Controller's Office – Travel and Expense

Approving Expense Transactions - Approvers

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I. Objectives

By the end of this procedure, you should be able to:

- Access email or worklist to approve expense transactions
- Review chartfield string using the Related Content
- Approve expense transactions (Travel Authorizations, Travel Advances, and Expense Reports)
- Send back expense transactions

II. Tips and Tricks

Here are few tips and tricks that will help when approving transactions prepared on your behalf:

- Make sure Email User and/or Worklist is checked on your **My System Profile** page to receive notification that an expense transaction needs your approval.
- If you plan to be out of the office for a several days please remember to select an alternate user to review and approve transactions using the **My System Profile** page in PeopleSoft.

III. Scenario

A proxy within your department created expense transactions for a traveler that require your approval.

IV. Prerequisites

Before approving expense transactions be sure to have the following:

- The approval role in PeopleSoft.
- Email User and/or Worklist 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 Using Email

Use email to approve a Travel Authorization. Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Authorizations are required for:

- a. Expenses \$5000 or greater
- b. All Foreign Travel
- c. All Travel Advances

As an approver:

- Verify the traveler
- Review attachments
- Review Notes
- Review the expense lines and amounts
- Review the accounting details
- Add comments when necessary
- Approve the transaction

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the **link**.

Approval requeste	d for travel authorization	n Sus Urb Conf Hong Kong 2/7/18 for TABOR,LLOYD.
CALLAHAN, J	Pmailbox.sc.edu <joannec IOANNE; O CALLAHAN, JOANNE Ioruary 7, 2018 at 5:42 PM</joannec 	-
Employee ID: Employee Name: Submission Date: Travel Auth Description Travel Auth ID: Business Purpose: Reimbursement Amount: You can navigate direct		

Step 3: Now you can see the details of the Travel Authorization. On this page, you can view:

- The name of the traveler
- Travel Authorization ID
- Travel dates
- Details of anticipated expenses
- The actions you can take such as Approve, Send Back, and Hold

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

Step 5: Click the Accounting Details option.

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Step 6: Review the Accounting Details for this transaction.

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

Step 8: Click the Close option.

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2 1000000226	Sus Urb Conf Hong	2	1	1 GROUND	Taxis from hotel to conference	USC01	CL071	100670	E1012	52024	202				200.000	N	02/07/2018	02/07/2018	02/07/2018			
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Step 9: To view all important documentation, click the Attachments link. (Quotes if needed.)

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Step 10: Click the File Name to view.

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Step 11: Review the sample attachment.

Step 12: After reviewing the sample attachment, **close** to continue approving the Travel Authorization.

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Step 13: Click **OK** to return to the Travel Authorization approval page.

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Step 14: Click the Notes link to view and add notes.

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	Date From 02/07/	2018	To 02/07	/2018 Upo	dated on 02/07/2018 5:42:13PM	By MARKT				
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You can deny individua	I expenses and stil	I approve or sen	d back the over	all report.						
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Expense Type	Date	Amount	Currency	Attachments	Approve					
Air Travel Expenses	02/07/2018	1,200.00	USD	Attachments	\checkmark					
Ground Transportation	02/07/2018	200.00	USD	Attachments	\checkmark					
Hotel and Lodging	02/07/2018	900.00	USD	Attachments	 Image: A start of the start of					
Meal Expenses	02/07/2018	400.00	USD	Attachments						
Totals										
			Total	2,700.00 USD						
		Less Non-A	proved	0.00 USD						
		Total Au	thorized	2,700.00 USD						

Step 15: Review any notes already added by the proxy or other approvers.

Step 16: Click in the Text field to add a new note.

Step	17:	Click	the	Add	Notes	button.
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You can deny in	Notes	Name 15	Role	Date/Time	
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Expense Type	Use this area to add important information.	LLOYD TABOR	Employee	02/07/2018 3:55PM	
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Air Travel Expense	OK Cancel				
Ground Transpor					
Hotel and Lodgin					
Meal Expenses	02/07/2018 400.00 USD Attachm	ents 🗸			

Step 18: Notice the note is added.

Step 19: Click the **OK** button to return to the Travel Authorization approval page.

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You can deny in Notes	Name	Role	Date/Time	
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Expense Type Use this area to add important informal	ion. JOANNE CALLAHAN	18 Employee	02/07/2018 3:37PM	
Air Travel Expense Use this area for important information.	ANNETTE JORDAN	Employee	02/07/2018 5:58PM	Ξ
Ground Transpor				
Hotel and Lodgin				
Meal Expenses 02/07/2018 400.00	USD Attachments			
Totals				

Step 20: Click the Expand Section Approval History button to review the approval workflow.

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Comment History
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TRAVEL_AUTH_ID=1000000226:Pending
Travel Auth. Approval 1
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TRAVEL_AUTH_ID=1000000226:Awaiting Further Approvals View/Hide Comments
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Not Routed Multiple Approvers Level 2 Approvers
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TRAVEL_AUTH_ID=1000000226:Awaiting Further Approvals SView/Hide Comments
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Not Routed

Step 21: Now that you have reviewed the travel authorization details and all is good, click the **Approve** button.

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You can deny individual	l expenses and still	approve or send	back the ove	rall report.				
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Meal Expenses	02/07/2018	400.00 U	ISD	Attachments	V			
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Step 22: Click the **OK** button to confirm the approval.

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Ground Transportation	02/07/2	Submit Confirmation			
Hotel and Lodging	02/07/2	LLOYD TABOR	Authorization ID	1000000226	
Meal Expenses	02/07/2	Travel Authorization Totals			
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		This report will be approved.			
Approval History Comments	2	OK Cancel			
		-			.:

Now that you have approved the Travel Authorization, it is ready to move to the next level in the approval workflow.

VI. Approving Travel Authorizations Using the Worklist

Use the Worklist to approve a Travel Authorization. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Authorizations are required for:

- d. Expenses \$5000 or greater
- e. All Foreign Travel
- f. All Travel Advances

As an approver:

- Verify the traveler
- Review attachments
- Review Notes
- Review the expense lines and amounts
- Review the accounting details
- Add comments when necessary
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the Worklist link.

Favorites - Main Menu -					
UNIVERSITY OF		Home	Worklist	MultiChannel Console	Performance Trace Add to Favorites
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Our menu has changed	11				
The menu is now located across the top of the Menu to get started.	e page. Click on Main				
Highlights					
Recently Used pages now appear under the Favorites menu, located at the top left.	CRACLE representation of a function of a representation of a function of a representation of a function of a representation of a function of a function of a function of an intervention of an intervention				
Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.					
Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.					

Step 2: Click the **Date From link** to view most recent. You may need to click this a couple of times to see the most recent at the top.

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Detail View Worklist Filters	Feed -
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From Date From Work Item Worked By Activity Priority Link	
Mark Tabor 01/17/2018 Approval Routing Approval Workflow 2-Medium 0 100	pproval, 118, USC01, 1-01-12, N, 0, VEL AUTH ID:1000000094 Mark Worked Reassign
ROC	2:RA,0,A,

Step 3: Click the **link** for the Travel Authorization you would like to approve.

