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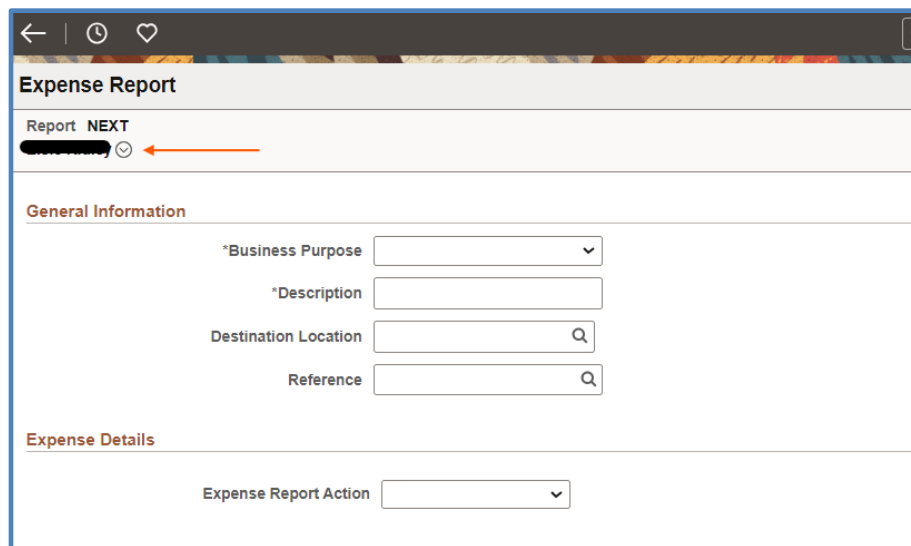
This job aid is designed to provide instructions on how to enter Expense Reports as a delegate using the Georgia*FIRST* PeopleSoft Financials Travel and Expense module. Fluid Navigation is shown first and Classic Navigation directions start on page 5.

Fluid Navigation

1. Select the **Create Expense Report** tile found on your Employee Self Service homepage.
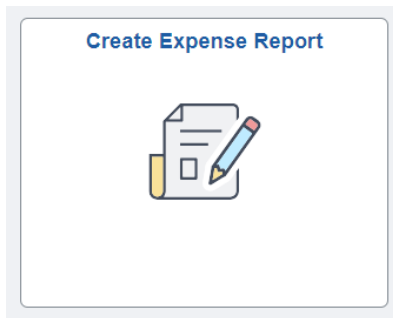
2. Select the action arrow next to the employee's name.

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

General Information
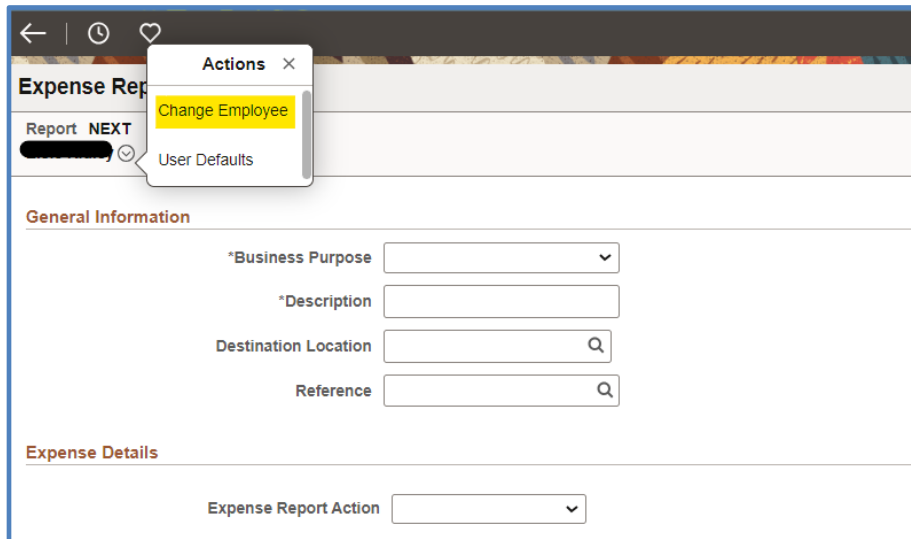
*Business Purpose	Attend Meetings ▾
*Description	Meeting
Destination Location	🔍
Reference	🔍

📎 Attach Receipt ›

📓 Accounting Defaults ›

Creation Date 08/24/2023 Brooklyn Davis
Updated on 08/24/2023

Expense Details

Expense Report Action ▾

Add Expense Lines
Add from Quick-Fill
Copy Expense Report

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

   a.*Date

   b.*Expense Type,

   c. Select a *Payment Type.

