## SFU Online Travel and Expense Report – Create an Expense Report Quick Reference Guide

A Navigate to Croate Expose Papart					
A. N	A havigate to create Expense Report				
d. L	auricit a browser session (internet explorer/Firefox/Google chrome)		FOI Additional help:		
D.	The mission Manual SELL and Liker Work Controls State State State Manual Sector Manual Sector State St		• Contact Payment Services nelp Line @ //o//o2//08/ 0K Entail <u>TEX nelp@stu.ca</u>		
ι.	Or Main Menu > Employee Self Service > Travel and Expense		Center to the First course of the Omme Kilowiedge Center OFK		
P C	ans to Submitting on Exponse Papart		Contact Sauka Jungic of Chanene E		
NOTE:	Actorick (*) refers to mandatony fields	Emboddod Holp 🕜			
STED 1	Complete Create Europees Header Section			_	
SIEP 1	*Business Burnese: select a purpose from a prodefined list	Create Expense Report		Save for Later   Summary and S	
	a. Business Purpose, select a purpose from a predemiculist	Empl I	D:	Quick StartPopulate From V	
	c. Reference: ontional field				
	d. Department Admin:	a	d 3X V		
	e. *Default Location: change location if you travel outside BC	b >*Report Description SSC 2018	Petault Location CAN-Br	itish Columbia	
	Important! Location drives Tax Calculations and Per	C > Reference			
	Diem Rates.	*Grantee Affiliation	f	g	
	f *Reason for Expenses Click Reason for Expenses link Fill	L.			
	out the reason for the expense report click on the		Keason for Expense	Ses Attachments (U)	
	g. Add Notes button and then OK button to return to				
	Expense Report page.				
	<b>n.</b> *Attachments: You will be asked Transaction needs to be				
	Saved before attaching the mes to it. Click yes then you can				
STED 2	Varifu/Enter Default Accounting for Depart	Default Accounting for Peport			
JILF 2	a Before you begin know your grant number that you				
	intend to charge your expenses to If fund 31 enter	% *GL Unit Project Alias Fund	Dept Program PC Bus Project	Activity Department Description Program Description Project Name	
	RXXXXXX in the " <b>Project Alias</b> " field, hit enter				
				Q	
	<b>b.</b> Click button to apply accounting details on each	+ Add Chartfield Line - To ad Defaults	Apply		
	expense line below.	Default Accounting for Report Semina	ar Series		
	c. If entering seminar series lunch expenses, click on				
	Load Defaults and enter "90172" in the "Program" field.	% *GL Unit Project Alias Fund D	Program PC Bus Unit Project	Activity Department Description Program Description Project Name	
	Apply			Ctate and Asutarial	
	hit enter, then click every . If when you hit load	100.00 SFUNV Q Q 11 Q 4		Sciences Non-Specific Functions	
	defaults and the numbers don't match to what is				
	displayed here, please change it.	🛨 Add Chartfield Line 📑 Load Defaults 📑	Apply		
STEP 3	Enter Expense Line	Expenses ②			
	Colori Posta in coloria da Constructor	Expand All   Collapse All 🖇 Quick-Fill		Totals (1 Line) 150.00 CAD	
	a. Select *Date in order to pick an Expense Type.			c_	
	<b>b.</b> Choose <b>Expense Type</b> from the drop down menu.	a *Date *Expense Type	Description	*Payment Type *Amount *Currency	
	if necessary	Contende Registration Pees	251 characters remaining		
	n necessary.	*Billing Type Internal Expe >	🋱 Attendees	🗹 Default Rate *Exchange Rate 1.00000000 🗘 📑	
		CAN-British Columbia	Calculate VAT	Non-Reimbursable Reimbursement Amt 150.00 CAD	
			Part VAT Information	No Receipt Calculated VAT 7.14	
				No VAT Receipt Override VAT	
STEP 4		By checking this box, I (the claimant) certify that:			
	Go to the top right hand corner of the screen and click	1. The expenses are accurate and eligible for the purpos			
	H Save for Later .This Allows for editing before final submit, if	Sponsor guidelines.			
	necessary.	O The set of an obligation of a state of a state of the set of			
	NOTE: Save often to avoid losing data entered. Then click on	Submit Expense Report			
	Summary and Submit				
	Select the certify tick box and click on "Submit Expense Report".				