Favorites -		Worklist - > Worklist					
	ITY OF H CAROLINA			Home	Worklist MultiChannel Consol	e Performance Trace A	dd to Favorites Sign out
Worklist						New Wi	ndow Help Personalize Page
Detail View	RAVEL_OFFICE: Tr	avel Office	Worklist Filters		😒 🔊 Feed 🗸		
Worklist Item	IS				Pers	onalize Find View All 💷 🗔	First 🕚 1 of 1 🕑 Last
From	Date From	Work Item	Worked By Activity	Priority	Link		
Mark Tabor	01/17/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 118, USC01, 1901-01-12, N. 0, TRAVEL AUTH ID:1000000094 RDC:RA,0,A,	Mark Worked	Reassign
					3		

Step 4: Now you can see the details of the Travel Authorization. On this page, you can view:

- The name of the traveler
- Travel Authorization ID
- Travel dates
- Details of anticipated expenses
- The actions you can take such as Approve, Send Back, and Hold

	ain Menu 🗸 🔹 >	Worklist -> W	Vorklist					
					Ho	me Worklist	MultiChannel	Console Performance Trace Add to Favorites Sign out
SOUTHC	AROLINA							
								Related Content - New Window Help Personalize Page
Approve Travel A								
Travel Author	ization Summ	hary						
LLOYD TABOR General Information								
	Description Sus U	rh Conf Hong Kong	1/17/18	Auth	horization ID 100000094			
	ss Purpose Emplo		, , , , , , , , , , , , , , , , , , , ,	~~~	1000000004			
		vals in Process						
	Date From 01/17	/2018	To 01/17/201	в	Updated on 01/17/2018 12:08:07PM	By MARKT		
4				_	Attachments	Notes		
					na Ontiona Columna an Ari	1	GO]
					ore OptionsChoose an Act	ion	GO GO	
You can deny individu	ual expenses and sti	Il approve or send t	back the overall re	port.		-		
Details						Personalize	Find 신신	
Expense Type	Date	Amount Cu	urrency	Attachments	Approve			
Air Travel Expenses	01/17/2018	1,200.00 US	SD .	Attachments	\checkmark			
Ground Transportation	n 01/17/2018	200.00 U	SD .	Attachments				
Hotel and Lodging	01/17/2018	900.00 U	SD .	Attachments	\checkmark			
Meal Expenses	01/17/2018	400.00 US	SD .	Attachments	\checkmark			
Totals								
			Total 2,70	0.00 USD				
		Less Non-App	roved	0.00 USD				
		Total Author	orized 2,70	0.00 USD				
Approval Histo	ory							
Comments]
							24	
Budget Budget Options	Status Valid							
Approve	Send	Back	Hold					

Follow **Steps 4 thru 22** in the **Approving a Travel Authorization Using Email** section, to finish reviewing the transaction details and approve.

VII. Approving Travel Advances using Email

Use email to approve a Travel Advance. Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

Travel Advances can be created for 70% of total estimated expenses for Hotel/Lodging and Meals but cannot exceed \$3000.00 per policy.

As an approver:

- Verify the traveler
- Review Travel Advance details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the **link**.

Approval Request for USC travel adv	vance for Sus Urb Conf Hong Kong 1/17/18 for TABOR,LLOYD.
J OANNEC@mailbox.sc.edu <jo O CALLAHAN, JOANNE; O CALLAHAN, Wednesday, January 17, 2018 at 1:48 PM Show Details</jo 	JOANNE; 📀 CALLAHAN, JOANNE
A USC travel advance request has been submitted that requir Employee ID: 1060632 Employee Name: TABOR,LLOYD Submission Date: 2018-01-17 Advance Description: Sus Urb Conf Hong Kong 1/17/18 Advance ID: 200000032 Business Purpose: Employee Travel Reimbursement Amount: 1180.00 USD You can navigate directly to the page for more information b https://fms-trn.ps.sc.edu/psp/FTRN/EMPLOYEE/ERP/c/AP	1

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 Advance ID and status
- Travel Authorization ID and status
- Travel Advance details
- The actions you can take such as Approve, Send Back, and Hold

	ain Menu 🗸				
UNIVERSITY O				Home Worklist MultiChannel Console	Performance Trace Add to Favorites Sign out
SOUTH C	AROLINA				
SCA.					
					Related Content - New Window Help Personalize Page
Approve LICC	Travel Advence				
Approve USC	Travel Advance				
LLOYD TAB	OR				
Busines	ss Purpose Employee Travel	Advance I	D 200000032	Approvals in Process	
Advance I	Description Sus Urb Conf Hong Kong 1/17/18	Travel Authorization	ID 100000094		
		Post Stat	te Not Applied		
		Create	d 01/17/2018	JOANNE CALLAHAN	
	3	Last Update	d 01/17/2018 User Defaults	LLOYD TABOR	
USC Travel Advance ②	View Printable Version	Notes		Attachments (1)	
*Source	Description			*Amount Currency	
Travel Advance	Sus Urb Conf Hong Kong 1/17/18			1,180.00 USD	
Totals					
	Advance Amount 1,180.00 USD				
Approval Histo	ory				
Comments					
				PC	
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.

Favorites -	Main Menu 🗸			
			Home Worklist MultiChannel Cons	ole Performance Trace Add to Favorites Sign out
	ISITY OF			
200 B	Inchedity		1	4
				Related Content New Window Help Personalize Page
				Accounting Detail
Approve U	JSC Travel Advance			5
LLOY	D TABOR			
E	Business Purpose Employee Travel	Advance ID 2000000	032 Approvals in Process	
Adv	vance Description Sus Urb Conf Hong Kong 1/17/18	Travel Authorization ID 100000	0094	
		Post State Not Appl	ed	
		Created 01/17/20	18 JOANNE CALLAHAN	
		Last Updated 01/17/20	18 LLOYD TABOR	
USC Travel Advance (?	View Printable Version	Dotes	Attachments (1)	
*Source	Description		*Amount Currency	
Travel Advanc	Sus Urb Conf Hong Kong 1/17/18		1,180.00 USD	
Totals				
	Advance Amount 1,180.00 USD			
Approva	I History			
- Commer	nts			
			(I) (I)	
Appre	ove Send Back Hold			

Step 6: Review the Accounting Details for this transaction.

Favorites - Main Menu -						
UNIVERSITY OF			Home Worklist MultiChannel C	onsole Per	formance Trace Add to Favorites	Sign out
SOUTH CAROLINA						
8				Relate	ed Content - New Window Help Perso	nalize Page
Approve USC Travel Advance	9					
LLOYD TABOR						
Business Purpose Employee	e Travel	Advance ID 200000032	Approvals in Process			
Advance Description Sus Urb C	Conf Hong Kong 1/17/18 Trave	Authorization ID 100000094				
		Post State Not Applied				
		Created 01/17/2018	JOANNE CALLAHAN			
		Last Updated 01/17/2018	LLOYD TABOR			
		User Defaults				
USC Travel Advance	ble Version	Division Notes	🖉 Attachments (1)			
*Source Do	escription		*Amount Currency			
Travel Advance Su	us Urb Conf Hong Kong 1/17/18		1,180.00 USD			
·						
	nting Detail					0 -
SC_EX_ADV_ACCTG_DTL- TRAVEL	ADVANCE ACCTG DETAILS					
Download results in : Excel SpreadSheet	CSV/Text Eile XMI Eile (1 kb)					
View All	COV TEALT ILE ANNE THE (TAD)		6		First 1-1 of 1 Last	
ID Adv ID Line Distribution S	Status Acctg Date Created GL Unit U	er Dept Fund Account Cla	ss Project Amount Status ID	Report Total	Descr	
1 1060632 200000032 1 1 F	PAR 01/17/2018 01/17/2018 USC01 CL0	71 100670 E1012 10206 202	2 1180.000 N	1180.00	0 Sus Urb Conf Hong Kong 1/17/18	

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

Step 8: Click the Close option.

