



Business Process Document

PS FIN Travel Expenses: Copying Expense Report Expense Lines

Department	
Responsibility/Role	
File Name	Copying Expense Report Expense Lines_BUSPROC.doc
Version	
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Date Modified	8/12/2009
Last Changed by	
Status	

Copying Expense Report Expense Lines

Trigger:

Required Field(s)	Comments

Output - Results	Comments

Additional Information

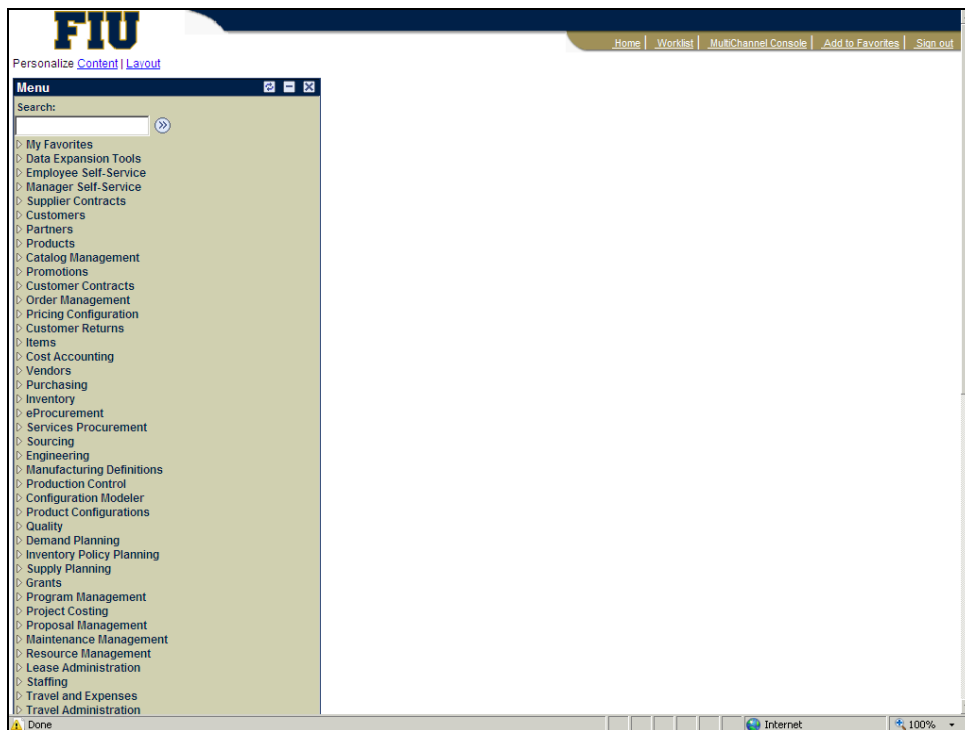
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Procedure

In this topic, you will copy several Expense Report Expense Lines and submit them for approval.

