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I. Objectives

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

- Access email to approve expense transactions
- Approve expense transactions (Travel Authorizations, Travel Advances, and Expense Reports)

II. Tips and Tricks

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

- Update banking information and email. Be sure to make changes when necessary.
- Make sure Email User is checked on your My System Profile page to receive notification that an expense transaction needs your approval.

III. Scenario

A proxy created a Travel Authorization, Expense Report, or a Travel Advance on your behalf. All expense transactions created on your behalf, require your approval before moving on to department and travel office approval.

IV. Prerequisites

Before approving expense transactions prepared on your behalf be sure to have the following:

- Bank account information entered validating you as a traveler in PeopleSoft. Allowing you or a Proxy to create an expense transaction on their behalf.
- Email 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

Use email to approve a Travel Authorization created by a Proxy on your behalf.

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

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

![Approval Request Example]

A travel authorization request has been submitted that requires your attention:

- **Employee ID:** 1668632
- **Employee Name:** TABOR, LLOYD
- **Submission Date:** 2/6/2018
- **Travel Auth Description:** Sus Urb Conf Hong Kong 2/7/18 for TABOR, LLOYD
- **Travel Auth ID:** 1600000226
- **Reimbursement Amount:** 2700.00 USD

You can navigate directly to the page for more information by clicking the link below:

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

- The name of the traveler
- Current status of the Travel Authorization
- Travel dates
- General Information identifying the Travel Authorization
- Details of anticipated expenses
Step 4: Click the Related Content link to review the accounting details for this transaction.

Step 5: Click the Accounting Details option.

Step 6: Review the Accounting Details for this transaction.
Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

Step 8: Click the **Close** option.

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**Step 9:** To view all important documentation, click the **Attachments** link. (Quotes if needed.)
Step 10: Click the File Name to view.

Step 11: Review the sample attachment and close to continue approving the Travel Authorization.
**Step 12:** Click OK to return to the Travel Authorization approval page.

**Step 13:** Click the Notes link to view and add notes.
Step 14: Review any notes already added by the proxy.

Step 15: Click in the Text field to add a new note.

Step 16: Click the Add Notes button.

Step 17: Notice the note is added.

Step 18: Click the OK button to return to the Travel Authorization approval page.
**Step 19:** If you feel the transaction needs to be sent back to the Proxy for modifications, click the **Send Back** button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.

![Screenshot of the Travel Authorization Summary page]
Step 20: Once you have reviewed the transaction, click **Approve** button.

Now that you have approved the Travel Authorization, it is ready to move through workflow for final approval.

Step 21: Click the **OK** button to confirm the approval.
VI. Approving Travel Advances

Use email to approve a Travel Advance created by a Proxy on your behalf.

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

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

![Approval Request for USC travel advance for Sus Urb Con Hong Kong 1/10 for TABOR,LLOYD.](image1)

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 Authorization ID and status
- Travel Advance details
Step 4: Click the Related Content link to review the accounting details for this transaction.

Step 5: Click the Accounting Details option.

Step 6: Review the Accounting Details for this transaction.
**Step 7:** Click the **Pagelet Settings** icon to close the Accounting Details window.

**Step 8:** Click the **Close** option.

**Step 9:** To view all important documentation, click the **Attachments** link.
Step 10: Click the **File Name** to view.

Step 11: Review the sample attachment and close the attachment.
Step 12: Click OK to return to the Travel Advance approval page.

Step 13: Click the Notes link to view and add notes.
**Step 14:** Review any notes already added by the proxy or other approvers.

**Step 15:** Click in the **Text field** to add a new note.

**Step 16:** Click the **Add Notes** button.

**Step 17:** Notice the note is added.

**Step 18:** Click the **OK** button to return to the Travel Advance approval page.
Step 19: If you feel the transaction needs to be sent back to the Proxy for modifications, click the Send Back button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.

Step 20: Once you have reviewed the transactions, click Approve button.
Step 21: Click the OK button to confirm the approval.

Now that you have approved the Travel Advance, it is ready to move through workflow for final approval.
VII. Approving Expense Reports

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

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

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

![Expense report email and PeopleSoft link](https://fms-trm-ps.sc.edu/psp/ITMN/EMPLOYEE/EPD/C/APPROVE_EXPENSE_TRANSACTIONS_EX_SHEET_APPR_GBL?Action=4&Sheet_ID=3000000343)
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
- Dates of Travel
- Trip Location
- Details of expenses
- The actions you can take such as Approve, Send Back, and Hold
**Step 4:** Click the **Related Content** link to review the accounting details for this transaction.

**Step 5:** Click the **Accounting Details** option.

**Step 6:** Review the Accounting Details for this transaction.
Step 7: Click the **Pagelet Settings** icon to close the Accounting Details window.

Step 8: Click the **Close** option.

Step 9: To view all important documentation, click the **Attachments** link.
Step 10: Click the File Name to view.

Step 11: Review the sample attachment and close the attachment.
**Step 12:** Click **OK** to return to the Expense Report approval page.

**Step 13:** Click the **Notes** link to view and add notes.
Step 14: Review any notes already added by the proxy or other approvers.

Step 15: Click in the Text field to add a new note.

Step 16: Click the Add Notes button.

Step 17: Notice the note is added.

Step 18: Click the OK button to return to the Expense Report approval page.
Step 19: If you feel the transaction needs to be sent back to the Proxy for modifications, click the Send Back button. A comment will be required. The Proxy will make all necessary changes, submit the transactions once again, and then it will require your approval.

Step 20: Once you have reviewed the transactions, click Approve button.
**Step 21:** Click the **OK** button to confirm the approval.

Now that you have approved the Expense Report, it is ready to move through workflow for final approval.