Favorites -	Main	Men																			
N/A	IVICIII	ment										н	ome	Worklis	•	MultiChannel	Consola	Porf	ormance Trace	Add to Favorites	Sig
UN UN	IVERSITY OF		INIA									п	one	VVUIKIIS		MultiGriatifiei	CONSOLE	Fen	ormance trace	Add to Pavonies	JU
	JUIHCA	KOI	JINA																		
																		Relate	d Content 🔻 New	Window Help	Personaliz
Approv	USC T	rave	el Advan	e																	
			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,														-				
LI	OYD TABOI	R																			
	Business	Purp	ose Employ	ee Trav	el				Advand	ce ID ;	20000000	32 A	pproval	s in Proce	SS						
	Advance De	escrip	tion Sus Urt	Conf H	long Kong 1	/17/18	т	ravel Au	thorizati	on ID	1000000	094									
									Post	State I	Not Applie	d									
									Cre	eated (1/17/201	8 J	OANNE	CALLAHA	N						
								1	Last Upo		01/17/201 ser Defa		LOYDT	ABOR							
USC Tra Advance		é	View Prin	table Ve	ersion			Ģ	Notes	3				ß	Attachr	ments (1)					
*Source				Descrip	tion							•	Amount	Currency							
Travel Adv	ance			Sus Url	Conf Hong	Kong 1/17/	18					1	,180.00	USD							
	-																				\mathcal{O}
Related				unting																	•
C_EX_A	DV_ACCT	G_D	TL- TRAVI	EL AD	VANCE A	CCTG DE	TAILS											_		(Close
Download	roculte in · I	Evcel	SpreadSheet	CSV	Text File X	MI File (1	kb)													8	
View All		LAUGI	opreadoneer	001		merne (r	(LD)												First 1-	1 of 1 Last	
			Distribution					Oper							-	Travel Auth	Report				
ID	Adv ID	Line	Li	Status	Acctg Date	Created	GL Unit	Unit	Dept	Fund	Account	Class	Project	Amount	Status	ID	ID	Total	Descr		
	200000032			DAD	04/47/0040	01/17/2018	LICCOL	CI 071	100670	E1012	10206	202		1180.000	N			1180.000	Sus Urb Conf Hong 1/17/18	g Kong	

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

Favorites -	Main Menu -						
UNIVERSIT				Home Worklist MultiChannel	Console	Performance Trace Add to Favo	rites Sign out
SOUTH	Y OF CAROLINA						
Ser B.						Related Content - New Window He	lp Personalize Page
25000 Contractor Margar							
Approve US	C Travel Advance				_		
LLOYD T	ABOR						
Busi	ness Purpose Employee Travel	Advance I	D 200000032	Approvals in Process			
Advand	ce Description Sus Urb Conf Hong Kong 1/17/18	Travel Authorization	ID 100000094				
		Post Sta	te Not Applied				
		Create	d 01/17/2018	JOANNE CALLAHAN			
			d 01/17/2018	LLOYD TABOR			
		20	User Defaults				
USC Travel Advance 👔	View Printable Version	Notes		9 Attachments (1)			
*Source	Description			*Amount Currency			
Travel Advance	Sus Urb Conf Hong Kong 1/17	7/18		1,180.00 USD			
Totals					1		
	Advance Amount 1,180.00 USD						
Approval Hi	story				ľ		
- Comments					1		
				D.C.			
Approve	Send Back Hole	1					
Applove		-					

Step 10: Click the File Name to view.

Favorites - Main M	enu 🗸					
UNIVERSITY OF	OUNA		Home	Worklist MultiChannel Console	Performance Trace Ad	d to Favorites Sign out
Soothe ad	OLIVY				na se se se des ses	
					Related Content - New Win	dow Help Personalize Page
Approve USC Tra	vel Advance					
LLOYD TABOR						
Business P	urpose Employee Travel	Advance ID 2000000	032 Approvals	in Process		
Advance Des	Cash Advance Attachments					×
						Help
	Advance ID 200000032					
						-
	Details			Personalize Find View All 💷 🔜	First ④ 1 of 1 ④ Last	
USC Travel Advance (2)	File Name	Description	User	Name	Date/Time Stamp	
*Source	USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	01/17/2018 1:44:24PM	
	Adding large attachments can take some time to up transaction before adding large attachments.	load, therefore, it is advisable to save	the			
Totals	OK Cancel					
Approval History						
Comments						
				₽¢¢		

Step 11: Review the sample attachment.

Step 12: After reviewing the sample attachment, **close** to continue approving the Travel Advance.

Favorites - Main Menu -		
UNIVERSITY OF SOUTH CARCINA	Home Worklist MultiChannel Console Performa	nce Trace Add to Favorites Sign out
Approve USC THOME	Insert Design Layout References Mallings Review View Calibri (Body) • 22 • A^A A · A · A · A · A · A · A · A · A ·	ntent 👻 New Window Help Personalize Page
Busines		x
Advance D USC Travel Advance ? *Source Travel Advance * Totals *	UNIVERSITY OF SOUTH CAROLINA This is an attachment for PeopleSoft Testing and Training	Help 1 of 1 Last Stamp 8 1:44:24PM
Approve Page 1 o	of 1 9 Words 🖳 English (US)	

Step 13: Click OK to return to the Travel Advance approval page.

Favorites - Main M			Home	Worklist MultiChannel Cor	nsole Performance Trace Ac	dd to Favorites Sign out
Approve USC Tra	vel Advance				Related Content 👻 New Wir	ndow Help Personalize Page
LLOYD TABOR						
Business P Advance Desc	Cash Advance Attachments	Advance ID	200000032 Approvale	in Process		×
Auvance Desi	Advance ID 200000032					Help
	Details			Personalize Find View All	🎘 🔣 First 🕚 1 of 1 🕑 Last	
USC Travel Advance (2)	File Name	Description	User	Name	Date/Time Stamp	
*Source	USC_PeopleSoft_Attachment.docx		JOANNEC	JOANNE CALLAHAN	01/17/2018 1:44:24PM	
	Adding large attachments can take some time to transaction before adding large attachments.	o upload, therefore, it is advisable	e to save the			
Approval History						
Comments						
Approve	Send Back Hold					

Step 14: Click the Notes link to view and add notes.

Favorites -	Main Menu 🗸				
	PSITY OF			Home Worklist MultiChannel Console	Performance Trace Add to Favorites Sign out
millim SOU	RSITY OF	IA			
000					Related Content - New Window Help Personalize Page
Approve U	USC Travel A	Advance			
LLOY	YD TABOR				
	Business Purpose	Employee Travel	Advance ID 200000032	Approvals in Process	
Ad	vance Description	Sus Urb Conf Hong Kong 1/17/18	Travel Authorization ID 10000009	4	
			Post State Not Applied		
			Created 01/17/2018	JOANNE CALLAHAN	
			Last Updated 01/17/2018	LLOYD TABOR	
			Se User Defaults		
USC Travel Advance		View Printable Version	Notes	Attachments (1)	
*Source		Description	-	*Amount Currency	
Travel Advance	ce	Sus Urb Conf Hong Kong 1/17/18		1,180.00 USD	
Totals					
	Advar	nce Amount 1,180.00 USD			
Approva	al History				
- Comme	ents				
). A	
		Overd Bask			
Арр	orove	Send Back Hold			

Step 16: Click in the Text field to add a new note.

Favorites -	Main Menu -					
	TY OF TCAROLINA		Home Worklist	MultiChannel Console		to Favorites Sign out
					Related Content - New Window	w Help Personalize Page
Approve US	SC Travel Advance					
LLOYD	TABOR					
Bu	Expense Notes for Cash Advance					×
Adva						Help
	Use this area to add important information.		16			
USC Travel Advance 👔	Add Notes 17					
*Source	Notes			Personalize Find	💷 🔜 🛛 First 🕚 1 of 1 🔮	2 Last
Travel Advance	Notes	Name	15	Role	Action Date/Time	
Totals	Use this area to add important information.	JOANNE CALLAHAN	~	Employee	01/17/2018 1:44PM	
	OK Cancel					
Approval I						
Comment	5					
				a.C.		
Арргом	e Send Back Hold					

Step 17: Click the Add Notes button.

Step 18: Notice the note is added.

-	Step 19:	lick the OK button to return to the Travel Advance approval page	e.
	Favorites -	Aain Menu 👻	

	TY OF I CAROLINA	Home	Worklist MultiChannel Con	sole Performance Trace Ad	d to Favorites Sign out
				Related Content - New Win	dow Help Personalize Page
Approve US	SC Travel Advance				
LLOYD	TABOR				
Bu	Expense Notes for Cash Advance				×
Adva					Help
USC Travel	Add Notes				
Advance ②					
*Source	Notes		Personalize F	Find 💷 🔜 🛛 First 🕚 1-2 of 2	Last
Travel Advance	Notes	Name	Role	Action Date/Time	
Totals	Use this area to add important information.	JOANNE CALLAHAN	Employee	01/17/2018 1:44PM	
	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	-
Approval I	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	
Approval I	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	
	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	
	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	_
	Use this area to add important information.	ANNETTE JORDAN	Employee	01/17/2018 2:19PM	_

Approving Expense Transactions

Step 20: Click the Expand Section Approval History button.

