

**Local Travel includes mileage driven within the North Texas area required to perform regular duties or responsibilities by employees. Local Travel DOES NOT require a registration payment or overnight stay.**

1. In the search bar type – **Create Expense Report**.
2. Click on the Create Expense Report Task.
3. Complete the following: - Expense Report Information:
  - **Creation Options** -- Select Create New Expense Report.
  - **Memo** – Add Local Travel Reimbursement with appropriate month and year

Memo	Local Mileage Reimbursement May 2023
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- **Company** -- Collin College auto-populates.
- **Expense Report Date** -- Current date auto-populates.
- **Business Purpose** -- From drop down menu choose Local Travel.
- **Cost Center** – Assigned Cost Center auto-populates – verify if correct.
- **Additional Worktags** — Will auto-populate based on your Cost Center.  
**DO NOT CHANGE.**

▼ Expense Report Information

Expense Report For \* Employee: Kathy Bouchez

Creation Options \*  Create New Expense Report  
 Copy Previous Expense Report

Memo Local Mileage Reimbursement May 2023

Company \* Collin College

Expense Report Date \* 05/08/2023

Business Purpose Local Travel

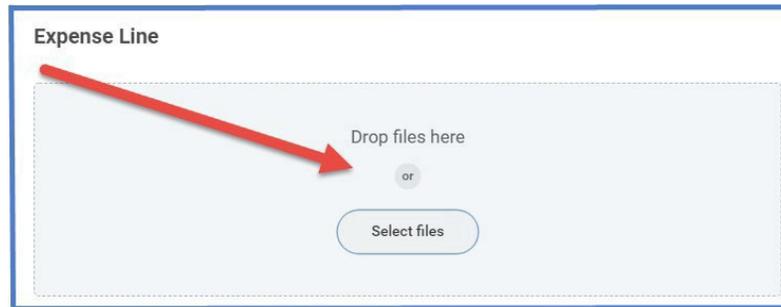
Cost Center \* CC1259 Finance & Budgeting

Grant

Project

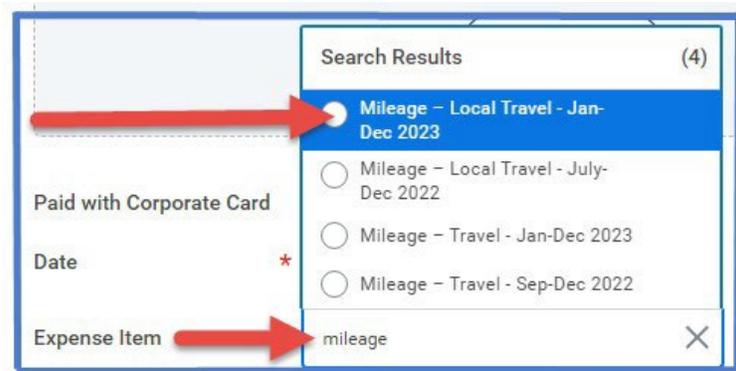
Additional Worktags \* Campus: CA14 Districtwide  
 Division: DV40 Administrative Services  
 Fund: FD100 Unrestricted  
 Program: PG350 Institutional Support

4. Click OK – bottom left hand corner.
5. Click Add
6. Attach **completed** Local Travel Form -- Under Expense Line is a gray box that states Drop files here or select files. ([Local Travel form](#))



7. Scroll down and complete the following:

- Uncheck the Paid with Corporate Card box.
- **Date** -- Current date auto-populates.
- **Expense Item** -- Type in Mileage and choose Mileage – Local Travel – Appropriate year.



- **Quantity** – Enter total number of miles for the month being reimbursed. Amount of miles entered should match total number of miles on the local travel form.
- **Total Amount** – Auto-populates
- **Memo** -- Add any pertinent information.
- **Cost Center and Additional Worktags** – Auto-populates from Header. Verify Cost Center is correct. DO NOT CHANGE the additional worktags.

**NOTE** -- A separate expense line will need to be added for tolls or lunches if requesting reimbursement.

- Clicking on the expense line allows the report to update. Review the information at the top of the report for reimbursement accuracy.



- If amount is correct then submit report.

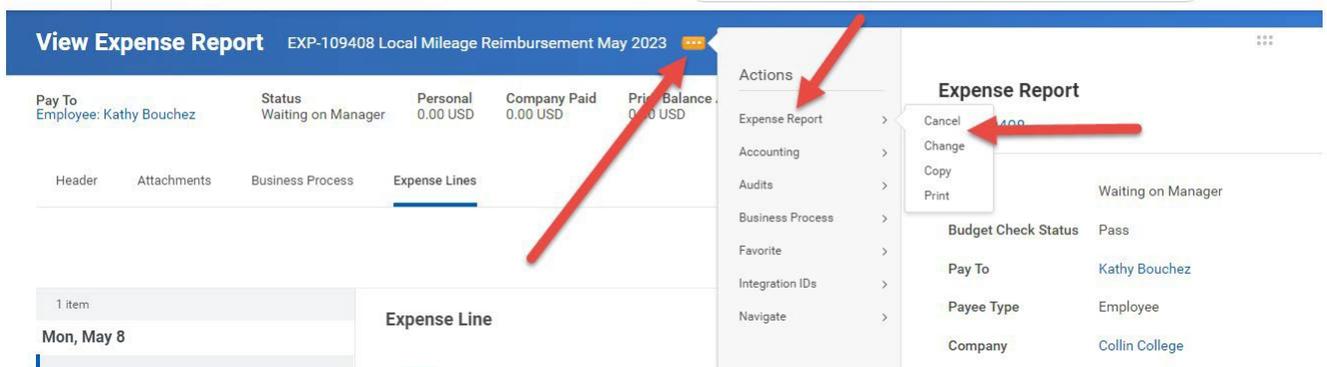
**Note** -- A notification box pops up showing the Expense Report has been submitted. Report will go through budget check and then on to approver.

The Expense Report number, (Example – EXP-100029), can be found on the blue bar located at the top of the screen.

To determine the **status of the Expense Report**, enter the EXP number into the search bar and open up the report. Click on the Process History. This shows who needs to approve, who has approved, and any notes the approver wrote regarding the report.

To **Change or Cancel an Expense Report:**

- Open up report.
- Click on the action items (box with three dots). This brings up a menu.
- Hover over the words Expense Report. This brings up another menu.
- Click on the word change or cancel depending on what needs to be done.



- If making changes to the report – make changes then click the orange submit button. Report will go back through approvals.
- If canceling the report – make sure to hit the orange OK button or the report will not be canceled.