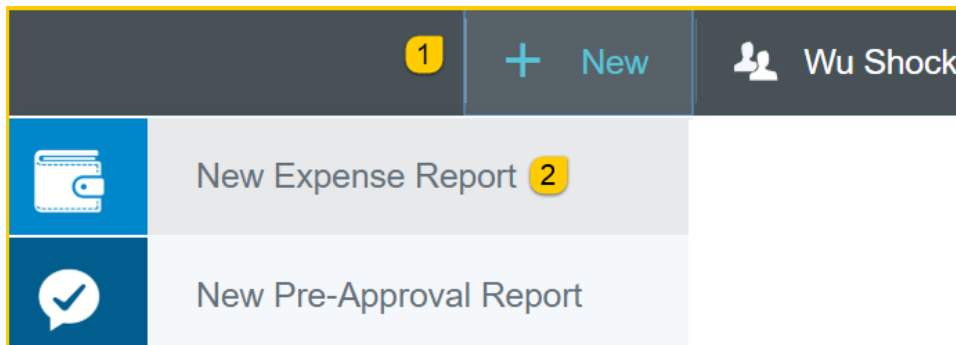




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CREATING A TRAVEL EXPENSE REPORT - STUDENT

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. **Note:** Students (that are not student employees) do not have access to the Chrome River system. A WSU employee will be responsible for creating and submitting the Pre-Approval document for the student.



The Expense Report header screen will appear.

The screenshot shows the 'Expenses For Wu Shock' header screen. At the top right, there are 'Cancel' and 'Save' buttons. Below the title, there are four numbered steps: 1. 'Import from Pre-Approval' with an 'IMPORT PRE-APPROVAL' button; 2. 'Report Name' with a text input field; 3. 'Business Purpose' with a text input field; 4. 'Report Type' with a dropdown menu showing '-- Select --'.



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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. **Report Name:** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expense reports. Naming Convention: Student Last Name, Student First Name, Dates of Travel
3. **Business Purpose:** 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. **Report Type:** Select Travel

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

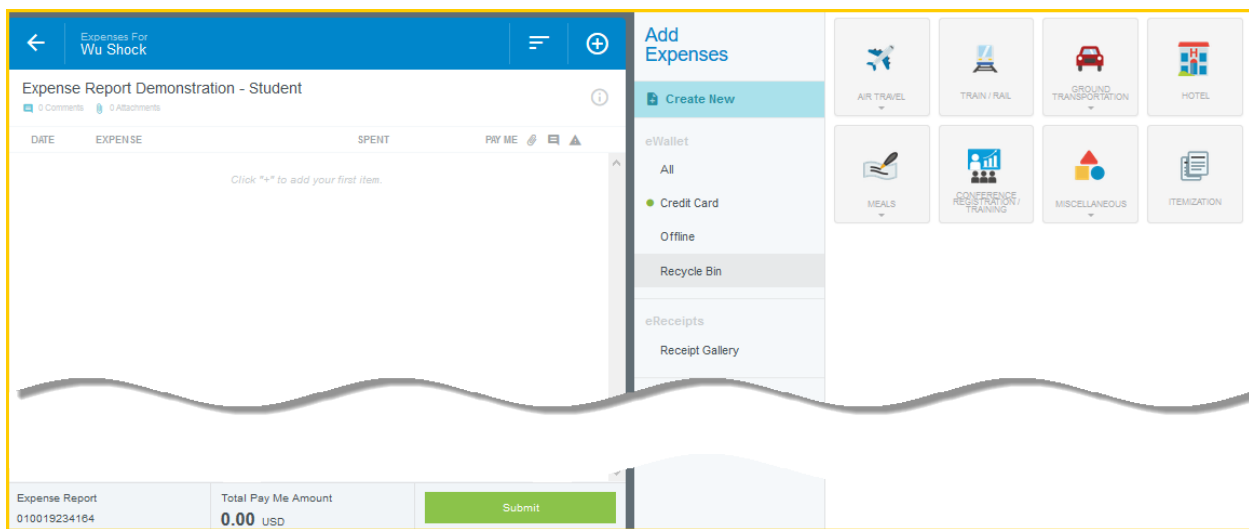


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5. **Departure Date:** Click the calendar icon to select the date which represents the actual departure date for this travel event.
6. **Return Date:** Click the calendar icon to select the date which represents the actual return date for this travel event.
7. **Destination:** Select the Country/State/City you are traveling to. Destinations are preloaded in Chrome River and are presented in the following format: Country/State/City. Begin typing the destination city to narrow down the choices.
8. **Traveler Type:** Select Student
9. **Travel Type:** Select either In State, Out of State or International
10. **Student Information:** Enter the students name, myWSU ID, street address, city, state, and zip code.
11. **Vendor:** Search for the student in the **Vendor** field. Select the appropriate student record. If the student is not listed, scroll to the top of the list and click **Vendor Not Found**
12. **Address not correct:** If a student 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.
13. **Are you attending a conference:** Select **Yes** if the student will be attending a conference. A conference agenda or schedule at a glance must be attached to the expense report. Select **No** if the student will not be attending a conference.
14. **Will there be personal time during this trip:** Leave the box blank if there will not be personal time included in this travel event. Select the check box if there will be personal time included in this travel event and enter the appropriate dates in the **Personal Time Start/End Date** fields.

