UNIVERSITY OF
South Carolina

Controller's Office – Travel and Expense
Travel and Expense Quick Reference Guide

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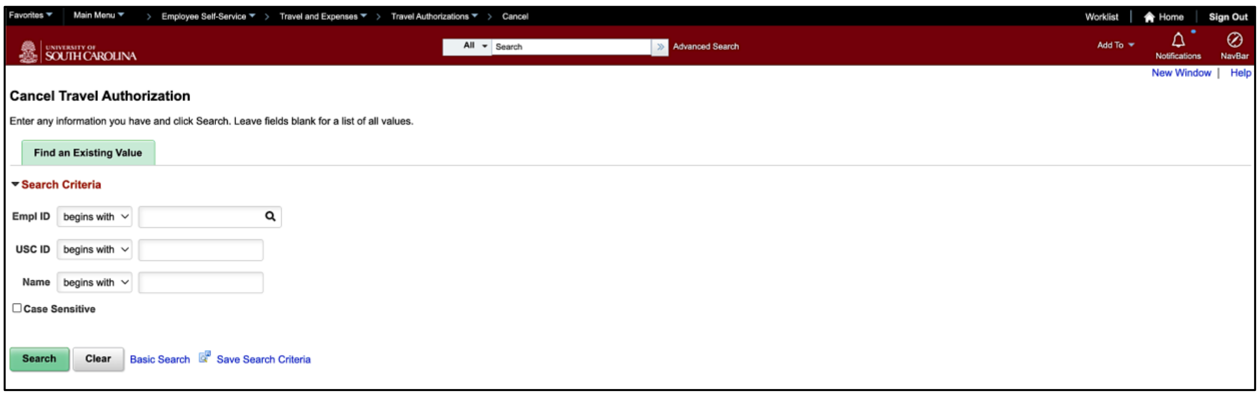
I. How to Cancel a Travel Authorization (TA)

Only TA's that are approved can be cancelled.

To cancel a Travel Authorization, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Travel Authorizations > Cancel

a. Enter either Empl ID, USC ID or Name and click **Search**.
b. Only the items that can be cancelled will display. Check the TA you would like to cancel and click the **Cancel Selected Travel Authorization(s)** button.



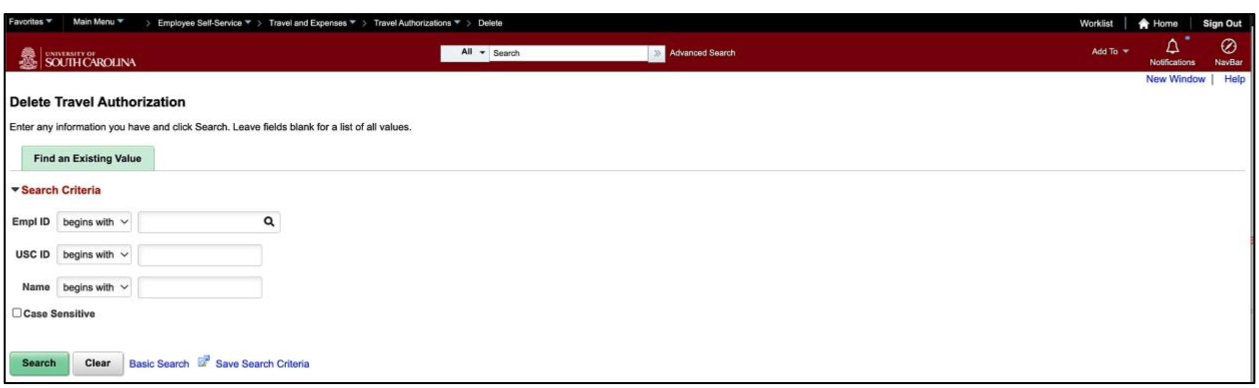
II. How to Delete a Travel Authorization (TA)

Only TA's that are pending can be deleted.

To delete a Travel Authorization, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Travel Authorizations > Delete

a. Enter either Empl ID, USC ID or Name and click **Search**.
b. Only the items that can be deleted will display. Check the TA you would like to delete and click the **Delete Selected Authorization(s)** button.



