



**State of Wisconsin
Department of Administration**

**Deleting Expense Report as a
Delegated User Job Aid**

Version 1.0



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PURPOSE AND DESCRIPTION

Purpose

This document explains the key topics involved in delegating entry authority. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activities.

Description

The key topics involved in the Delegating Entry Authority process are:

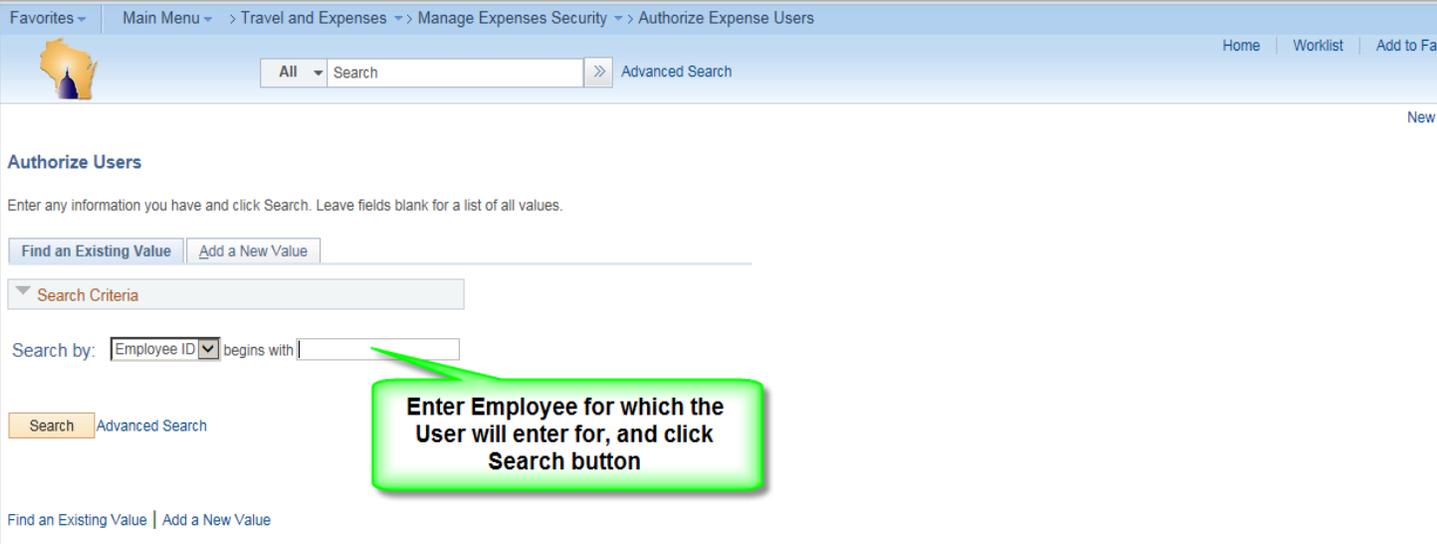
- Topic 1: Travel Expense Processor to Assign Entry Delegation Authority
- Topic 2: Delegated User to Delete Expense Report



TOPIC 2: TRAVEL EXPENSE PROCESSOR TO ASSIGN ENTRY DELEGATION AUTHORITY

Travel Expense Processor to Assign Entry Delegation Authority Procedure Steps

Scenario: The agency Travel Expense Processor logs into STAR PeopleSoft and Assigns Entry Delegation Authority on behalf of the Employee. Follow the steps explained below.

Step	Action
1.	Travel Expense Processor logs into PeopleSoft.
2.	<p>Navigate to Travel and Expenses > Manage Expenses Security > Authorize Expense Users</p> 



3.

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users 🔍

 All ▾ Search [] >> Advanced Search 🔍 Last Search Results 🔍

Authorize Users

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

▼ Search Criteria

Search by: Last Name ▾ begins with SELL []

[Search](#) | [Advanced Search](#)

Search Results

View All First 1-18 of 18 Last

Last Name	Employee ID	Name
SELL	100002071	SELL,DEANNA
SELL	100033913	SELL,TIMOTHY
SELL	100042482	SELL,CHRISTOPHER
SELL	100048634	SELL,JENNIFER
SELL	100048701	SELL,HEIDI
SELL	100061113	SELL,KIMBERLY
SELL	100065037	SELL,JAMES
SELL	100069458	SELL,JAMES
SELLEN	100065250	SELLEN,GARY
SELLENT	100065283	SELLENT,LACY
SELLERS	100022850	SELLERS,DEANNA
SELLERS	100035071	SELLERS,CHERRIE
SELLERS	100066161	SELLERS,DANIEL
SELLHAUSEN	100067256	SELLHAUSEN,TREESA
SELLIN	100019723	SELLIN,ADAM
SELLNER	100022068	SELLNER,VALERIE
SELLNOW	100014854	SELLNOW,RACHEL
SELLWOOD	100073118	SELLWOOD,ALYSSA

[Find an Existing Value](#) | [Add a New Value](#)

Select the Employee



4.

Authorize Users
KIMBERLY SELL

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

User given authority to Enter on the Employees behalf

*Authorized User ID	Name		
HILARLYXZ		+	-
SELLKXIQY	SELL,KIMBERLY	+	-

Employee

Click on "+" to Add another Delegated User

Save

Return to Search Previous in List Next in List Notify

5.

