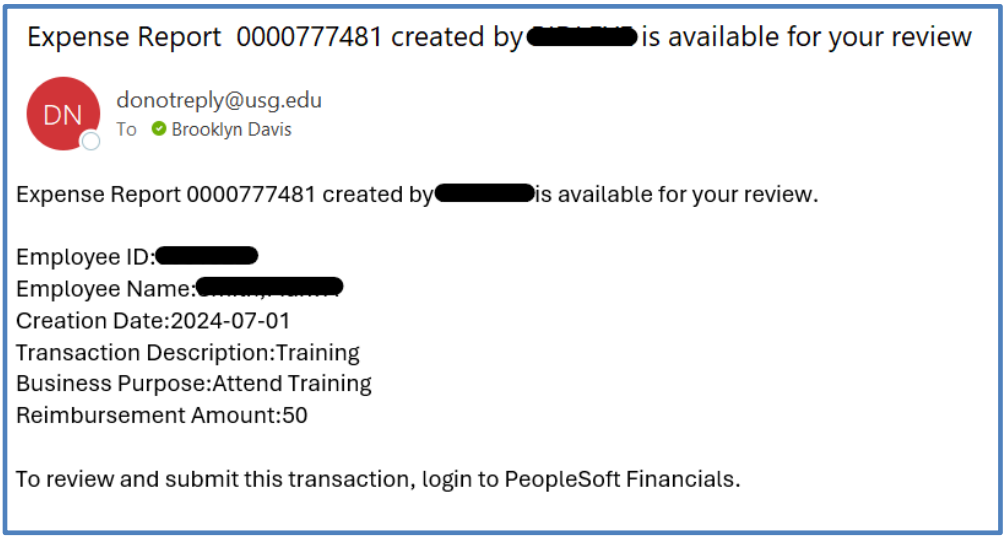


12. Click **Yes** to send an email notification to the traveler.

13. A message will appear in the top left corner of the page. The message says that the Expense report has been submitted to the traveler for review.



14. The traveler will receive a notification to review the Expense Report.



15. The traveler will then log in and review and submit the expense report.