

Expense Report – Regular

Log into PeopleSoft at myportal.sdccd.edu using the username & password that you use to log into your SDCCD computer

Navigate to the Expense Report screen from the home page by selecting: Menu/Finance Service Center/Travel & Expense/Expense Report

The screenshot shows the myPortal website interface. The browser address bar displays <https://myportal.sdccd.edu>. The user is logged in as KRUSE, JOSEPH. The main navigation menu is open, showing the following options:

- Employee Service Center
- Finance Service Center
- Training (How To)
- Procurement
- Travel & Expense
- Expense Report
- Cash Advance
- Request a Payment
- Travel and Expense Center
- Manager Self Service
- Reports

The "Expense Report" option is highlighted in green. A central banner reads "New HCM and Finance Portal!" with a "Read More" button. The banner text states: "PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Options."

On the right side, there are "Employee Quick Links" for MY PAY, TIMESHI, BENEFIT, and PERSON, and a "Training (How to)" section with links for FINANCE and HUMAN R.

Choose "Add" to create a new expense report. *If you are inputting travel as a delegate for another person, be sure that the ID # shown in the Employee ID field is the ID # of the traveler.

Favorites ▾ | Main Menu ▾ > Employee Self Service ▾ > Finance ▾ > Travel and Expenses ▾ > Expense Reports ▾ > Create/Modify



SAN DIEGO COMMUNITY COLLEGE DISTRICT
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Finance ▾

Expense Report

Find an Existing Value

Add a New Value



Empl ID 

Add

Find an Existing Value | Add a New Value

Navigate to the "Quick Start Menu," select populate from "A Travel Authorization" and click "Go"

Favorites ▾ Main Menu ▾ > Employee Self Service ▾ > Finance ▾ > Travel and Expenses ▾ > Expense Reports ▾ > Create/Modify

Home Worklist Add To Favorites Sign out

Menu ▾ Search 🔍

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Finance ▾

New Window | Help | Personalize Page

Create Expense Report

Joseph Kruse ?

*Business Purpose

*Report Description

Reference

Default Location Attachments

Quick Start

- ...Populate From
- A Template
- A Travel Authorization**
- An Existing Report
- Entries from My Wallet

Totals (0 Lines) 0.00 USD

*Date *Expense Type

Description *Payment Type

*Amount 0.00 *Currency USD

Expand All | Collapse All

Totals (0 Lines) 0.00 USD

1. (arrow pointing to Quick Start dropdown)

2. (arrow pointing to A Travel Authorization)

3. (arrow pointing to GO button)

Select the appropriate Travel Authorization. This will populate all expenses that were listed in the selected Travel Authorization.

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Home Worklist Add To Favorites Sign out

Menu Search

Finance

Create Expense Report

Save for Later | Summary and Submit

Anne McMahon

Quick Start A Travel Authorization GO

*Business Purpose
*Report Description
Reference

Expenses

Expand All | Collapse All

*Date *Expenses

Expand All | Collapse All

0.00 USD

Amount *Currency 0.00 USD + -

0.00 USD

Copy from Approved Travel Authorization

From Date 08/10/2015 To 12/10/2015 Search


Travel Auth Description	Authorization ID	Date From	Date To	Amount	Currency
Select ASCCC Fall Plenary	0000000366	11/04/2015	11/07/2015	1,056.98	USD

Return

If necessary, adjust the total dollar amounts for each expense type.

[Favorites](#) | [Main Menu](#) | [Employee Self Service](#) | [Finance](#) | [Travel and Expenses](#) | [Expense Reports](#) | [Create/Modify](#)

[Home](#) | [Worklist](#) | [Add To Favorites](#) | [S](#)


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[Menu](#) |

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Create Expense Report

[Save for Later](#) | [Summary and Submit](#)

Anne McMahon [?](#)

 Actions [GO](#)

*Business Purpose

*Report Description

Reference

Default Location

Authorization ID

[Attachments](#)

Expenses [?](#)

[Expand All](#) | [Collapse All](#) | Add: [My Wallet \(0\)](#) | [Quick-Fill](#)

