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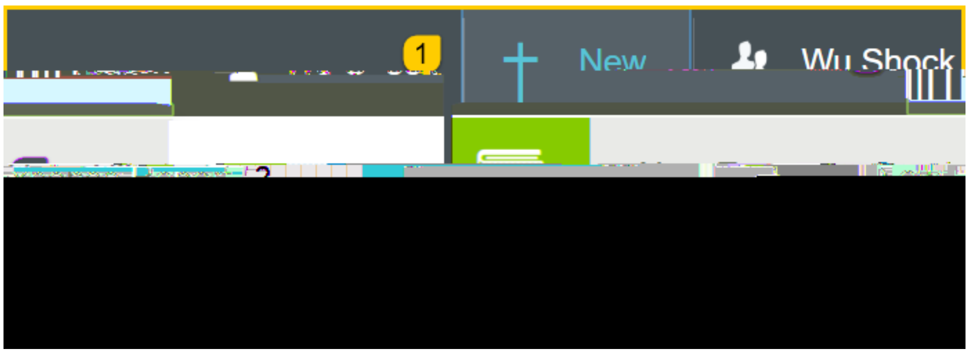
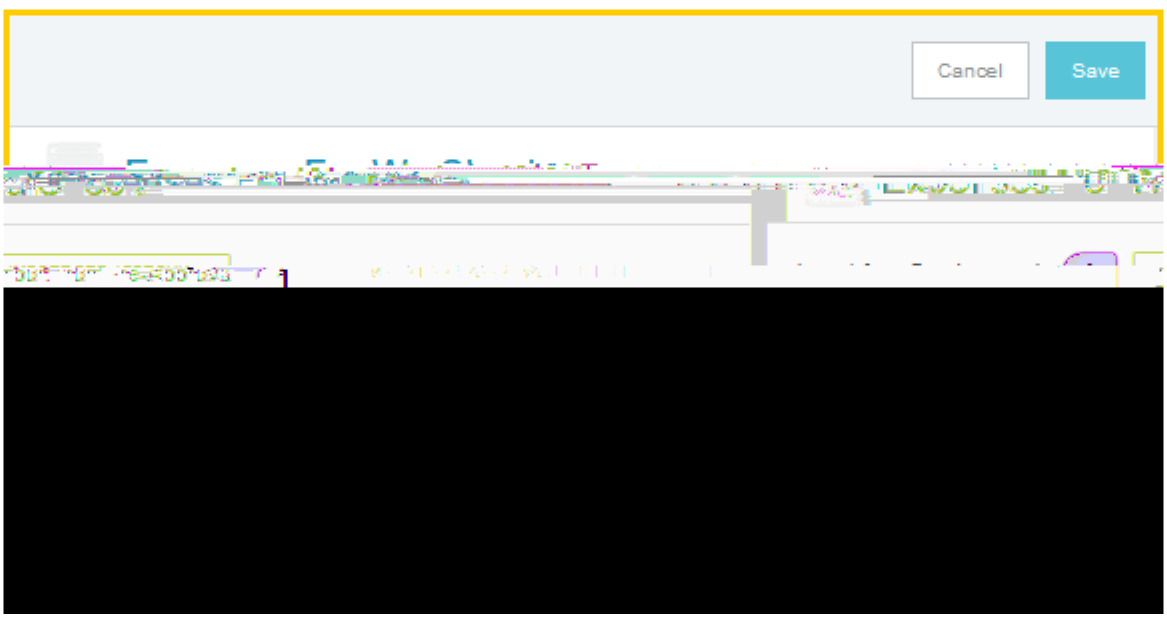
CREATING A TRAVEL EXPENSE REPORT - CANDIDATE

To create a Travel Expense Report, click the **+NEW** button in the upper right corner and select **New Expense Report** from the drop-down menu.



The Expense Report header screen will appear.