Favorites	•	Main Menu 🗸							
	NIVERSI	P. OF				Home Workli	st MultiChannel Consol	e Performance Trace	Add to Favorites Sign out
Du S	OUT	ICAROLINA							
States.									
20									
Арр	oroval H	listory							
USC	Trave	el Advance	Employee						
	- AI	VANCE ID=2	000000032:Approved		View/Hide Comments				
		Approval Required							
	Approv								
	M	ark Tabor							
	✓ ^{En} 01	nployee /17/18 - 1:48 PM							
▶	Com	ment History							
		el Advance	Annroval 1						
			••						
			000000032:Pending		View/Hide Comments				
	ivel 1 App		1						
2	Skippe M	ark Tabor							
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l l'	M	ultiple Approvers							
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) Co	omments	,						
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		el Advance	Approval 2						
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		_	000000032:Awaiting	Further Approvals	View/Hide Comments				
	vel 2 Ap								
	Not Roi	uted ultiple Approvers							
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	- AI	DVANCE_ID=2	000000032:Awaiting	Further Approvals	View/Hide Comments				
Tra	avel App	roval Required							
	Not Ro								
	Te	ultiple Approvers avel Department							
	₿ "								
►	Com	ment History							
The Con	nments	1							
							28		
							h		
	Approve	•	Send Back	Hold					

Step 21: Now that you have reviewed the Travel Advance details and all is good, click the **Approve** button.

Favorites - Main Menu -					
UNIVERSITY OF SOUTH CAROLINA	Home Worklist	MultiChannel Console	Performance Trace	Add to Favorites	Sign out
MIXIM SOUTH CAROLINA					
Department Approvers 01/17/18 - 1:48 PM					
Pending Multiple Approvers Department Approvers					
▶ Comments					
Comment History					
USC Travel Advance Approval 2					
ADVANCE_ID=2000000032:Awaiting Further Approvals View/Hide Comments					
Level 2 Approval					
Not Routed Multiple Approvers Level 2 Approvers					
Comment History					
Travel Department Approval					
ADVANCE_ID=2000000032:Awaiting Further Approvals Sview/Hide Comments					
Travel Approval Required					
Not Routed					
Multiple Approvers					
Comment History					
▼ Comments					
21		₽¢€			
Approve Send Back Hold					

Step 22: Click the **OK** button to confirm the approval.

Favorite	Main Menu -			
	UNIVERSITY OF		Home Worklist MultiChannel Console Performance Trace	Add to Favorites Sign out
	Department Approver 01/17/18 - 1:48 PM	S		3
	Pending Multiple Approvers Department Approver			
	Comments			_
1	Comment Histor	Save Confirmation		×
USC	Travel Advance			Help
	ADVANCE_ID	Travel & Expenses - Cash Advance Report		
L	evel 2 Approval	Submit Confirmation		
	Not Routed Multiple Approvers	LLOYD TABOR Adva	ance ID 200000032	
	Level 2 Approvers	Totals		
	Comment Histor	Advance Amount 1,180.00 USD		
Trav	el Department /	This report will be approved.		
	ADVANCE_ID			
1	Travel Approval Required	OK		
	Not Routed Multiple Approvers Travel Department	22		
þ	Comment History	y		
- Co	omments			
			Tes	

Now that you have approved the Travel Advance, it is ready to move to the next level in the approval workflow.

Approving Expense Transactions

VIII. Approving Travel Advances using the Worklist

Use the Worklist to approve a Travel Advance. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

Travel Advances can be created for 70% of total estimated expenses for Hotel/Lodging and Meals but cannot exceed \$3000.00 per policy.

As an approver:

- Verify the traveler
- Review Travel Advance details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the Worklist link.

Favorites - Main Menu -					
UNIVERSITY OF		Home Worklist	MultiChannel Console	Performance Trace Add to Favorites	Sign out
IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		1			
5				P	
				Personalize Content Layout	? Help
Top Menu Features Description	0 •				
Our menu has changed	1				
The menu is now located across the top of the Menu to get started.	page. Click on Main				
Highlights					
Recently Used pages now appear under the Favorites menu, located at the top left.	CRACLE reger to the set of registrate to the set of the set of t				
Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.					
Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.					

Step 2: Click the **Date From link** to view most recent. You may need to click this a couple of times to see the most recent at the top.

Favorites -		Worklist -> Worklist					
UNIVERS	H CAROLINA			Home	Worklist MultiChannel	Console Performance Trace Add	to Favorites Sign ou
SOOL	ACAROLINA						
						New Wind	low Help Personalize Pa
Worklist							
Worklist for 7	RAVEL_OFFICE: Tra	avel Office					
Detail View			Worklist Filters		ᅌ 🔊 Feed 👻		
Worklist Item						Personalize Find View All 💷	First ④ 1 of 1 ④ La
From	Date From	Work Item	Worked By Activity	Priority	Link		Filst @ For T @ La
					CAApproval 45 USC01		
	01/17/2018	Approval Routing	Approval Workflow	2-Medium ᅌ	1901-01-12, N, 0, ADVANCE ID:200000032	Mark Worked	Reassign
Mark Tabor	01/1//2018				RDC:RA,0,A,		

Step 3: Click the link for the Travel Advance you would like to approve.

Favorites -		Worklist -> Worklist					
	ITY OF H CAROLINA			Home	Worklist MultiChannel	Console Performance Trace A	dd to Favorites Sign out
mi)(im SOUT	HCAROLINA						
6 <u>6</u> 8						New Wi	ndow Help Personalize Page
Worklist							nden fried freidenditzer age
VVOIKIISL							
Worklist for	RAVEL_OFFICE: Tr	avel Office					
Detail View			Worklist Filters		🗢 🔝 Feed 👻		
Worklist Iten	IS					Personalize Find View All 💷	First 🕚 1 of 1 🕑 Last
From	Date From	Work Item	Worked By Activity	Priority	Link		
Mark Tabor	01/17/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval, 45, USC01, 1901-01-12, N, 0, ADVANCE ID:2000000032 RDC:RA,0,A,	Mark Worked	Reassign
						3	

Step 4: Now you can see the details of the Travel Advance. On this page, you can view:

- The name of the traveler
- Advance description
- Travel Advance ID and status
- Travel Authorization ID and status
- Travel Advance details
- The actions you can take such as Approve, Send Back, and Hold

Favorites Main Menu Worklist Worklist	
UNIVERSITY OF	Home Worklist MultiChannel Console Performance Trace Add to Favorites Sign out
SOUTH CAROLINA	
0	Related Content - New Window Help Personalize Pag
Approve USC Travel Advance	
LLOYD TABOR	
Business Purpose Employee Travel	Advance ID 2000000032 Approvals in Process
Advance Description Sus Urb Conf Hong Kong 1/17/18	Travel Authorization ID 100000094
	Post State Not Applied
	Created 01/17/2018 JOANNE CALLAHAN
	Last Updated 01/17/2018 LLOYD TABOR
(4)	User Defaults
USC Travel Sview Printable Version	Notes Attachments (1)
*Source Description	*Amount Currency
Travel Advance Sus Urb Conf Hong Kong 1/17/18	1,180.00 USD
Totals	
Advance Amount 1,180.00 USD	
Approval History	
▼ Comments	
	(3) 4
Approve Send Back Hold	

Follow **Steps 4 thru 22** in the **Approving a Travel Advance Using Email** section, to finish reviewing the transaction details and approve.

IX. Approving Expense Reports using Email

Use email to approve an Expense Report created by a Proxy on your behalf.

An Expense Report in PeopleSoft makes it easy to transform a handful of receipts into a final document for expense reimbursement(s).

As an approver:

- Verify the traveler
- Review Expense Report details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Open and review the Approval Request in your email.

Step 2: Log in to PeopleSoft using your Network ID and password, then click the link.

