



**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

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

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

The screenshot shows the 'Delete Travel Authorization' page. At the top, there is a navigation breadcrumb: 'Employee Self-Service > Travel and Expenses > Travel Authorizations > Delete'. The page header includes the University of South Carolina logo and a search bar with 'All Search' and 'Advanced Search' options. The main content area is titled 'Delete Travel Authorization' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. Under the 'Search Criteria' section, there are three search criteria: 'Empl ID begins with', 'USC ID begins with', and 'Name begins with', each with a text input field and a search icon. There is also a 'Case Sensitive' checkbox. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

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

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

The screenshot shows the 'Expense Report' search page in the University of South Carolina system. The breadcrumb navigation is: Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify. The page title is 'Expense Report' and it includes a search bar with 'All Search' and 'Advanced Search' options. Below the search bar, there are two tabs: 'Find an Existing Value' (which is highlighted with a red box) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a section for 'Search Criteria' with the following fields: Report ID (begins with), Report Description (begins with), Name (begins with), Empl ID (begins with), USC ID (begins with), Business Purpose (begins with), and Creation Date (=). There is also a checkbox for 'Case Sensitive'. At the bottom of the search criteria section, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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.

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
08/07/2023	Hotel and Lodging	5 Night Stay at Hyatt Place/Harbison 218 characters remaining	Personal Reimbursement	448.00	USD

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

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

Expense Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Report ID begins with

Report Description begins with

Name begins with

Empl ID begins with

USC ID begins with

Business Purpose begins with

Creation Date =

Case Sensitive

[Basic Search](#)

- 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.

Older Transaction Explanation ×

[Help](#)

Expense Report

Older Transaction

Joanne Callahan Report ID 3000160650

The date entered for the Hotel and Lodging expense on line 1 is older than what is allowed by company policy. Please provide an explanation as to why.

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.

By checking this box, I certify the expenses submitted are accurate and comply with the University of South Carolina Travel Policy (FINA 1.00). I also certify that the expenses were incurred on official business for the University, and that they have not been (or will not be) reimbursed from any other source. The University reserves the right not to reimburse expenditures without receipts or not defined in University policy.

Submit Expense Report

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.

Expense Report Submit Confirm x

[Help](#)

[Create Expense Report](#)

Save Confirmation

Joanne Callahan

Totals ?

Employee Expenses (6 Lines)	987.81 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
Amount Due to Employee	987.81 USD	Amount Due to Supplier	0.00 USD		

OK

Cancel

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**.

The screenshot shows the 'Expense Report' search page. At the top, there is a navigation breadcrumb: 'Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > View'. The page title is 'Expense Report'. Below the title, there is a search bar with 'Expense Reports' selected and a search icon. To the right of the search bar are links for 'Advanced Search', 'Add To', 'Notifications', and 'NavBar'. The main content area has a heading 'Expense Report' and a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Realtime Search' (selected) and 'Keyword Search'. Below this is a 'Search Criteria' section with a dropdown arrow. The criteria include: Report ID (begins with), Report Description (begins with), Name (begins with), Empl ID (begins with), USC ID (begins with), Business Purpose (begins with), Report Status (equals), and Creation Date (equals). There is also a checkbox for 'Case Sensitive'. At the bottom of the search criteria are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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**.

The screenshot shows the 'Travel Authorization' search page. At the top, there is a navigation breadcrumb: 'Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > View'. The page title is 'Travel Authorization'. Below the title, there is a search bar with 'All' selected and a search icon. To the right of the search bar are links for 'Advanced Search', 'Add To', 'Notifications', and 'NavBar'. The main content area has a heading 'Travel Authorization' and a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a button labeled 'Find an Existing Value'. Below this is a 'Search Criteria' section with a dropdown arrow. The criteria include: Authorization ID (begins with), Description (begins with), Name (begins with), Empl ID (begins with), USC ID (begins with), Status (equals), and Creation Date (equals). There is also a checkbox for 'Case Sensitive'. At the bottom of the search criteria are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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.

Notes

Notes	Name	Role	Action Date/Time
This is a test.	Joanne Callahan	Employee Approval	11/09/2023 6:39PM