III. Travel Authorizations Past the Travel Dates but not Approved

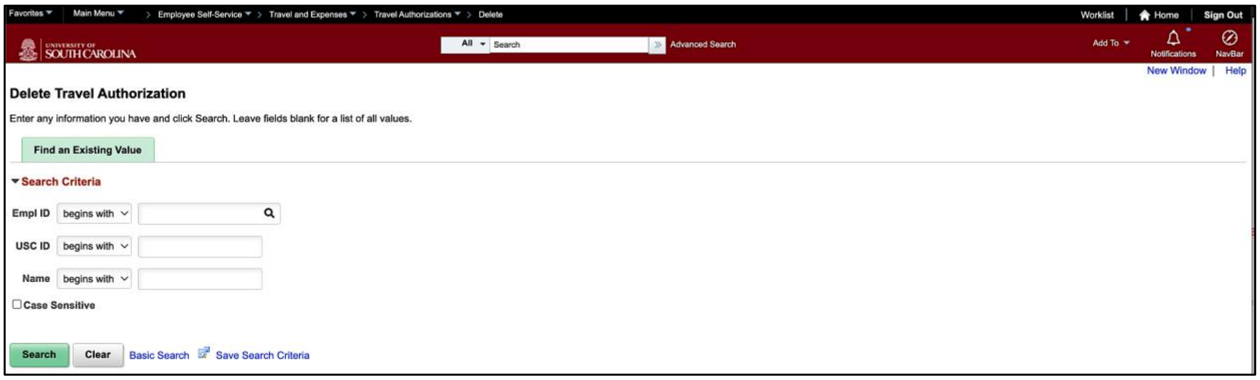
If the TA is not fully approved but the travel dates have passed, the TA will need to be sent back by the pending approver and deleted.

Only TA's that are pending can be deleted.

Once the TA is in a pending status, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Travel Authorizations > Delete

a. Enter either Empl ID, USC ID or Name and click **Search**.
b. Only the items that can be deleted will display. Check the TA you would like to delete and click the **Delete Selected Authorization(s)** button.



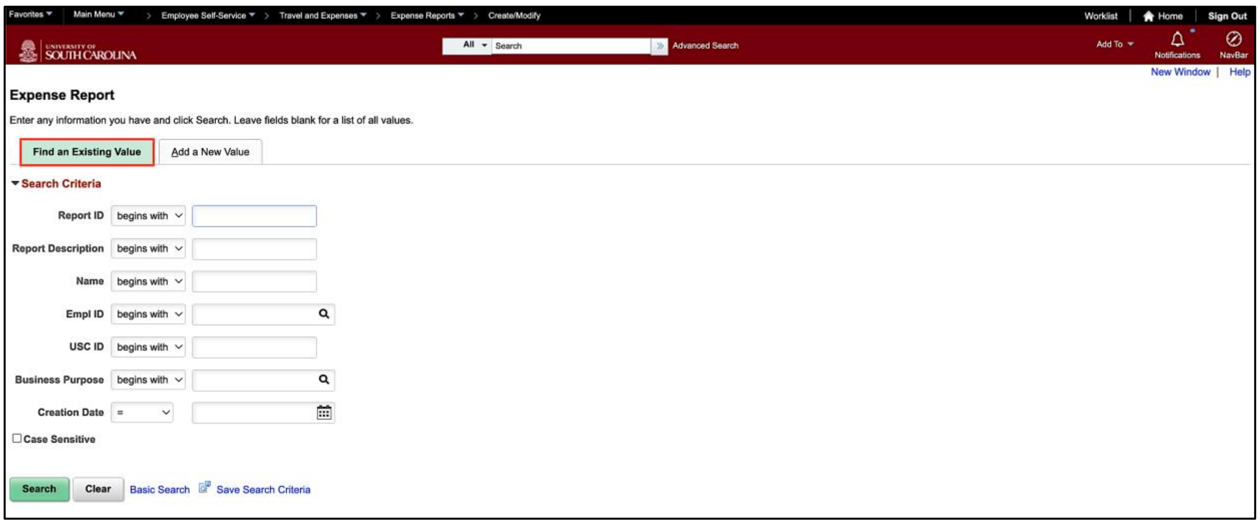
IV. Find an Expense Report that is Sent Back or Saved for Later

If you receive an email that an expense report was sent back and needs to be modified or if you saved an expense report prior to submitting.

