

## Controller's Office – Travel and Expense

### QUICK REFERENCE GUIDE

#### 1. How to Cancel a Travel Authorization (TA)

- a. Only TA's that are approved can be cancelled
- b. Use the following navigation:

[Main Menu - Employee Self-Service - Travel and Expense - Travel Authorizations - Cancel](#)

- c. Enter either Empl ID, USC ID or Name and click **Search**.
- d. Only the items that can be cancelled will display. Check the TA you would like to cancel and click Ok.

The screenshot shows the 'Cancel Travel Authorization' web form. At the top, there is a navigation breadcrumb: 'Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Cancel'. Below this is the University of South Carolina logo and name. The main heading is 'Cancel Travel Authorization'. Below the heading is the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a green button labeled 'Find an Existing Value'. Below that is a section titled 'Search Criteria' with a dropdown arrow. It contains three search criteria: 'Empl ID' with a 'begins with' dropdown and a search input field with a magnifying glass icon; 'USC ID' with a 'begins with' dropdown and a search input field; and 'Name' with a 'begins with' dropdown and a search input field. There is a checkbox for 'Case Sensitive'. At the bottom, there are buttons for 'Search' (green), 'Clear', 'Basic Search', and 'Save Search Criteria'.


#### 2. How to Delete a Travel Authorization

- a. Only TA's that are pending can be deleted
- b. Use the following navigation:

[Main Menu - Employee Self-Service - Travel and Expense - Travel Authorizations - Delete](#)

- c. Enter either Empl ID, USC ID or Name and click **Search**.
- d. Only the items that can be deleted will display. Check the TA you would like to delete and click Ok.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Travel and Expenses](#) > [Travel Authorizations](#) > [Delete](#)


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### Delete Travel Authorization

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

[Find an Existing Value](#)


▼ **Search Criteria**

Empl ID

USC ID

Name

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)


### 3. Travel Authorizations Past the Travel Dates but not Approved

- a. 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.
- b. Only TA's that are pending can be deleted
- c. Once the TA is in a **Pending Status** use the following navigation:

[Main Menu - Employee Self-Service - Travel and Expense - Travel Authorizations - Delete](#)

- d. Enter either Empl ID, USC ID or Name and click **Search**.
- e. Only the items that can be deleted will display. Check the TA you would like to delete and click Ok.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Travel and Expenses](#) > [Travel Authorizations](#) > [Delete](#)


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### Delete Travel Authorization

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

[Find an Existing Value](#)


▼ **Search Criteria**

Empl ID

USC ID

Name

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

#### 4. Finding an Expense Report That is Sent Back or Saved for Later

- a. 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
- b. Use the following navigation:

Main Menu - Employee Self-Service - Travel and Expense – Expense Reports – Create/Modify – Find an Existing Value

- c. Under the **Find an Existing Value** tab, enter either Report ID, Empl ID, USC ID or Name and click **Search**.
- d. 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. At the top, there is a navigation breadcrumb: 'Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify'. Below this is the University of South Carolina logo and name. The main heading is 'Expense Report'. Below the heading is the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (which is active) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a section titled 'Search Criteria' with a dropdown arrow. This section contains several search fields, each with a 'begins with' dropdown menu and an input field: 'Report ID', 'Report Description', 'Name', 'Empl ID' (with a search icon), 'USC ID', 'Business Purpose' (with a search icon), and 'Creation Date' (with an equals sign dropdown and a calendar icon). There is also a checkbox for 'Case Sensitive'. At the bottom of the search criteria section are three buttons: 'Search' (green), 'Clear' (grey), and 'Basic Search' (blue). To the right of 'Basic Search' is a link 'Save Search Criteria' with a small icon.

#### 5. Older Transaction Error on Expense Line in an Expense Report

- a. 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.



- b. Do this for each expense line with a warning.
- c. 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 – Find an Existing Value

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

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Expense Report

**Older Transaction**

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

OK

**6. Confirmation of the Submission of an Expense Report or TA**

- a. Once a TA or expense report is ready to submit, click **Summary and Submit** – check the **Box** and click **Submit Expense Report**

Amount Due to Employee 1,518.01 USD

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

- b. 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 – There is an error or errors in the report that require correction.

**Expense Report Submit Confirm**

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Expense Report

**Submit Confirmation**

Totals ?

Employee Expenses (9 Lines)	1,518.01 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

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Amount Due to Employee	1,518.01 USD	Amount Due to Supplier	0.00 USD
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OK

Cancel

**7. How to View an Expense Report or TA**

- a. When in the view mode, expense reports and travel authorizations can only be reviewed – no modifications can be made – only attachments and notes can be added – click **Save Changes** if an attachment or notes are added.
- b. Use the following navigation to view an **Expense Report**:

[Main Menu - Employee Self-Service - Travel and Expense – Expense Reports - View](#)

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

The screenshot shows the 'Expense Report' search page in the University of South Carolina's Employee Self-Service system. The breadcrumb navigation at the top reads: Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > View. The page header features the University of South Carolina logo and name. Below the header, the title 'Expense Report' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search mode buttons: 'Realtime Search' (highlighted in green) and 'Keyword Search'. A 'Search Criteria' section is expanded, showing several search fields: 'Report ID' (dropdown: begins with), 'Report Description' (dropdown: begins with), 'Name' (dropdown: begins with), 'Empl ID' (dropdown: begins with, with a search icon), 'USC ID' (dropdown: begins with), 'Business Purpose' (dropdown: begins with, with a search icon), 'Report Status' (dropdown: =), and 'Creation Date' (dropdown: =, with a calendar icon). A 'Case Sensitive' checkbox is present and unchecked. At the bottom, there are 'Search' (green), 'Clear' (grey), 'Basic Search' (blue), and 'Save Search Criteria' (blue) buttons.

- d. Use the following navigation to view a **Travel Authorization**:

[Main Menu - Employee Self-Service - Travel and Expense – Travel Authorization – View – Advanced Search](#)

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

## Travel Authorization

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

[Find an Existing Value](#)

### ▼ Search Criteria

Authorization ID    
 Description    
 Name    
 Empl ID     
 USC ID    
 Status    
 Creation Date

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

## 8. Review the Approval History of an Expense Report or TA

- a. See number 7 – **How to View an Expense Report or TA**
- b. On the summary page open the **Approval History** – This will give the approval workflow

### ▶ Approval History

- c. If there is no Approval History, the Expense Report or TA has not been submitted
- d. If the approval workflow shows terminated, it has been sent back – See number 4 above – Review the notes to find out why an expense report was sent back

 [Notes](#)