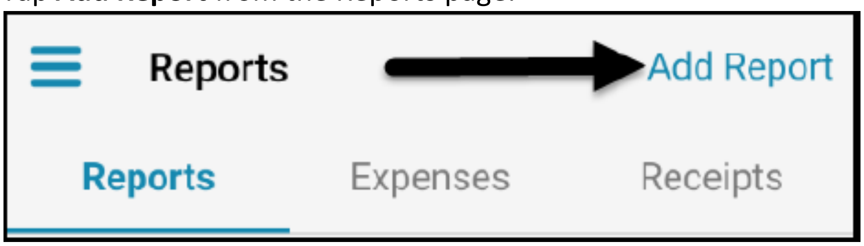
Create and Submit an Expense Report on Mobile

Manage an Expense Report on Mobile

1. Open an active session on your mobile device and log into the app.
2. Tap **Expense** from the main menu.
3. View the following from the Reports page:
   - **In Progress** displays expense reports in an Unsubmitted or Returned status.
   - **Pending** displays expense reports in a Submitted, Approved, Partially Approved, or Pending Paid status. Use this section to recall a submitted expense report if necessary.
   - **History** displays expense reports in a Paid status.
4. Tap **Add Report** from the Reports page.

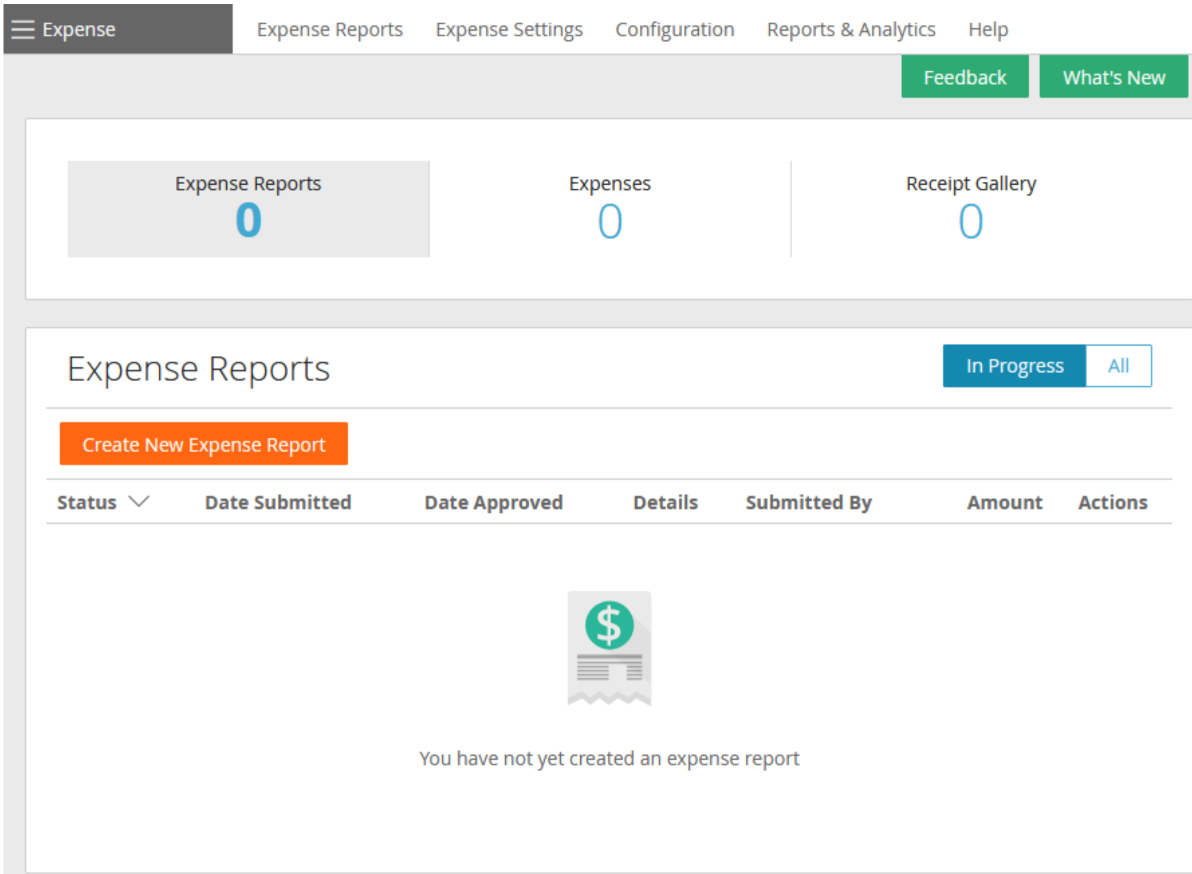


5. Tap **Title** to give the expense report a unique name, then
6. Tap **Save**.
7. Tap **Business Purpose** and enter text as applicable
8. Tap **Save**.
9. Tap **Comments** to add any additional detail.
10. Tap **Save**.
11. Tap **Add Expense** to bring up two options for adding an expense: **Add Existing Expense** or **Create New Expense**.
12. Populate all required fields.
    - **Add Expense**
    - **Add Existing Expense** to attach an existing expense from the Expenses page.
    - **Create New Expense** to create a New Expense.
    - As a user adds expenses to the expense report, the dollar figure will update based on the dollar amounts.
13. Tap **Save** for two options to appear:
    - **Save & Submit** to send the expense report for approval.
    - **Save for Later**.

Manage an Expense Report on the Web

1. Navigate to **HR & Payroll > Expense > Expense Reports**.

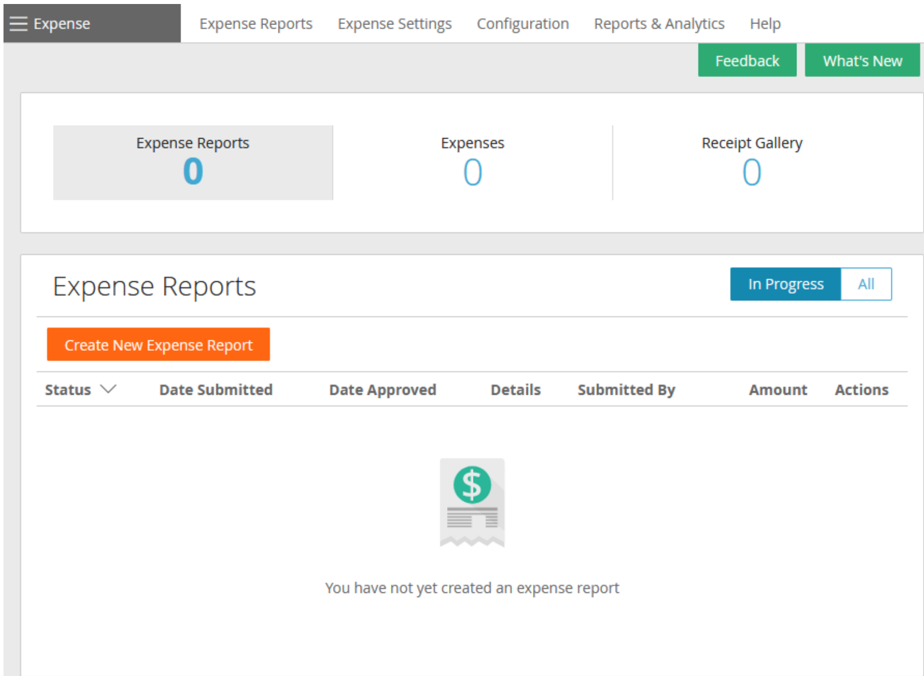
2. Select **Create New Expense Report**.
