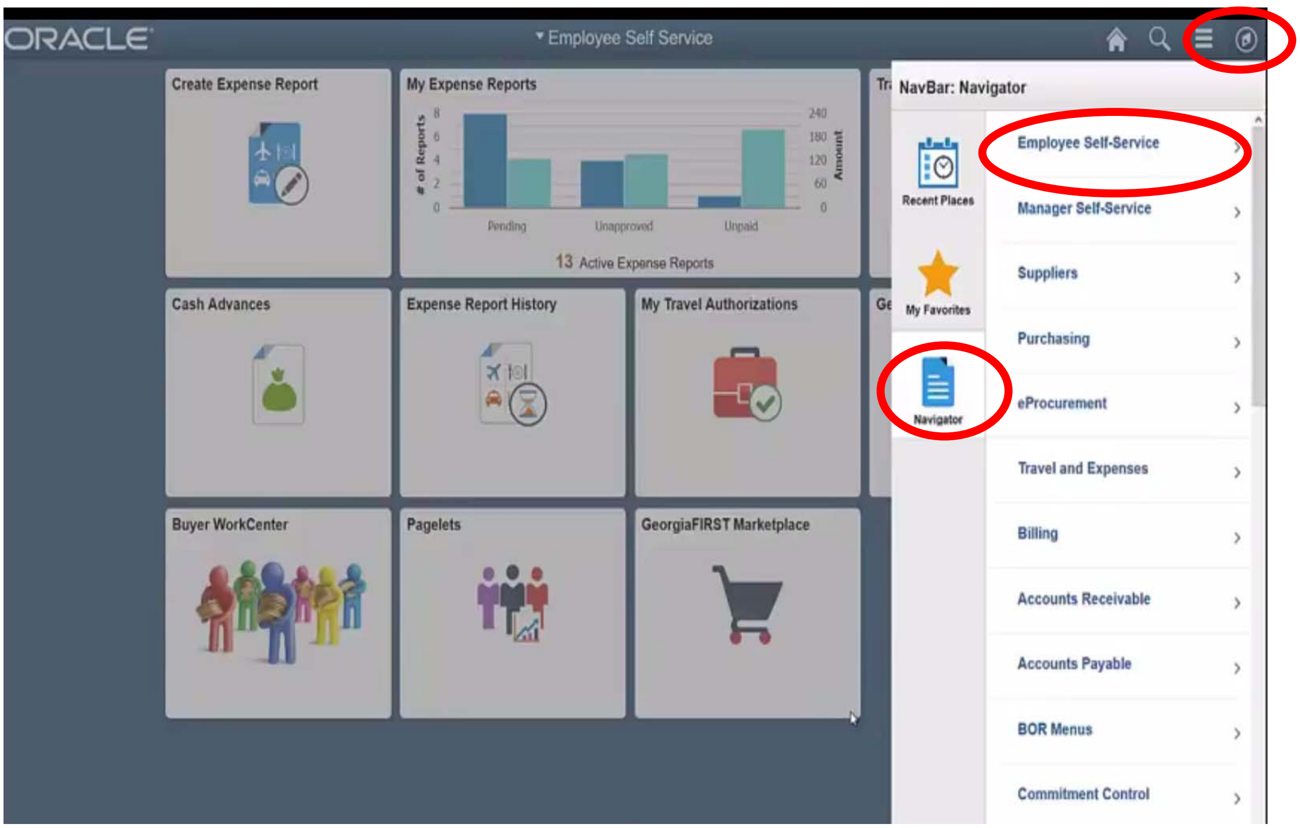
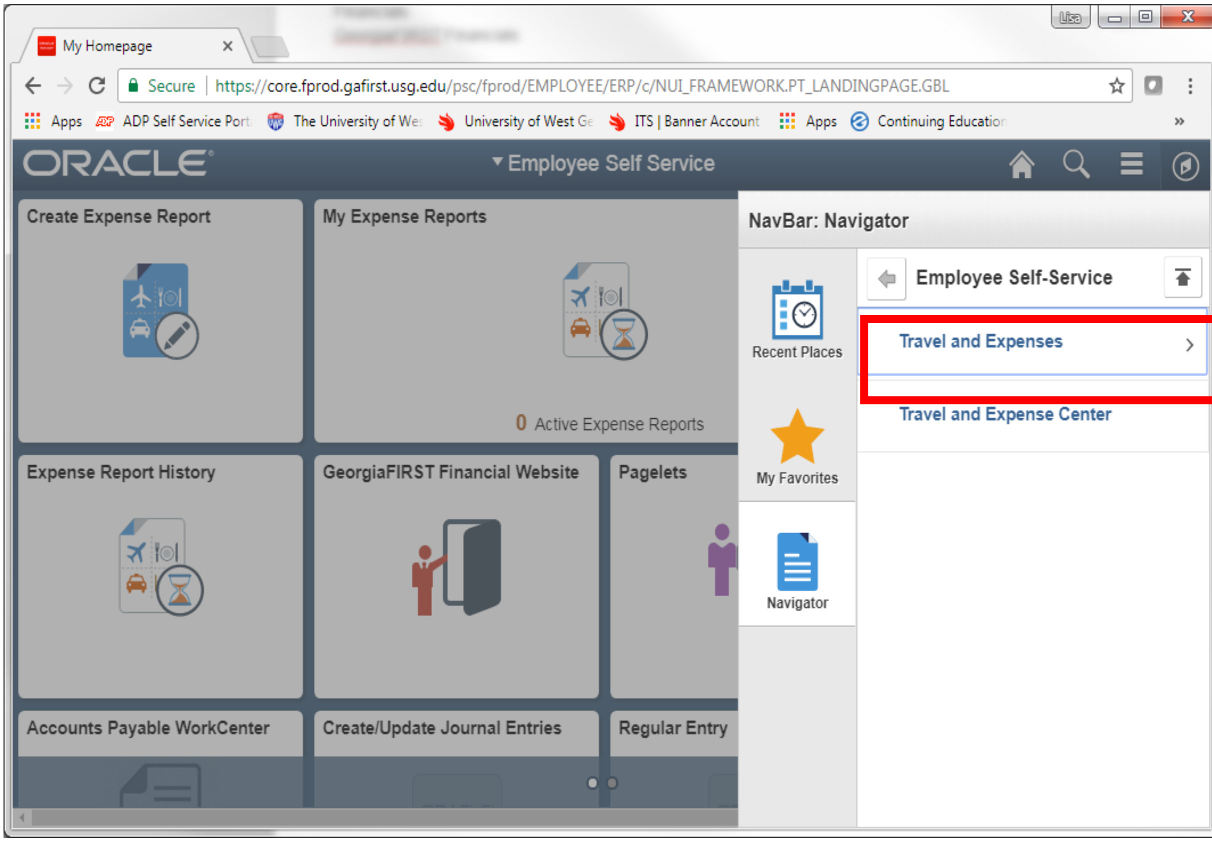
PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