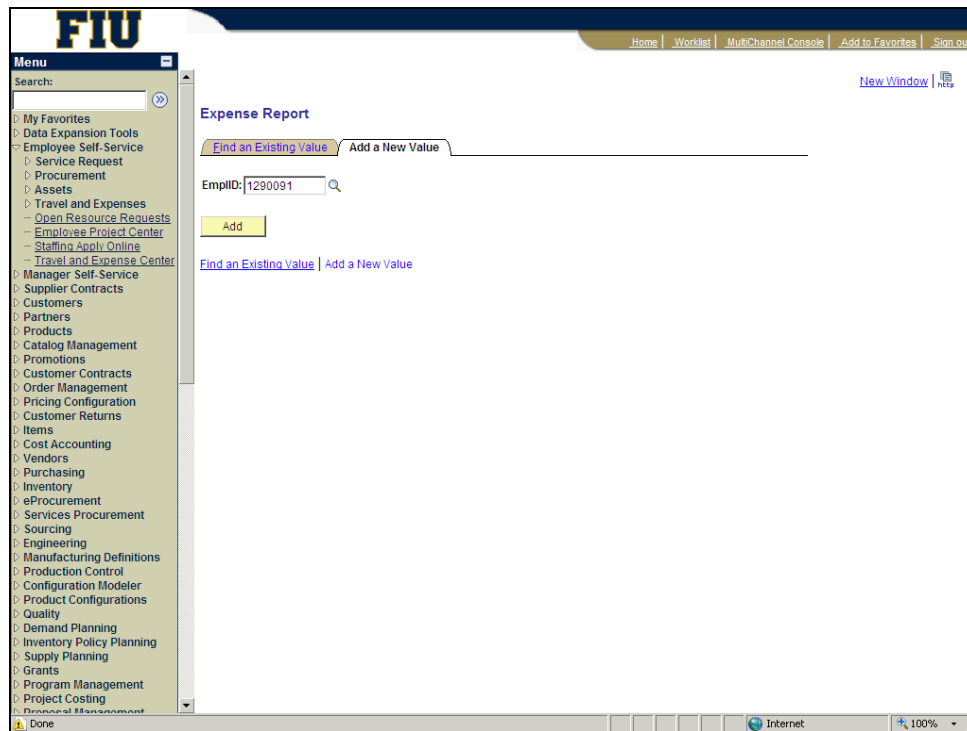


Step	Action
1.	Click the Employee Self- Service link. Employee Self-Service
2.	Click the Travel and Expense Center link. Travel and Expense Center
3.	Click the Expense Report link. Expense Report
4.	Click the Expense Report link. Create



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Step	Action
5.	Click the Find an Existing Value tab. Find an Existing Value
6.	Enter the desired information into the begins with field. Enter " 0000181131 ".
7.	Click the Search button. Search

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Expense Report Entry
 Patty Panther User Defaults Report ID: 0000181131

General Information

*Description: Research Project Comment:
 *Business Purpose: Field Work Reference:
 Status: Pending Last Updated: 03/30/2009 By: 1290091
 Default Location: Georgia Atlanta Post State: Not Applied

Accounting Defaults Apply Cash Advance(s) More Options: GO

Details

Select	Expense Type	Expense Date	Amount Spent	Currency	Payment Type	Billing Type
<input type="checkbox"/>	Domestic Auto Rental	03/01/2009	50.00	USD	Out of Pocket	FIU Expe
<input type="checkbox"/>	Domestic Airfare	03/01/2009	200.00	USD	Out of Pocket	FIU Expe
<input type="checkbox"/>	Domestic Lodging	03/01/2009	150.00	USD	Out of Pocket	FIU Expe
<input type="checkbox"/>	Domestic Meal-Entertainme	03/01/2009	15.00	USD	Out of Pocket	FIU Expe

Copy Selected Delete Selected New Expense Add Check For Errors

Totals

Employee Expenses:	415.00 USD	Due Employee:	415.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

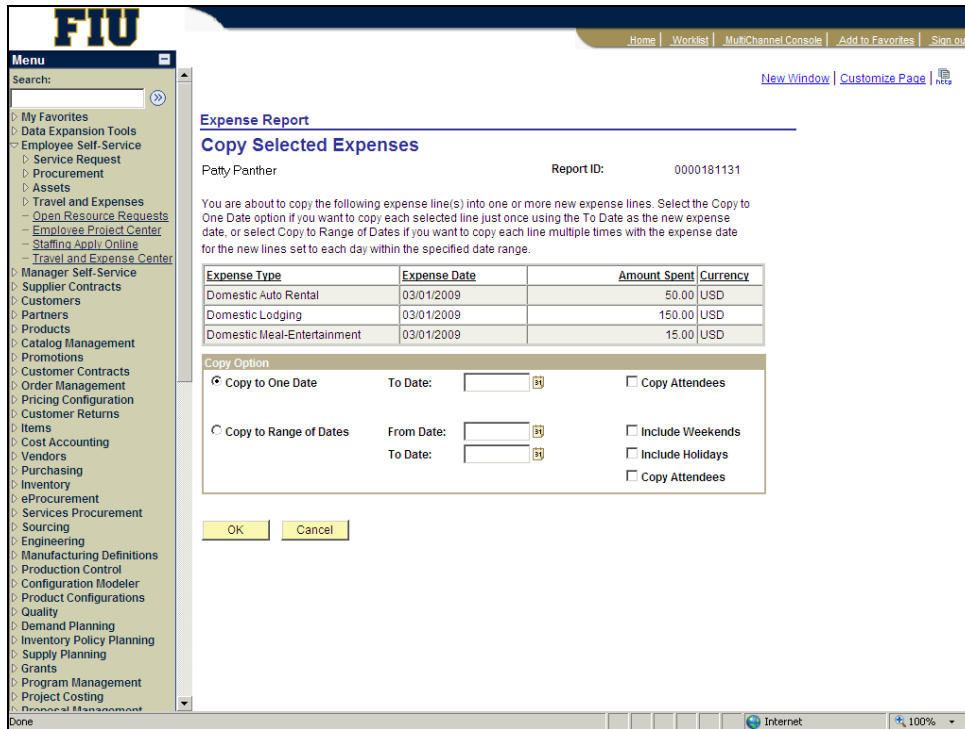
Step	Action
8.	Click the Select option. To choose which items you wish to copy. <input type="checkbox"/>
9.	Click the Copy Selected button. To copy your selected items. <input type="button" value="Copy Selected"/>



