

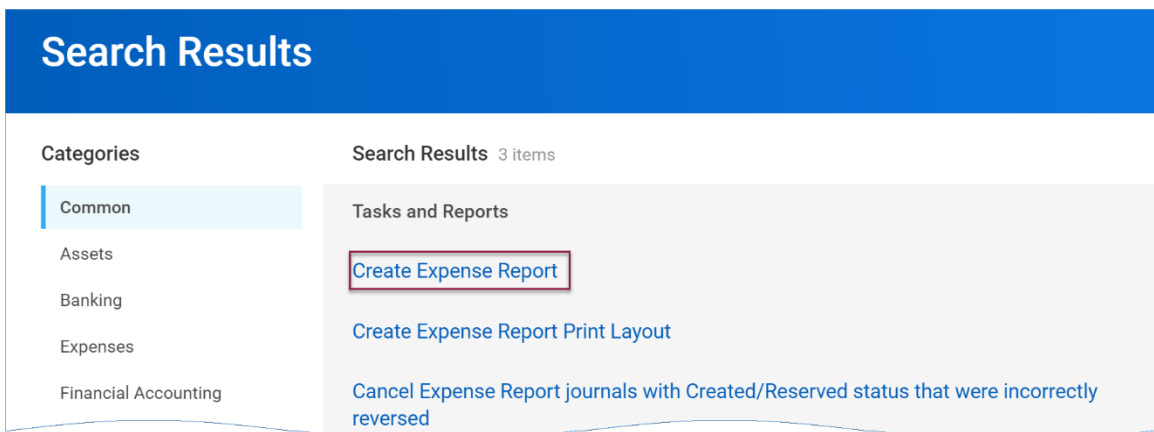
Expense Report Event

Steps–Create Expense Report

1. Enter **Create Expense Report** in the Search bar.



2. From the **Search Results** page, select **Create Expense Report**.



Expense Report Event

3. The **Create Expense Report** page displays.

Create Expense Report

Use this task to enter an expense report into the system. Please determine if you would like to create a new expense report or copy from an existing expense report.

▼ **Expense Report Information**

Expense Report For * Employee: Edna Trevizo

Creation Options

- Create New Expense Report
- Copy Previous Expense Report [dropdown]
- Create New Expense Report from Spend Authorization [dropdown]

Company * [dropdown: Arizona State University]

Expense Report Date * 01 / 29 / 2018 [calendar icon]

Project [dropdown]

Gift [dropdown]

Grant [dropdown]

Cost Center * [dropdown]

Expense Report Event

5. This is a screenshot of the completed **Expense Report Information** section:

The screenshot shows a form titled "Expense Report Information" with a dropdown arrow on the left. The form contains the following fields and options:

- Expense Report For**: * Employee: Edna Trevizo
- Creation Options**:
 - Create New Expense Report
 - Copy Previous Expense Report [dropdown menu]
 - Create New Expense Report from Spend Authorization [dropdown menu]
- Company**: * [dropdown menu] X Arizona State University
- Expense Report Date**: * 01 / 29 / 2018 [calendar icon]
- Project**: [dropdown menu]
- Gift**: [dropdown menu]
- Grant**: [dropdown menu]
- Cost Center**: * [dropdown menu] X CC0004 GU-Employee Related Expenses
- Program**: [dropdown menu]
- Additional Worktags**: * [dropdown menu]
 - X Activity: A2000 Research Support
 - X Campus: Tempe
 - X Fund: FD2000 Miscellaneous Auxiliary

At the bottom of the form are two buttons: "OK" (orange) and "Cancel" (grey).

6. Click **OK**.

Expense Report Event

7. The **Create Expense Report** page populates the values you entered.

The screenshot shows the 'Create Expense Report' page for Employee: Edna Trevizo. The total amount is 0.00 USD. The 'Expense Report Information' section is populated with: Company: Arizona State University, Expense Report Date: 01/29/2018. The 'Expense Report Reference Information' section is populated with: Reimbursement Payment Type: Direct Deposit, Spend Authorization: (empty), Final Expense Report for Spend Authorization: (unchecked), and Memo: (empty). Below these sections are tabs for 'Expense Report Lines' and 'Attachments'. The 'Expense Report Lines' tab is active, showing a table with one line item: Date: 01/29/2018, Amount: 0.00. Below the table are fields for 'Expense Report Line' (Date: 01/29/2018, Expense Item: (empty), Quantity: 1) and 'Spend Authorization Line' (Available Spend Authorization Lines: (empty)).

