

THE RESEARCH FOUNDATION The State University of New York

Contact: rftravel@rfsuny.org

Use this job aid to apply a travel advance to an expense report using iExpense.

This step is only required if there is an unapplied advance in the system tied to the traveler (regardless of the trip).

		1		Expenses
Expenses Home   Expense Reports   Access Aut	norizations   Projects and Tasks   Payments Sear	ch 🚽	-	
	General Information Cash and Other Expenses	Expense Allocations Advances	Review	
Create Expense Report: Advances				
Select an advance to apply to your expense report.			Save	Cancel Back Step 4 of 5 Next
Advances Application				
Advance Summary	3 Ieasuii.	4 Unapplied Advance Reaso	n	× ×
·····,	Expenses Eligible For A	Application 624.60 USD		
	Advanc Advance Amou Updated Advanc	e Balance int Applied se Balance		
			Save	Cancel Back Step 4 of 5 Next
	Expenses   Contact Us   Global Policy   Ho	ome   Logout   Preferences   Diag	nostics	
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	<b>Note:</b> This step in the process will not be visible if no outstanding advance exists
2	Indicates you are on the page to Create Expense Report: Advances
3	Click the Flashlight icon to bring up the Search and Select: Advance Number window
4	If an advance will not be applied to this expense report, type the reason here. Example: Advance does not apply to this trip



Search and Select	List of Values - Windows Internet	Explorer		
earch and Sele	ct: Advance Number			
				Cance! Select
Search				
To find your item,	select a filter item in the pulldown lis	and enter a value in t	he text field, then selec	t the "Go" button.
Search By Advan	ce Number 🔽	Go		
Desults				
Select Quick S	elect Advance Number	Advance Date	Advance Amount	Advance Balance
	Travel advance 3/1-3/4/11	01-Mar-2011	100.00 USD	100.00 USD
About this Page				
2				Cance! Select
			- Tructod	itor 🚯 100% 💌

## Use one of the following procedures to select the appropriate advance.

1	Select the appropriate radio button then click one of the Select buttons. OR,



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2



THE RESEARCH FOUNDATION The State University of New York	e Reports	Contact Us Global Policy Home Logout Preferences Diagnostics
Expenses Home   Expense Reports   Access Authorizations   Pro	ojects and Tasks   Payments Search	$\bigcirc$
General Infor	mation Cash and Other Expenses Expense Allocations Advances Re	view
Create Expense Report: Advances Select an advance to apply to your expense report.		Save Cancel Back Step 4 of 5 Next
Advances Application TIP If you do not apply an advance you must enter a reason. * Indicates required field * Advance Number Advance Amount Advance Balance * Advance Amount Applied 100.00 USD 100.01 USD 100.01 USD	-3/4/11 I Unapplied Advance Reason	3
Advances Summary	Expenses Eligible For Application         624.60 USD           Advance Balance         100.00 USD           Advance Amount Applied         100.00 USD           Updated Advance Balance         0.00 USD	
Copyright (c) 2006, Oracle. All rights reserved. About this Page	<u>Contact Us</u>   <u>Global Policy</u>   <u>Home</u>   <u>Logout</u>   <u>Preferences</u>   <u>Diagnosti</u>	(Save) Cancel) (Back Step 4 of 5 Next)

1	Advance information is returned. (Note: The Advance Amount Applied can be changed to be a lesser value if needed.)
2	Expenses Eligible For Application represents the total expenses entered on this report
	Click the appropriate button:
	Save button – Save progress and remain on this screen
3	Cancel button – Discard unsaved changes and return to Expenses Home
	Back button – Navigate to previous step
	Next button – Navigate to next step
	You have successfully applied an advance payment to your iExpense report.