**What is fluid for Expenses?**

PeopleSoft Fluid pages are designed to be used on all types of devices such as smart phones, tablets and desktops.  When accessing a PeopleSoft fluid page, the system detects the device you are using and renders the appropriate page.

Navigation:

Employee Self Service > Expenses tile



The Expenses tile alerts you with the total amount of expenses in your wallet that still needs to be applied to an expense report.  The amount displayed is for the user that is logged in.  If a user has access to multiple employees (delegates), this amount will not include the amount from those other employees.  This is also applicable to all other tiles within Expenses.

**Expenses homepage**:

View notifications and navigate to various PeopleSoft Expenses processes/actions.

The Expenses homepage includes the following options (tiles) and is described in detail on the next pages:
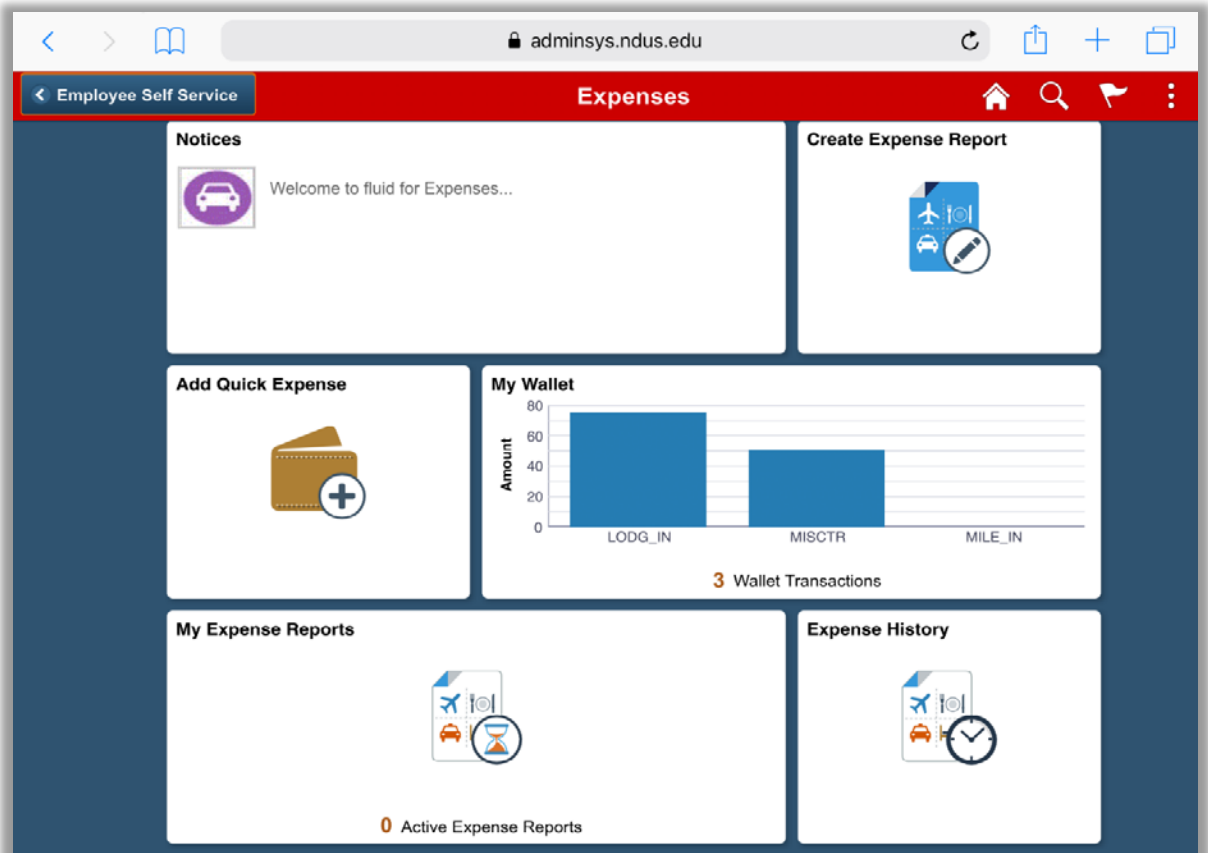
**Notices**

**Add Quick Expense** (My Wallet)

**My Wallet** (Review and update My Wallet transactions)
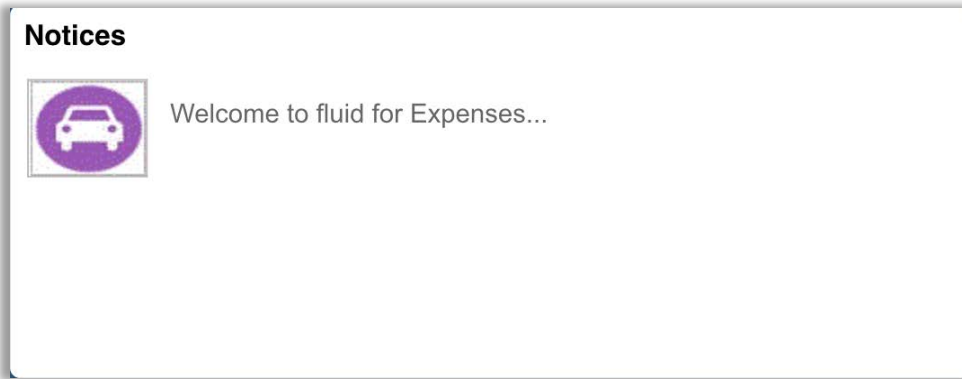
**Create expense report**