As an alternative to creating and submitting a Fluid expense report, you can utilize the traditional "classic view" in the PeopleSoft Financials system by clicking on the Compass icon. This will access the NavBar. Once on the NavBar, click the Navigator icon. The traditional PeopleSoft menu will be displayed. You can then proceed to Employee Self Service. This will take you into the traditional view of PeopleSoft.

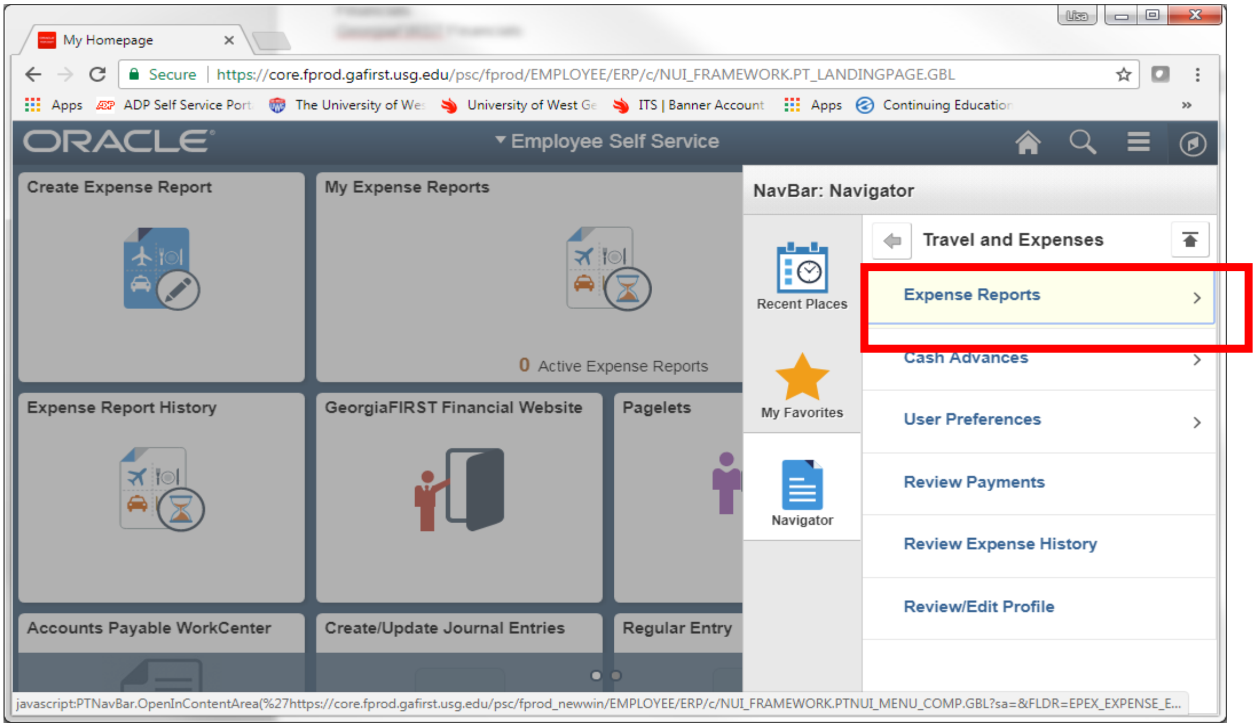


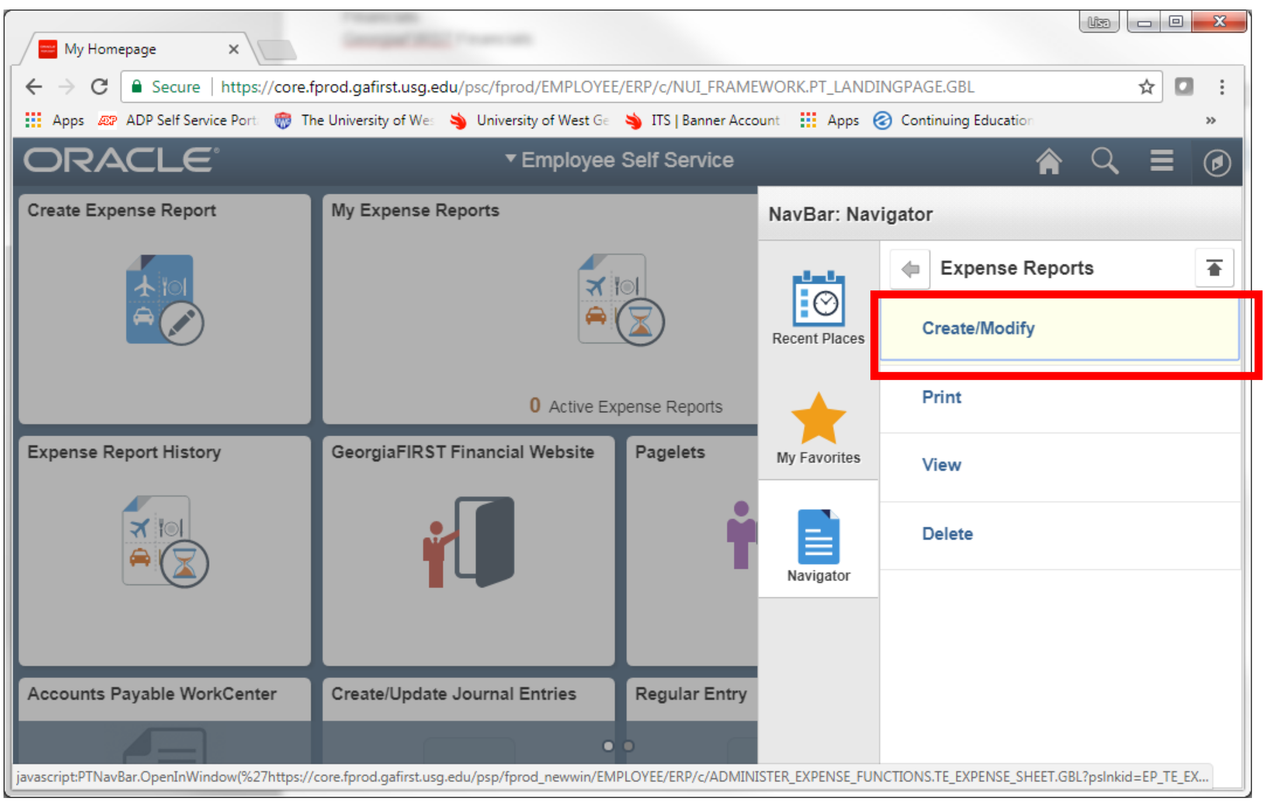
PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

You will be able to go to Travel and Expenses > Expense Reports > Create/Modify to access your report for review and submission.