Click **Save** at the top right side of the screen to continue.

After completing the Expense Report Header information, the Add Expenses screen will slide in from the right.





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Expense types are consolidated into categories displayed on expense tiles. Some expense tiles expand to provide additional expense options. Example: **Mileage** is located under **Ground Transportation**.

Select the specific expense tile you want to add to the Expense Report. Each expense selected will open in a form and require additional information. For detailed information on each Expense Tile, please see the **CR0019 Travel Expense Tile Detail** help document.

The screenshot shows the 'Airfare' expense form in Chrome River. At the top right are 'Cancel' and 'Save' buttons. The form includes the following fields and options:

- Date:** 04/01/2019 (with a calendar icon)
- Spent:** 0.00 (with a calculator icon and a currency dropdown set to USD)
- Business Purpose:** A large text input field.
- Description:** A large text input field, labeled as 'Optional'.
- Personal Expense Charged on PCARD?:** An unchecked checkbox.
- Merchant:** A text input field, labeled as 'Optional'.
- Add Banner Activity and/or Location?:** An unchecked checkbox.
- Funding:** A section with a search box 'Search for Funding', a dropdown menu currently showing '-- Select --', and an '+ Add Funding' button.
- Attachments (0):** A section with a 'Drag image here to upload' area and an 'Add Attachments' button.

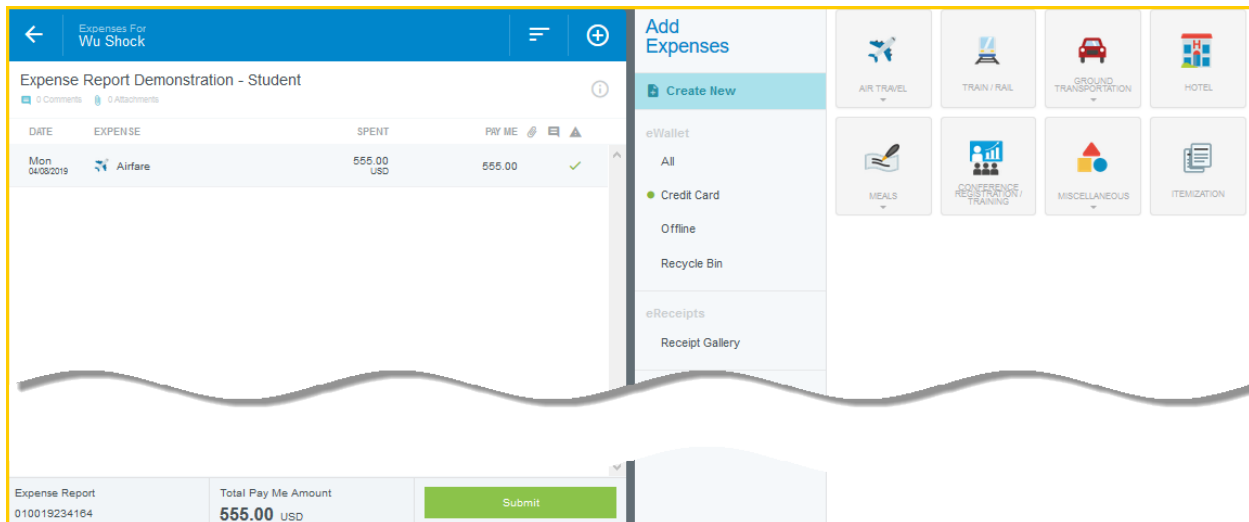


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Complete the expense tile form and click **Save** at the top right side of the screen to continue.

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.





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

The image shows a 'Submit Confirmation' dialog box with a green header. Below the header, the text reads: 'I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.' To the right of this text are three numbered yellow circles: 1, 2, and 3. Below these circles are three buttons: 'Cancel' (white), 'Pre-Approval' (blue), and 'Submit' (green).

There will be three options presented below the confirmation:

1. **Cancel:** 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. **Pre-Approval:** 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. **Submit:** Once you have read the certification statement, click the **Submit** button to submit the expense report into workflow for approvals.