

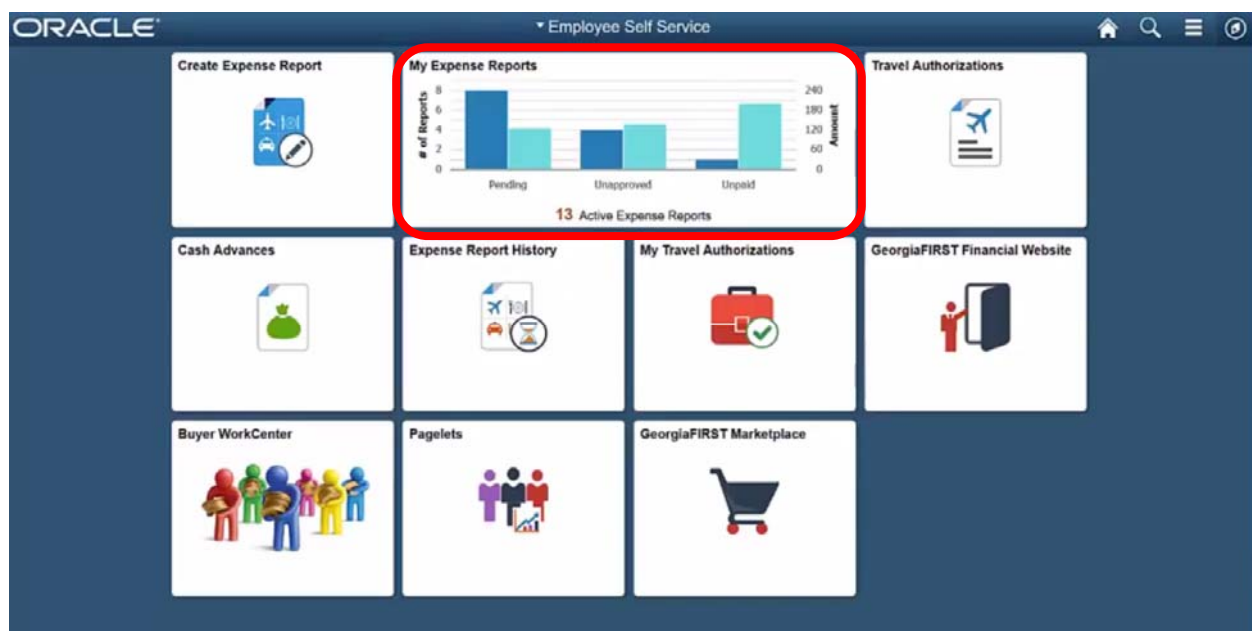
# Submitting a Pending Expense Report after the PeopleSoft Financials Upgrade

As an individual who had an expense report in a pending status on November 30 (prior to the upgrade associated with Release 5.30), you will need to submit the pending expense report for approval when the system is back up on Monday, December 4, after 10AM.

Upon logging into PeopleSoft, you will see a new fluid interface. There are two ways you can access your pending expense report to submit it into workflow...the fluid interface or the traditional classic view.

## Using the Fluid Interface

You can utilize the new fluid interface by clicking on the “**My Expense Reports**” tile on the new fluid homepage. Once you click on the tile, you should be able to search for your pending expense report.



Once the report is opened, you will be able to review the report. Next click on the **Review and Submit** button.

Expense Entry

Meeting in Atlanta [icon]

Daphne Burch [icon]

Save Review and Submit

Last Saved: 11/21/2011 3:00PM

The Expense Summary page will display.

Click the **Submit** button. If you are not on the paperless pilot program, you can still print your expense report by clicking on the **View Printable Report** option.

The screenshot shows the 'Expense Summary' page in the PeopleSoft Financials system. The page title is 'Expense Summary'. Below the title, there is a section for 'Meeting in Atlanta' and 'Daphne Burch'. The 'Expense Report Summary' section shows a total of 156.00 USD for 2 items, with a due date to the employee. The 'Approval Status' section shows a report ID of 0000602416 and a status of 'Pending'. The 'Additional Information' section includes links for 'Travel Authorization', 'View Analytics', 'Notes', and 'View Printable Report'. The 'Submit' button is highlighted with a red box, and the 'View Printable Report' link is also highlighted with a red box.

The submission statement will display.

Click **Submit**.

The screenshot shows a submission statement form. The title is 'I certify the expenses submitted are accurate and comply with expense policy.' Below the title, there is a paragraph of text: 'I do solemnly swear, under criminal penalty of a felony for false statements subject to punishment by fine of not more than \$1000 or by imprisonment for not less than one nor more than five years, that the above statements are true and I have incurred the described expenses and the state use mileage in the discharge of my official duties for the state.' At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red box.

A message will appear at the top of the page confirming that your Expense Report has been submitted and you will be returned to the My Expense Reports page.

The screenshot shows the 'My Expense Reports' page in the PeopleSoft Financials system. The page title is 'My Expense Reports'. Below the title, there is a message: 'Expense Report 0000602416, Meeting in Atlanta, has been submitted.' The message is displayed in a green box with a close button (X) on the right.

## Using the Traditional “Classic View”

As an alternative, you can utilize the traditional “classic view” in the PeopleSoft Financials system by clicking on the **Compass** icon. This will access the NavBar. Once on the NavBar, click the **Navigator** icon. The traditional PeopleSoft menu will be displayed. You can then proceed to **Employee Self Service**. This will take you into the traditional view of PeopleSoft that should look very similar to the view prior to the upgrade. You will be able to go to Expense Report > Modify to access your report for review and submission.

