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.

Contents

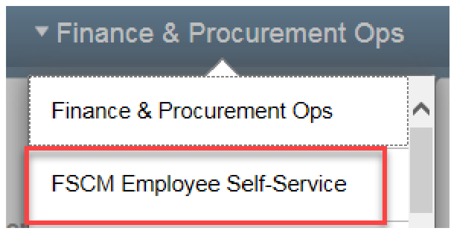
TOPIC 1: COPYING AN EXISTING EXPENSE REPORT

COPYING AN EXISTING EXPENSE REPORT Procedure Steps

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

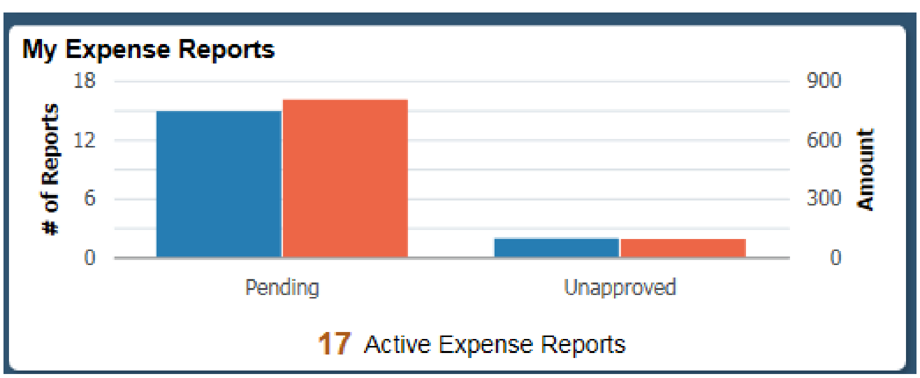
1. Access PeopleSoft Finance using the following link: https://starfin.wi.gov
2. Log in to PeopleSoft Finance using your IAM account.

- **STEP 1:** Navigate to the **FSCM Employee Self-Service** Home Page.



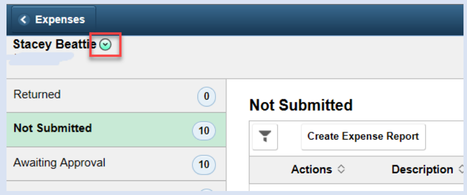
- **STEP 2:** Click on the **Travel and Expenses** tile.

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

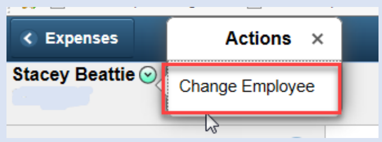


- **STEP 4:** Your Name and Employee ID should default in. To continue creating your own Expense Report, please skip to **Step 5**.

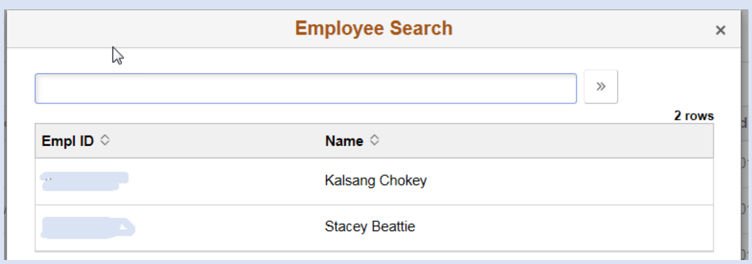
If you are entering as a delegated user for other employees, click on the green circle with the downward arrow.



Click on **Change Employee**.



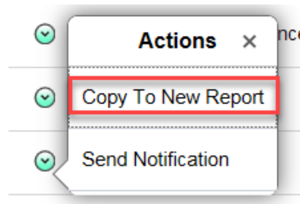
A listing of the employees that you have the authority to enter for will be displayed. You can also search for an employee if you are a delegated enterer for multiple employees by entering the name in the search box.



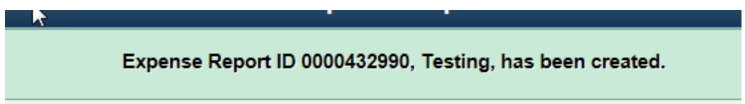
Select the appropriate name from the listing.

- **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.

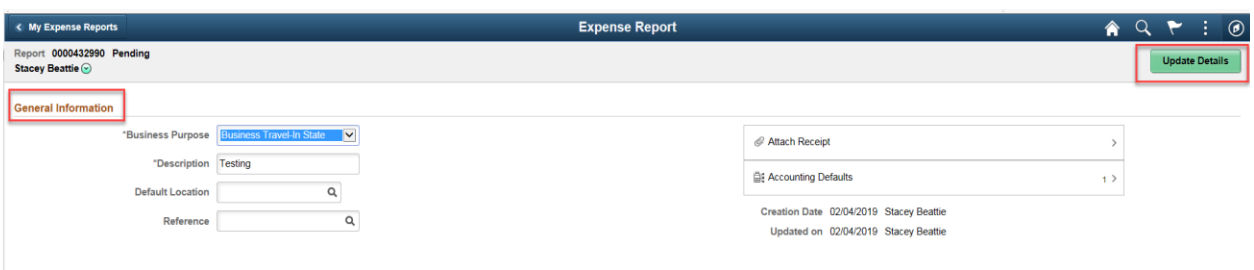
➢ **STEP 6:** A list of available actions for that expense report is displayed. Click **Copy to New Report**.



➢ **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.



➢ **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.



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