	@mailbox.sc.edu <joannec@r JOANNE; O CALLAHAN, JOANNE</joannec@r 	nailbox.sc.edu>
Thursday, Febru	ary 8, 2018 at 7:17 AM	
Show Details		
An expense report has	been submitted that requires you	action:
Employee ID: Employee Name: Submission Date: Report Description: Report ID: Business Purpose: From Date To Date Trip Location Total Amount: Reimbursement Amount:	1060632 TABOR,LLOYD 2018-02-08 Sus Urb Conf Hong Kong 1/23-31 3000000386 Employee Travel 2018-01-23 2018-01-31 Hong Kong 6152.00 USD	1
	tly to the approval page by click	ing the link below:

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
- Travel Dates
- Trip Location
- Details of expenses
- The actions you can take such as Approve, Send Back, and Hold

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		Irb Conf Hong Kong	1/23-31		Created 02/08/20				01/31/2018	
Re	eference				Last Updated 02/08/20			Trip Location	Hong Kong	
Budge	et Status Not B	udget Checked	Budget Optior	ns	Authorization ID 100000	0116				
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Cash Advan	nces Applied	0.00 USD			Prepaid Expenses	0.00 USD		Supplier Credits	0.00 USD	
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Step 4: Click the **Related Content** link to review the accounting details for this transaction.

Step 5: Click the Accounting Details option.

	Transactions - > Approve Transactions	
	Home Wo	rklist MultiChannel Console Add to Favorites Sign out
Min SOUTH CAROLINA		
		4
		Related Content - New Window Help Personalize Page
Annual Francisco Density Francisco Original		Accounting Details
Approve Expense Report - Expense Summary		
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Business Purpose Employee Travel	Report 300000386 Approvals in Process	From Date 01/23/2018
Description Sus Urb Conf Hong Kong 1/23-31	Created 02/08/2018 JOANNE CALLAHAN	To Date 01/31/2018
Reference	Last Updated 02/08/2018 LLOYD TABOR	Trip Location Hong Kong
	Authorization ID 1000000116	
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Employee Expenses (6 Lines) 6,152.00 USD	Non-Reimbursable Expenses 0.00 USD	Employee Credits 0.00 USD
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Employee Expenses (6 Lines) 6,152.00 USD Cash Advances Applied 0.00 USD Amount Due to Employee 6,152.00 Approval History	Non-Reimbursable Expenses 0.00 USD Prepaid Expenses 0.00 USD	Employee Credits 0.00 USD Supplier Credits 0.00 USD
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Employee Expenses (6 Lines) 6,152.00 USD Cash Advances Applied 0.00 USD Amount Due to Employee 6,152.00 Approval History	Non-Reimbursable Expenses 0.00 USD Prepaid Expenses 0.00 USD	Employee Credits 0.00 USD Supplier Credits 0.00 USD

Step 6: Review the Accounting Details for this transaction.

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

Step 8: Click the Close option.

	Main Menu	•	Travel a	ind Expense	es 🗸 > Approve Tr	ansactio	ons 👻 🔅	Appro	ove Tra	nsactions											
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	Descriptio	on Su	s Urb Conf I	Hong Kong	1/23-31					2/08/201			CALLAH	IAN				To Date	01/31	2018	
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	Sus Urb Conf	2	1	GROUND	Taxis from hotel to conference center	USC01	CL071	100670	E1012	52024	202				200.000	N	02/08/2018	1000000116	1		
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Step 9: To view all important documentation, click the **Attachments** link.

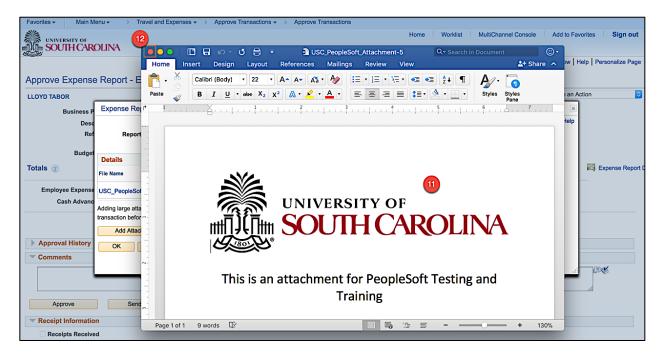
Favorites Main Menu Travel and Expenses	> Approve Transactions - > Approve T	ransactions		
UNIVERSITY OF		Home	Worklist MultiChannel Consol	e Add to Favorites Sign out
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Approve Expense Report - Expense Summa	iry			
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Business Purpose Employee Travel	Papart	3000000386 Approvals in Process		
Description Sus Urb Conf Hong Kong 1/23-3				01/23/2018
Reference	Last Updated		To Date Trip Location	e 01/31/2018
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Budget Status Not Budget Checked Budget	Options		9	
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Cash Advances Applied 0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee	6,152.00 USD	Amount Due to Supplie	r 0.00 USD	
Approval History				
▼ Comments				
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Approve Send Back	Hold		Save Changes	

Step 10: Click the File Name to view.

Favorites - Main M		> Approve Tr	ansactions - Approve	e Transactions	Home Worklist	MultiChannel Console	e Add to Fav	vorites Sign out
						Related Content -	New Window H	Help Personalize Page
Approve Expense	e Report - Expense Summa	iry					(
LLOYD TABOR						Actions	Choose an A	ction 😒
Business P	Expense Report Attachments						×	
Desc Ref Budget	Report ID 3000000386						Help	
Totals (2)	Details				Personalize Find View All 🔄	📕 First 🕚 1 of 1	Last	Expense Report I
	File Name	10	Description	User	Name	Date/Time Stamp		-
Employee Expense Cash Advanc	USC PeopleSoft Attachment docx			JOANNEC	JOANNE CALLAHAN	02/08/2018 7:14:37AM	-	
Approval History Comments	Adding large attachments can take some transaction before adding large attachme Add Attachment OK Cancel		therefore, it is advisable to	save the				
Approve	Send Back	Hold			Save Changes			

Step 11: Review the sample attachment.

Step 12: After revieing the sample attachment, close to continue approving the Expense Report.



Step 13: Click **OK** to return to the Expense Report approval page.

Favorites - Main M	tenu - > Travel and Expenses - > Approve T	ransactions - > Approve T	ransactions				
				Home Worklist	MultiChannel Console	Add to Fav	orites Sign out
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Business P	Expense Report Attachments					×	
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Ref	Report ID 300000386						
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	File Name	Description	User	Name	Date/Time Stamp		
			JOANNEC			=	
Cash Advand	Adding large attachments can take some time to upload	, therefore, it is advisable to sa	ve the				
	Add Attachment						
Comments							
							26
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Approve	Send Back Hold			Save Changes			
Receipt Information	n						
Receipts Receive	ed						
Expense Line (?)							

Step 14: Click the **Notes** link to view and add notes.

Favorites Main Menu Travel and Expenses Approve Transactions	> Approve Transactions		
UNIVERSITY OF	Hor	me Worklist MultiChannel Console Add to Favorites	i Sign out
SOUTH CAROLINA			
		Related Content - New Window Help	Personalize Page
Approve Expense Report - Expense Summary			
Approve Expense Report - Expense Summary			
LLOYD TABOR		Actions Choose an Action	0
Business Purpose Employee Travel	Report 3000000386 Approvals in Process	F D-t- 04/02/0010	
Description Sus Urb Conf Hong Kong 1/23-31	Created 02/08/2018 JOANNE CALLAHAN		
Reference	Last Updated 02/08/2018 LLOYD TABOR	To bate ononzoro	
	uthorization ID 100000116	Trip Location Hong Kong	
Budget Status Not Budget Checked Budget Options		14	
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Cash Advances Applied 0.00 USD Pro	epaid Expenses 0.00 USD	Supplier Credits 0.00 USD	
Amount Due to Employee 6,152.00 USD	Amount Due to Supp	olier 0.00 USD	
Approval History			
▼ Comments			
			7 🎸
Approve Send Back Hold		Save Changes	

Step 15: Review any notes already added by the proxy or other approvers.

