Submitting Expense Transactions Created by Delegate in PeopleSoft Financials

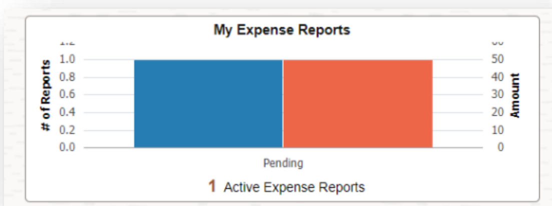
All employees must submit their own expense transactions. When an expense transaction is created by a delegate, users will need to log into PeopleSoft Financials to submit their own Expense Report, Travel Authorization or Cash Advance that was created on their behalf.

Submitting Expense Reports: Fluid and Classic Navigations

FLUID NAVIGATION:

To Submit an **Expense Report** through the Fluid tiles, log into PeopleSoft Financials

1. Select the **My Expense Reports** tile. Selecting this tile will allow you to view all of your expense reports that are either Returned, Not Submitted, Awaiting Approvals, or Pending Payment.



2. Select the expense report that you would like to submit for approval in the **Not Submitted** tab.
3. On the Expense Report Entry page, verify that all of your expenses entered by your delegate are as expected.
4. Select the **Review and Submit** button found on the top right corner of the page.
5. To submit your expense report, select the submit button on the top right corner of the page.
6. When the attestation box appears, **certify that the expenses submitted are accurate and comply with expense policy** and click submit.
7. Once your expense report successfully submits for approval, you will be redirected back to the **My Expense Report page,** where you can view your expense report now awaiting approval.

Submitting Expense Reports: Fluid and Classic Navigations

CLASSIC NAVIGATION:

To Submit an Expense Report through classic navigation, Log into PeopleSoft Financials.

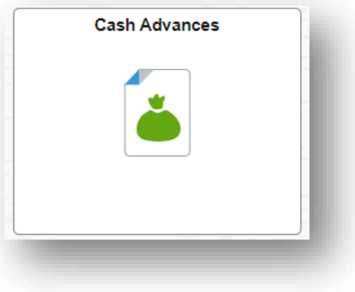
1. Navigate to: NavBar > Menu > Employee Self Service > Travel and Expenses > Expense Reports > Create/Modify
2. Select the **Find an Existing Value** button.
3. Click **Search.**
4. Select the expense report you would like to submit for approval.
5. View your expense report information to verify all expense lines look as expected.
6. Select the **Summary and Submit** link found on the top right of the page.
7. Check the attestation box to **certify the expenses submitted are accurate and comply with expense policy.**
8. Select the **Submit Expense Report** button.
9. After the report has successfully submitted for approval, you will then be redirected to the view expense report page, where you can view the approval history for your expense report.

Submitting Cash Advances: Fluid and Classic Navigations

FLUID NAVIGATION:

To Submit a **Cash Advance** through the Fluid tiles, log into PeopleSoft Financials

1. Select the Cash Advances Fluid Tile.



2. Select the **Find an Existing Value** button.
3. Click **Search.**
4. Select the Cash Advance you would like to submit for approval.
5. View your Cash Advance information to verify all expense lines look as expected.
6. Check the attestation box to **certify the expenses submitted are accurate and comply with expense policy.**
7. Select the **Submit Cash Advance** button.
8. After the Advance has successfully submitted for approval, you will then be redirected to the view Cash Advance page, where you can view the approval history for your advance.

*Note: Not all institutions use Cash Advances.

Submitting Cash Advances: Fluid and Classic Navigations

CLASSIC NAVIGATION:

To Submit a Cash Advance through classic navigation, Log into PeopleSoft Financials.

1. Navigate to: NavBar > Menu > Employee Self Service > Travel and Expenses > Cash Advances > Create/Modify
2. Select the **Find an Existing Value** button.
3. Click **Search.**
4. Select the Cash Advance you would like to submit for approval.
5. View your Cash Advance information to verify all expense lines look as expected.
6. Check the attestation box to **certify the expenses submitted are accurate and comply with expense policy.**
7. Select the **Submit Cash Advance** button.

   After the Advance has successfully submitted for approval, you will then be redirected to the view Cash Advance page, where you can view the approval history for your Advance.

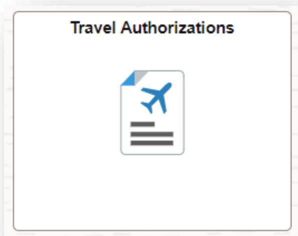
*Note: Not all institutions use Cash Advances.

Submitting Travel Authorizations: Fluid and Classic Navigations

FLUID NAVIGATION:

To Submit a **Travel Authorization** through the Fluid tiles, log into PeopleSoft Financials

1. Select the **Travel Authorizations** Fluid Tile.



2. Select the **Find an Existing Value** button.
3. Click **Search.**
4. Select the Travel Authorization you would like to submit for approval.
5. View your Travel Authorization information to verify all expense lines look as expected.
6. Select the **Summary and Submit** button at the top right of the page.
7. Check the attestation box to **certify these costs are reasonable estimates and comply with expense policy.**
8. Click the **Submit Travel Authorization** button.
9. After the Travel Authorization has successfully submitted for approval, you will then be redirected to the view Travel Authorization tab, where you can view the approval history for your authorization.

Submitting Travel Authorizations: Fluid and Classic Navigations

CLASSIC NAVIGATION:

To Submit a Travel Authorization through classic navigation, Log into PeopleSoft Financials

1. Navigate to: NavBar > Menu > Employee Self Service > Travel and Expenses > Travel Authorizations > Create a Travel Authorization
2. Select the **Find an Existing Value** button.
3. Click **Search.**
4. Select the Travel Authorization you would like to submit for approval.
5. View your Travel Authorization information to verify all expense lines look as expected
6. Select the **Summary and Submit** link found on the top right of the page.
7. Check the attestation box to **certify these costs are reasonable estimates and comply with expense policy.**
8. Select the **Submit Travel Authorization** button.
9. After the Travel Authorization has successfully submitted for approval, you will then be redirected to the view Travel Authorization page where you can view the approval history for your authorization.