

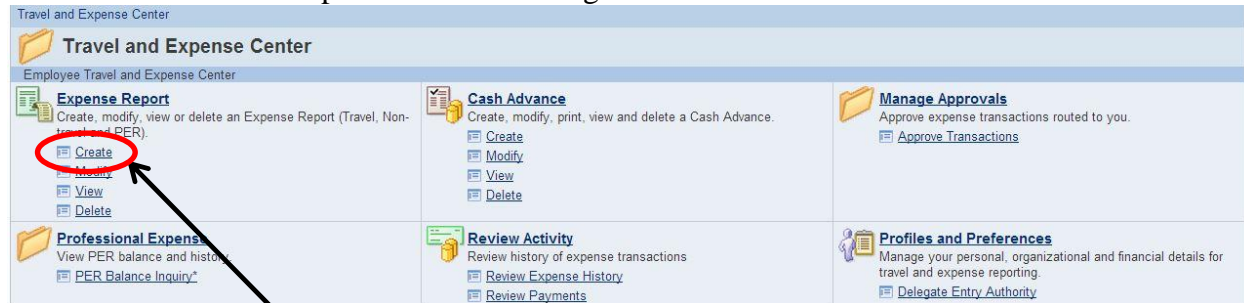
How to Create a Claim in PeopleSoft

Please be sure to see our [important tips](#) on completing your claim.

Sign in to PeopleSoft from our EAS Home Page





Select the Travel and Expense Center to navigate to this console



Click the **Create** link

Expense Report

Find an Existing Value | Add a New Value

Empl ID:  

Your empl or studentID will Show up here

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

Create Expense Report

Select a Template

Matthew Barnett

Report ID:

NEXT

Template Information			
Customize Find First 1-2 of 2 Last			
	Template	Description	Template Type
Select	EXPENSES	Non-Travel Expenses	Public Template
Select	TRAVEL	Travel Expenses	Public Template

[Copy from Existing Expense Report](#)

Choose your template

Create Expense Report

Add Expenses To Report

Matthew Barnett

Report ID:

NEXT

Template: TRAVEL Description: Travel Expenses

Expense Date

05/23/2013

Add Expense Types:

Select	Expense Type
<input type="checkbox"/>	Hospitality
<input type="checkbox"/>	Kilometers (#Kms)
<input type="checkbox"/>	Kilometers -Manual Calculation
<input type="checkbox"/>	Meals - Receipted
<input type="checkbox"/>	Parking/Visitor Permits
<input type="checkbox"/>	Per Diem - Canada \$45/day
<input type="checkbox"/>	Per Diem - Int'l \$CDN 66/day
<input type="checkbox"/>	Per Diem - USA \$US 45/day
<input type="checkbox"/>	Pres&VPs Work Sessions/Mtgs
<input type="checkbox"/>	Registrations
<input type="checkbox"/>	Services General
<input type="checkbox"/>	Supplies General
<input type="checkbox"/>	Telephone/Internet
<input type="checkbox"/>	Vehicle Rental
<input type="checkbox"/>	Working Sessions/Meetings

OKCancel

Choose your expense types
(Optional)
Click "OK"

Dates can be changed later

Complete your claim with all pertinent details as seen in this example.

Employee-facing reg x
https://www.prodps.ualberta.ca/psp/finprd/EMPLOYEE/ERP/s/WEBLIB_TE_NAV.WEBLIB_FUNCTION.FieldFormula.iScript_AddExpense?TE.Mt

Suggested Sites Web Slice Gallery Imported From IE Campus Compu... Earth and Atmo... FMIS Customer ... www.travel.ualb...

UNIVERSITY OF ALBERTA

Favorites Main Menu > Employee Self-Service

Create Expense Report
Expense Report Entry
Matthew Barnett

Report ID: NEXT

General Information

*Description: Saskatoon, SK May 21-23 2013
*Business Purpose: Conference
Project: G022000108
Details: G022000108 - Gen Res-Chair,Earth Atmos Sci Sharp,Martin
Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and emotional trauma.
Reference: 58194

Enter this first (If known and applicable)

Speed Code (Optional)

Details

*Overview Mileage *Currency

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	*Description	Non Reimb	No Rcpt
<input type="checkbox"/>			Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

Copy Selected Delete Selected Check For Errors New Expense Add

Totals

Employee Expenses:	200.00	Due Employee:	200.00
Non-Reimbursable Expenses:	0.00		
Cash Advances Applied:	0.00		

Definition of Totals Update Totals

Save Submit Print Detailed Report

Enter a speed code here. Click "OK"

If the expense is to be split between multiple projects, use the "Add Chartfield Line" button.

