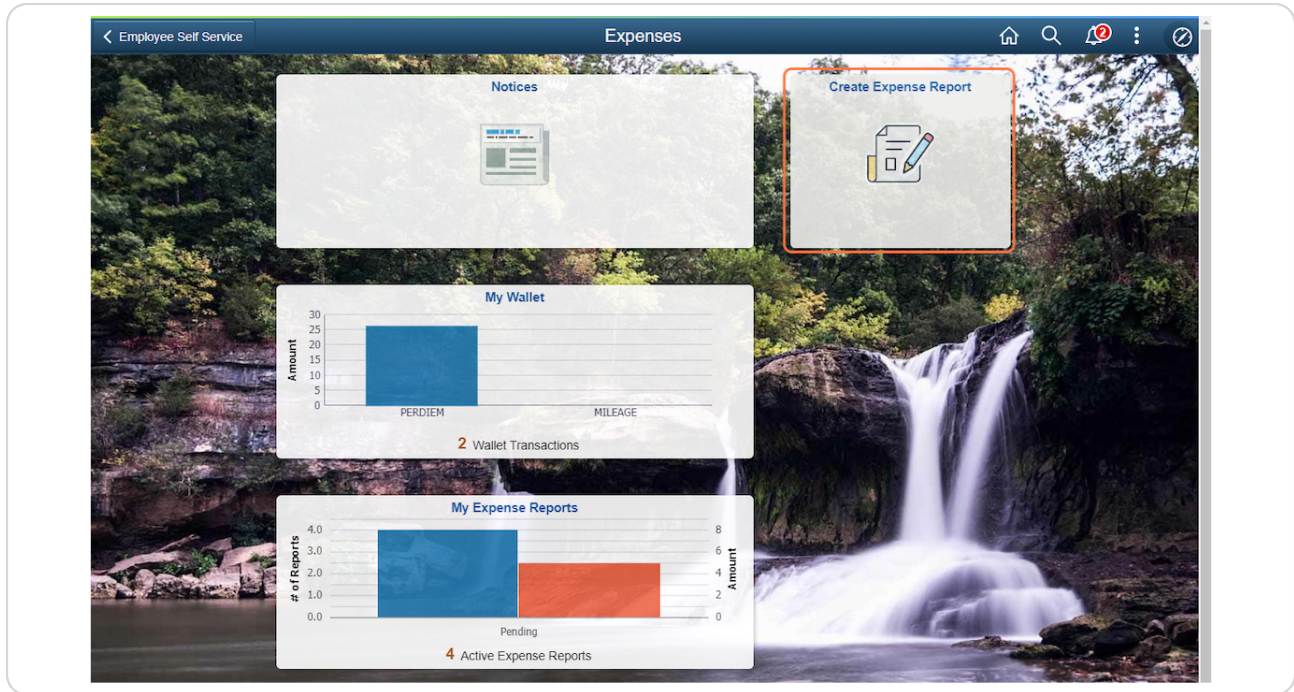


ER - Create from scratch and complete the General Information (Header)

STEP 1

Navigate to Expenses and click Create Expense Report.

From the Expenses page, click Create Expense Report.



STEP 2

Select the Business Purpose.

