



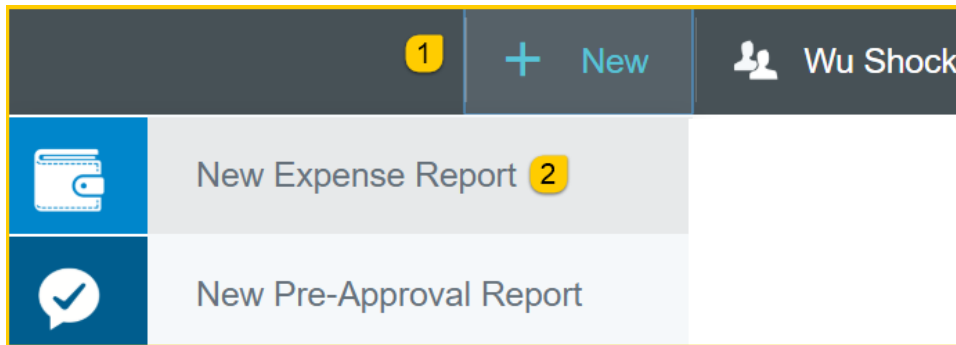
Chrome River User Manual

CREATING A TRAVEL EXPENSE REPORT - EMPLOYEE

Only include expenses reimbursable to the traveler or charged on the travelers WSU issued procurement card on the expense report. Items that were paid through Accounts Payable, or charged on another employees WSU issued pcard, cannot be added as an expense line.

To document these types of situations, please utilize the comments field on the header of the expense report. See the **Add Comments** section of this document for more details.

To create a Travel Expense Report, click the **+NEW** button in the upper right corner and select **New Expense Report** from the drop-down menu.



The Expense Report header screen will appear.

The screenshot shows the 'Expenses For Wu Shock' form. At the top right are 'Cancel' and 'Save' buttons. The form title is 'Expenses For Wu Shock'. Below the title are four fields, each with a yellow circle containing a number: 1. 'Import from Pre-Approval' (Optional) with an 'IMPORT PRE-APPROVAL' button. 2. 'Report Name' with a text input field. 3. 'Business Purpose' with a text input field. 4. 'Report Type' with a dropdown menu showing '-- Select --'.



Chrome River User Manual

1. **Import Pre-Approval:** This feature populates many fields on the header and individual expense lines with values from the pre-approval. See the **CR0010 Import Pre-Approval Report** document for detailed information.
2. **Report Name:** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expense reports. Naming Convention: Meeting/Conference Name or Destination, Dates of Travel
3. **Business Purpose:** Enter a clear, detailed business purpose for the travel event. The business purpose should explain: (1) what purpose the expenditure served, (2) why the expense was necessary, and (3) how it furthered the University's goals. See the **CR0027 Business Purpose** document for more detailed information.
4. **Report Type:** Select Travel

Selecting the Travel report type, opens up additional fields on the expense report header form.

