A. Navigate to Create Expense Report

- Launch a browser session (Internet Explorer/Firefox/Google Chrome)
- Enter fins.sfu.ca in the page address (URL), login with the appropriate credentials
- Path: Main Menu > SFU End-User WorkCentre > Expense Rpt - Create/Modify
  Or: Main Menu > Employee Self-Service > Travel and Expense

B. Steps to Submitting an Expense Report

**NOTE:** Asterisk (*) refers to mandatory fields

**STEP 1**
Complete Create Expenses Header Section

- *Business Purpose:* Choose "d." for Chair Travel Grant or choose "b." if fund 31-RXXXXX
- *Report Description:* enter a relevant description
- Reference: optional field
- Department Admin:
- *Default Location:* change location if you travel outside BC Important! Location drives Tax Calculations and Per Diem Rates.
- *Reason for Expenses:* Click link. Fill out the reason for the expense report, click on the button and then button to return to Expense Report page.
- *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**
Verify/Enter Default Accounting for Report

- Before you begin, know your grant number that you intend to charge your expenses to. If fund 31 enter RXXXXX in the “Project Alias” field, hit enter.
- Click button to apply accounting details on each expense line below.
- If entering expenses for funding from the Chair Travel Grant, enter “N876491” in the “Project Alias” field, hit enter. Click button to apply accounting details on each expense line.

**STEP 3**
Enter Expense Line

- Select *Date* in order to pick an Expense Type.
- Choose *Expense Type* from the drop down menu.
- Fill out the required fields. Change *Location* and *Currency* if necessary.

**STEP 4**
Go to the top right hand corner of the screen and click . This allows for editing before final submit, if necessary.

**NOTE:** Save often to avoid losing data entered. Then click on “Submit Expense Report”.

For Additional help:
- Contact Payment Services Help Line @ 778-782-7087 OR Email TEX_Help@sfu.ca
- Refer to the FINS course on the Online Knowledge Centre UPK
- Contact Sadika Jungic or Charlene Bradbury