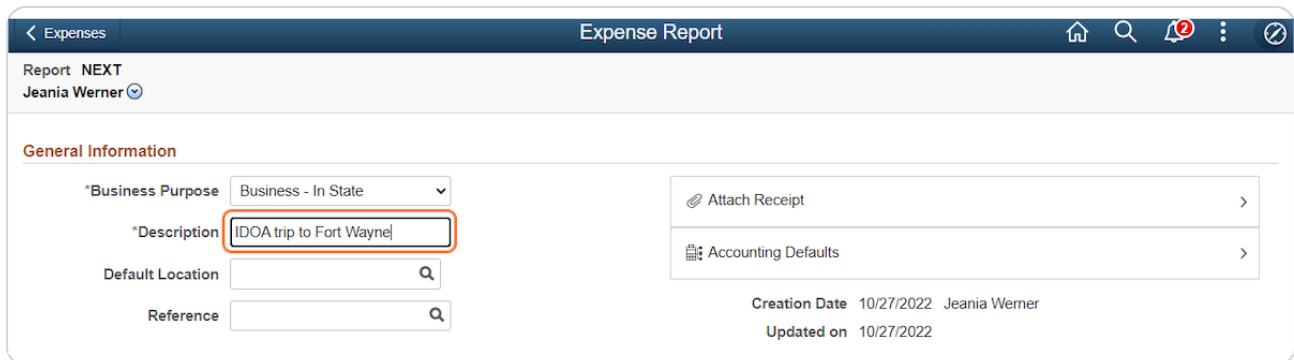
A new Expense Report will appear. Click the Business Purpose drop-down to select the correct option: Business - DTA Out of State, Business - In State or Business - Out of State.

The screenshot shows the 'Expense Report' form in the system. The navigation bar at the top includes a back arrow, 'Expenses', and 'Expense Report'. Below the navigation bar, the user's name 'Jeania Werner' and a 'NEXT' button are visible. The form is titled 'General Information' and contains several fields: 'Business Purpose' (a dropdown menu with 'Business - In State' selected and highlighted by a red box), '*Description' (a text input field), 'Default Location' (a search input field), and 'Reference' (a search input field). To the right of these fields are two buttons: 'Attach Receipt' and 'Accounting Defaults', both with right-pointing arrows. At the bottom right of the form, the 'Creation Date' is '10/27/2022' and the 'Updated on' date is '10/27/2022', both attributed to 'Jeania Werner'.

STEP 3

Enter the Description.

In the Description field, enter your Agency Acronym and a brief description of the purpose of travel.

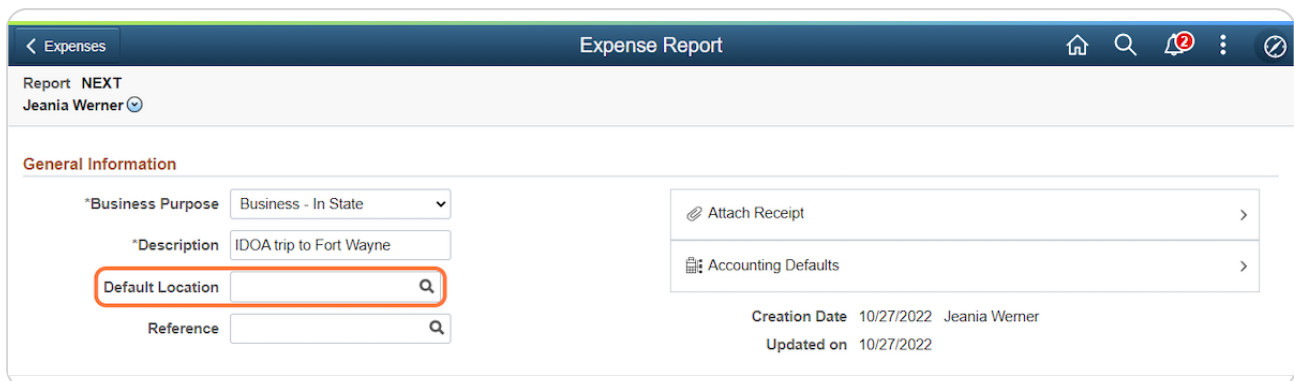


The screenshot shows the 'Expense Report' form in a mobile application. The header includes a back arrow, 'Expenses', 'Expense Report', and navigation icons. Below the header, it says 'Report NEXT' and 'Jeania Werner'. The 'General Information' section contains several fields: '*Business Purpose' (Business - In State), '*Description' (IDOA trip to Fort Wayne), 'Default Location', and 'Reference'. To the right, there are buttons for 'Attach Receipt' and 'Accounting Defaults'. At the bottom right, it shows 'Creation Date 10/27/2022' and 'Updated on 10/27/2022'. The '*Description' field is highlighted with a red box.