To find an Expense Report that was sent back or saved for later, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Expense Reports > Create/Modify

a. Under the Find an Existing Value tab, enter either Report ID, Empl ID, USC ID or Name and click **Search**.
b. Only the items that can be modified will display. Make all needed changes, Save and Submit for approval.



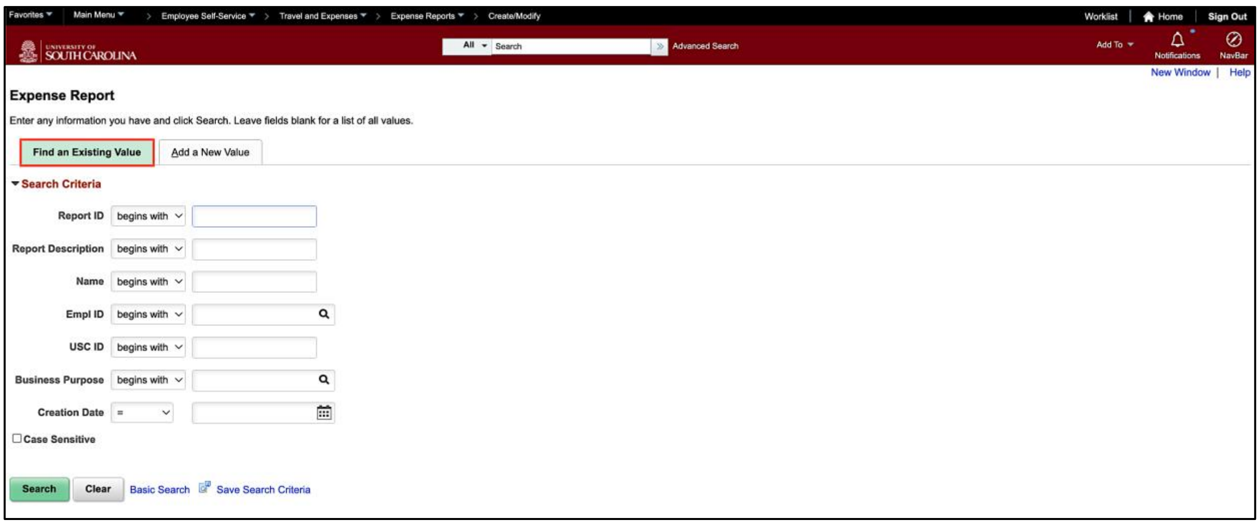
V. Older Transactions Error on Expense Line in an Expense Report

If after **Clicking Save for Later** you receive a red warning bubble on the expense line or lines, click the **bubble** and add a comment. Do this for each expense line with a warning.

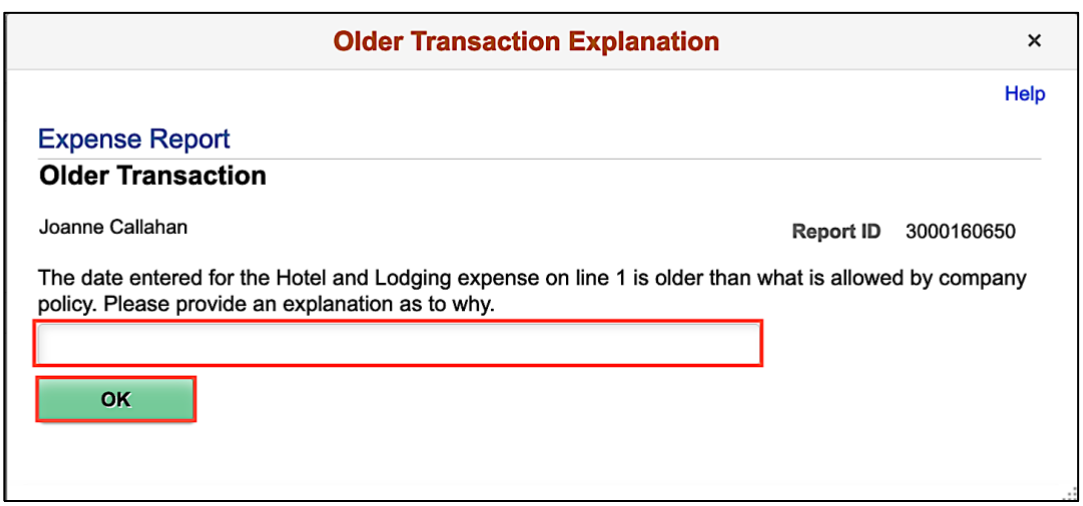
If the comment box will not allow you to type in a comment, find the expense report again using the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Expense Reports > Create/Modify