Expenses For Wu Shock

Import from Pre-Approval

Report Name

Business Purpose

Report Type

Departure Date **5**

Return Date **6**

Destination **7**

Traveler Type **8**

Travel Type **9**

Are you attending a Conference? **10**

Will there be personal time during this trip? **11**

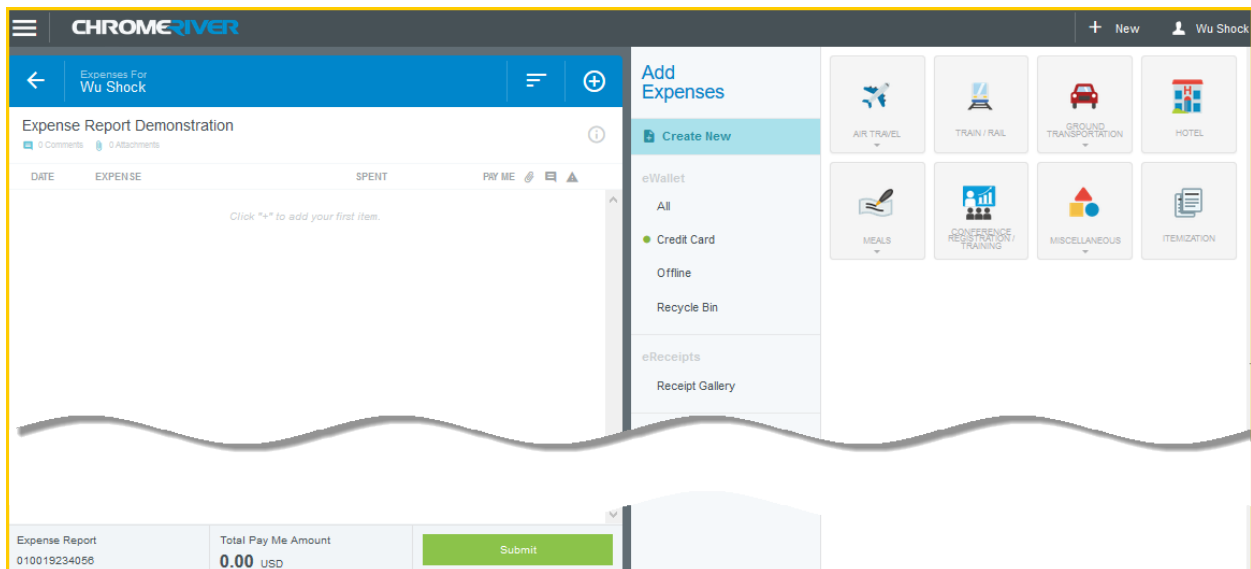


Chrome River User Manual

5. **Departure Date:** Click the calendar icon to select the date which represents the actual departure date for this travel event.
6. **Return Date:** Click the calendar icon to select the date which represents the actual return date for this travel event.
7. **Destination:** Select the Country/State/City you are traveling to. Destinations are preloaded in Chrome River and are presented in the following format: Country/State/City. Begin typing the destination city to narrow down the choices.
8. **Traveler Type:** Select Employee
9. **Travel Type:** Select either In State, Out of State or International
10. **Are you attending a conference:** Select **Yes** if you are attending a conference. A conference agenda or schedule at a glance must be attached to the expense report. Select **No** if you will not be attending a conference.
11. **Will there be personal time during this trip:** Leave the box blank if there will not be personal time included in this travel event. Select the check box if there will be personal time included in this travel event and enter the appropriate dates in the **Personal Time Start/End Date** fields.

Click **Save** at the top right side of the screen to continue.

After completing the expense report header information, the **Add Expenses** screen will slide in from the right.



Expense types are consolidated into categories displayed on expense tiles. Some expense tiles expand to provide additional expense options. Example: **Mileage** is located under **Ground Transportation**.



Chrome River User Manual

Select the specific expense tile you want to add to the Expense Report. Each expense selected will open in a form and require additional information. For detailed information on each Expense Tile, please see the **CR0019 Travel Expense Tile Detail** help document.

The screenshot shows the 'Airfare' expense form. At the top right, there are 'Cancel' and 'Save' buttons. The form is titled 'Airfare' with a globe icon. It contains the following fields and options:

- Date:** 04/01/2019 (with a calendar icon)
- Spent:** 0.00 (with a calculator icon) and USD
- Business Purpose:** A large text input field.
- Description:** A large text input field with 'Optional' written below it.
- Personal Expense Charged on PCARD?:** A checkbox that is currently unchecked.
- Merchant:** A text input field with 'Optional' written below it.
- Add Banner Activity and/or Location?:** A checkbox that is currently unchecked.
- Funding:** A section with a search box labeled 'Search for Funding' and a dropdown menu currently showing '-- Select --'. Below this is a '+ Add Funding' button.
- Attachments (0):** A section with a grid icon and a '+ Add Attachments' button. Below this is a 'Drag image here to upload' area.

