

ATTACHING RECEIPTS TO TRAVEL & EXPENSE TRANSACTIONS

PeopleSoft Financials Travel & Expense module offers the ability to add attachments to each of the following expense transactions: Travel Authorizations, Cash Advances and Expense Reports.

Attachments in the form of supporting documentation and/or receipts can be attached electronically from the top right-hand section of the Travel Authorization, Cash Advance and Expense Report pages; this allows documentation to stay with the transaction as it navigates through the approval workflow. Additionally, employees, users and auditors can access these attachments from the transaction at any time and this functionality allows for a paperless documentation process.

Employees can add attachments to a transaction in 'Pending' status before the transaction is submitted for approval. Approvers can add attachments to a transaction after it is submitted by an employee and while it is in 'Approvals in Process' status. However, no additional attachments can be added once a transaction is in 'Approved' status.

Procedure

Below are step by step instructions on how to attach receipts to a Fluid Expense Report accessed via the Create Expense Report tile.

| Step | Action |
|------|---|
| 1. | Select the Add Attachment button |
| 2. | Select the My Device button. |
| 3. | Locate and select the file, then click the Open button. |
| 4. | Select the Upload button. |
| 5. | When the upload is complete, a bar appears at the bottom of the File Attachment window reading Upload Complete . |
| 6. | Click Done . |
| 7. | Enter a description for the attachment in the Description field, if needed. |
| 8. | Repeat steps to add additional attachments. |
| 9. | Select the Done button when finished. |

Procedure

Below are step by step instructions on how to attach receipts to a Classic Plus Expense Report, Travel Authorization or Cash Advance which is accessed by navigating to NavBar > Navigator > Employee Self-Service > Travel and Expenses.

| Step | Action |
|-------------|--|
| 1. | Select the Attachments link. |
| 2. | Select the Add Attachment button. |
| 3. | Select the Choose File button. |
| 4. | Locate and select the file, then click the Open button. |
| 5. | Select the Upload button. |
| 6. | Enter a description for the attachment in the Description field, if needed. |
| 7. | Repeat steps to add additional attachments. |
| 8. | Select the OK button when finished. |