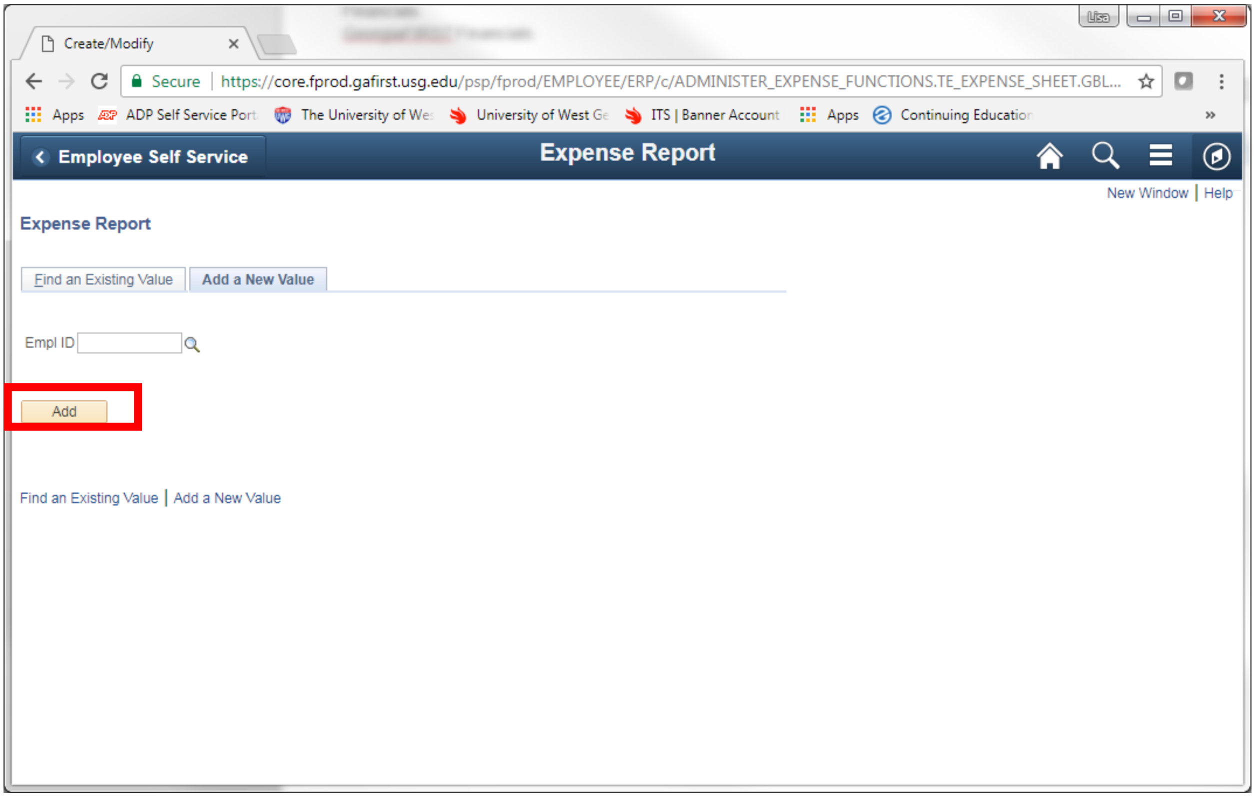
PeopleSoft Travel Paperless Process Using the Traditional “Classic View”



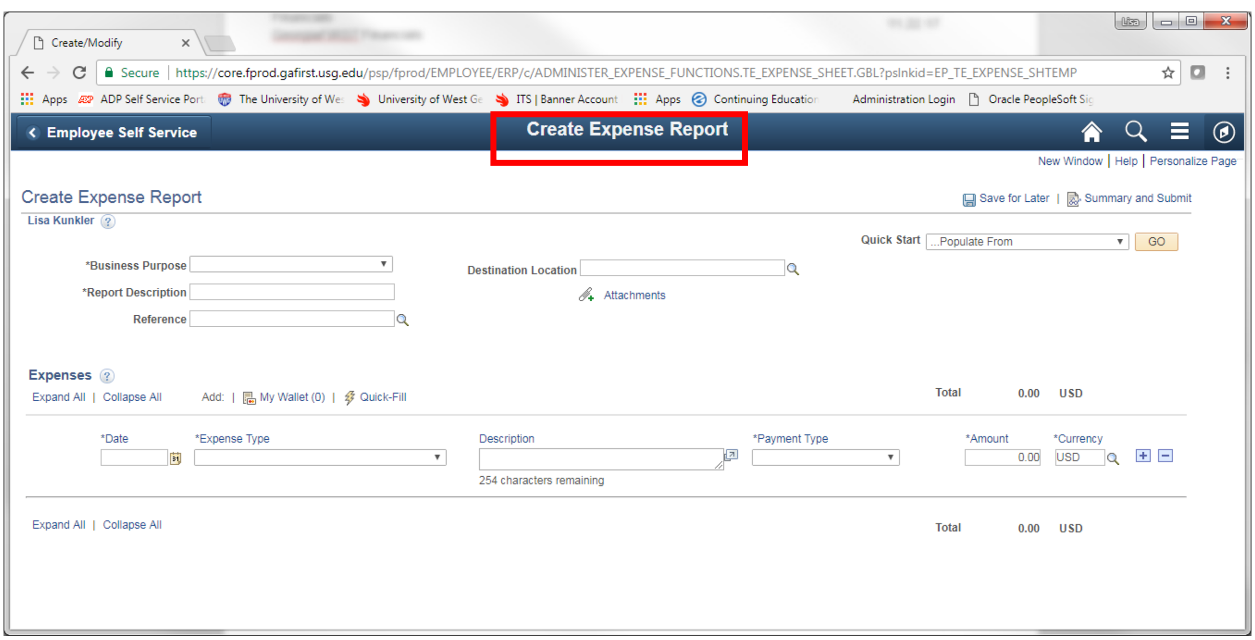


PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

Then screens will resemble the screens before the Upgrade in December 2017 now called the "Classic View". You will click on the add button to start an expense report.