Step 16: Click in the Text field to add a new note.

	and Expenses Approve Transactions A	Approve Transactions				
UNIVERSITY OF			Ho	ome Worklist MultiChanne	el Console Add to Favo	orites Sign out
SOUTH CAROLINA						
				Related Co	ntent 🔻 New Window He	Ip Personalize Page
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Description Sus Urb Cor				(16) He	Date 01/23/2018	
Reference	Use this area to add important information.				ation Hong Kong	
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Cash Advances Applied	Notes	Persona	alize Find 🗖	📕 🛛 First 🕚 1 of 1 🕑 Last	0.00 USD	
	Notes 15	Name	Role	Action Date/Time		
Amount Due	Use this area to add important information.	JOANNE CALLAHAN	Employee	02/08/2018 7:14AM		
Approval History						
✓ Comments	OK Cancel					
Approve Send Bac	k Hold			Save Changes		

Step 17: Click the Add Notes button.

Step 18: Notice the note is added.

Step 19: Click the **OK** button to return to the Expense Report approval page.

	vel and Expenses - > Approve Transactions - >	Approve Transactions		
UNIVERSITY OF SOUTH CAROLINA		ł	Home Worklist MultiChannel Co	nsole Add to Favorites Sign out
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Reference				n Hong Kong
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	Add Notes			
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Amount Di	Use this area to add important information.	ANNETTE JORDAN Employee	02/08/2018 12:36PM	
Approval History	Use this area to add important information.	JOANNE CALLAHAN Employee	02/08/2018 7:14AM	
Comments	OK Cancel			
Approve Send B	Hold		Save Changes	

Step 20: Click the Expand Section Approval History button.

rites Main Menu Travel and Expenses Approve Transactions Approve Transactions	
	Home Worklist MultiChannel Console Add to Favorites Sig
OVITH CAROLINA	
OVUTHCAROLINA	
Approval History	
kpense Report Employee	
SHEET_ID=3000000386:Approved	
Employee Approval Required	
Approved Mark Tabor ✓ Employee C0208/18 - 7:17 AM	
vpense Report Approval 1	
SHEET_ID=3000000386:Pending View/Hide Comments Level 1 Approval	
Skipped	
Mark Tabor Department Approvers	
Pending Multiple Approvers Department Approvers	
▶ Comments	
kpense Report Approval 2	
SHEET_ID=3000000386:Awaiting Further Approvals	
Level 2 Approval	
Not Routed	
Multiple Approvers Level 2 Approvers	
avel Department Approval	
SHEET_ID=3000000386:Awaiting Further Approvals	
Travel Approval Required	
Not Routed	
Multiple Approvers	
Iravel Department	

Step 21: Now that you have reviewed the Expense Report details and all is good, click the **Approve** button.

							Related Content -	New Window H	elp Personalize P
pprove Expense Repo	rt - Expense Summa	ıry					A - 1	Choose an Ac	tion
LOYD TABOR							Actions		0011
Business Purpose Employee Travel					Approvals in Process		From Date	01/23/2018	
Description Sus Urb Conf Hong Kong 1/23-31			02/08/2018	JOANNE CALLAHAN			01/31/2018		
Reference			Last Updated Authorization ID		ANNETTE JORDAN		Trip Location	ip Location Hong Kong	
Budget Status	Not Budget Checked Budget	Options	Authorization ID	100000116					
otals 👔			100	View Analytic	x (?)	Notes	🖉 Attachm	nents (1)	Kan Expense Re
Employee Expenses (6 Lines	6,152.00 USD	N	on-Reimbursable Expenses	0.0	0 USD		Employee Credits	0.00 USD	
Cash Advances Applied	d 0.00 USD		Prepaid Expenses	0.0	0 USD		Supplier Credits	0.00 USD	
Amo	ount Due to Employee	6,152.00 U	ISD	Am	ount Due to Supplie	r 0.0	0 USD		
Approval History									
Comments									
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21									

Step 22: Click the **OK** button to confirm the approval.

Favorites -	Main Menu	Approve Transactions Approve Transactions				
	Save Confirmation					Sign out
SOU						Help
	Approve Expense Report					onalize Page
Approve E	Submit Confirmation					
LLOYD TABO	LLOYD TABOR	Report ID 300000386				
LLOTD TABO	Totals 👔					
в	Employee Expenses (6 Lines) 6,152.00 USI	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD	
	Cash Advances Applied 0.00 USI		0.00 USD	Supplier Credits	0.00 USD	
Totals 👔	Amount Due to Employee	6,152.00 USD Amount	Due to Supplier	0.00 USD		pense Report [
Employe	This report will be approved.					
Approval	22 OK Cancel					
Commen						
						5

Now that you have approved the Expense Report, it is ready to move to the next level in the approval workflow.

X. Approving Expense Reports Using the Worklist

Use the Worklist to approve an Expense Report. The Worklist is where you will find a prioritized list of the work you have to do. To work on an item, select it from the worklist and the appropriate page will open to begin work.

Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

An Expense Report in PeopleSoft makes it easy to transform a handful of receipts into a final document for expense reimbursement(s).

As an approver:

- Verify the traveler
- Review Expense Report details
- Verify the chartfield string is correct
- Approve the transaction
- Or, Send back the transaction for revision

Step 1: Click the Worklist link.

Favorites - Main Menu -				
UNIVERSITY OF		Home Worklist	MultiChannel Console Add to Favorites	Sign out
SOUTH CAROLINA				
			Personalize Content Layout	? Help
Top Menu Features Description	0 0 -		• •	•
Our menu has change	ed!			
The menu is now located across the top of the Menu to get started.	ne page. Click on Main			
Highlights				
Recently Used pages now appear under the Favorites menu, located at the top left.	COACLE Tops View Products 1 Marcing Matter Marcing Matter Matter Marcing Matter			
Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.	ORACLE No. Income to the second secon			
Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.				

Step 2: Click the **Date From link** to view most recent. You may need to click this a couple of time to see the most recent at the top.

Favorites -	Main Menu 🗸 💦 >	Worklist - > Worklist					
	I CAROLINA				Home Worklist	MultiChannel Console	Add to Favorites Sign out
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Worklist Items	. 2				Personaliz	e Find View All 💷 🔜	First 🕚 1-10 of 10 🕑 Last
From	Date From	Work Item	Worked By Activity	Priority	Link		
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 212, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000191 RDC:RA,0,A,	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval, 124, USC01, 1901-01-12, N, 0, ADVANCE ID:2000000108 RDC:RA,0,A,	Mark Worked	Reassign
Travel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 185, USC01, 1901-01-12, N, 0, SHEET ID:3000000323 RDC:RA.0.A,	Mark Worked	Reassign
Proxy 19	02/01/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 216, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000197 RDC:RA,0,A,	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 223, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000204 RDC:RA,0,A,	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval, 134, USC01, 1901-01-12, N, 0, ADVANCE ID:2000000118 RDC:RA,0,A,	Mark Worked	Reassign
Traveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 197, USC01,	Mark Worked	Reassign
Travel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 259, USC01,	Mark Worked	Reassign
					TAApproval, 248, USC01,		

Step 3: Click the **link** for the Expense Report you would like to approve.