STEP 4

Look up the Default Location.

In the Default Location field, enter the city you traveled to (or leave it blank) and click Lookup.

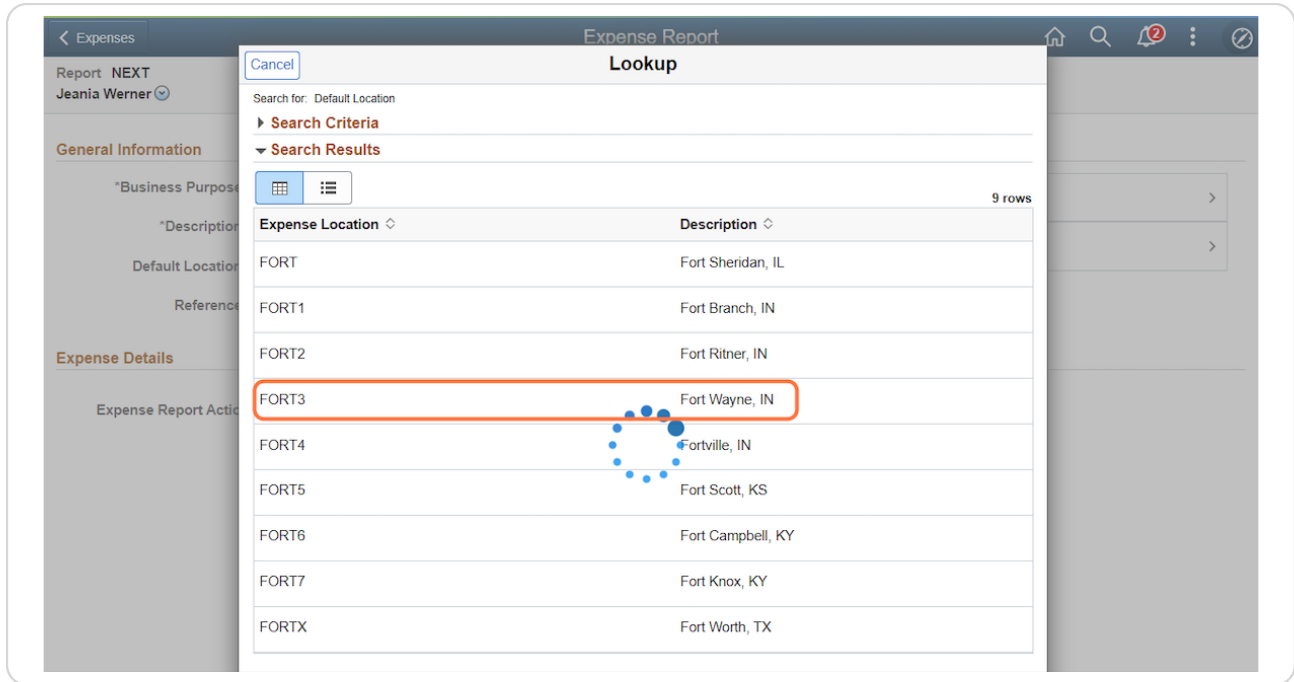


The screenshot shows the 'Expense Report' form in a mobile application, similar to the previous one. The '*Description' field now contains 'IDOA trip to Fort Wayne'. The 'Default Location' field is highlighted with a red box. The rest of the form, including the 'Attach Receipt' and 'Accounting Defaults' buttons and the creation/updated dates, remains the same.

STEP 5

Select the Default Location.

When you've located the city you need, click anywhere on the desired Expense Location row.



STEP 6

The General Information (Header) is complete.

The Reference field isn't used; don't enter anything.

You'll need to upload attachments for an ER on the expense lines so you won't be attaching them through the Attach Receipt button here.

You can click the Accounting Defaults icon to access the Expense Report Defaults page.