Example:

Total (1 Item) 50.00 USD

➕ Add   🗑 Delete   🔽 Filter   ⋯ More

▾ Thursday, August 24, 2023

Emp Meals - Full Day	50.00 USD

Emp Meals - Full Day - 08/24/2023

*Date	08/24/2023 📅
*Expense Type	Emp Meals - Full Day 🔍
Description	☑

Payment Details

*Payment	Credit Card ▾
*Amount	50.00 USD 🔍

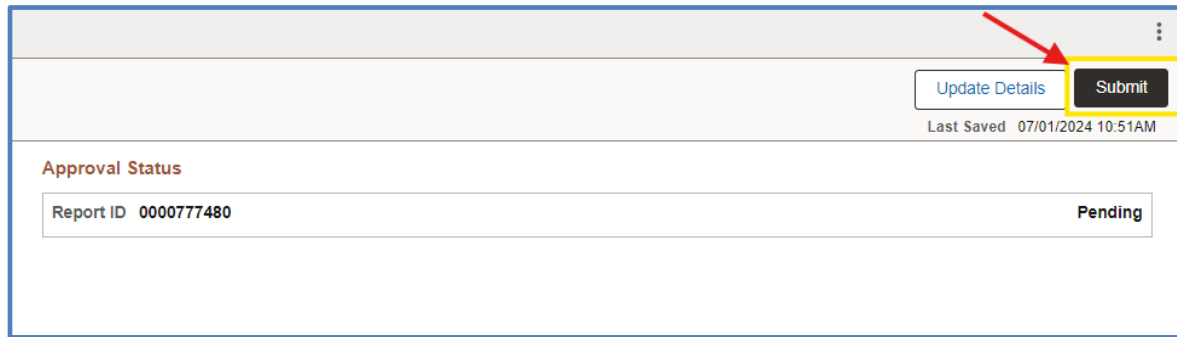**Additional Information**

*Billing Type	Internal ▾
*Expense Location	ATLANTA 🔍

📄 First or Last Day of Travel ›

📓 Accounting 1 ›

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.
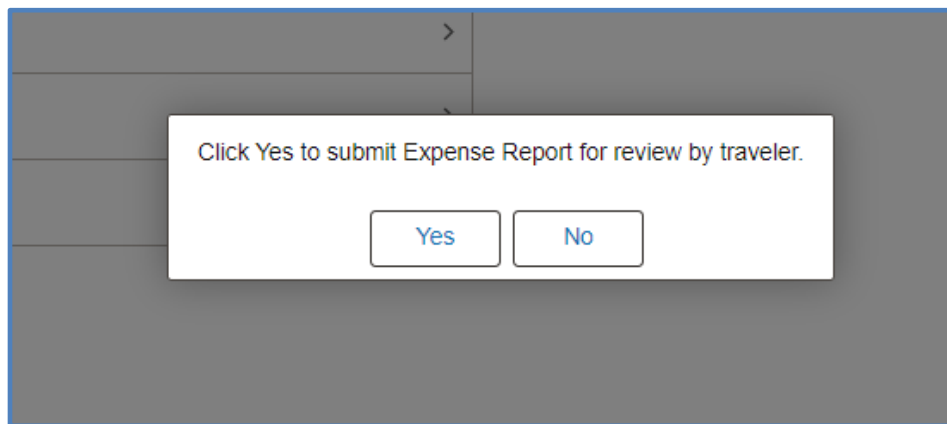
⋮

Save   **Review and Submit**

Last Saved 07/01/2024 10:46AM
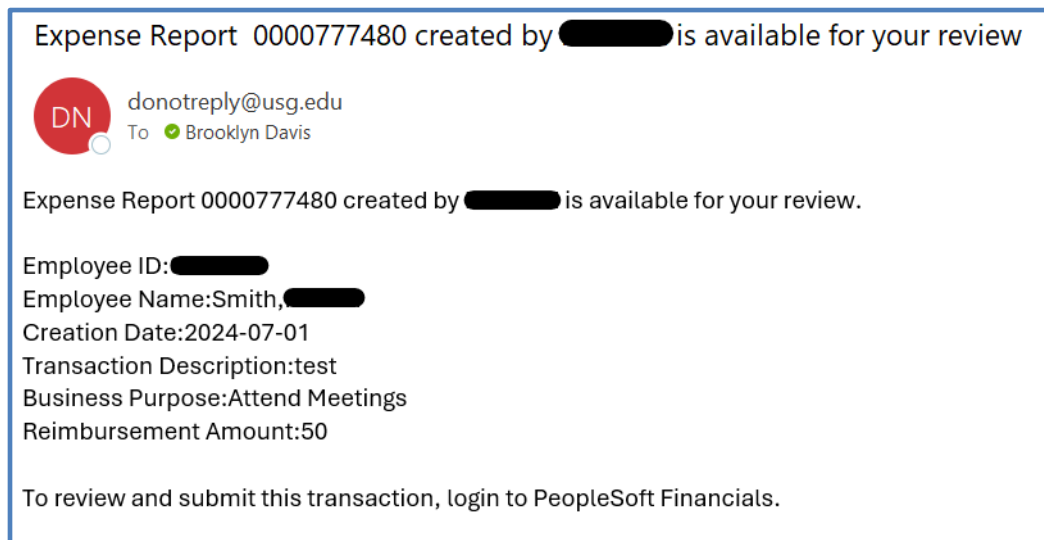
9. Once on the summary page, select the Submit button.

