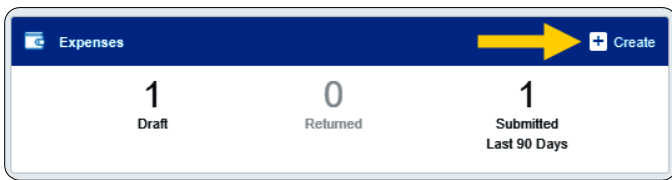


Create Expense Report (Student)

Create New Expense Report

1. Click the **+CREATE** button in the upper right corner of the Expenses swim lane.



2. Enter the Header data:

The screenshot shows the 'Expenses For Wu Shocker' form. It includes fields for:

- Report Name
- Business Purpose
- Report Type (dropdown menu set to 'Travel')
- Departure Date (calendar icon)
- Return Date (calendar icon)
- Destination (dropdown menu set to '-- Select --')
- Traveler Type (dropdown menu set to 'Student')
- Travel Type (dropdown menu set to '-- Select --')
- Student Information: Name / MyWSU ID / Street Address / City / State / Zip
- Vendor (dropdown menu set to '-- Select --')
- Address not correct (checkbox)
- Are you attending a Conference? (dropdown menu set to '-- Select --')
- Will there be personal time during this trip? (checkbox)

- **Import Pre-Approval:** Pre-Approvals are required to be attached to Student travel reports.
- **Report Name:** Naming Convention: Student First Name, Student Last Name Dates of Travel

- **Business Purpose:** Enter a clear, detailed business purpose for the travel event.
- **Report Type:** Select Travel
- **Departure Date:** Click the calendar icon to select the date which represents the actual departure date for this travel event.
- **Return Date:** Click the calendar icon to select the date which represents the actual return date for this travel event.
- **Destination:** Select the Country/State/City you are traveling to.
- **Traveler Type:** Select Student
- **Travel Type:** Select In State, Out of State or International
- **Student Information:** Provide the Name, myWSU ID, Street Address, City, State, and Zip code of the Student
- **Vendor:** Search for the Student in the **Vendor** field. Select the appropriate student record. If the student is not listed, scroll to the top of the list and click **Vendor Not Found**.
- **Address not correct:** If a student record was selected in the vendor field, and the address displayed is correct, leave this check box blank. If the address displayed is incorrect, select this check box.
- **Are you attending a conference:** Select **Yes** if the student will be attending a conference. Remember: a conference agenda or schedule at a glance must be attached before submitting the expense report. Select **No** if the student will not be attending a conference.
- **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. This field is not typically used for Student travel.

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

Add Expenses

- Select the specific expense tile you want to add to the Expense Report

The screenshot shows the 'Add Expenses' interface. On the left is a sidebar with 'Create New' (1), 'eWallet' (All, Credit Card, Offline, Recycle Bin), and 'eReceipts' (Receipt Gallery). The main area displays a grid of expense tiles: AIR TRAVEL (2), TRAIN / RAIL, GROUND TRANSPORTATION, AIRFARE (3), BAGGAGE FEE, TRAVEL AGENCY FEE, HOTEL, MEALS, CONFERENCE REGISTRATION / TRAINING, MISCELLANEOUS, and ITEMIZATION.

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

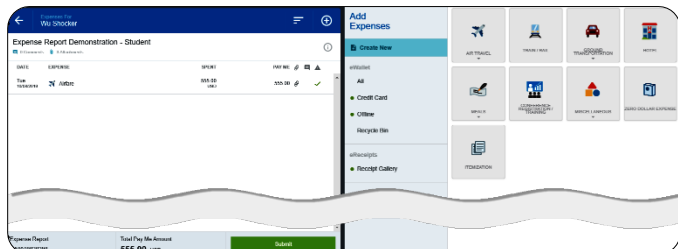
The screenshot shows the 'Airfare' expense form. At the top right are 'Cancel' and 'Save' buttons. The form fields are: Date (10/25/2019), Spent (555.00 USD), Business Purpose (Expense Report Demonstration - Student), Description (Optional), Merchant (Optional), and Add Banner Activity and/or Location? (checkbox). Below these is a 'Funding' section with a search box containing 'A0003-101614-20450 A0003: GU State General Fund 101614: Regents Press of Kansas' and '2622-Student Travel'. At the bottom is an 'Attachments (0)' section with a 'Drag image here to upload' area and an 'Add Attachments' button.

- Date:** Enter the actual date of the expense which can typically be found on the receipt. The date on each expense form must be within the date range entered on the expense report header in the Departure Date and Return Date fields.
- Spent:** Enter the actual amount spent for this expense type.
- Business Purpose:** The business purpose will default with the information entered on the Expense Header, but can be modified (as needed) on any of the expense forms. Once modified, the new Business Purpose text will be carried forward to each subsequent expense type.
- Description:** Provide any additional information about this expense. This field is optional for most expense types.
- Merchant:** The merchant field is optional.
- Add Banner Activity and/or Location:** Select this check box if you would like to add a Banner Activity and/or Location code.

- **Activity:** Click the drop-down box and select the appropriate value from the list.
- **Location:** Click the drop-down box and select the appropriate value from the list.
- **Funding:** Select the proper funding for the expense type.
- **-Select-:** Tap anywhere in the field labeled – Select- and chose the appropriate account code.

Once a funding option has been selected, Chrome River will carry forward the funding information to each subsequent expense added to the report.

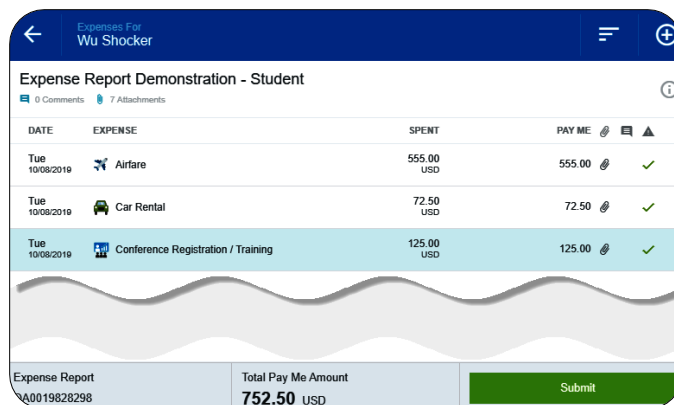
- The expense will be added to the Expense Report and will be visible on the left side of the screen. The Add Expense page will appear on the right side of the screen.



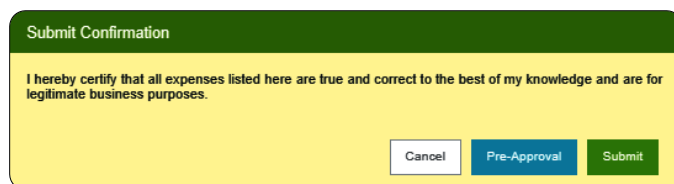
- Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right side of the screen.

Submit

- 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.



- **Cancel:** Clicking cancel allows you to return to the expense report to make any needed changes. You can chose to leave the report in draft status.
- **Pre-Approval:** If linking a pre-approval to the expense report, select the Pre-Approval button.
- **Submit:** Once you have read the certification statement, click the Submit button to submit the expense report into workflow for approvals.