Quick Tips: Creating a New Expense Report

- Go to Actions (on right) and select "Create Expense Report"
- Fill in the Purpose: description of the trip is required. See Sample Business Justifications above.
- Under attachments:
  - Add conference schedule and any general justification/back-up.
- Under expense items, use the + sign to add a new line:
  - Create expense item:
    - Date which is when the purchase took place (e.g. for registration and flight can be much earlier)
    - Don't touch template
    - Pick the appropriate type – NOTE: if you change the type after you added the account info. The system resets the fields and you have to put the account information in again.
    - Add the amount
    - Upload the corresponding attachment
- Add a description*, merchants name (everything with an asterisk must be completed)
- Expenses on different dates should be charged separately.
- You can duplicate previous items – makes it go a little faster.
- Project numbers are provided only by faculty/advisers or designates.

* Add details for trips with Taxi/Uber e.g "to hotel from airport"