    - If **Create New Expense Report** is not available the expense policy does not allow users to submit Expense Reports.
    - Only employees assigned to an expense policy can add expense reports, expenses, and receipts via the mobile app.



1. Enter a **Report Title**.
2. Enter the **Business Purpose** as applicable.
3. Select an option from the **Event** dropdown if applicable.
4. Update the applicable Cost Centers.
5. Select **Create Expense**.
6. Enter a **Title**.
7. Select the **Transaction Date** when the expesne occurred.
8. Select **Payment Method** from the dropdown for the expense payment method.
9. Select an option from the **Category** dropdown.
10. Enter any necessary **Notes**.
11. Toggle **Yes** for the option to **Override Cost Center**. This option will be available when the policy allows.
12. Toggle **Yes** in the **Itemize?** box to create additional line items associated with the expense.
13. Add a receipt to the expense as required or necessary via the following options:
    - Drage and drop.
    - Upload from a local drive on the computer.

- Select from the Receipt Gallery.

14. Select **Save** to create the expense.



15. Add any additional expenses as necessary.
    - **Create Expense** to add a new expense transaction.
    - **Select Saved Expense** to apply a previously created expense to the report.
16. Review the **Status** column to verify if the expense report passes validation.
    - A checkmark confirms validation and that the expense report submitted.
    - A warning icon indicates that a there is no attached receipt, but it is possible to submit the expense.
    - An exclamation point will not allow for the expense report to submit until attaching a receipt or note.
17. Select **Submit for Approval**.