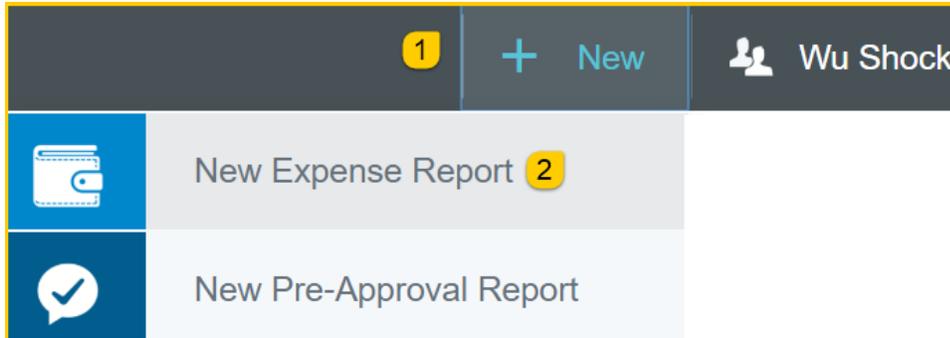




# Chrome River User Manual

## 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.

The screenshot shows the 'Expenses For Wu Shock' header screen. At the top right are 'Cancel' and 'Save' buttons. Below the title bar is a form with four fields, each with a yellow circle containing a number: 1. 'Import from Pre-Approval' (Optional) 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 --'.

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.



# Chrome River User Manual

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: Candidate Last Name, Candidate 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.

Expenses For Kristie Courtney

Import from Pre-Approval

Report Name

Business Purpose

Report Type

Departure Date **5**

Return Date **6**

Traveler Type **7**

Travel Type **8**

Vendor **9**

Address not correct **10**

Candidate Information: Name/Street Address/City/State/Zip **11**

WSU Position Number / Position Title **12**

Division Routing **13**

Department **14**

Will there be personal time during this trip? **15**

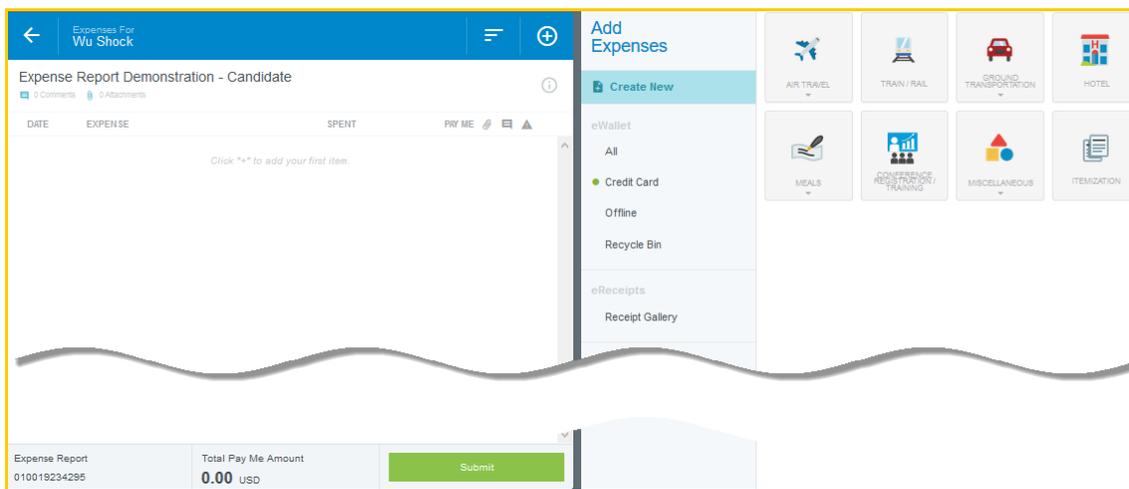


# Chrome River User Manual

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. **Traveler Type:** Select Candidate
8. **Travel Type:** Select either In State
9. **Vendor:** 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. **Address not correct:** 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. **Candidate Information:** Enter the name, street address, city, state, and zip code of the candidate.
12. **WSU Position Number / Position Title:** Enter the position number and position title as listed on the search documentation.
13. **Division Routing:** Select the appropriate division routing – if you are not a part of Academic Affairs or Student Affairs, select None.
14. **Department:** Select the appropriate department from the drop-down list.
15. **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. This field is not typically used for Candidate travel.