Step	Action
10.	<p>Click the OK button.</p> <p>You will get this message when copying expense line items.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;">OK</div>

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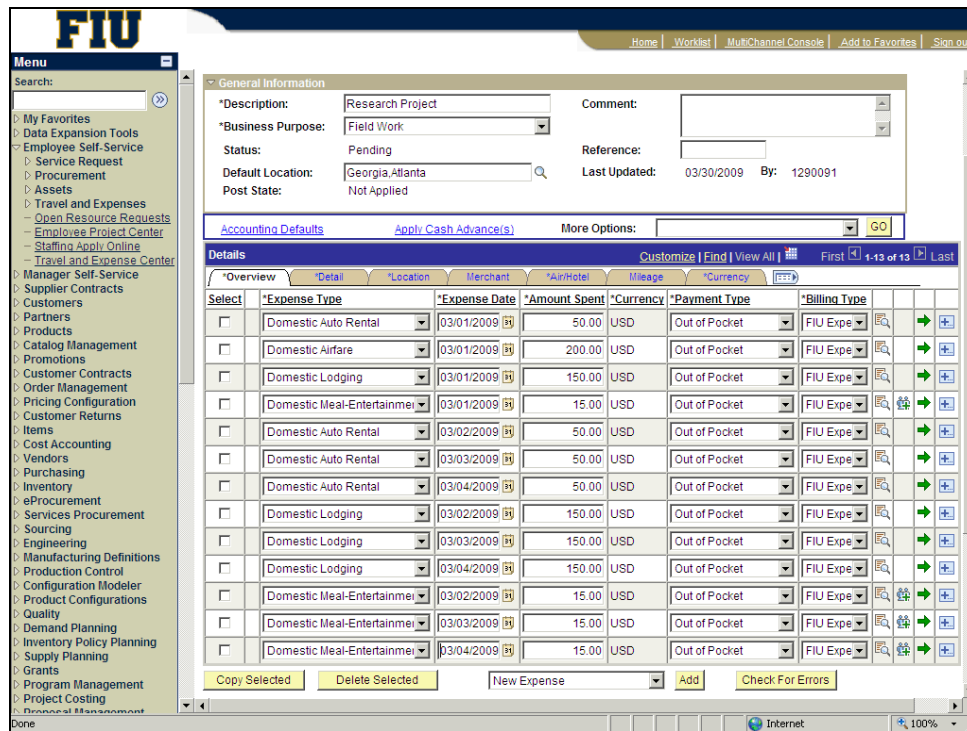


Step	Action
11.	Click the Copy to Range of Dates option. This will allow you to copy the selected expense to multiple dates. <input checked="" type="radio"/> Copy to Range of Dates
12.	Enter the desired information into the From Date field. Enter " 03/02/2009 ".
13.	Enter the desired information into the To Date field. Enter " 03/04/2009 ".
14.	Click the Include Holidays and Include Weekends option. If you do not select these, the date range will only apply the copy to work week days. <input type="checkbox"/> Include Weekends <input type="checkbox"/> Include Holidays
15.	Click the OK button. <input type="button" value="OK"/>