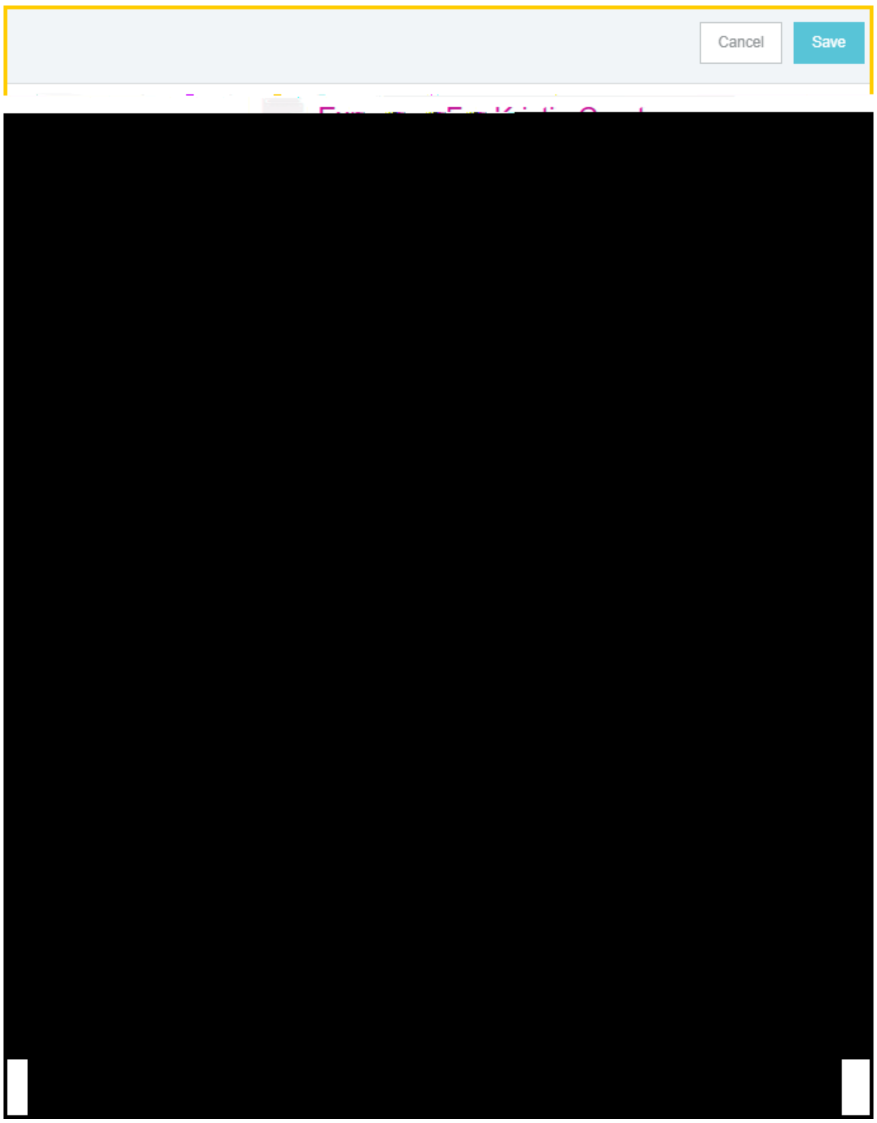


Enter the Header data:

1. **Import Pre-Approval:** This feature populates many fields on the header and individual expense lines with values from the pre-approval. See the **CR0010 Import Pre-Approval Report** document for detailed information.

2. **<u>Report Name:</u>** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expense reports. Naming Convention: Candidate Last Name, Candidate First Name, Dates of Travel
3. **<u>Business Purpose:</u>** Enter a clear, detailed business purpose for the travel event. The business purpose should explain: (1) what purpose the expenditure served, (2) why the expense was necessary, and (3) how it furthered the University's goals. See the **CR0027 Business Purpose** document for more detailed information.
4. **<u>Report Type:</u>** Select Travel

Selecting the Travel report type, opens up additional fields on the expense report header form.



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5. **<u>Departure Date:</u>** Click the calendar icon to select the date which represents the actual departure date for this travel event.
6. **<u>Return Date:</u>** Click the calendar icon to select the date which represents the actual return date for this travel event.
7. **<u>Traveler Type:</u>** Select Candidate
8. **<u>Travel Type:</u>** Select either In State
9. **<u>Vendor:</u>** Search for the Candidate in the **Vendor** field. Select the appropriate candidate record. If the candidate is not listed, scroll to the top of the list and click **Vendor Not Found**
10. **<u>Address not correct:</u>** If a candidate record was selected in the vendor field, and the address displayed is correct, leave this check box blank. If the address displayed is incorrect, select this check box.
11. **<u>Candidate Information:</u>** Enter the name, street address, city, state, and zip code of the candidate.
12. **<u>WSU Position Number / Position Title:</u>** Enter the position number and position title as listed on the search documentation.
13. **Division Routing:**

Complete the expense tile form and click **Save** at the top right side of the screen to continue.
The expense will be added to the expense report and will be visible on the left side of the screen. The **Add Expense** page will appear on the right side of the screen. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense tile form and clicking **Save** at the top right side of the screen.

When you have completed all the entries for the expense report, click the **Submit** button located at the bottom of the left side of the screen.

A submit confirmation will appear at the top of the right side of the screen.

There will be three options presented below the confirmation:

1. **<u>Cancel:</u>** Clicking **Cancel** allows you to return to the expense report to make any needed changes. You can chose to leave the report in draft status.
2. **<u>Pre-Approval:</u>** If linking a pre-approval to the expense report, select the Pre-Approval button. Review the **CR0010 Import Pre-Approval Report** help document for additional details
3. **<u>Submit:</u>** Once you have read the certification statement, click the **Submit** button to submit the expense report into workflow for approvals.