a. Under the **Find an Existing Value** tab, enter either Report ID, Empl ID, USC ID or Name and click **Search**.

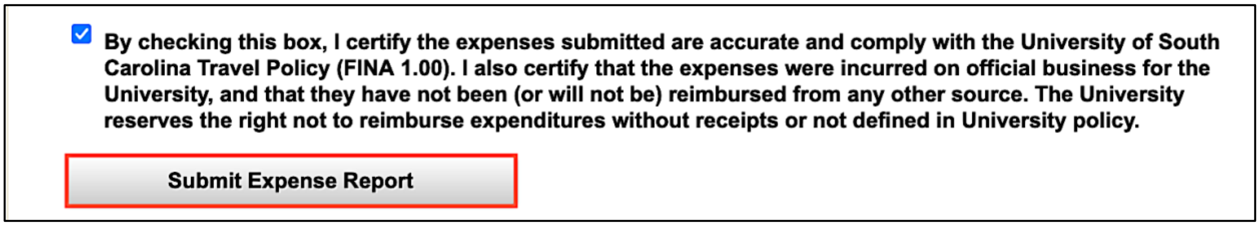


b. Once you find the expense report a second time, click **Save for Later**, the comment box will open and allow the comment to be added.



VI. Confirmation of the Submission of an Expense Report or TA

Once a TA or expense report is ready to submit, click the Summary and Submit link. On the Summary page, check the box and click **Submit Expense Report** button.



If you do not get a popup window **Expense Report Submit Confirm** and are unable to click **OK**, the expense report or travel authorization is NOT submitted. This is indicating an error or errors in the report that need to be corrected.

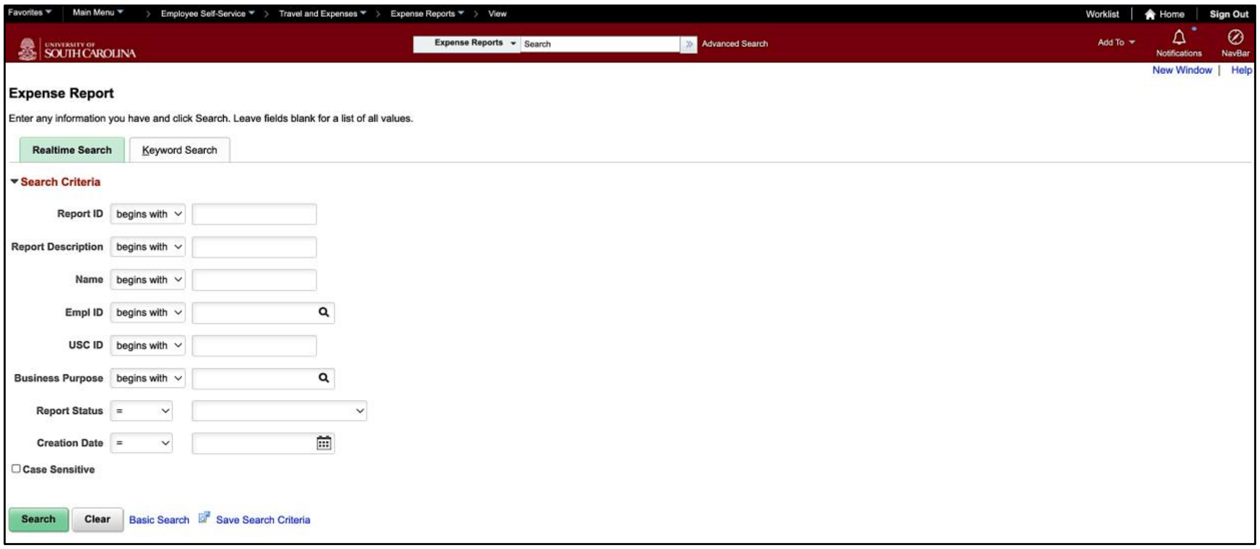
VII. How to View an Expense Report or TA