Estimated Tax:
Total Distribution:

Accounting Detail

General Ledger ChartFields

Speedcode	Description	Amount	*GL Unit	Monetary Amount	Account	Fund	Dept	Program	Class
		200.00	UOFAB	200.00	502101		360410		

Add ChartField Line Refresh

OK

Employee-facing reg x

https://www.prodps.ualberta.ca/psp/finprd/EMPLOYEE/ERP/s/WEBLIB_TE_NAV.WEBLIB_FUNCTION.FieldFormula.iScript_AddExpense?TE.M...

Suggested Sites Web Slice Gallery Imported From IE Campus Compu... Earth and Atmo... FMIS Customer ... www.travel.ualb...

UNIVERSITY OF ALBERTA

Home Add to Favorites Sign out

Favorites Main Menu Employee Self-Service

New Window Help Customize Page

Create Expense Report

Expense Report Entry

Matthew Barnett

Report ID: NEXT

General Information

***Description:** Saskatoon, SK May 21-23 2013

***Business Purpose:** Conference

Project: G022000108

Details: G022000108 - Gen Res-Chair,Earth Atmos Sci Sharp,Martin
Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and e

Reference: 58194

Accounting Defaults

Apply Cash Advance(s)

Details

*Overview *Mileage *Currency

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	*Description	Non Reimb	No Rcpt
<input type="checkbox"/>	58194	Gen Res - Chr Earth Atmos Sci	Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

Copy Selected Delete Selected Check For Errors New Expense Add

Totals			
Employee Expenses:	200.00	Due Employee:	200.00
Non-Reimbursable Expenses:	0.00		
Cash Advances Applied:	0.00		

Definition of Totals Update Totals

Save Submit Print Detailed Report

Click if you had a Travel Advance.
See [here](#) for further details.

Review the claim for completeness and then click 'Save'

Employee-facing reg x

https://www.prodds.ualberta.ca/psp/finprd/EMPLOYEE/ERP/s/WEBLIB_TE_NAV.WEBLIB_FUNCTION.FieldFormula.iScript_AddExpense?TE.Mt...

Suggested Sites Web Slice Gallery Imported From IE Campus Compu... Earth and Atmo... FMIS Customer ... www.travel.ualb...

UNIVERSITY OF ALBERTA

Home Add to Favorites Sign out

Favorites Main Menu > Employee Self-Service

New Window Help Customize Page

Create Expense Report

Expense Report Entry

Matthew Barnett Report ID: 000304821

Notice that a Report ID# appears

General Information

*Description: Saskatoon, SK May 21-23 2013

*Business Purpose: Conference

Project: G022000108

Details: G022000108 - Gen Res-Chair,Earth Atmos Sci Sharp,Martin Supporting Details: Program facilitator for Emergency T&E Support Conference. Research activities regarding claim-induced mental and emotional trauma.

Reference: 58194

Accounting Defaults Apply Cash Advance(s)

Details

Overview Mileage Currency

Select	SpeedCode	SpeedCode Description	*Expense Type	*Expense Date	*Amount Spent	*Currency	No GST	GST	Description	Non Reimb	No Rcpt
<input type="checkbox"/>	58194	Gen Res - Chr Earth Atmos Sci	Supplies General	05/23/2013	200.00	CAD	<input type="checkbox"/>	9.52	Walmart-Facial tissue, pens	<input type="checkbox"/>	<input type="checkbox"/>

Copy Selected Delete Selected

First - Print the Report

Totals

Employee Expenses:	200.00	Due Employee:	200.00
Non-Reimbursable Expenses:	0.00		
Cash Advances Applied:	0.00		

Definition of Totals

Update Totals

Save Submit

Print Detailed Report

Then "Submit"

Approval of this report confirms that the above information is an accurate record of expenses incurred by the claimant and the appropriate supporting documentation is provided. For research project/trust accounts, these expenditures are in support of the research project and in compliance with the sponsor guidelines and donor terms.

OK Cancel

YOU MUST CLICK "OK" TO COMPLETE THE PROCESS!!!

***Return your printed Detailed Report and all original receipts to the EAS Office for processing.**