

# WCAS Expense Report Navigation

Log in to <https://nuportal.northwestern.edu>

Navigation: NUPortal > Financial > Payments tab > Expense Reports > Create a new Expense Report

The screenshot displays the NUPortal interface. At the top, a navigation bar includes links for Business Intelligence, CACEAR, Collaboration, Canvas/Blackboard, Directory, Email, Events, FASIS, Library, NetID, News, Time Entry, and WildCARD. Below this is the 'NORTHWESTERN UNIVERSITY NUPortal' header with a search bar and a 'Welcome, User' message. A secondary navigation bar contains tabs for Financial, Accounting, Budgeting, Purchasing, and Payments (highlighted with a red circle and the number 3). On the left, a sidebar menu lists various university services, with 'Financial' highlighted (circled in red with the number 2). The main content area is divided into several sections: 'Expense Reports' (containing a link 'Create a new Expense Report' circled in red with the number 4), 'Online Vouchers', and 'Vendor Add/Maintenance'. On the right side, there are sections for 'Approval Inbox' and 'Payments Related Links'.

**Alternate Navigation: NUFinancials > Employee Self-Service > Travel and Expense Center > Expense Report > Create**

# WCAS Expense Report Quick Reference

The screenshot shows the WCAS Expense Report form with the following elements highlighted by numbered callouts:

- 1**: \*Description: Enter an Overall Description
- 2**: Accounting Defaults
- 3**: \*Expense Type: Domestic Meal – Group
- 4**: People icon (to enter attendees)
- 5**: Add button
- 6**: Detail tab
- 7**: Air/Hotel tab
- 8**: Mileage tab
- 9, 12**: Save for Later button
- 10**: Printable View link
- 11**: Attachments (0) link

**Totals Section:**

Employee Expenses:	0.00 USD	Due Employee:	0.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Budget Checking Status: **Not Checked**

- 1a. Enter an overall **Description** of your expense.
- 1b. Select a **Business Purpose** from the dropdown menu.
2. Click **Accounting Defaults** and enter the chartstring(s) this reimbursement will be charged to.
3. Select an **Expense Type** from the drop down menu. Enter the **Expense Date** and **Amount Spent** from receipt.
4. Click the people icon and enter all Group Meal attendees (if applicable).
5. To add more expense lines, click the drop down menu and select **New Expense** or **Multiple Expenses**, then click **Add**.
6. Click the **Detail** tab and enter a **Description** for each line (vendor name, location, missing receipt, etc.)
7. Click the **Air/Hotel** tab and enter the **Number of Nights** stayed for each hotel line (if applicable).
8. Click the **Mileage** tab to enter Private Auto Mileage and enter the number of **Miles** driven (if applicable). Attach proof of mileage documentation (Google Map, MapQuest, Yahoo Maps, etc.).
9. Click **Save for Later**. Click **Check Budget**, and then click **OK**.
10. Upon a Valid Budget Check, Click the **Printable View** link to print out a copy for signatures. Obtain the signatures of the employee and their supervisor.
11. Scan and attach the signed Expense Report, taped-down receipts, and other supporting documentation (90-day memo and policy exception form, if applicable) in **Attachments** (under the Comment field).
12. Click **Save for Later**.
13. **Submit your taped and ordered receipts to the Business Office**