8. Enter the **Expense Report Reference Information** fields according to the following table:

Field	R/O/C	Action
Reimbursement Payment Type	R	Select an option from the drop-down menu.
Spend Authorization	O	Select a Spend Authorization , if available.
Final Expense Report for Spend Authorization	O	Indicate if this is a final expense report for a spend authorization.
Memo	O	Leave additional details here, if necessary.

Expense Report Event

9. This is a screenshot of the completed **Expense Report Reference Information** fields.

✓ Expense Report Reference Information

Reimbursement Payment Type * ⋮

Spend Authorization ⋮

Final Expense Report for Spend Authorization

Memo

Two expense reports remaining.

10. Scroll down to the **Expense Report Lines** tab.

Expense Report Lines

Attachments

⊕ Add
⊕ Import Existing Record
Viewing: ☰

01/29/2018	0.00	Expense Report Line 🗑️	⊕ Itemize

Date *

Expense Item *

Quantity *

Per Unit Amount *

Total Amount *

Memo

Project

Gift

Grant

*Cost Center

Program

Spend Authorization Line

Available Spend Authorization Lines

Attachments from File

Drop files here

or

Select files

Attachments from Mobile Application

Expense Report Event

12. This is a screenshot of the completed **Expense Report Line** section:

Date	Amount	Item
01/29/2018	150.00	Equipment Computers

Expense Report Line

Date * 01 / 29 / 2018

Expense Item * X Equipment Computers

Quantity * 1

Per Unit Amount * 150.00

Total Amount * 150.00

Memo

Project

Gift

Grant

*Cost Center X CC0004 GU-Employee Related Expenses

Program

*Additional Worktags X Activity: A2000 Research Support
X Campus: Tempe
X Fund: FD2000 Miscellaneous Auxiliary

13. To itemize expense lines, click **Itemize** to split expense lines into individual components. In the pop-up window that appears, enter the fields based on the instructions in Step 11, and include a required **Business Reason**.

Spend Authorization Line

Available Spend Authorization Lines

Itemize


Expense Report Event

14. If there is an expense item match from a linked spend authorization to the expense report line, the spend authorization lines populate the **Available Spend Authorization Lines** prompt.



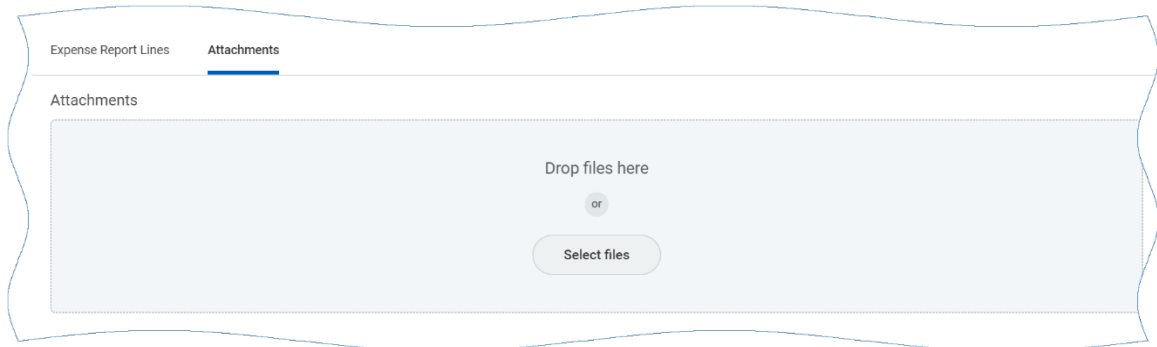
The screenshot shows a section titled "Spend Authorization Line". Below the title is a label "Available Spend Authorization Lines" followed by a dropdown menu icon.

15. In the **Item Details** section, enter a required **Business Reason** for the expense.



The screenshot shows the "Item Details" section. It includes a label "Authorization Line" at the top. Below it is the "Item Details" heading, followed by a "Business Reason" field with a red asterisk indicating it is required. Below the field is the "Attachments from File" section.

