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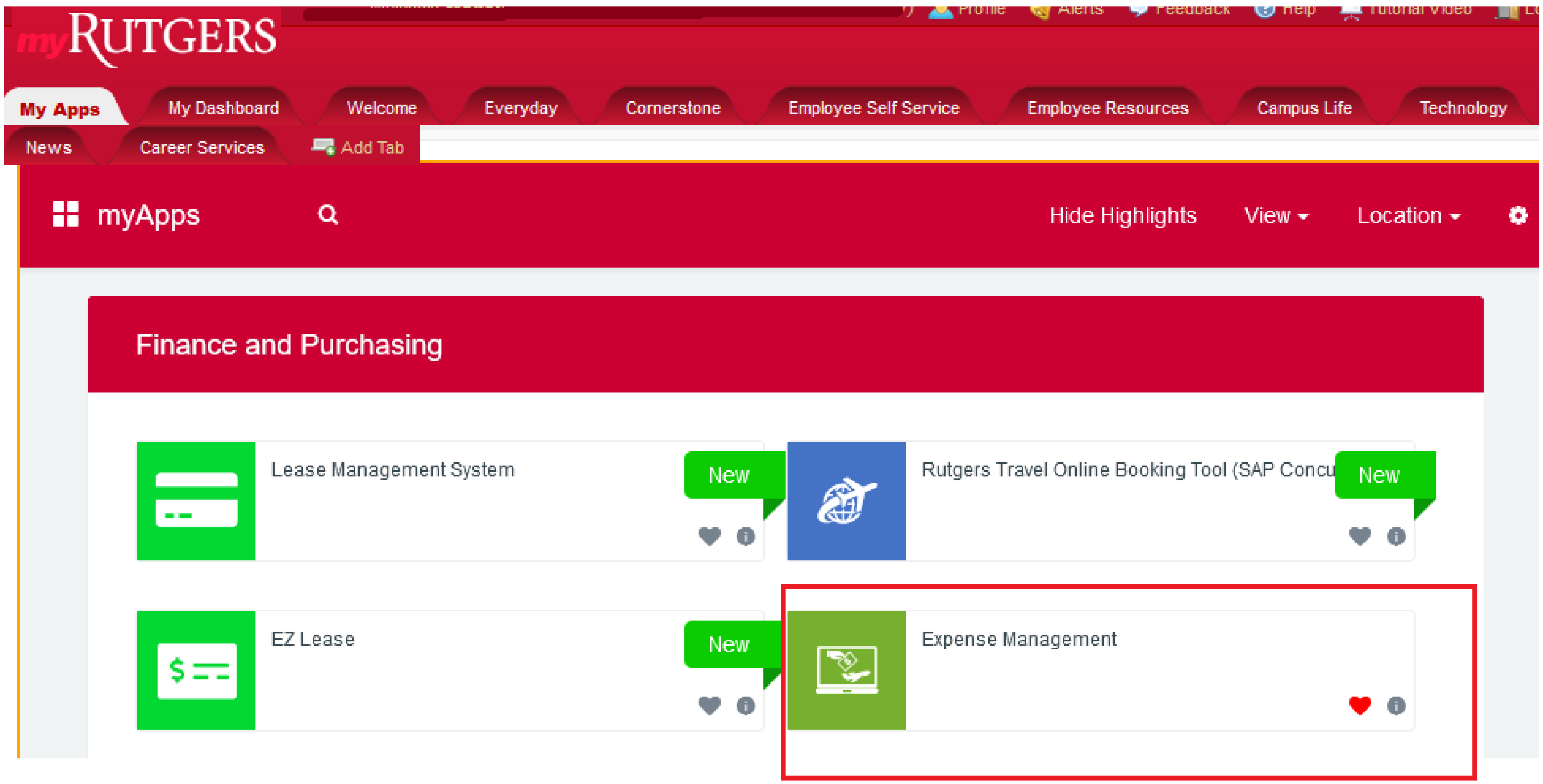
Navigating to the Expense Management System

