HOW TO COMPLETE AN EXPENSE REPORT
FIRST TIME USING EXPENSE TOOL

Training for Expense (Employee) RECOMMENDED
Web-based training is located at
• Go into https://onlinelearning.rutgers.edu/canvas.
• From there, click on Canvas Login
• Sign in with your NetID and password
• Go into Dashboard on the left
• Click on Expense Management Course Pathway
• Click on Modules
• The section EX010 has the tutorial for Enter and Submit Expense Reports

Adding Banking Information
Go to the Task Icon on the right side of the page.
Adding Banking Information continued

Choose Manage Bank Accounts. Once in there, click on the + to add your banking info. Complete all of the info with a * and you also need to add your Bank and Branch. Do not enter any spaces or dashes. For Account Type, do not choose Money Market. Only Checking and Savings.

Once the info is entered, Click on Save and Close. The final step is to make your bank the Primary so you would click next to Valid to highlight the row. Then click on Primary. A check box should show up to the left of your bank name.
If you previously started a report this is the screen you will see.

You can start an expense report or add an expense item to one already started.
All those with an * must be completed. Make sure you complete the description box.

Date of expense

You will select the type of expense from the drop down menu. Example shown

Get this information from the business office

Each individual expense needs to be entered onto one of these screens.
When your report is finished and ready to be submitted click the submit button.