When in the view mode, expense reports and travel authorizations can only be reviewed so no modifications can be made. In this mode only attachments and notes can be added. Be sure to click **Save Changes** if an attachment or notes are added.

To view an Expense Report, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Expense Reports > View

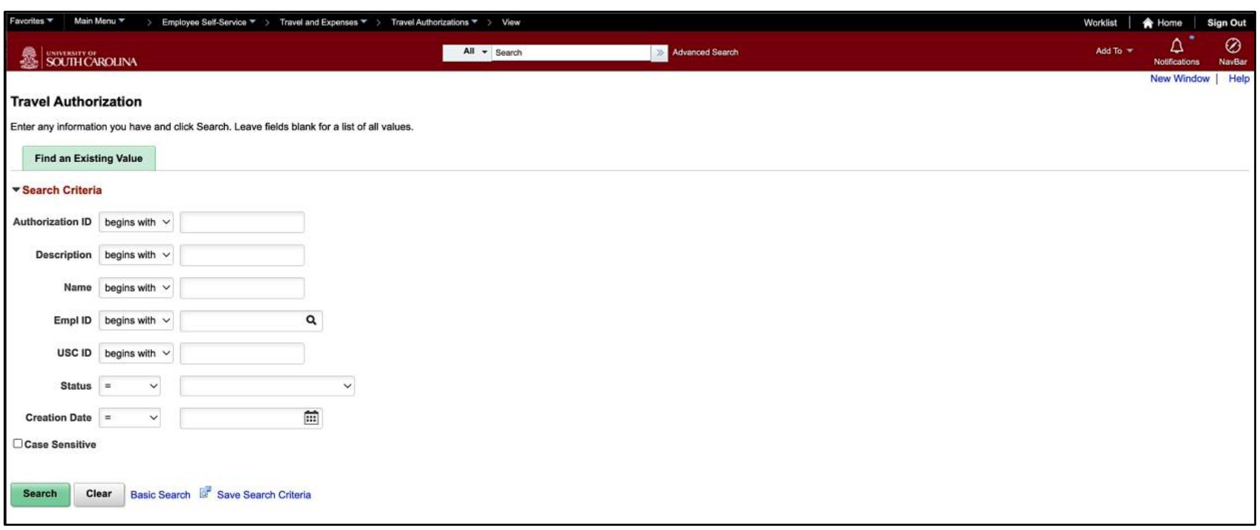
a. Enter either Report ID, Empl ID, USC ID or Name and click **Search**.



To view a Travel Authorization, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Travel Authorization > View

b. Enter either Authorization ID, Empl ID, USC ID or Name and click **Search**.



VIII. Review the Approval History of an Expense Report or TA

When in the view mode, expense reports and travel authorizations can only be reviewed so no modifications can be made. In this mode you can view the Approval History.

To view an Expense Report, use the following navigation:

Main Menu > Employee Self-Service > Travel and Expense > Expense Reports > View

a. On the summary page, click the Expand arrow to open the Approval History. This will provide the approval workflow.

b. If there is no Approval History, the Expense Report or TA has not been submitted.

c. If the approval workflow shows terminated this indicates the expense report has been sent back. To find an expense report that is sent back refer number IV. Above. Review the notes to find out why an expense report was sent back.