The Create Expense Report screen will appear and you can complete as usual.

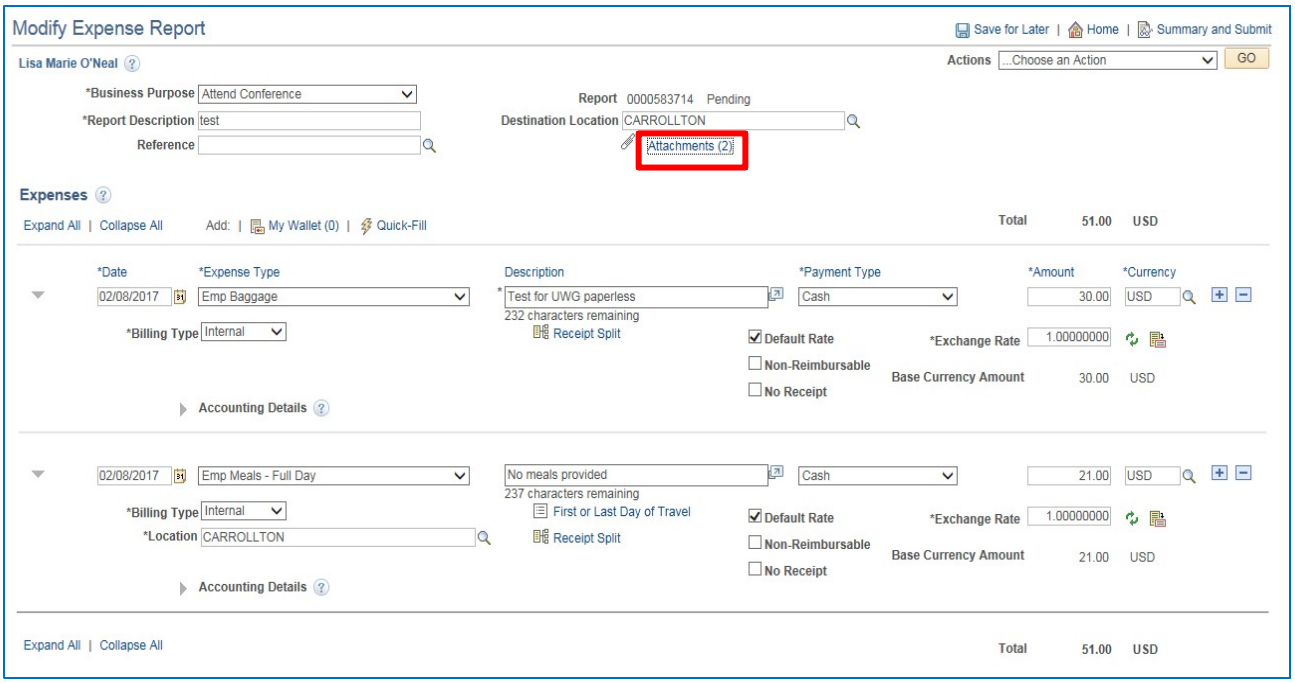


PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

To submit a paperless Expense Reimbursement please follow the attached additional steps:

Attaching receipts and supporting documents.

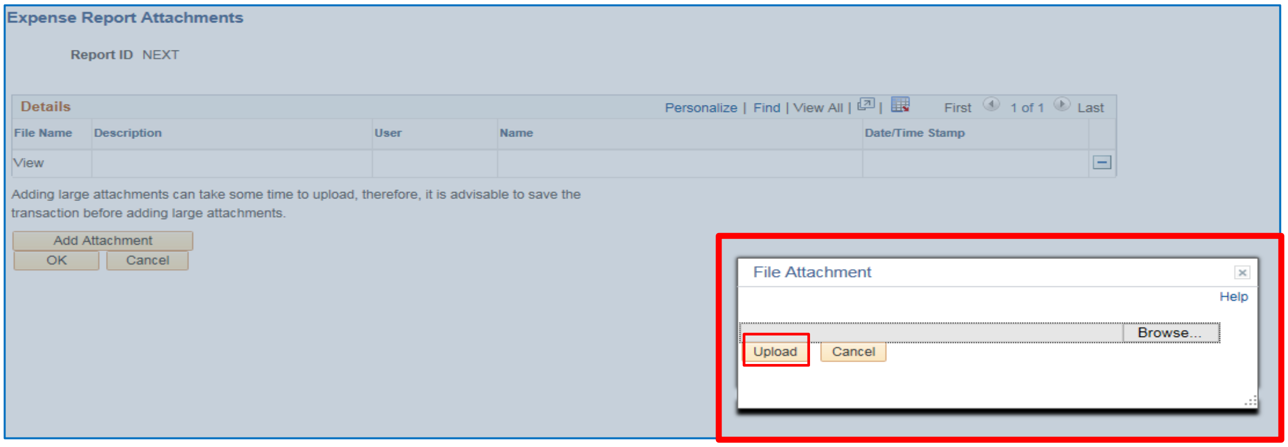
- Save receipts/documents to your computer desktop or documents folder for easy access. Redact sensitive information before attaching credit card statements or cancelled bank checks to expense reports.
- Select **Attachments** link