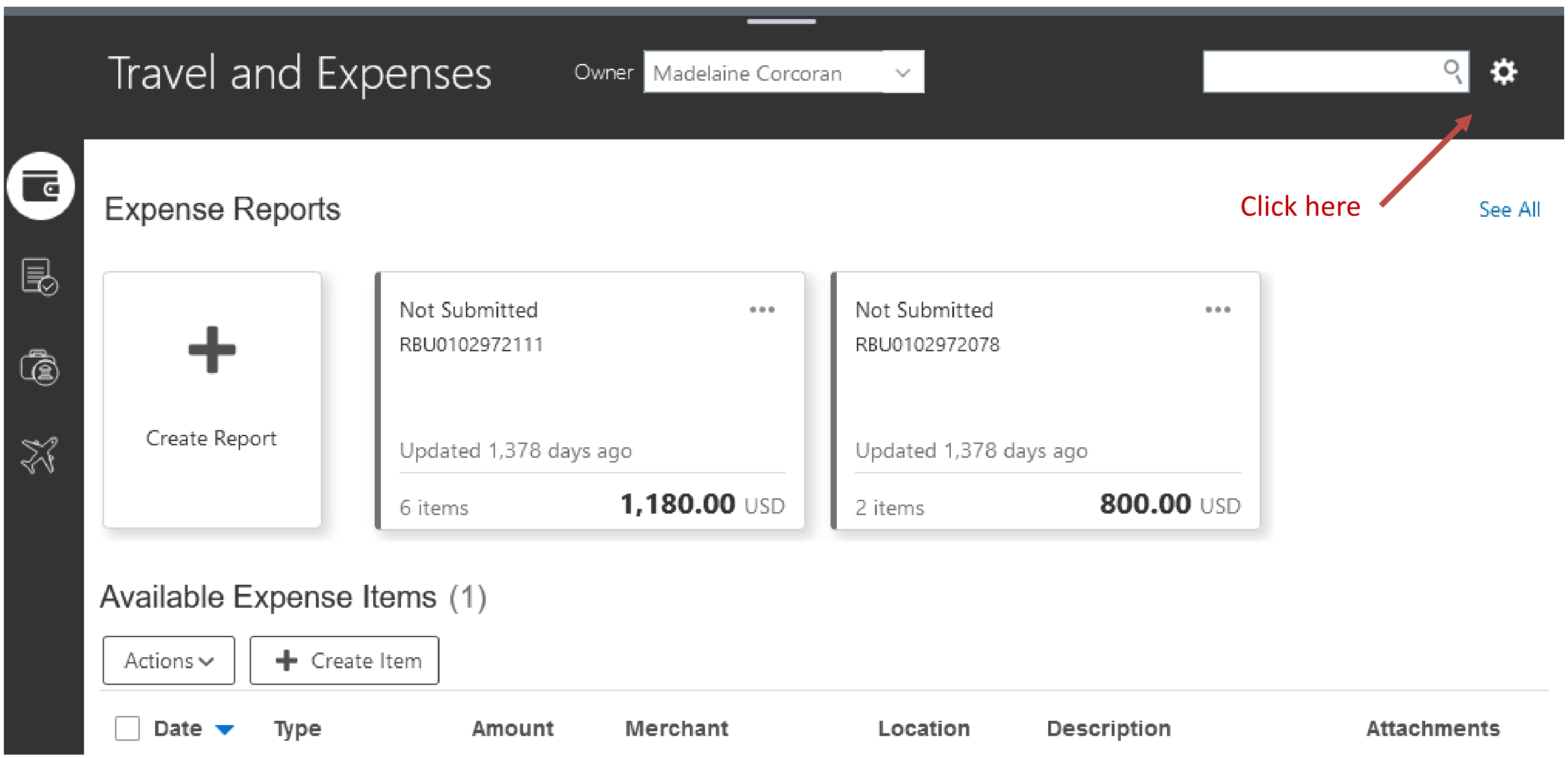
The Expense Management system can be accessed through Rutgers portal at my.rutgers.edu. Look for the Expense Management icon under the My Apps tab and Finance and Purchasing.



Using the Expense Management System

The Expense Management System is your starting point for all activities related to expense reports and cash advances. All expense reimbursements and cash advances will be paid to the employee via direct deposit.

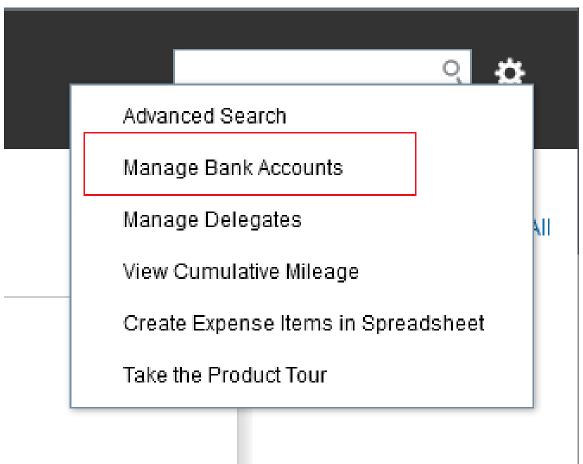
- For first time users, click on the Settings icon to set up Banking information and Manage Delegates.

