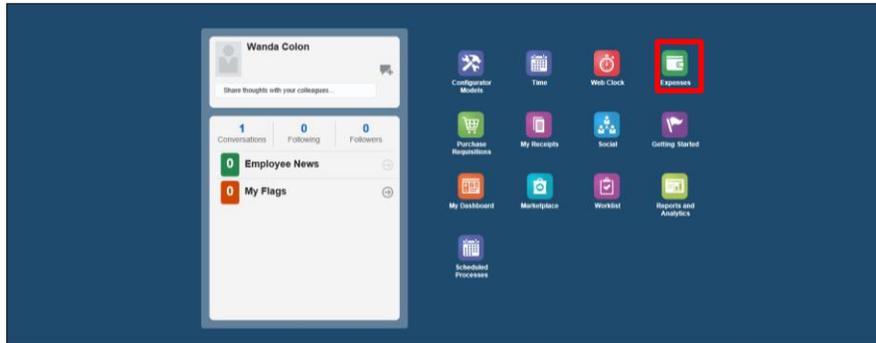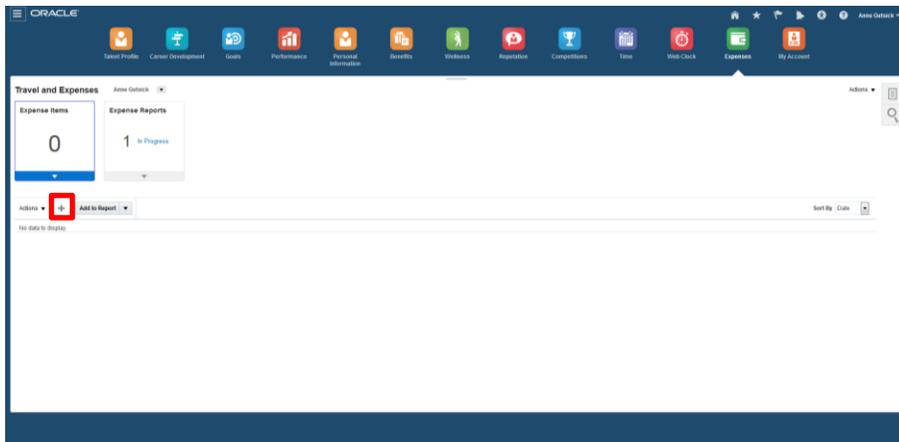# How to Create an Expense Report

From your home page:

1. From the right hand side, select the Expense icon
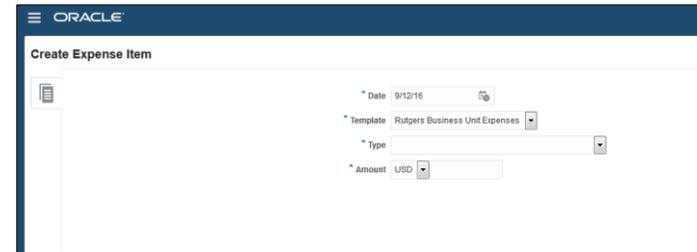

2. Click on the **+** sign below the Expense Items box

3. Enter the Expense Item details: **Date** of expense; Select from **Templates (**from drop down**)**; Expense **Type** (from drop

down); **Amount** and other required information (designated with a *****) and project information (if applicable).
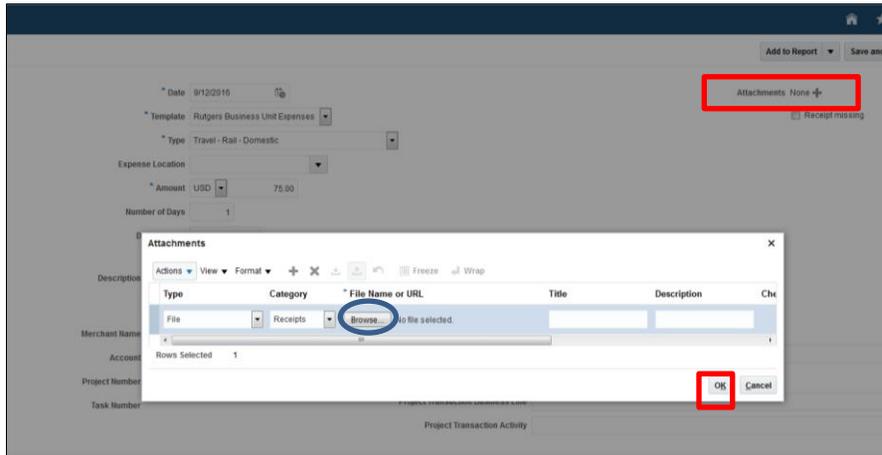

It is highly encouraged that the *Description* field is completed to aid the approvers and auditors in their task.