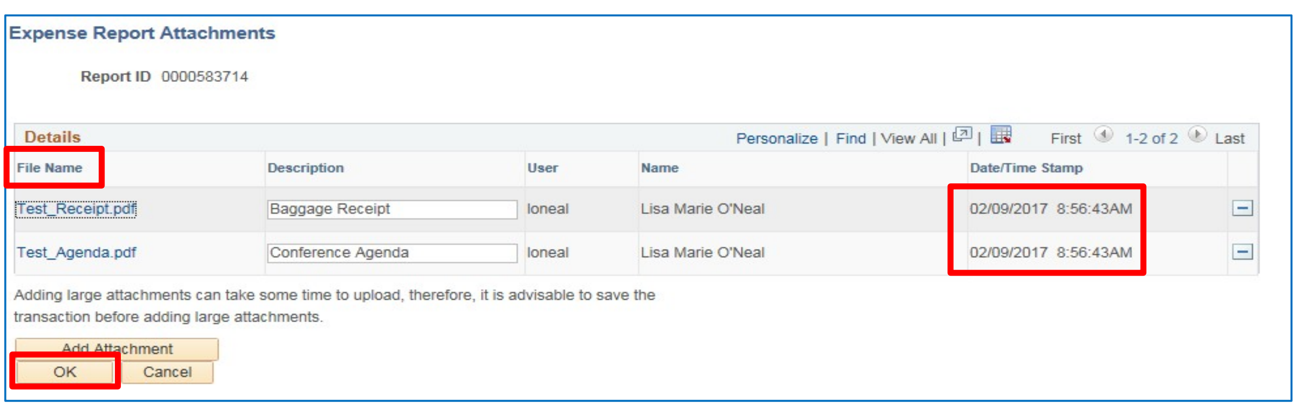
The **Expense Report Attachments** window will open. Select the **Add Attachment** button.

PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

A File Attachment window will open. Select the Browse button, search for your file and select it. Select the Upload button.



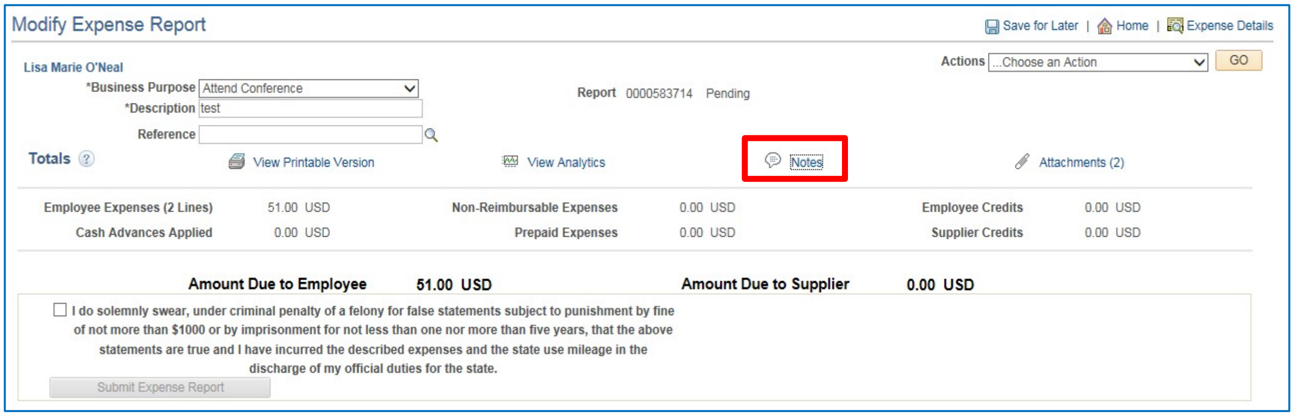
The attachment appears in the Expense Report Attachments window. Enter a description for the attachment in the **Description** field. The **date/time stamp** will not show until after saving the Expense Report. Attaching documents as one PDF or individual documents is up to the traveler. If you have several small receipts, taping them to a blank piece of paper makes scanning easier. Also, attach your conference agenda, 45-day form, missing receipt forms, currency conversions, etc. when needed. Receipts must be legible. It would be helpful to attach all documents in the order expenses are listed on the expense report. After attaching documents, select the **OK** button.



