

# **Copying an Existing Expense Report**

Once you click **Summary and Submit**, it is sent to your supervisor and you will no longer be able to modify unless you withdraw the report.

#### Important:

When selecting an expense report to copy, please try to choose one with a status of Approved for payment, Staged or Paid. Also, please review the accounting codes to insure they match codes that you are currently using with the project to be charged.

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## **TOPIC 1: COPYING AN EXISTING EXPENSE REPORT**

#### **COPYING AN EXISTING EXPENSE REPORT Procedure Steps**

Scenario: The employee frequently has similar travel transactions Follow the steps explained below.

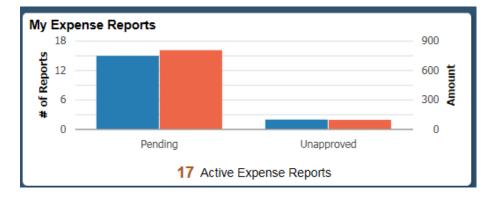
- 1. Access PeopleSoft Finance using the following link: <u>https://starfin.wi.gov</u>
- 2. Log in to PeopleSoft Finance using your IAM account.
- **STEP 1:** Navigate to the **FSCM Employee Self-Service** Home Page.



**STEP 2:** Click on the **Travel and Expenses** tile.



**STEP 3:** Click on the **My Expense Reports** tile.



STEP 4: Your Name and Employee ID should default in. To continue creating your own Expense Report, please skip to Step 5.



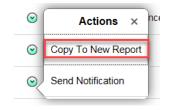
If you are entering as a	delegated user fo	or othe	<b>r employees</b> , click on the green circle with the
downward arrow.			
	< Expenses		
	Stacey Beattie 🕑		
	Returned	0	Not Submitted
	Not Submitted	10	T Create Expense Report
	Awaiting Approval	10	Actions $\diamond$ Description $\diamond$
Click on Change Employ	ee.		
	< Expense	s	Actions ×
	Stacey Beat	ttie 🥑 💡	Change Employee
			···
A listing of the employed	es that you have t	he aut	hority to enter for will be displayed. You can
also search for an emplo	oyee if you are a d	lelegat	ed enterer for multiple employees by entering
the name in the search l	oox.		
		Emple	oyee Search ×
	k5		»
			2 rows
Em	pl ID 🛇		me ≎).
Em	pi ID 🛇		me $\diamond$ Isang Chokey
Em		Ka	
		Ka	sang Chokey
Select the appropriate n		Ka Sta	sang Chokey

STEP 5: The categories of expense reports are listed. Expense reports can be copied from any of the categories. Find the expense report that you wish to copy and click on the green circle with the upside-down arrow.

Travel and Expenses				My Expense	Reports			â	Q :
Stacey Beattie 🕑									
Returned	0	View All							
Not Submitted	15	T Create	Expense Report						17 ro
Awaiting Approval	2	Actions $\diamond$	Description $\Diamond$	Business Purpose 🛇	Report ID 🛇	Status 🗘	Updated Date $\Diamond$	Amount $\Diamond$	
Pending Payment	0	۲	Testing	Business Travel-In State	0000432988	Pending	02/04/2019	10.00 USD	>
View All	17	$\odot$	test	Agency Event/Meetng-In State	0000432986	Pending	02/04/2019	400.00 USD	>
		۲	STAR Conference	Confrace/Convention-In State	0000432980	Submitted for Approval	01/31/2019	10.00 USD	>
		۲	Testing	Training/Education-In State	0000432979	Pending	01/31/2019	8.00 USD	>
		۲	Testing	Business Travel-In State	0000432978	Approvals in Process	01/31/2019	86.50 USD	>
		•	Testing2	Business Travel-In State	0000432969	Pending	01/31/2019	110.00 USD	>
		۲	test	Business Travel-In State	0000432983	Pending	01/16/2019	0.00 USD	>
		۲	Alliance Conference	Confrace/Convention-OutofState	0000432977	Pending	12/12/2018	0.00 USD	>



STEP 6: A list of available actions for that expense report is displayed. Click Copy to New Report.



STEP 7: A message will be displayed across the top of your screen briefly that a new expense report has been created and the number.

1	
	Expense Report ID 0000432990, Testing, has been created.

STEP 8: The General Information section of the new expense report will be displayed. Change can be made in the General Information. Click on Update Details to make the changes to the information as needed, i.e. dates, description, amounts, etc.

✓ My Expense Reports	rts Expense Report						: @	D
Report 0000432990 Pending Stacey Beattie 🕑						Update [	Details	
General Information								
*Business Purpose	Business Travel-In State		@ Attach Receipt	>				
*Description	Testing		Accounting Defaults	1 >				
Default Location	Q,		His Providence ig prendence	1				
Reference	Q		Creation Date 02/04/2019 Stacey Beattie Updated on 02/04/2019 Stacey Beattie					

**STEP 9:** Click **Save** to save the expense report and not submit or **Review and Submit**.