UNIVERS		Worklist -> Worklist			Home Worklist	MultiChannel Console	Add to Favorites Sign out
Norklist						New V	Vindow Help Personalize Page
	TRAVEL OFFICE: Tr	avel Office					
Detail View			Worklist Filters		ᅌ 🔊 Feed 👻		
Worklist Item	15				Personali:	ze Find View All 💷 🔜	First 🕚 1-10 of 10 🕑 Last
From	Date From	Work Item	Worked By Activity	Priority	Link 3		
Mark Tabor	02/08/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 234, USC01, 1901-01-12, N, 0, SHEET ID:3000000386 RDC:RA,0,A,	Mark Worked	Reassign
ravel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 248, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000228 RDC:RA.0,A,	Mark Worked	Reassign
ravel Office	02/08/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 259, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000237 RDC:RA.0.A,	Mark Worked	Reassign
raveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	CAApproval, 134, USC01, 1901-01-12, N, O, ADVANCE ID:2000000118 RDC:RA,O,A,	Mark Worked	Reassign
Fraveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 197, USC01, 1901-01-12, N, 0, SHEET ID:3000000342 RDC:RA,0,A,	Mark Worked	Reassign
fraveler 25	02/06/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 223, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000204 RDC:RA,0,A,	Mark Worked	Reassign
Proxy 19	02/01/2018	Approval Routing	Approval Workflow	2-Medium	TAApproval, 216, USC01, 1901-01-12, N, 0, TRAVEL AUTH ID:1000000197 RDC:RA.0.A,	Mark Worked	Reassign
ravel Office	01/31/2018	Approval Routing	Approval Workflow	2-Medium	ERApproval, 185, USC01, 1901-01-12, N, 0, SHEET ID:3000000323 RDC:RA,0,A,	Mark Worked	Reassign

Step 4: 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

orites - Main	n Menu - > Travel and Exper	ises + / Appio	ve Transactions Approve Transactions					
UNIVERSITY OF	1			Home	Worklist	MultiChannel Console	Add to Favo	rites Sign
SOUTH CA	ROLINA							
-						Related Content -	New Window He	Personalize
prove Exper	ise Report - Expense Si	ummary						
OYD TABOR						Actions	Choose an Act	ion
	s Purpose Employee Travel		Report 300000386	Approvals in Process			04/00/0040	
	escription Sus Urb Conf Hong Kon	g 1/23-31	Created 02/08/2018	JOANNE CALLAHAN			01/23/2018 01/31/2018	
L 1	Reference		Last Updated 02/08/2018	LLOYD TABOR		Trip Location		
Bud	get Status Not Budget Checked	Budget Options	Authorization ID 100000116	3				
als 🕐	ger olaras mor budger onecked	Budget Options	Wew Analy	tice (III) Notes	🖋 Attachm	uante (1)	Expense
ais 👔		4		10 3 7	Notes			
Employee Exper	nses (6 Lines) 6,152.00 USD	-	Non-Reimbursable Expenses 0	00 USD	Em	ployee Credits	0.00 USD	
Cash Adva	nces Applied 0.00 USD		Prepaid Expenses 0	00 USD	S	upplier Credits	0.00 USD	
	Amount Due to Emplo	oyee 6,152.	00 USD Ai	nount Due to Supplie	er 0.00 L			
Approve Approve Receipt Informa Receipts Rece	Y Send Back ition	byee 6,152.	00 USD Ai	nount Due to Supplie	r 0.00 (Save Changes]		
Approve Receipt Informa Receipts Rece Expense Line	Y Send Back tion		00 USD Ai	nount Due to Supplie]	1	
Approve Approve Receipt Informa Receipts Rece Expense Line Expense Line I	y Send Back tion tived				Save Changes]	ze Find 🔊 🖬	
Approve Approve Receipt Informa Receipts Rece Expense Line Expense Line I Date	Y Send Back ttion sived		Description	Reimburse Amt	Save Changes	Personaliz	Approve	
Approve Approve Receipt Informa Receipts Rece Expense Line Expense Line I hate I1/23/2018	Y Send Back ttion sived Expense Type Air Travel Expenses		Description Columbia to Hong Kong	Reimburse Amt 1,200.00	Save Changes	Personaliz	Approve ✓	
Approve Approve Receipt Informa Receipts Rece Expense Line I International Internation	Y Send Back ttion tived Expense Type Air Travel Expenses Ground Transportation		Description Columbia to Hong Kong Taxis from hotel to conference center	Reimburse Amt 1,200.00 200.00	Save Changes	Personaliz de de	Approve V V	
Approve Approve Receipt Informa Receipts Rece Expense Line I Inf/23/2018 I1/23/2018 I1/23/2018 I1/23/2018	Y Send Back tion vived		Description Columbia to Hong Kong Taxis from hotel to conference center Hyatt Regency	Reimburse Amt 1,200.00 200.00 900.00	Save Changes	Personaliz de de de de de	Approve	
Approve Approve Receipt Informa Receipts Rece Expense Line I Date D1/23/2018 D1/23/2018 D1/23/2018 D1/23/2018	y Send Back tion ived			Reimburse Amt 1,200.00 200.00 900.00 428.00	Save Changes Currency USD USD USD USD	Personaliza A A A A A A A A A A	Approve V V V V	
Receipt Informa Receipts Rece Expense Line	Y Send Back tion vived		Description Columbia to Hong Kong Taxis from hotel to conference center Hyatt Regency	Reimburse Amt 1,200.00 200.00 900.00	Save Changes	Personaliz de de de de de	Approve	

Follow **Steps 4 thru 22** in the **Approving an Expense Report Using Email** section, to finish reviewing the transactions details and approve.

XI. Send Back an Expense Transaction

If you want the person who originated (the Proxy) the Expense Report to make a change to it and resubmit it, you can make that happen by clicking the **Send Back** button. **Only by clicking the Send Back** button can you allow the Proxy to gain access to the report again. The following steps walk you through this procedure; they pick up at the point in which you have opened a submitted report from your email and/or worklist.

Step 1: Click in the **Comment** textbox at the bottom of the report and add the reason for sending back. The purpose of this is to inform the Proxy why you are sending the form back, and how you want him/her to edit the form before they resubmit it to you. *The system will not allow you to send back the report without typing an explanation.*

×2							Related Content -	New Window Help	Personal	lize F
pprove Expense Report	- Expense Sum	mary								
LOYD TABOR							ActionsChoo	ese an Action	0	(
Business Purpose Em	ployee Travel		Report	000000336	Approvals in Process					
Description AIC	PA Conf. Orlando		Created	10/23/2017	JOANNE CALLAHAN					
Reference			Last Updated	10/23/2017	SHERRY HUMPHREY					
Budget Status Vali	d Bud	get Options								
otals ?			74	View Analyti	ics	Notes	6	Attachments (1)		
Employee Expenses (3 Lines)	730.43 USD		Non-Reimbursable Expenses	0.0	00 USD		Employee Credits	0.00 USD		
Cash Advances Applied	0.00 USD		Prepaid Expenses	0.0	00 USD		Supplier Credits	0.00 USD		
Amou	nt Due to Employee	730.43	USD	Am	ount Due to Suppli	er O	.00 USD			
Approval History										
Comments	•									
Please change the accounting deta	ails.								₽¢	
	2									
Approve	Send Back	Hold								
Receipt Information										
Receipt Information Receipts Received										

Step 2: Click the Send Back button.

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Step 3: To complete sending the form back, click the OK button on the Submit Confirmation page.

Favorites -	Main Menu	Worklist					
	Save Confirmation					ŀ	Sign out
0	Approve Expense Report						onalize Page
Approve	Submit Confirmation						
	LLOYD TABOR		Report ID 000000033	6			GO GO
LLOYD TABO	Totals 👔						
	Employee Expenses (3 Lines)	730.43 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	
Totals (?)							
	Amount Due to	> Employee	730.43 USD Amoun	t Due to Supplier	0.00 USD		×
Employ	This report will be sent back for						-
	This report will be sent back for	revision.					
Approva	OK Cancel						
Comme							
Please ch							Ľ
Арр							
Treceipt							
C Recei							
The Expense							
Expens	Senie Renis				1.01		
Expens	- Line itema				101		-

When a transaction is sent back for modifications, the Proxy will see the comment.