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.





# Chrome River User Manual

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.

---

 **Airfare**

Date  

Spent  

Business Purpose

Description Optional

Personal Expense Charged on PCARD?

Merchant Optional

Add Banner Activity and/or Location?

Please type the funding you would like to search for in the box below. As you type, a drop down list of matching items will be displayed for selection.

**Funding**

**Attachments (0)**  

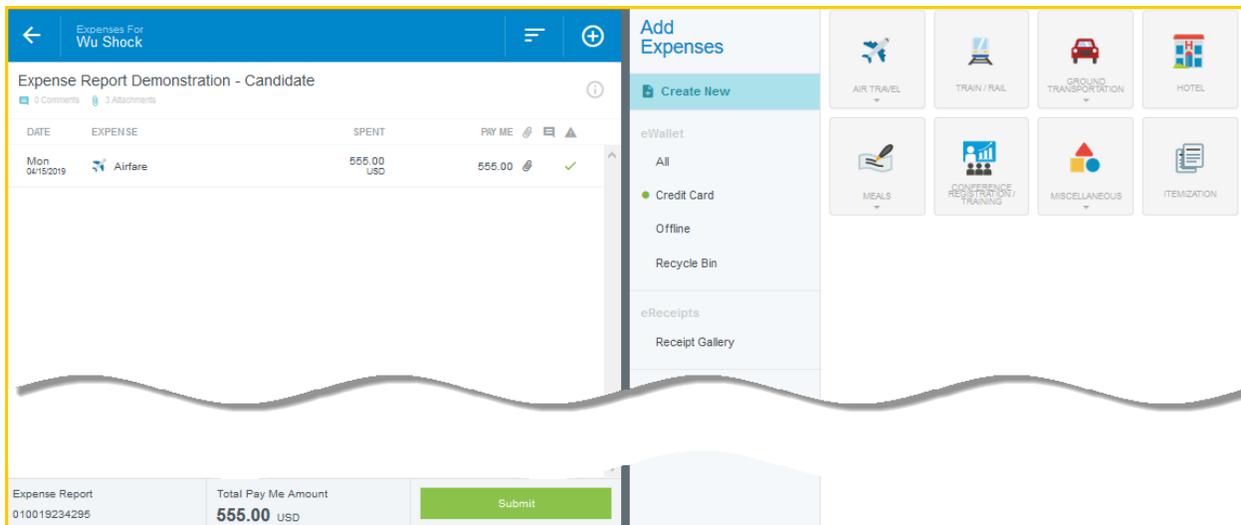
Drag image here to upload



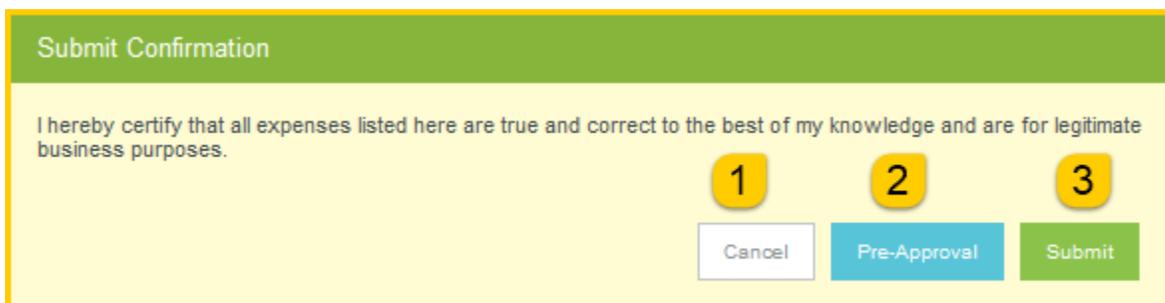
# Chrome River User Manual

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:



# Chrome River User Manual

---

1. **Cancel:** Clicking **Cancel** allows you to return to the expense report to make any needed changes. You can choose 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.