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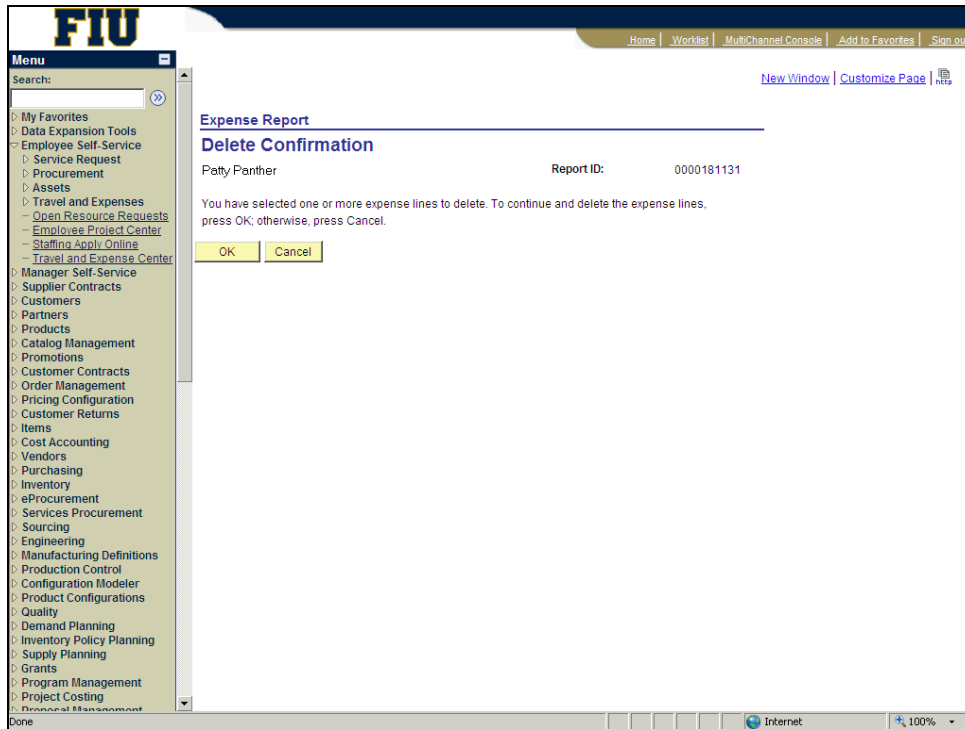
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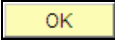


Step	Action
16.	Click the Select option. <input type="checkbox"/>
17.	Click the Delete Selected button. If you want to delete a selection in the Overview field. <input type="button" value="Delete Selected"/>

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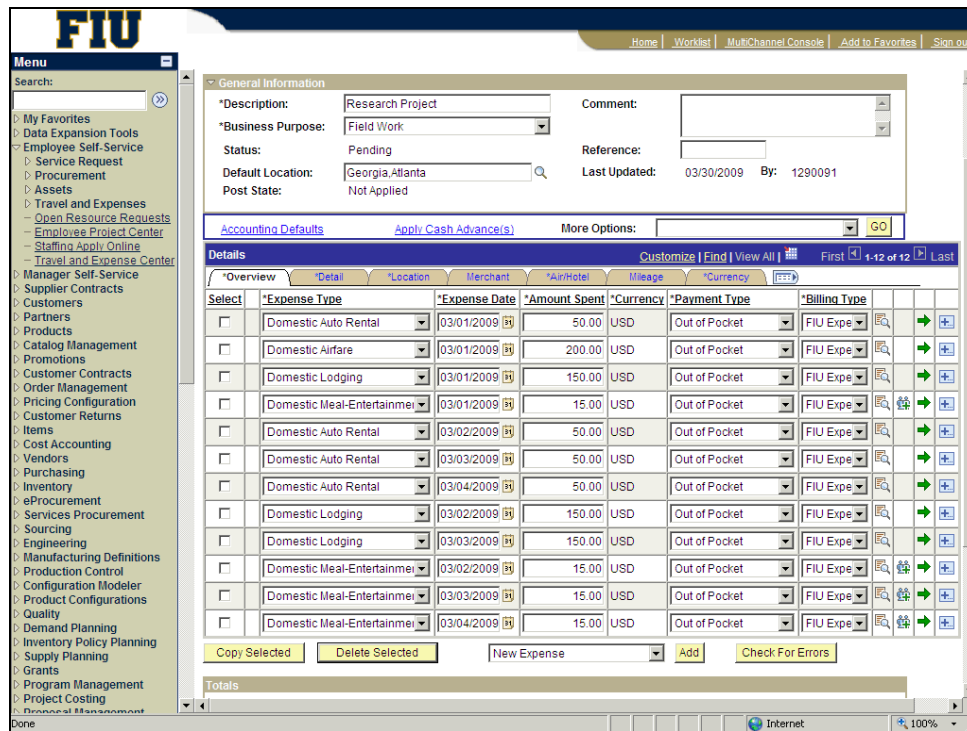


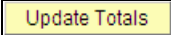


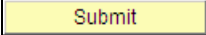
Step	Action
18.	Click the OK button. To confirm your Delete action. 



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Step	Action
19.	Click the scrollbar.
20.	Click the Update Totals button. To update all of your entries. 
21.	Click the View Additional Fields For This Expense button. This will allow you to enter more specific information about the individual expense. 
22.	Click in the Description field. Change the Domestic Lodging to "La Quinta". 
23.	Click the Submit button. When you are done editing your expenses. 
24.	Click the OK button to confirm.

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Step	Action
25.	Click the Home link. 
26.	Congratulations. You have successfully copied Expense Report Expense Lines. End of Procedure.