To add an attachment: (See details below)

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4. Click on the **+** sign next to the word **Attachment.** Click on **Browse** and find your attachment on your computer.

5. Highlight the appropriate document and Click **Open** to attach the document to your expense report. Then click **OK.**
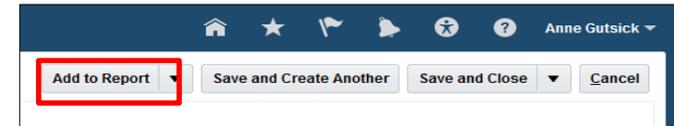6. Check to see if receipt is attached to the report.

7. Click on **Save and Create Another** if you have another expense to add or **Save and Close** to continue compiling your report at another time.
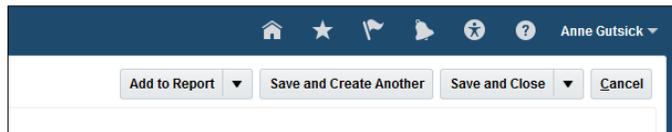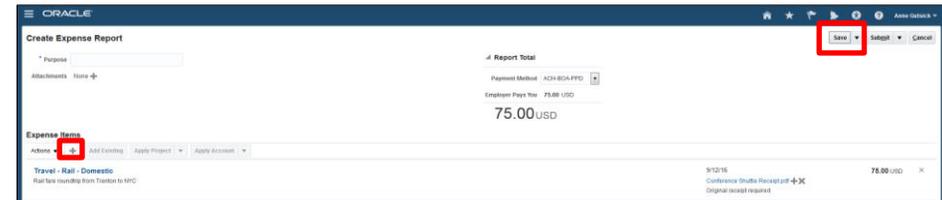

To add to Report:

8. Click on **Add to Report** to create the report. When you Add to Report, you will be prompted to give the report a **Purpose** for expense. Type in reason and then Click **Save.**
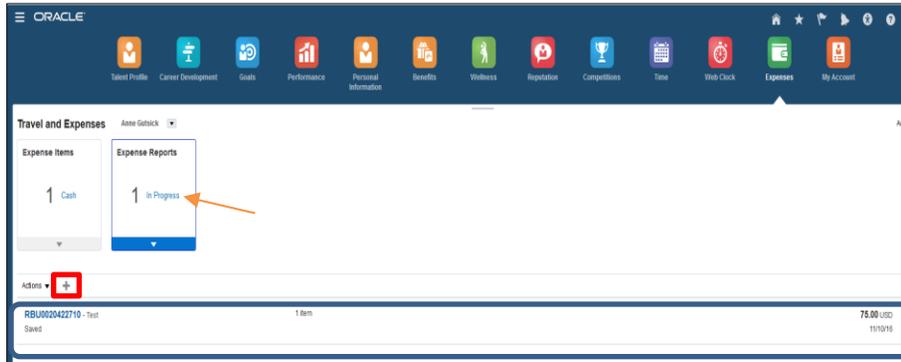