Authorize Users
KIMBERLY SELL

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

*Authorized User ID	Name		
HILARLYXZ		+	-
SELLKXIQY	SELL,KIMBERLY	+	-
		+	-

Click on the Magnifying Glass to look-up the User to add

Save

Return to Search Previous in List Next in List Notify



6.

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users 🔍

Home | Worklist

All ▾ Search >> Advanced Search 🔍 Last Search Results

New Worklist

Authorize Users

KIMBERLY SELL

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Authorize Users

*Authorized User ID	Name
HILARLXYXZ	
SELLKXIQY	SELL,KIMBERLY
<input type="text"/>	

Save

Look Up Authorized User ID

Search by: User ID ▾ begins with beat

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-4 of 4 Last

User ID	Description
BEATBLCED	Beatty, Betsy
BEATTSAGMN	Beattie, Stacey
BEATTSXBDO	Beattie, Stacey
BEATYMLHGQ	Beaty, Mackinzi

Return to Search Previous in List Next in List Notify

**Start Typing Name/ID, click Look Up Button
Select the User You Were Looking For**

7.

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users 🔍

All ▾ Search >> Advanced Search 🔍 Last Search Results

Authorize Users

KIMBERLY SELL

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Authorize Users

*Authorized User ID	Name		
HILARLXYXZ		+	-
SELLKXIQY	SELL,KIMBERLY	+	-
BEATTSXBDO	BEATTIE,STACEY	+	-

Save

Click SAVE

Return to Search Previous in List Next in List Notify

NEW Delegated User was added



8.

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users 🔍



All ▾

Search



Advanced Search



Last Search Results

Save Confirmation

KIMBERLY SELL



The Save was successful.

OK



Return to Search



Previous in List



Next in List



Notify



TOPIC 2: DELEGATED USER TO DELETE EXPENSE REPORT

Delete Expense Report Procedure Steps

Follow the steps explained below.

Step	Action
1.	<p>Navigate to: Employee Self-Service > Travel and Expenses > Expense Reports > Delete</p> <p>The screenshot shows the 'Main Menu' with a search bar. The navigation path is highlighted as follows:</p> <ul style="list-style-type: none"> Employee Self-Service (highlighted in yellow) Travel and Expenses (highlighted in yellow) Expense Reports (highlighted in yellow) Delete (highlighted in grey) <p>Additional menu items visible include: Accounts Payable, Accounts Receivable, Allocations, Application Diagnostics, Asset Management, Background Processes, Banking, Billing, Cash Management, Catalog Management, Commitment Control, Cost Accounting, Customer Contracts, Customer Returns, Customers, Deal Management, Development Utilities, Engineering, Enterprise Components, eProcurement, eSettlements, Excise and Sales Tax/V, Financial Gateway, General Ledger, Grants, Inventory, IT Asset Management, Items, Maintenance Management, and Manager Self-Service.</p> <p>Text box on the left: Menu Search, supports typeahead and is much faster.</p>



<p>2.</p>	<p>A search criteria page will appear. It will appear pre-populated with your own employee ID.</p> <p>Delete Expense Report</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value</p> <p>▼ Search Criteria</p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text" value="100047769"/> <input type="button" value="Q"/></p> <p>Name: <input type="text" value="begins with"/> <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Q"/> Save Search Criteria</p>
<p>3.</p>	<p>Enter the Empl ID of the employee for the expense report that you are trying to delete. A “No matching values were found” message will be displayed. <u>Do not</u> try to search using the magnifying glass. Click Search.</p> <p>Delete Expense Report</p> <p>Enter any information you have and click Search. Leave fields blank for</p> <p>Find an Existing Value</p> <p>▼ Search Criteria</p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text" value="100074651"/> <input type="button" value="x"/> <input type="button" value="Q"/></p> <p>Name: <input type="text" value="begins with"/> <input type="text" value="No matching values were found."/></p> <p><input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Q"/> Save Search Criteria</p>
<p>4.</p>	<p>A listing of Expense Reports, that are in Pending status, come up. Check the “Select” box for the Expense Reports that should be deleted, then push the “Delete Selected Report(s)” button.</p>



[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Travel and Expenses](#) > [Expense Reports](#) > [Delete](#)



Travel and Expense

Delete an Expense Report

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Delete an Expense Report 

Select	Report ID	Report Description	Creation Date	Amount	Currency
<input checked="" type="checkbox"/>	0000007500		10/20/2015	300.00	USD
<input type="checkbox"/>	0000007485	STARCOM October	10/19/2015	708.50	USD
<input type="checkbox"/>	0000007484	Expenses STARCOM	10/19/2015	123.16	USD
<input type="checkbox"/>	0000007482	STARCOM October	10/19/2015	708.50	USD

Select the transaction(s) you would like to delete

5.

Delete Confirmation page will come up letting you know that your deletion was successful. Click OK

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Travel and Expenses](#) > [Expense Reports](#) > [Delete](#)



Travel and Expense

Delete Confirmation

KIMBERLY SELL

 The selected transaction(s) have been deleted.