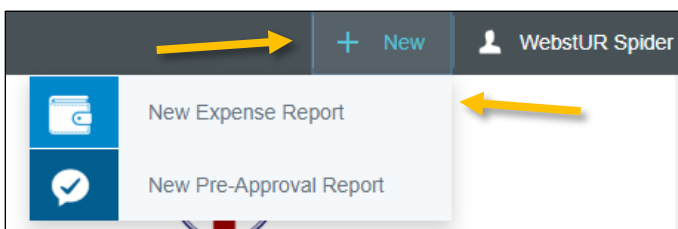


Note: If you are creating a report for someone other than yourself, you will need to be set up as a delegate for that user (See [Add a Delegate](#)). Once you have been authorized to work as someone else's delegate, you will need to switch over to their account in order to create the report. To do so, click the User Icon in the top right corner of the Navigation Bar (with your name) and select the appropriate user. This will take you into their account where you can create a report on their behalf.

1. Click the **+ New** button on the Navigation Bar and select **New Expense Report** from the dropdown menu.



2. Complete the expense report header with the following:

- **Report Name** – Provide a descriptive, unique report name
- **Report Type** – Select **Travel Reimbursement (not to a student)** or **Non-Travel Reimbursement or Refund (not to a student)**
- **Business Purpose** – Enter a clear, detailed business purpose for the report describing why the expenses are reasonable, appropriate, and necessary
- **Traveler Type/Payee Type** – Select **UR Employee** (Note: If you select a Report Type of Travel Reimbursement and Trip Type of Employee Travel, this field will not display since the system knows the payee is a UR Employee)

If you select **Travel Reimbursement** for the **Report Type**, you will also be asked to enter the following:

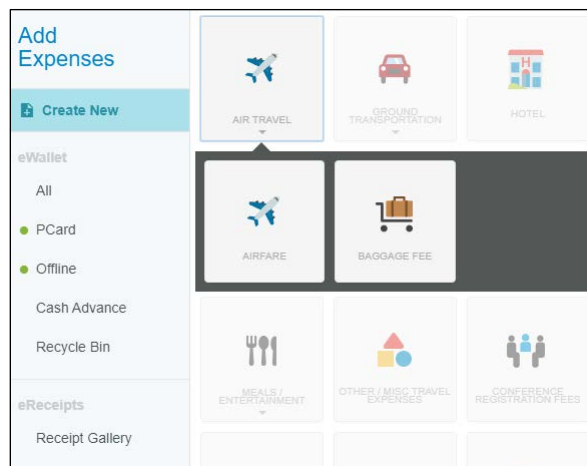
- **Trip Type** – Select the appropriate trip type. This selection will be used to populate the account code for the report's expenses. Generally, employees will use **Employee Travel**
- **Start Date** – Click the calendar icon to select the date of departure
- **End Date** – Click the calendar icon to select the date of return
- **Travel Type** – Select **Domestic** or **International**

- **Trip Destination** – Begin typing to select the City/State (Domestic) or Country (International) to which you are traveling

After the report header has been fully completed, click **Save** in the upper right corner to continue.

Add Expenses

3. Selecting **Create New** in the Add Expenses window will display an expense tile mosaic to the right. Select an expense to add to the expense report from the mosaic. Tiles with a downward facing arrow at the bottom are “parent” tiles that have additional expense tiles organized under them.



4. Complete the expense tile form, including adding a receipt (where applicable) and selecting the **Index(s)** where the expense should be charged. Click **Save** in the upper right corner to continue.

Transaction Date: 07/01/2019

Spent: 227.34 USD

Business Purpose: Professional development and networking with other mascots

Description (Optional):

Airfare should be for Economy class and should not include trip insurance, seat upgrades beyond small seat selection fees, or baggage fees for more than two bags. If any of these are included, please remove the expense from the reimbursement total or provide explanation below for why they were appropriate and necessary.

If you are able to provide an estimate of the total miles traveled for this flight expense (including all legs of the trip), that information is very helpful for our efforts to accurately measure our carbon footprint and would be greatly appreciated. Please enter this information in the Description box below.

Please select the airline used from the list. If your return flight was on a different airline than your departing flight, use the second picklist to report that additional airline.

Airline: JetBlue

5. The expense will be added to your expense report and will be visible on the report summary to the left. The Add Expense window will appear again on the right side of the screen.

DATE	EXPENSE	SPENT	PAY ME
Mon 07/01/2019	Airfare	227.34 USD	227.34

Expense Report: 0A0020156696

Total Pay Me Amount: 227.34 USD

6. Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense tile form, and clicking **Save** at the top right.

Submit

7. Once you have finished adding all expenses to your expense report, click the green **Submit** button at the bottom of the report summary.

DATE	EXPENSE	SPENT	PAY ME
Mon 07/01/2019	Airfare	227.34 USD	227.34
Sun 09/01/2019	Hotel	472.89 USD	472.89
Sun 09/01/2019	Hotel - Lodging / T...	412.89 USD	412.89
Sun 09/01/2019	Hotel - Meals	60.00 USD	60.00
Sun 09/01/2019	Car Rental	183.47 USD	183.47

Expense Report: 010019651278

Total Pay Me Amount: 883.70 USD

8. A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Pre-Approval** to attach a previously submitted pre-approval report to your expense report for informational purposes. Click **Submit** to submit the expense report to the approval workflow.

Submit Confirmation

I affirm that this report is complete and accurate, and that all expenses being paid or reimbursed by the University are valid and comply with University policy. I affirm that any expenses claimed for reimbursement were paid with personal funds and have not been previously reimbursed through a submitted expense report or by an outside agency or third party. I affirm that no alcohol purchases being paid or reimbursed have been charged to a federal grant, and that any airfare payments or reimbursements charged to a federal grant comply with the Fly America Act or, when applicable, the Open Skies Agreement.

Buttons: Cancel, Pre-Approval, Submit