Financial System – Entering Expense Report

1. Logon to Empac – Finance Production Login

![Empac Login Screen]

2. Click on Main Menu/Employee Self Service/Travel & Expense Center. Choose Expense Report/Create

![Travel & Expense Center]

3. If you are creating this for yourself, your Empl ID will prepopulate. If you are an authorized creator for another person, you must enter their Empl ID, then click Add.

![Expense Report]

**Note:** If you would like to be authorized to enter on behalf of another employee, please e-mail travel@uml.edu with the employee’s Empl ID included in the request. Please remember to copy the other Employee on your request.
4. Complete the Expense report using the following instructions.

5. **Description** – Enter a description of the trip/expense being reimbursed, using the following format: Start Date – End Date/City, State and/or Country.
   - Domestic Example – 7/1-7/5/2015 Chicago IL
   - Foreign Example – 7/1-7/5/2015 Paris France
   - Business Expense – Supplies Mobile Robotics Project

   ** All overnight, out of state and foreign travel MUST be accompanied by an approved Travel Authorization.

6. **Business Purpose** – choose from drop down list of values.

7. **Comment** - this is used for additional information that is not captured elsewhere in the form but is pertinent to the reimbursement. Copy and paste header from Description adding details as needed.
   - Example – 7/1-7/5/2015 Chicago IL – AEP Conference

8. **Expense Type** – select from the drop down. Once this is entered the remaining fields will be available.
9. Enter the appropriate Expense Date and Amount spent. Currency will default to USD. Payment Type – select from Drop down. If Pro-Card is selected, Billing type will default, if not select value from Billing Type from Drop down.

10. To add rows for additional expenses, click the + at end of row and continue until all entries are completed.

11. Totals will update once you have completed the entries. Anything paid via Pro-Card will populate as Prepaid, the rest will total with Employee Expenses.

12. If Mileage is entered, use the Mileage tab to enter miles travelled. Totals will then be updated on the Overview tab.
13. **Click on Detail Tab** to enter Descriptions of line items.

14. **Click on Accounting Defaults Link** to enter Speed Type. This can be supplied by your Business Manager if you do not know it. Enter the Speedtype here, when you tab out the remaining values will populate. Then click **OK**.

15. Check for **Errors** to validate entries. If an error is found, a red flag will mark the row. Clicking on the **flag** will give you details about the error and the option to update information.
16. Repeat this for each entry that requires the additional information or adjustment.

17. To attach receipts and other needed documentation, you must first click **Save For Later** to activate the Attachments Link.
18. Click on the Attachments Link to upload receipts and other documentation. Click on Add Attachment. Add a row for each document.

19. Expense Report

20. Expense Report Entry

Norma Clark

Report ID: 0000248525
Once completed, click on [Submit] and it will be processed for approvals.
24. Once submitted, click on Notify to email your supervisor they have a Travel Expense report available for review.

25. Click on Look Up Recipient
26. Enter the Name and click Search. Click on name, and Add to Recipient list. Click on OK when all entries are completed.

27. 

Send Notification

Lookup Address
28. Review information, add appropriate text to **Message** and click OK when completed.

**Send Notification**

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.

Click **Lookup Recipient** to search for a name. Click **Delivery Options** to view or change the method of the send.

**Notification Details**

- **To**: Conley Jr, Richard M /LRCONLEY
- **CC**: Durkin, Michael Edward /LMDURKIN
- **BCC**: 
- **Priority**: 
- **Subject**: <Enter Subject here>

**Template**

- **Workflow Notification**
  - **Priority**: %NotificationPriority
  - **Date Sent**: 2015-08-15

**Message**

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page.