

EX.010.031 - CREATING A PRIVATE EXPENSE REPORT TEMPLATE

Purpose	<ul style="list-style-type: none"> Identify the purpose for creating private expense report templates. Identify who is responsible for creating expense report templates. Create a private expense report template.
Description	<p>To reduce time and errors in preparing expense reports, users can create templates that reflect typical expenses incurred on a routine basis. Creating a private expense report template will allow employees to customize expense types that are frequently used, eliminating the need to add these expenses each time an expense report is created.</p> <p>Employees can create their own, private templates. Public templates are created by the Expenses Administrator for all employees to use.</p>
Security Role	BOR PeopleSoft User BOR PeopleSoft User – No Tauth
Assumptions	None
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions for creating a private expense report template.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Employee Self-Service link.
4.	Click the Travel and Expenses link.
5.	Click the User Preferences link.
6.	Click the Create/Update User Template link.
7.	Click the Add a New Value tab.
8.	Enter a short template name in the Document Template field. <i>Note: this field is limited to 8 characters.</i>
9.	Click the Template Type list.
10.	Click the Expense Report list item.
11.	Click the Add button.
12.	Enter a template description in the Description field. <i>Note: this field is limited to 30 characters.</i>
13.	Enter a template short description in the Short Description field. (optional)
14.	Select an Expense Type to add to the template.
15.	Click the plus (+) button to add multiple new rows at row 1.
16.	Enter the number of rows to add.
17.	Click the OK button. The rows will be added.
18.	Click the next blank Expense Type list.
19.	Select an Expense Type to add to the template.
20.	Repeat these steps to add additional Expense Types to the template.
21.	Click the Save button.
22.	Click the OK button.