PeopleSoft Travel Paperless Process Using the Traditional “Classic View”

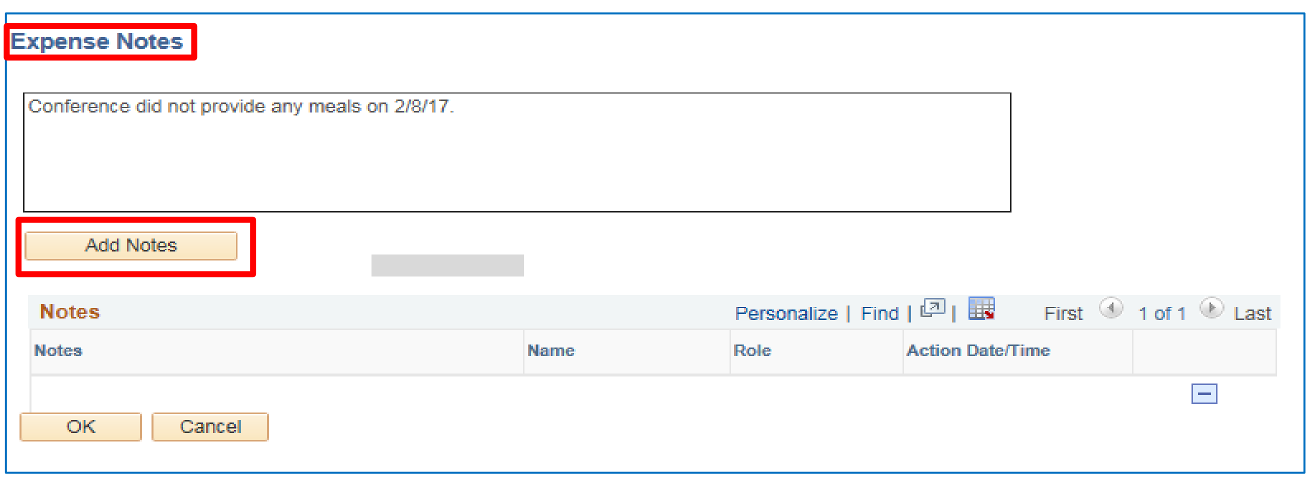
Including Notes:

In the Summary and Submit Window, select **Notes** button and another window will open to enter any information the traveler wants to document about the expense report.



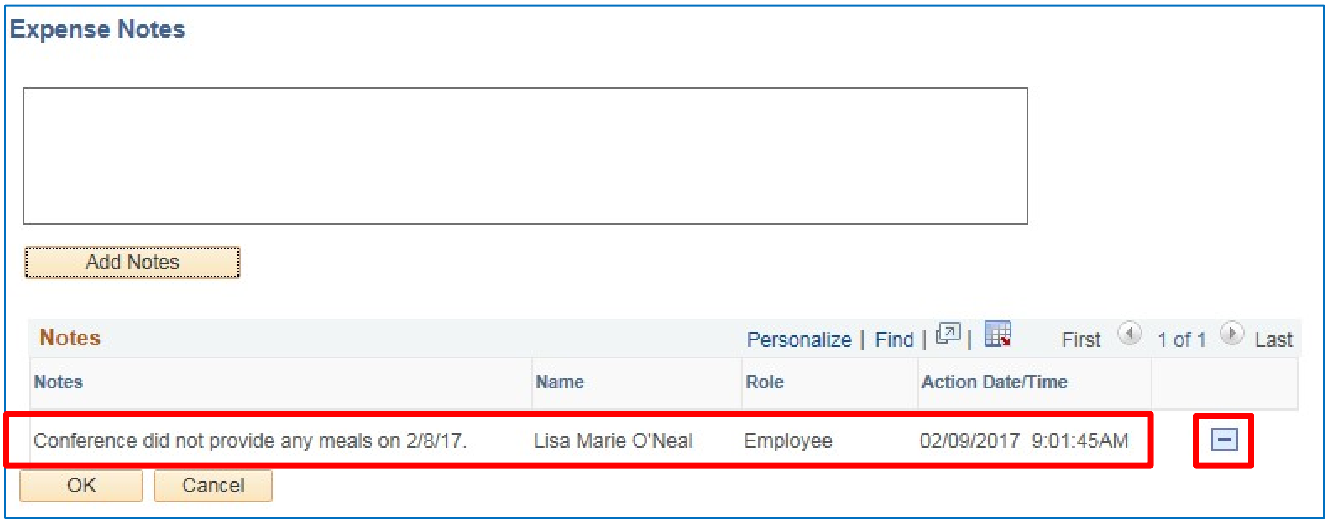
Enter and add notes on this window. Some examples of notes would be the traveler can inform Travel Services of any meals provided/not provided by the Conference, Travel Times for Single Day Travel, type of vehicle being used for fuel reimbursement (if claiming fuel), or any other extenuating circumstances concerning the travel. Do not include a website link for a conference agenda, because the link may not be available during the time Travel Services reviews the report. Therefore, please attach the conference agenda. The description section per line entry may be utilized to enter individual meal information.

