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

A. Navigate to Create Expense Report									
a.	Launch a browser session (Internet Explorer/Firefox/Google Chrome)			For Additional help:					
b.	Enter fins.sfu.ca in the page address (URL), login with the appropriate	Contact Payment Services Help Line @ 778-782-7087 OR Email <u>TEX Help@sfu.ca</u>							
с.	Path: Main Menu > SFU End-User WorkCentre > Expense Rpt - Create				Refer to the FINS course on the Online Knowledge Centre UPK				
	Or Main Menu > Employee Self-Service > Travel and Expense		Contact Sa	dika Jungic or Charlene Bra	adbury				
	eps to Submitting an Expense Report	1.8							
NOTE:		Embedded Help 🕙							
STEP 1		Create Expense Report				📘 Sa	ive for Later 🛃 Summ	hary and S	
	a. *Business Purpose: Choose "d." for Chair Travel Grant or					Quick StartPopulate	From	~ (
	choose " b ." if fund 31-RXXXXX	Empil							
	b. *Report Description: enter a relevant description	Business Purpose b. Research Expenses - Fur		d Department Admin					
	c. Reference: optional field	b *Report Description SSC 2018	nd 3X V						
	 d. Department Admin: e. *Default Location: change location if you travel outside BC 	C Reference	Q	e *Default Location CAN-Britis	n Columbia				
	Important! Location drives Tax Calculations and Per	*Grantee Affiliation	Q	F					
	Diem Rates.				E				
	f. *Reason for Expenses Click Reason for Expenses link. Fill			Reason for Expenses	Attachments (0)				
	out the reason for the expense report, click on the								
	g. Add Notes button and then OK button to return to								
	Expense Report page.								
	h. *Attachments: You will be asked "Transaction needs to be saved before attaching the files to it" Click yes then you can								
	Scan and upload your receipts, documents, etc.								
STEP 2		Default Accounting for Report	nd 31, 13, 21						
5121 2	a. Before you begin, know your grant number that you		na 31, 13, 21						
	intend to charge your expenses to. If fund 31 enter	% *GL Unit Project Alias Fund	Dept Program	PC Bus Unit Project	Activity Departm	ment Description Pro	gram Description F	Project Name	
	RXXXXXX in the " Project Alias " field, hit enter.								
	b. Click Apply button to apply accounting details on each	100.00 SFUNV Q RXXXXXX Q Q	2	Q Q Q	Q				
		🛨 Add Chartfield Line 🛛 🔒 Load Defaults							
	expense line below.	Default Accounting for Report ? Chai	ir Travel Grant						
	c. If entering expenses for funding from the Chair Travel			PC Bus					
	Grant, enter "N876491" in the " Project Alias " field, hit	% *GL Unit Project Alias Fund	Dept Program	Unit Project	Activity De	epartment Description	Program Description	on Projec	
	enter. Click 🖶 Apply . Button to apply accounting details				- St	ats and Acutarial		. STAT	
	on each expense line.	100.00 SFUNV (N876491) 13 Q	4580 Q 90140	Q PCU13 Q N876491		ciences	Research Support	t Grant	
		· · · · · · · · · · · · · · · · · · ·							
		Add Chartfield Line Add Chartfield Line Coad Defaults	Apply						
STEP 3	Enter Expense Line	Expenses ②							
	a. Select *Date in order to pick an Expense Type.	Expand All Collapse All 🛛 🕸 Quick-Fill				Totals (1 Line)	150.00 CAD		
	 b. Choose *Expense Type from the drop down menu. 	a *Date b *Expense Type	D	Description	*Payment Type	*0	ل ا		
	c. Fill out the required fields. Change *Location and *Currency	O2/05/2019 Conference Registration Fees		SSC	EFT Payment	~Am	150.00 CAD	Q + -	
	if necessary.		2	51 characters remaining					
		*Billing Type Internal Expt ~		🛱 Attendees	Default Rate	*Exchange Rate	1.0000000 🍫 📑		
		CAN-British Columbia	Q	Calculate VAT	Non-Reimbursable	Reimbursement Amt	150.00 CAD		
					No Receipt	Calculated VAT	7.14		
					No VAT Receipt	Override VAT			
STEP 4	Co to the ten right hand earner of the correct and allely	By checking this box, I (the claimant) certify that:							
	Go to the top right hand corner of the screen and click Save for Later. This Allows for editing <u>before</u> final submit, if	1. The expenses are accurate and eligible for the purpos							
	necessary.	Sponsor guidelines.							
	NOTE: Save often to avoid losing data entered. Then click on								
	Summary and Submit	Submit Expense Report							
	Select the certify tick box and click on "Submit Expense Report".								