Note: You can continue to add expenses later, up to the time you Submit the report.
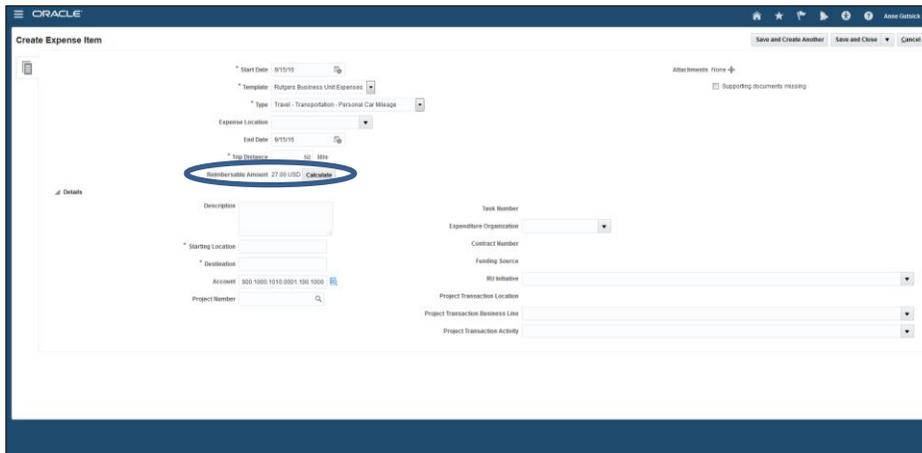

To add new charges:

9. Expense Report will show up under Expense Reports as *In Progress* Click on the row that the report number **RBU0020422710 (example) is** in and the row will highlight blue.
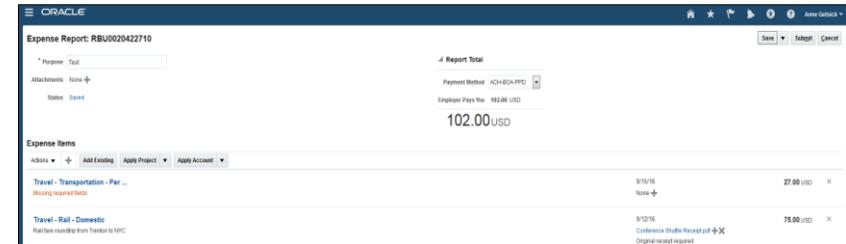
10. Click on **+** sign to **Create Expense items** to this *Travel and Expenses* type *report*.

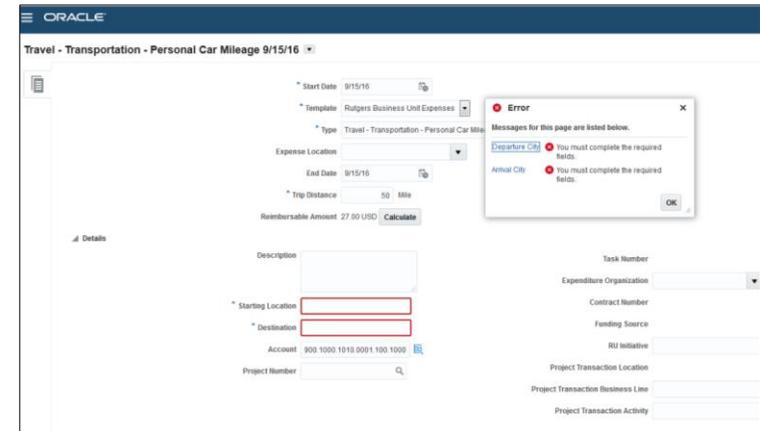**Note:** Mileage type expense item will auto-calculate rate per mile.

Once all Expense items are entered:
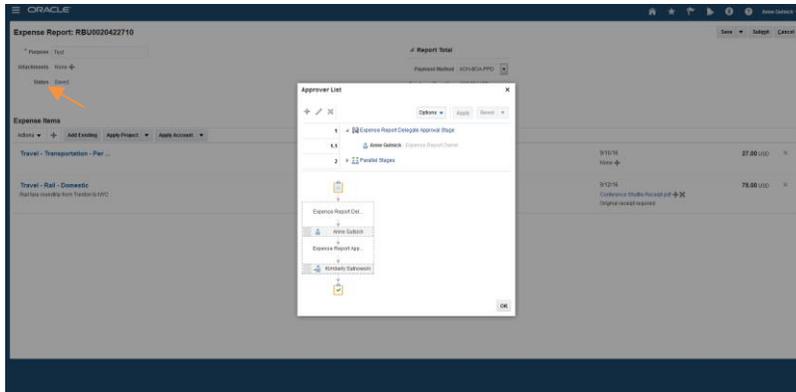
11. Click on **Save and Close**.

Note: If fields are missed, then an error message will show up Go back into the expense item and add the missing information.

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To find out your approval path:

12. Select **Status** and Click on the blue hyperlink:

13. After all expense items have been added to the report, Click **Submit.**

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