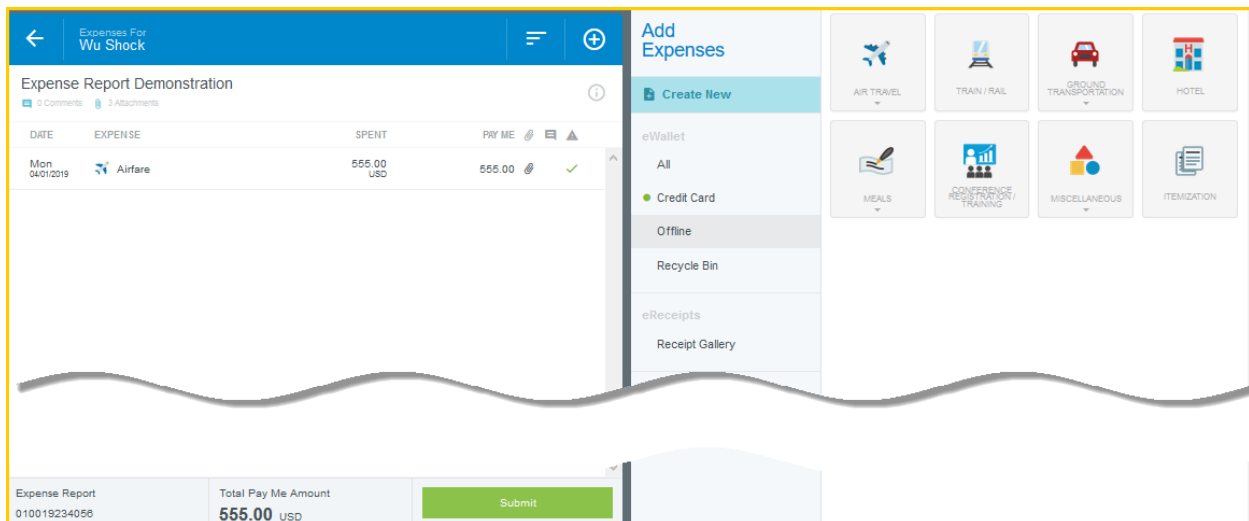
Complete the expense tile form and click **Save** at the top right side of the screen to continue.



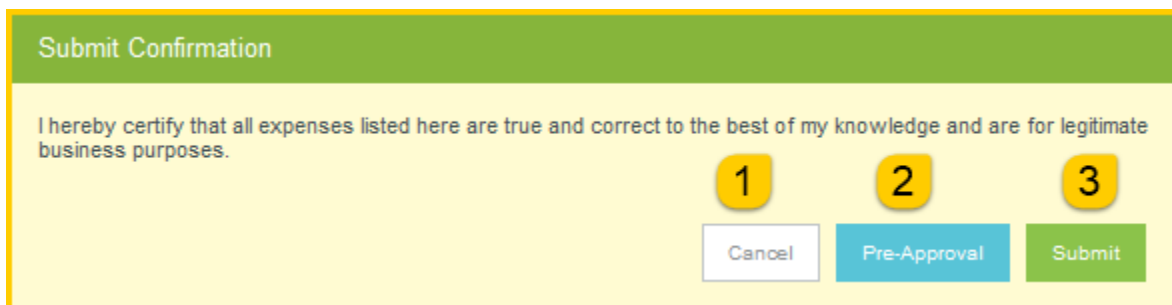
Chrome River User Manual

The expense will be added to the Expense Report and will be visible on the left side of the screen. The **Add Expense** page will appear on the right side of the screen. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense tile form, and clicking **Save** at the top right side of the screen.

When you have completed all the entries for the Expense Report, click the **Submit** button located at the bottom of the left side of the screen.



A submit confirmation will appear at the top of the right side of the screen.





Chrome River User Manual

There will be three options presented below the confirmation:

1. **Cancel:** Clicking **Cancel** allows you to return to the expense report to make any needed changes. You can choose to leave the report in draft status.
2. **Pre-Approval:** If linking a pre-approval to the expense report, select the **Pre-Approval** button. Review the **CR0010 Import Pre-Approval Report** help document for additional details.
3. **Submit:** Once you have read the certification statement, click the **Submit** button to submit the expense report into workflow for approvals.

Add Comments

To add comments to the header of the expense report, click on the report name on the left side of the screen. When the header page is displayed, scroll to the bottom and enter a comment in the **Add Comment** field. Click **Post** when finished.

