Attaching Electronic Receipts to an Expense Report

Summary:

In addition to faxing paper receipts to 7-1355 you can now also attach electronic receipts within the PeopleSoft Application to an Expense Report. (PDF documents only as of 5-24-10, Word and Excel documents will also be integrated in the near future)

Please note that user will have to continue to follow all existing requirements for Receipts. Please see 'Documentation Requirements: Receipts Requirements (page 24 in Travel and Other Expenses Manual)'

Navigation: Employee Self-Service > Travel & Expense Center > Expense Report

- You'll notice a new box on the header section titled 'Receipts'.
- Click on the 'Attach Receipts' link

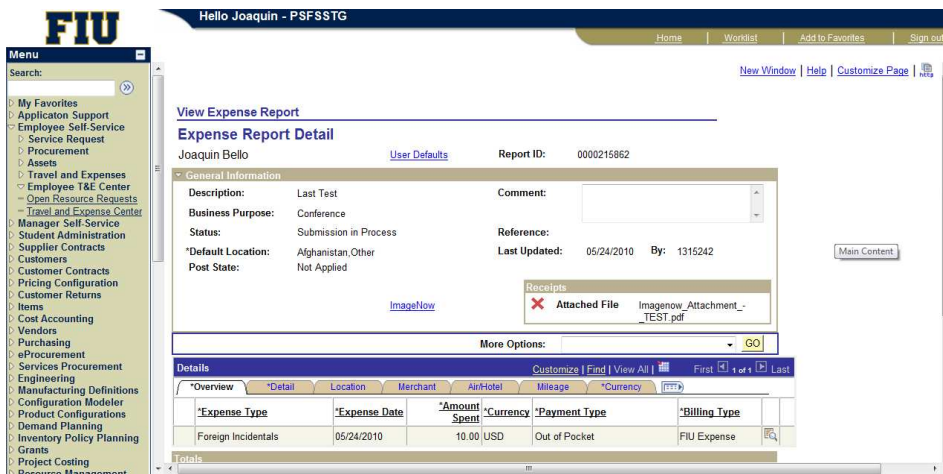- Click on the 'Browse' button

- Navigate to your 'PDF' receipt, select it and press 'OPEN'
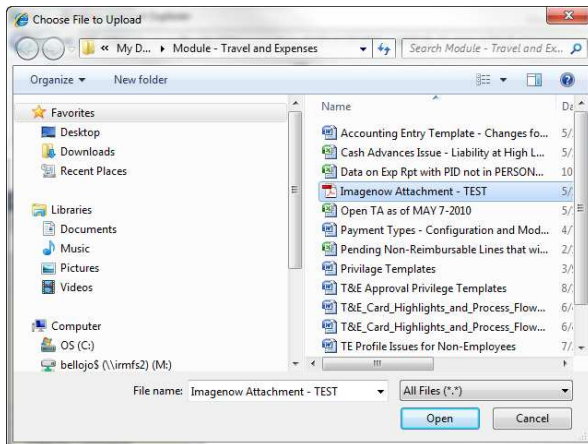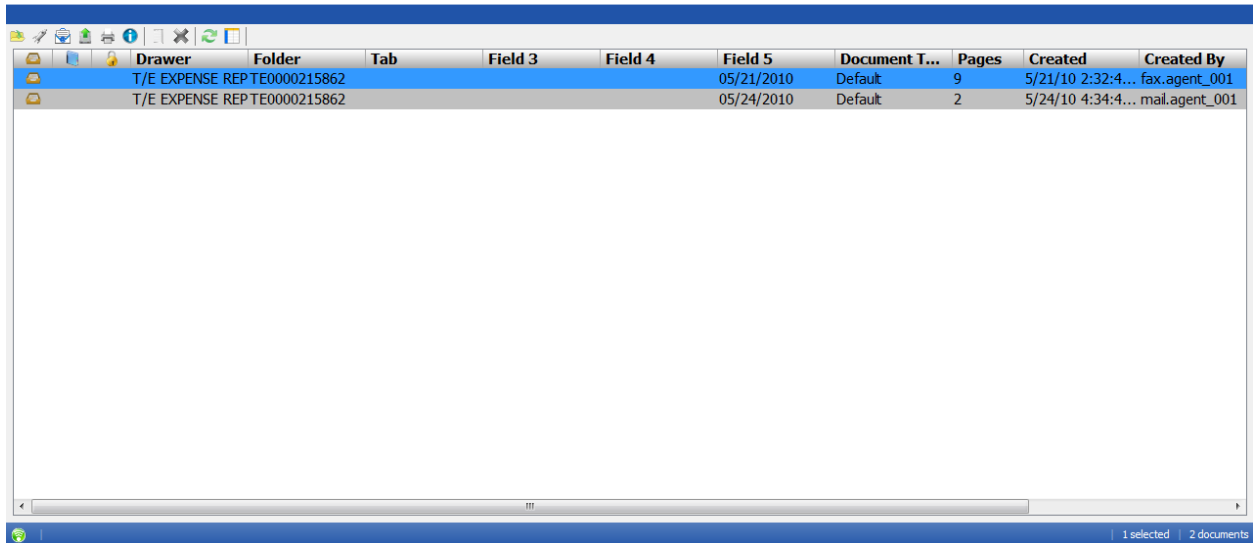

- Click on 'Upload'

- Verify that file was attached (see 'Receipts' box)
- 'Submit' Expense Report for Approval as normally done

The system will convert your PDF file into a TIFF file within Imagenow. If you click on 'Imagenow' within your Expense Report the electronic receipt should be attached, along with any faxed receipts related to the same Expense Report. Note the 'Created By' column….'Fax.Agent vs Mail.Agent'…..Mail.Agent will always contain all electronic receipts that were attached within PeopleSoft, while the Fax.Agent contains those which were faxed into 7-1355.