Update Details   **Submit**

Last Saved 07/01/2024 10:51AM

Approval Status

Report ID 0000777480   Pending

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

Click Yes to submit Expense Report for review by traveler.

Yes   No

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

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

Expense Report 0000777480 created by ⬛⬛⬛ is available for your review

DN   donotreply@usg.edu
To ✅ Brooklyn Davis

Expense Report 0000777480 created by ⬛⬛⬛ is available for your review.

Employee ID:⬛⬛⬛
Employee Name:Smith,⬛⬛⬛
Creation Date:2024-07-01
Transaction Description:test
Business Purpose:Attend Meetings
Reimbursement Amount:50

To review and submit this transaction, login to PeopleSoft Financials.
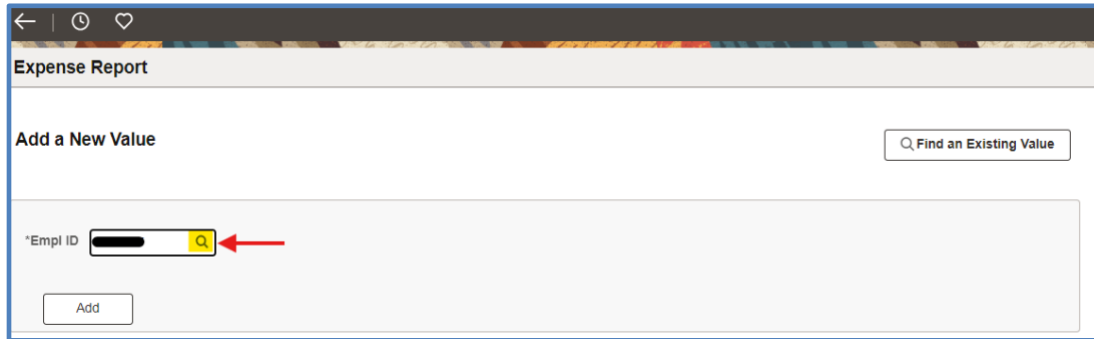
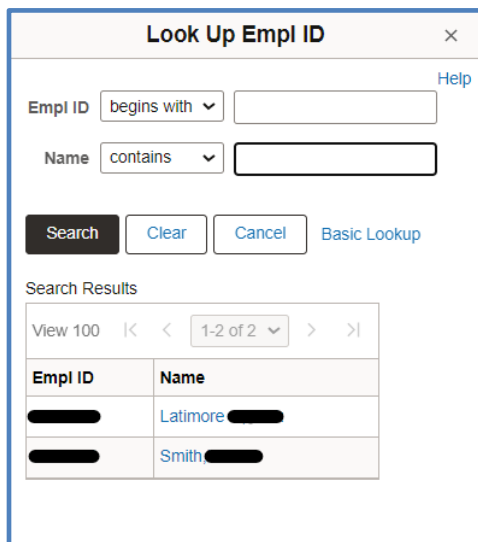13.   The traveler will then log in, review and submit the expense report.

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.

View Expense Report

Smith

Expense report 0000777481 has been submitted to the traveler for review.

Business Purpose	Attend Training	Report	0000777481	Pending
Description	Training	Created	07/01/2024	
Reference		Last Updated	07/01/2024	
		Post State	Not Applied	

Totals ⓘ   View Printable Version   View Analytics   Notes

Employee Expenses (1 Line)	50.00 USD	Non-Reimbursable Expenses	0.00 USD	
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	

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

Expense Report 0000777481 created by [redacted] is available for your review

DN   donotreply@usg.edu
      To ✓ Brooklyn Davis

Expense Report 0000777481 created by [redacted] is available for your review.

Employee ID:[redacted]
Employee Name:[redacted]
Creation Date:2024-07-01
Transaction Description:Training
Business Purpose:Attend Training
Reimbursement Amount:50

To review and submit this transaction, login to PeopleSoft Financials.

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