Expenses: Create and Submit an Expense Report
For employees creating and submitting an expense report

**Purpose:** Create and submit an expense report.

**How to Access:** Log into the Bear Trax application. Select the Expenses tile.

**Helpful Hints:** Be sure to keep in mind that...
- Expense reports will include out-of-pocket transactions only.
- All non-compensation employee reimbursements will be submitted through expense reports (e.g. uniform balances, administrative tuition reimbursement, enrichment, etc.)
- All expense reports must be submitted within 60 days or the system will reject your report
- You must agree to Shawnee State University corporate travel and expense policies before submitting your expense report
- If expenses are funded from more than one unit, you must create separate expense items for each unit number
- You can duplicate expense items to quickly enter reoccurring purchases within an expense report

**Procedure:** Complete the following steps to create an Expense Report:

1. Click on the Expenses tile under APPS.
Example #1 Page- If this is the first time creating an expense report, the page will look as shown below:

2. On the right hand side of the page under Create, select Create Expense Report.

Example #2- If returning to the system after having created your first expense report, the page will appear as shown below:

3. Click on the Actions drop down menu and select Create Expense Report.

create an expense item. A new expense item must be created for each item type of your expense report (e.g. hotel, plane ticket).

Note: Each meal must be its own line item.
4. Enter information in each field.

**Note:** All fields marked by an asterisk, *, are required.

**Note:** The text box for Expense Location is called a smart search. Start to type the name of the city (the search is case-sensitive) and wait for the results to appear. Then, scroll and select from the drop down.

Or to search for the location, click the drop down arrow on the Expense Location and click on **Search** at the bottom.
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**Note:** Page appearance will vary based on type of expense you are entering.

5. Type in the location and click **Search**. When the result appears under **Expense Location**, select it then click **OK**.

6. Click on the plus sign next to **Attachments** to attach the receipt to the item when required.
7. The **Attachments** page will open. Click on **Choose File**.

8. Select the receipt saved on your computer to be attached for this expense.
9. The Title will automatically populate. Add to the Description field a short description of your receipt then Click OK.

10. To save this expense item, select Save and Close, or Save and Create Another to add another item to the expense report.
Note: The Submit button will not activate until the corporate travel and expense policy box is checked. If you are not familiar with Shawnee State University corporate travel and expense policies, click the link to review before submitting your report.

11. Click the box next to the travel and expense policy agreement and the Submit button is now activated. Click Submit to submit the requisition into the standard approval workflow.

A confirmation warning will appear if receipts are required.

12. Click Yes.
A second confirmation message will appear indicating it was submitted for approval.

13. Click **OK**.

The report is submitted and the status will display as **Pending manager approval**.

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**Final Notes**

By following these steps, you have successfully created and/or submitted an expense report.