Totals (6 Lines) 1,056.98 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
11/05/2015 ?	Meetings & Conferences	*Registration	Employee Paid	425.00	USD
*Billing Type <input type="text" value="Internal Dis"/>		<input type="checkbox"/> Receipt Split	<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt	*Exchange Rate <input type="text" value="1.00000000"/> Reimbursement Amt 425.00	USD
Accounting Details ?					
11/04/2015 ?	Hotel / Lodging	*Irvine Marriott	Employee Paid	445.95	USD
*Billing Type <input type="text" value="Internal Dis"/>		<input type="checkbox"/> Receipt Split <input type="checkbox"/> Itemize Hotel Bill	<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt	*Exchange Rate <input type="text" value="1.00000000"/> Reimbursement Amt 445.95	USD
Accounting Details ?					
11/04/2015 ?	Automobile Mileage	*Round trip from Miramar to hotel	Employee Paid	96.03	USD
*Billing Type <input type="text" value="Internal Dis"/>			<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt	*Exchange Rate <input type="text" value="1.00000000"/> Reimbursement Amt 96.03	USD
Accounting Details ?					

*Date: 11/05/2015 [?](#) | *Expense Type: Meetings & Conferences | *Description: *Registration | *Payment Type: Employee Paid | *Amount: 425.00 | *Currency: USD

*Billing Type: Internal Dis | Receipt Split | Default Rate | *Exchange Rate: 1.00000000 | Reimbursement Amt: 425.00

Non-Reimbursable | No Receipt

[Accounting Details](#) [?](#)

*Date: 11/04/2015 [?](#) | *Expense Type: Hotel / Lodging | *Description: *Irvine Marriott | *Payment Type: Employee Paid | *Amount: 445.95 | *Currency: USD

*Billing Type: Internal Dis | Receipt Split | Default Rate | *Exchange Rate: 1.00000000 | Reimbursement Amt: 445.95

Non-Reimbursable | No Receipt

[Accounting Details](#) [?](#)

*Date: 11/04/2015 [?](#) | *Expense Type: Automobile Mileage | *Description: *Round trip from Miramar to hotel | *Payment Type: Employee Paid | *Amount: 96.03 | *Currency: USD

*Billing Type: Internal Dis | Default Rate | *Exchange Rate: 1.00000000 | Reimbursement Amt: 96.03

Non-Reimbursable | No Receipt

[Accounting Details](#) [?](#)

Attach receipts for all expenses (except meals). Also, attach Google Map documents that support any automobile mileage claimed on the expense.

Create Expense Report

 Save for Later |  Summary and Submit

Joseph Kruse ?

Quick Start ...Populate From ▾ GO

*Business Purpose



Default Location

*Report Description

 Attachments

Reference

Expenses ?

Expand All | Collapse All Add: |  My Wallet (0) |  Quick-Fill

Totals (0 Lines) 0.00 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	*Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="USD"/>

Expand All | Collapse All

Totals (0 Lines) 0.00 USD

Click "Save for Later" followed by "Summary and Submit"



Create Expense Report

1. Save for Later | Summary and Submit 2.

Joseph Kruse ?

Actions ...Choose an Action ▾ GO

*Business Purpose

*Report Description

Reference

Default Location

Attachments

Expenses ?

Expand All | Collapse All Add: | My Wallet (0) | Quick-Fill

Totals (1 Line) 0.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency	
<input type="text"/>	Automobile Mileage ▾	<input type="text"/>	<input type="text"/>	0.00	USD	+ -
*Billing Type	Internal Disl ▾		<input checked="" type="checkbox"/> Default Rate	*Exchange Rate	1.00000000	
*Miles	<input type="text"/> x 0.5750		<input type="checkbox"/> Non-Reimbursable	Reimbursement Amt	0.00	USD
			<input type="checkbox"/> No Receipt			

Accounting Details ?



Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Fund	Dept	Activity	Account	Oper Unit	Project	Affiliate
	MIR01		USD	1.00000000	1110	32011	631000	5351			

Expand All | Collapse All

Totals (1 Line) 0.00 USD

Click the check box to certify that the report is correct and click "Submit Expense Report"

Create Expense Report

 Save for Later |  Expense Details

Actions

*Business Purpose

*Description

Reference

Totals

 View Printable Version

 View Analytics

 Notes

 Attachments

Employee Expenses (1 Line)	0.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee 0.00 USD

Amount Due to Supplier 0.00 USD

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.