A. Navigate to Create Expense Report

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

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

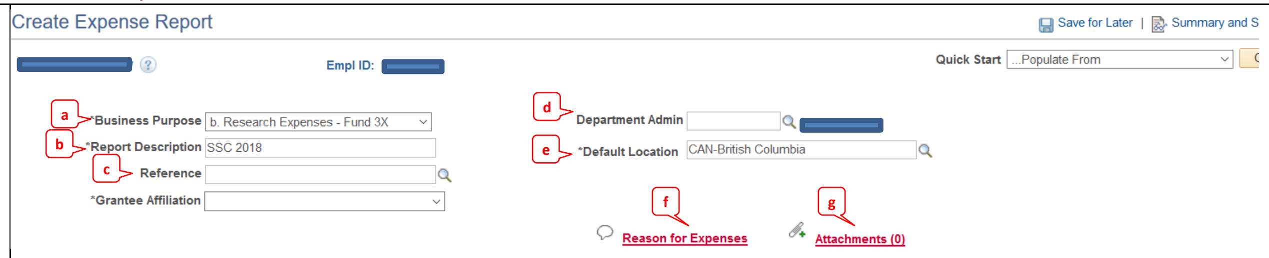
B. Steps to Submitting an Expense Report

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

STEP 1

Complete Create Expenses Header Section

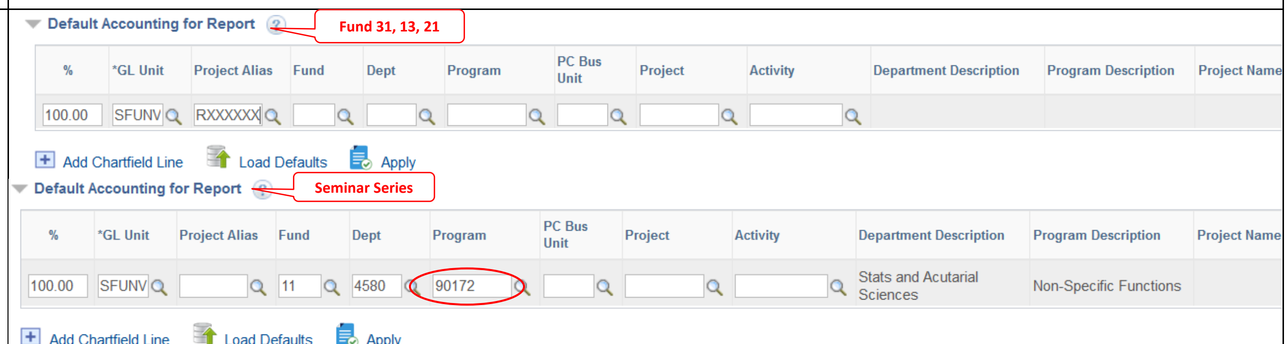
a. ***Business Purpose**: select a purpose from a predefined list
b. ***Report Description**: enter a relevant description
c. **Reference**: optional field
d. **Department Admin**:
e. ***Default Location**: change location if you travel outside BC
Important! Location drives Tax Calculations and Per Diem Rates.
f. ***Reason for Expenses** Click Reason for Expenses link. Fill 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

Verify/Enter Default Accounting for Report

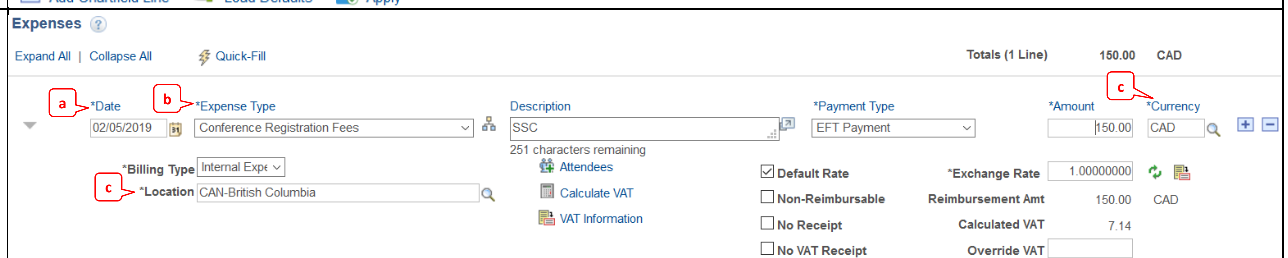
a. Before you begin, know your grant number that you intend to charge your expenses to. If fund 31 enter RXXXXXX in the "**Project Alias**" field, hit enter.
b. Click Apply button to apply accounting details on each expense line below.
c. If entering seminar series lunch expenses, click on Load Defaults and enter "90172" in the "**Program**" field, hit enter, then click Apply. If when you hit load defaults and the numbers don't match to what is displayed here, please change it.



STEP 3

Enter Expense Line

a. Select ***Date** in order to pick an Expense Type.
b. Choose ***Expense Type** from the drop down menu.
c. 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 Save for Later. This Allows for editing **before** final submit, if necessary.
NOTE: Save often to avoid losing data entered. Then click on Summary and Submit.
Select the certify tick box and click on "**Submit Expense Report**".