Job Aids: Expense Reports

Job Aids: Expense Reports PSFIN v9.2 Upgrade Training

d. The per diem amount will have been deducted by 25% to meet the state requirement of
75% reimbursement
11. To copy expense lines, select Copy Expense Lines from the Actions drop down menu; otherwise
go to step #11.
a. Click GO
b. In the Copy Expense Lines window, you can either copy the expense line to a single date
or a range of dates. You also have the option to include weekends or holidays
c. Enter a date in the To Date field
d. Check to box to select the expense line you wish to copy
e. Click OK
12. To save the expense report for later, select the Save for Later button.
13. Click the Summary and Submit link
14. To submit the Expense Report for approval, you must first check the verification checkbox
indicating the travel was for official business.
15. After checking the verification selection the Submit Expense Report button becomes enabled.
Click the Submit Expense Report button to submit the Expense Report for approval
View Expense Report
1. Access PSFIN Self-Service: http://fprod-selfservice.gafirst.usg.edu.
2. Select Employee Self-Service
3. Select Travel and Expenses
4. Select Expense Report
5. Select View
6. Enter the Expense Report ID and click Search or click Search (with the ID field blank) display all
Expense Reports
7. Select the Expense Report ID link to view the transaction
8. The Expense Report is displayed in a read-only format
9. To view the specifics of a particular expense line, select the Expand Section arrow on the
appropriate line. You can also select the Expand All link to expand all lines
10. The Approval History section displays the approval levels and names of the approvers (if not
pooled) which are still required for the transaction
11. The Action History section displays any actions that have been taken on the transaction
Modify Expense Report
1. Access PSFIN Self-Service: http://fprod-selfservice.gafirst.usg.edu.
2. Select Employee Self-Service
3. Select Travel and Expenses
4. Select Expense Report
5. Select Create/Modify
6. On the Find an Existing Value tab, enter the Expense Report ID and click Search or click Search
(with the ID field blank) to display all Expense Reports available for modification.
7. Select the Expense Report ID link to modify it.
8. Modify the Expense Report in the same fashion as you created it.

Job Aids: Expense Reports PSFIN v9.2 Upgrade Training

Print Expense Report
1. Access PSFIN Self-Service: http://fprod-selfservice.gafirst.usg.edu.
2. Selec
 Employee Self-Service
3. Selec
 Travel and Expenses
4. Selec
 Expense Report
5. Selec
 Print
6. Enter the Expense Report ID and click Search or click Search (with the ID field blank) to display
all Expense Reports
7. Selec
 the Expense Report ID link to view the transaction
8. A read-only view of the Expense Report is displayed
9. Selec
 the Print Expense Report link
10. A new window/tab will automatically open which will display the printed expense report. Note
that this may take several minutes
11. Use the print function on your browser to print the report after it displays
12. When you have finished viewing and/or printing the report, close the report window to return
to the Expense Report view page
Delete Expense Report
1. Access PSFIN Self-Service: http://fprod-selfservice.gafirst.usg.edu.
2. Selec
 Employee Self-Service
3. Selec
 Travel and Expenses
4. Selec
 Expense Report
5. Selec
 Delete
6. Enter the Expense Report ID or click Search and locate the expense report needing to be
deleted
7. Put a checkmark in the appropriate box to select the expense report you wish to delete
8. Selec
 the Delete Selected Report(s) button
9. The Delete Confirmation message is displayed