16. Click the **Attachments** tab.

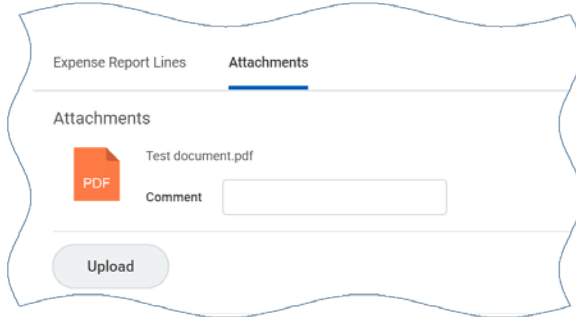


The screenshot shows the "Attachments" tab selected. The tab bar has "Expense Report Lines" and "Attachments". Below the tab bar is the "Attachments" section, which contains a large light gray area with the text "Drop files here" and a small "or" button. Below this is a "Select files" button.

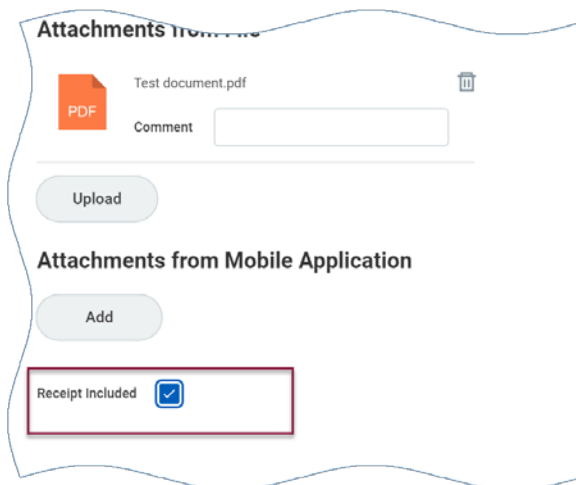
17. Click **Select Files** or drag and drop files into the attachments area.

Expense Report Event

18. Click **Upload** to add more documents, if needed.



19. Once you've uploaded all documentation, click the **Expense Report Lines** tab again. Click the **Receipt Included** checkbox.

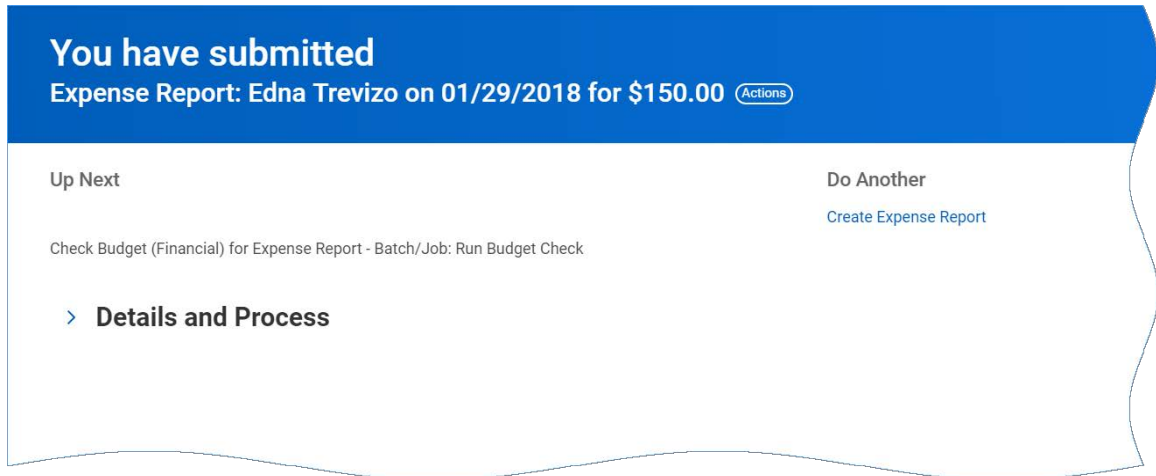


20. Click **Submit**.



Expense Report Event

21. The submission confirmation page displays.



The screenshot shows a confirmation page with a blue header. The header contains the text "You have submitted" in white, followed by "Expense Report: Edna Trevizo on 01/29/2018 for \$150.00" and a small "Actions" button. Below the header, the page is divided into two columns. The left column is titled "Up Next" and contains the text "Check Budget (Financial) for Expense Report - Batch/Job: Run Budget Check" and a link "> Details and Process". The right column is titled "Do Another" and contains the link "Create Expense Report".

You have submitted
Expense Report: Edna Trevizo on 01/29/2018 for \$150.00 [Actions](#)

Up Next

Check Budget (Financial) for Expense Report - Batch/Job: Run Budget Check

[> Details and Process](#)

Do Another

[Create Expense Report](#)