4		FTST			Home Worklist	MultiChar	nnel Con	sole Add to	o Favorites	Sigr
UNI	VERSITY OF									
								New Window	w Help Pers	onalize
difu	Expense Repor	+					-	Save for Later		n
-	ABOR (2)						G	Save for Later	I Southing	ry anu
	Back For Revision	By: HUMPHREY,SHERRY	Disease als	nange the accounting details.						
Sent	Back FOI Revision	By: HUMPHRET, SHERRT	Please ch	ange the accounting details.		Actions	Choo	ose an Action		
	*Business Purpose	Employee Travel	\bigcirc	Report 0000000336 Pending						
	*Report Description	AICPA Conf. Orlando		Default Location Out of State	Q					
	Reference		Q	Attachments (1)						
			4							
	es 🕐	Add: 🖳 My Wallet (0) 🖸 Quid	ck-Fill				Total	730.43	USD	
	All Collapse All	Add: 🕞 My Wallet (0) 🖸 Quid	ck-Fill	*Description	*Payment Type					
	*Date	*Expense Type		*Description	*Payment Type	er 🖸		Amount	*Currency	Ŧ
	•Date		ck-Fill	*Description *Hyatt Regency 241 characters remaining	*Payment Type	ər ᅌ			*Currency	Ŧ
	*Date	*Expense Type		* Hyatt Regency		er 文 ,		Amount	*Currency	ŧ
	*Date	*Expense Type		Hyatt Regency 241 characters remaining Meals for all travel days				Amount	*Currency	
	*Date 10/23/2017	*Expense Type Hotel and Lodging	0	Hyatt Regency 241 characters remaining	Personal Reimburseme		A [Amount 435.60	*Currency USD	
	NI Collapse All *Date 10/23/2017 10/23/2017 1	Expense Type Hotel and Lodging Meal Expenses	0	Hyatt Regency 241 characters remaining Meals for all travel days 229 characters remaining	Personal Reimburseme Personal Reimburseme	er 📀 ,	I₊ [I₊ [Amount 435.60 80.00	*Currency USD Q USD Q	ŧ
	*Date 10/23/2017	*Expense Type Hotel and Lodging	0	Hyatt Regency 241 characters remaining Meals for all travel days 229 characters remaining Return trip Orlando	Personal Reimburseme	er 📀 ,	A [Amount 435.60	*Currency USD Q USD Q	•
	NI Collapse All *Date 10/23/2017 10/23/2017 1	Expense Type Hotel and Lodging Meal Expenses	0	Hyatt Regency 241 characters remaining Meals for all travel days 229 characters remaining	Personal Reimburseme Personal Reimburseme	er 📀 ,	I₊ [I₊ [Amount 435.60 80.00	*Currency USD Q USD Q	÷
pand /	NI Collapse All *Date 10/23/2017 10/23/2017 1	Expense Type Hotel and Lodging Meal Expenses	0	Hyatt Regency 241 characters remaining Meals for all travel days 229 characters remaining Return trip Orlando	Personal Reimburseme Personal Reimburseme	er 📀 ,	I₊ [I₊ [Amount 435.60 80.00	*Currency USD USD USD	Ŧ

Note: Pending status indicates the transaction can be modified and submitted again for approval.

Approving Expense Transactions

XII. Hold an Expense Transaction

Holding an expense report claims the transaction for the approver. If a pool of approvers exists, each of whom can approve a transaction, placing the transaction on hold means that only the holding user can take action on the transaction. The following steps walk you through this procedure; they pick up at the point in which you have opened a submitted report from your email and/or worklist.

Step 1: Click in the **Comment** textbox at the bottom of the report and. The purpose of this is to inform the Proxy why the transaction is being held.

Favorites - Main Menu -	> Travel and Expenses +	Approve Transactions - > Approve	Transactions					
UNIVERSITY OF				Home	Worklist	MultiChannel Console	Add to Favorites	Sign out
SOUTH CAROLINA								
						Delated October 1	No. March 1111 1 Day	
						Related Content •	New Window Help Pers	sonalize Pag
Approve Expense Repo	rt - Expense Sumr	narv						
						ActionsChoos	e an Action	GO
JOANNE CALLAHAN						Actions		
Business Purpose E	mployee Travel	Rep	ort 0000000330	Submitted for Approval				
Description H	EUG Conf. in Boston	Crea	ed 10/16/2017	JESSICA KLIMA				
Reference		Last Updat	ed 10/16/2017	JOANNE CALLAHAN				
			ID 000000141					
Budget Status V	alid Budg	et Options						
Totals (?)			View Analy	lics	♀ Notes	Ø	Attachments	
Employee Expenses (3 Lines) 820.00 USD	Non-Reimbursable Exper	ses 0.	00 USD		Employee Credits	0.00 USD	
Cash Advances Applied	0.00 USD	Prepaid Exper	ses 0.	00 USD		Supplier Credits	0.00 USD	
Amo	ount Due to Employee	820.00 USD	An	nount Due to Suppli	er 0.0	0 USD		
Approval History								
Comments	0							
Checking for budget availability.							20	K.
Approve	Send Back	Hold						

Step 2: Click the Hold button.

Step 3: Click the OK button to complete the HOLD.

Favorites	Main Menu	actions - > Approve Transactions					
S.	Save Confirmation					× Help	Sign out
Appro	JOANNE CALLAHAN	Report ID 000000330	-				onalize Page
	Employee Expenses (3 Lines) 820.00 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		
Totals	Amount Due to Employee 820.00	USD Amount [Due to Supplier	0.00 USD			
Em	This report will be saved and held for later.						
	Ca You can approve, deny, or send back this report at a later time.						
> App							

When a transaction is held for further review, the Proxy can see that the Status has been updated to **On Hold** on the view pages.

Favorites - Main Menu -	Employee Self-Service -	Travel and Expenses	orts 🔻 > View 👩		
UNIVERSITY OF			Home	Worklist MultiChannel Console	Add to Favorites Sign out
SOUTH CAROLINA					
				Related Content -	New Window Help Personalize Page
View Expense Report					Expense Details
JOANNE CALLAHAN				ActionsChoose	an Action 📀 GO
Business Purpose Em	ployee Travel	Report 00	00000330 On Hold		
Description HE	UG Conf. in Boston	Created 10	16/2017 JESSICA KLIMA		
Reference		Last Updated 10/	23/2017 JOANNE CALLAHAN		
		Post State No	Applied		
Totals 🕐	View Printable Version	Wiew Analytics			
Employee Expenses (3 Lines)	820.00 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
Amo	unt Due to Employee	820.00 USD	Amount Due to Supplier	0.00 USD	
By checking this box, I	certify the expenses submitte	d are accurate and comply with expense pol	icy.		
Submit Expense Repor	t	Submitted On			
		Submitted On	0/16/2017 Submitted By JESS	CA KLIMA	
Approval History					
T Previous in List	ist				

When research complete, click the **Approve** button to remove the Hold allowing the transaction to move to the next level in the approval workflow.

XIII. Assign an Approver When Out of Office

Use the Alternate User section of the My System Profile page to designate an approver. In order to assign someone as an Alternate Approver they **MUST** have the approver role assigned to them.

In situations where you will be unavailable, add a user to the Alternate User ID field and enter a date range for when you are not going to be available. The system uses these dates to forward routings to the alternate user.

To designate an Approver when out of the office begin with the following navigation:

Main Menu → My System Profile

Step 1: Click in the **Alternate User ID** field and enter the name of the approver who will approve in your absence.

Step 2: Enter the date range for when you will not be available.

Step 3: Click the Save button.

Favorites	
UNIVERSITY OF	Home Worklist MultiChannel Console Add to Favorites Sign out
SOUTH CAROLINA	
	New Window Help Personalize Page
	New Willow [Help] Personalize Page
General Profile Information	
Joanne Callahan	
Password	
Change password	
Change or set up forgotten password help	
Personalizations	
My preferred language for PIA web pages is: English	
My preferred language for reports English	
and email is Currency Code USD	
Default Mobile Page	
Alternate User	
If you will be temporarily unavailable, you can select an alternate user to receive your routing 1 Alternate User ID From Date From Date To Date From From Date From	
Workflow Attributes	
Z Email User Vorklist User	
Miscellaneous User Links	
Email Personalize Find 💷 🔜 First 🕚 1	I-2 of 2 🕑 Last
Primary Email Account Email Type Email Address	
Joannec@mailbox.sc.edu	•
Other Sherrynh@mailbox.sc.edu	
IM Information Personalize Find 🗐 🛄 First 🕚	1 of 1 🛞 Last
Protocol XMPP Domain UserID Password	
XMPP Q JOANNEC	
3 Save	