After entering the Notes, select **Add Notes** button.



Adding the note will automatically, date/time stamp your information. Approvers and Travel Services have the ability to Add Notes about the expense report.

To delete a Note, select the minus button. The system will ask for a confirmation to delete the note. Only the individual who entered the note can delete their note. Neither Travel Services, nor approvers have the ability to delete the traveler's note.

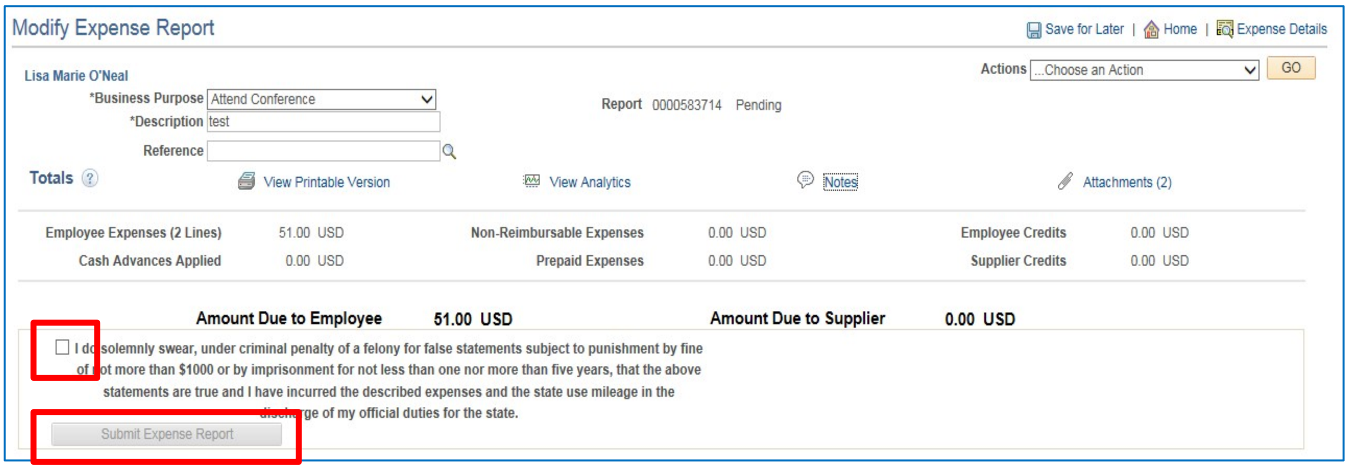


PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

As the Traveler continues processing the expense report, please remember to **check the box** for the attestation and then select **submit expense report**.

****THE TRAVELER MUST SUBMIT THE EXPENSE REPORT****

If a delegate submits the expense report, Travel Services will send the report back for submission by the Traveler. After selecting the **Submit Expense Report** option, another window will open. Select **OK** to finalize the submission process. The report will show as Pending, if **OK** is not selected.



Since the process is now paperless **you are not required to send the paper copy to the Travel Department**. It is recommended that you maintain the paper copy of your receipts which can be done electronically in your department for two years in case the report is pulled for audit. The approvers can view the attachments and notes and will be able to approve the reimbursement without having to view the paper copy.

PeopleSoft Travel Paperless Process Using the Traditional "Classic View"

IMPORTANT REMINDERS:

- The Traveler must **submit** the expense report.
- Paper copies are still required for Fiscal Year End Encumbrances, Cash Advances, Prepaid expenses (airfare, registrations, lodging) as well as any nonemployee travel expenses. Check Requests are still in the paper format also.
- Attach Conference Agenda
- Attach detailed receipts for Lodging, rental car, airfare showing proof of payment
- Include hours of travel on Single Day Travel
- Attach 45-day form and Missing Receipt Form (each require signatures prior to upload/attach by the traveler)
- Enter separate line entries for parking, internet, and lodging expenses on the hotel receipt.

Contact Travel Services with any questions about the Procedure

Anita Saunders ext.96394 orasaunder@westga.edu

Lisa O'Neal ext.95303 or loneal@westga.edu

Juli Humphries ext. 96125 or jhumphri@westga.edu