How to create an expense report

Follow these steps to create an expense report:

1. Log in to PeopleSoft.
2. Click Main Menu.
3. Click Services Procurement.
4. Click Manage Expenses.
5. Click Create next to it.

6. Type in a description in the Report Description box.
7. Select a Business Purpose from the drop-down menu.
8. Click Continue.
9. Select the expense type, and click Add.
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10. On the next page, fill in all of the fields except Preferred Merchant. The following fields must contain these values:
   a. Payment Type = Company
   b. Billing Action = Billable
   c. Merchant Type = No
   d. Preferred Merchant = Leave blank
   e. Non-preferred Merchant = Fill in name of merchant, such as name of restaurant or hotel
   f. Location = Michigan

11. Click Done if no more expenses need to be added. Otherwise, select another Expense Type and click Add.
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12. Click Save to review the report.

13. To add attachments, click the Attachment link.

14. If the report is correct and ready to be submitted, click Submit. Otherwise, click General Report Information to modify the report.
15. Once submitted, the approver’s name will appear in the box.