**My Expense Reports** (View and update active expense reports)

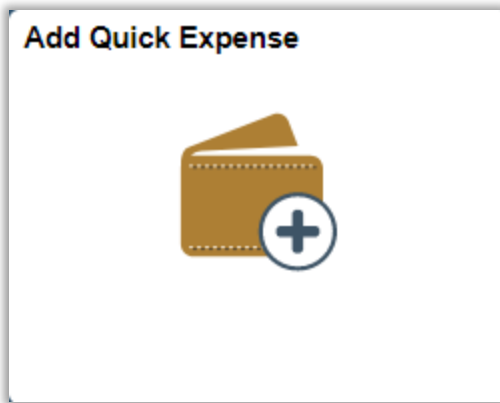**Expense History** (Expense Reports and My Wallet transactions)

**What actions can be performed in each tile?**

**Notices Tile:**



Displays notices/announcements for travel and expenses. The tile is maintained by CTS. Campuses do not have the ability to add notices/announcements.

**Add Quick Expense Tile**:



Actions that you can perform:

- Add an expense to your wallet - the expense can then be added to an expense report later
- Save an expense to your wallet with or without data - fill in the fields later or fill in the fields when you import the wallet entry to the expense report
- Add a receipt to an expense - capture a receipt image from your phone/tablet or upload a receipt from an existing file

**My Wallet**:



Depending on your device, the graphical information on the tile will show the top 7 or 10 expense types in your wallet.  The bottom of the tile will display the number of expenses in your wallet.

Actions that you can perform:

- Add a wallet entry
- Delete a wallet entry
- Attach a receipt to a wallet entry
- Export wallet entries into a new expense report

**Create Expense Report**:
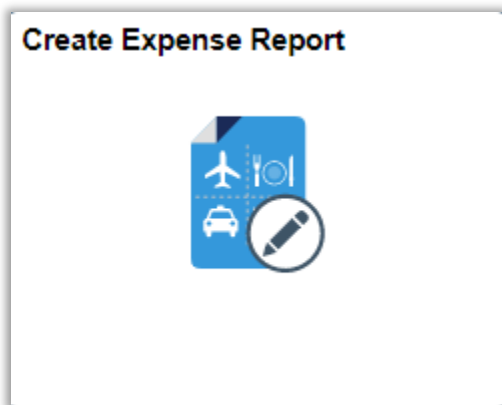


Actions that you can perform:

- Create a new expense report
- Add expenses manually
- Import entries from wallet

**My Expense Reports:**
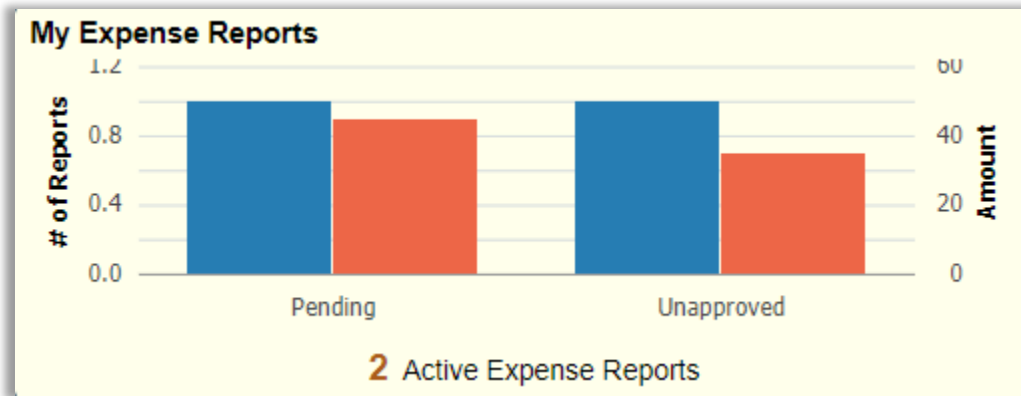


The My Expense Report tile displays the total number of expenses that have not been submitted, approved or paid.

Actions that you can perform:

- Copy an existing report to a new expense report
- Delete an Expense Report that is in pending status
- Send an e-mail notification to the approver or other people

Review all your expenses in various statuses including returned by approver or auditor, not submitted, submitted and waiting for approval or approved and pending for payment.

**Expense History**:
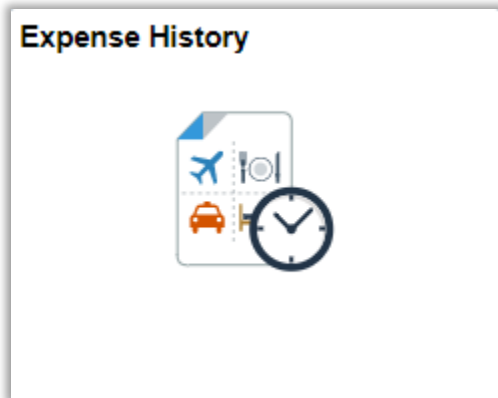


Display's Closed/Denied/Approved/Paid expense reports for the last 6 months. It also display's deleted wallet entries and wallet entries that have been assigned to an expense report for the last 6 months.

Actions that you can perform:

- Create Expense Report
- Expense Report History – Copy Expense Report / Send Notification
- My Wallet History – View Expense Report / Add Expense / Send Notification / Restore My Wallet