## CHROME RIVER QUICK GUIDE: CREATING AN EXPENSE REPORT – EMPLOYEE

Note: If you are creating a report for someone other than yourself, you will need to be set up as a delegate for that user (see Add a Delegate). Once you have been authorized to work as someone else's delegate, you will need to switch over to their account in order to create the report. To do so, click the User Icon in the top right corner of the Navigation Bar (with your name) and select the appropriate user. This will take you into their account and profile where you can create a report on their behalf.

 Click the +Create button on the Navigation Bar of the Expenses section.



- 2. Complete the Expense Report Header with the following:
  - Report Name Provide a unique and descriptive name for the report
  - **Report Type** Select Employee
  - **Purpose** Choose from the selected list based upon the purpose of the travel
  - Travel Type Select Domestic or International
  - Start and End Dates- Select
  - Business Purpose Select
  - Travel to more than one location –If traveling to multiple locations, please select 'Yes' and input each Country, City, State. There can be up to 3 destinations completed for each Expense Report. If more than 3 are traveled, please add additional destinations in the comment box.
  - Country, City, State Provide the appropriate Country, City, and State for the travel destination. Country State are drop down fields and City is a free form field.

After the report header has been fully completed, click **Save** in the upper right corner to continue.

POF - Images			Cancel Save
Report Name	National World Conference 2022- San Diego, CA		
Pay Me In	USD - US Dollars		
Report Type	Employee	•	
Non-WM Affiliate Optional	Select		
Student Optional	- Select		
Expense Purpose Optional	Select	•	
Expense Purpose Optional			
Purpose	Conference/Training	•	
Please attached the conferen	ce agenda, which is required.		
Reason Optional			
Travel Type	Domestic	•	
Start Date	01/09/2023		
End Date	01/11/2023		
Business Purpose	To attend conference to learn about new world process	es	
Travel to more than one location?	No	•	
Country 1	United States	•	
State 1	California	*	

## **ADD EXPENSES**

3. Click on the → sign with the circle to open the Add New Expense Window. Selecting Create new in the Add Expenses window will display expense tiles to the right. Tiles with the downward facing arrow at the bottom have additional expense tiles listed under them for you to choose for the report. Select an expense to add to the report.

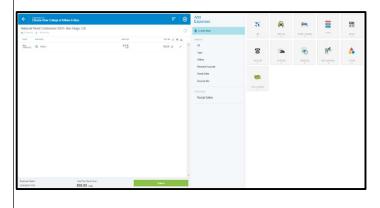
Expenses	74	<b>A</b>	1	101	¥11
eWallet	AR	oncore 2	others contains	HOTEL	1001
All Trips Offine Personal Account	<b>T</b> Annue	Michael Ha		en eltettik en	Sec.
Travel Data Recycle Bin					
eReceipts Receipt Gallery	TELECON TELECON	aryan (	urica.	RESERVICION.	en juni

 Complete the expense tile, including adding a receipt (where required) and selecting the Allocation (Index) where the expense should be charged. Click Save in the upper right corner to continue.

## CHROME RIVER QUICK GUIDE: CREATING AN EXPENSE REPORT – EMPLOYEE

		Cancel Save
😽 Airfare		
Date	01/09/2023	
Amount	500.00 🖬 USD	
Airline	American	•
Class	Economy	*
Travel 8 hours consecutive?		
Receipt must include iti	erary, seating class and proof of payment.	
Agency Card		
Allocation		
W121310 STATE Trav	el Office	

5. The expense will be added to your expense report and will be visible on the report summary to the left. The Add Expense window will appear again on the right side of the screen.



- Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense tile form, and clicking Save at the top right.
- Once you have finished adding all expenses to your expense report, click on the green Submit button at the bottom of the report summary.

National World Conference 2	were our proyo, on		
DATE EXPENSE		AMOUNT	PAY ME 🖉 🗮 🛦
Mon 01/09/2023 🎝 Airfare		500.00 USD	500.00 @ 🗸
		<b>_</b>	
Expense Report 2A0058477418	Total Pay Me Amount 500.00 USD		Submit

A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Pre-Approval** to attach a previously submitted Pre-Approval report to your expense report. Click **Submit** to submit the report to the approval flow.

Submit Confirmation			
I hereby certify that the expenses listed represent a true statement of actual travel expenses incurred in accordance with all applicable Williar Listed are for legitimate business purposes and in support of the VM mission and goals.	i & Mary Poli	cy and Procedures.	All expenses
RDF -	Cancel	Pre-Approval	Submit