

TRAVEL APPLICATION

Non-Travel Expense

HELPFUL HINTS

A non-travel expense does not require pre-approval. A non-travel expense reimbursement must be submitted by the employee within the University expense management application no later than sixty (60) calendar days after the expense was incurred.



Supported browsers:

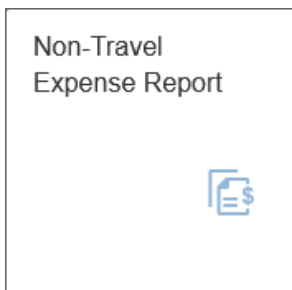
- PC: Chrome and Edge
- Macintosh: Chrome and Safari

PROCEDURE

Within Firefly, click on the *Travel and Expense Reporting* tile.



The travel page appears. Click *Non-Travel Expense Report*.



SUBMIT A NON-TRAVEL EXPENSE REPORT CREATED BY A DELEGATE

Updated March 16, 2023

Locate the non-travel expense report and click on it.

Non-Travel Expense

Employee ID: [Redacted] Delegate Name: SHANNON POPPE Campus: UNCA

Open Submitted Approved Sent for Payment

Search [] Create Cancel Copy

Report ID	Business Purpose	Report Date	Status
6900010631	Books/Videos/etc	02/28/2023	Open
6900010587	Membership/Fees	02/14/2023	Submitted
6900010598	Supplies (Lab/Office)	02/07/2023	Approved

The expense report opens. Click on an expense line to view details and the attachment/receipt.

Approval Log Approval Flow Print Save Submit for Approval Recall

Expense Date: 02/28/2023 To: 02/28/2023 Approver: Melody A Stark

*Business Purpose: Books/Videos/etc Amount: 25.00 USD

User Defined: Comment: []

Transaction Date	Expense Type	Business Purpose	Amount
02/28/2023	Awards Expenses 521700	Anniversary Award	25.00 USD

Each individual expense line contains detailed information and corresponding receipt. Click on the attachment line to review the receipt. Click **Save** to return to the main screen.

Expense Receipt Cost Distribution Attachments Save Cancel

*Expense Type: Awards Expenses 521700 *Transaction Date: 02/28/2023

*Business Reason: Anniversary Award *Description: For Julie's anniversary

*Vendor Name: Office Max *Amount: 25.00 USD

Comment: []

Cost Distribution

Distribution	Cost Object Type	Cost Object	Description
100	Cost Center	9145100200	NEBIS TRAVEL/TRAIN

Attachments

Document Class	Title	Date created	File Size (MB)
application/pdf	Award#2348734.pdf	03/09/2023	0.08 Mb

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Travel Quick Reference Guide

Updated March 16, 2023

If the expense report is complete, several options are available.

The screenshot shows the expense report interface. At the top, there is a navigation bar with buttons: Approval Log, Approval Flow, Print, Save, Submit for Approval, and Recall. Red circles with numbers 1 through 5 are placed over these buttons. Below the navigation bar, the form contains fields for Expense Date (02/28/2023), To (02/28/2023), Business Purpose (Books/Videos/etc), User Defined, Approver (Melody A Stark), Amount (25.00), and Currency (USD). A Comment field is also present. At the bottom, there is a table with columns: Transaction Date, Expense Type, Business Purpose, and Amount. The table contains one row: 02/28/2023, Awards Expenses 521700, Anniversary Award, 25.00 USD.

1. **Approval log:** will display any approval is acted on for this expense report (once submitted).
2. **Approval flow:** displays the approval steps and personnel to act on this expense report including supervisor, financial approver, and Payment Services audit.
3. **Print:** preview and print the report.
4. **Save:** save the report and return to it later.
5. **Submit to Approver:** submit the report to start the approval process.

Click **Submit for Approval**. A confirmation box appears. Click *ok*.

The screenshot shows a confirmation message box with a green header and a green border. The message text is: "Expense report 6900010631 was saved and sent for approval". There is an "Ok" button at the bottom right.

Once the expense has been submitted, the *save* and *submit for approval* buttons are no longer active.

The screenshot shows the top navigation bar with buttons: Approval Log, Approval Flow, Print, Save, Submit for Approval, and Recall. The 'Submit for Approval' button is disabled (greyed out).

RECALL A REPORT

To recall a report, click **Recall**. This can occur at any time before the report has been processed by Payment Services audit and sent for payment. An employee or a delegate can recall the report.