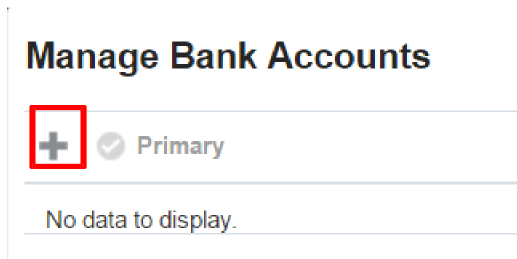


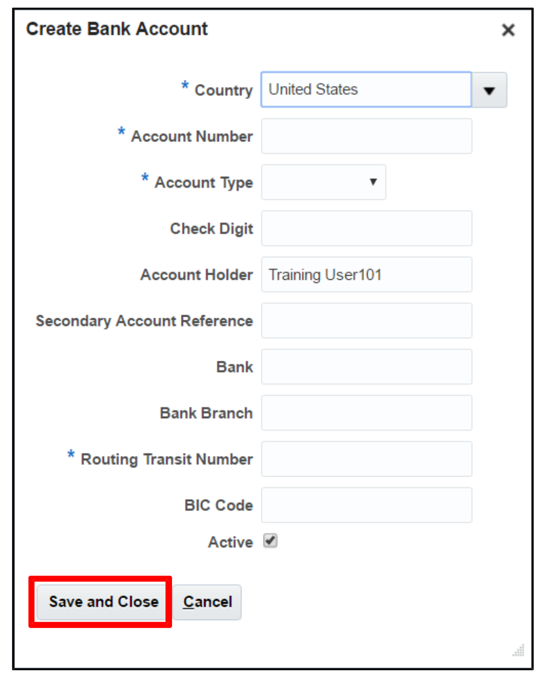
Bank Account Setup

To enter bank account information:

- Click the “Manage Bank Accounts” link from the Settings menu
- Click the **+** button to enter a new bank account
- Enter the required fields * along with Bank and Branch then click the **Save and Close** button







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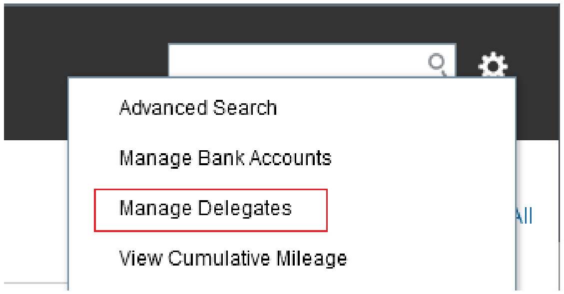
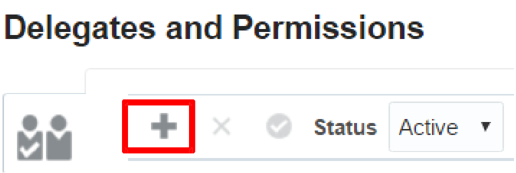
Adding Delegates

It is required to assign a delegate to submit the expense reports on your behalf. The delegate will review and enter the correct accounting string to charge the expenses to. Please contact our Business Services at business_admin@ejb.rutgers.edu to provide you with names of the appropriate delegates. To add a delegate:

- Click the “Manage Delegates” link from the Settings menu



- Click the **+** button to enter a new delegate

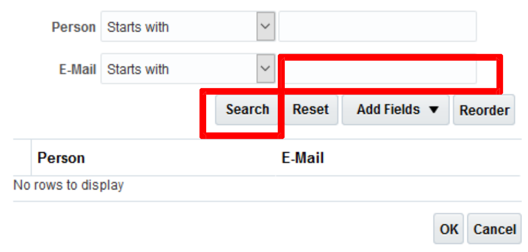


- Click on the magnifying glass

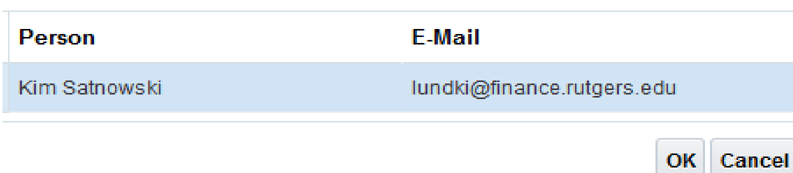
Adding Delegates (continued)

- From Search and Select: Person, choose Advanced

- Type in the beginning of the delegate's email then click Search



- Highlight the name of the delegate then click OK

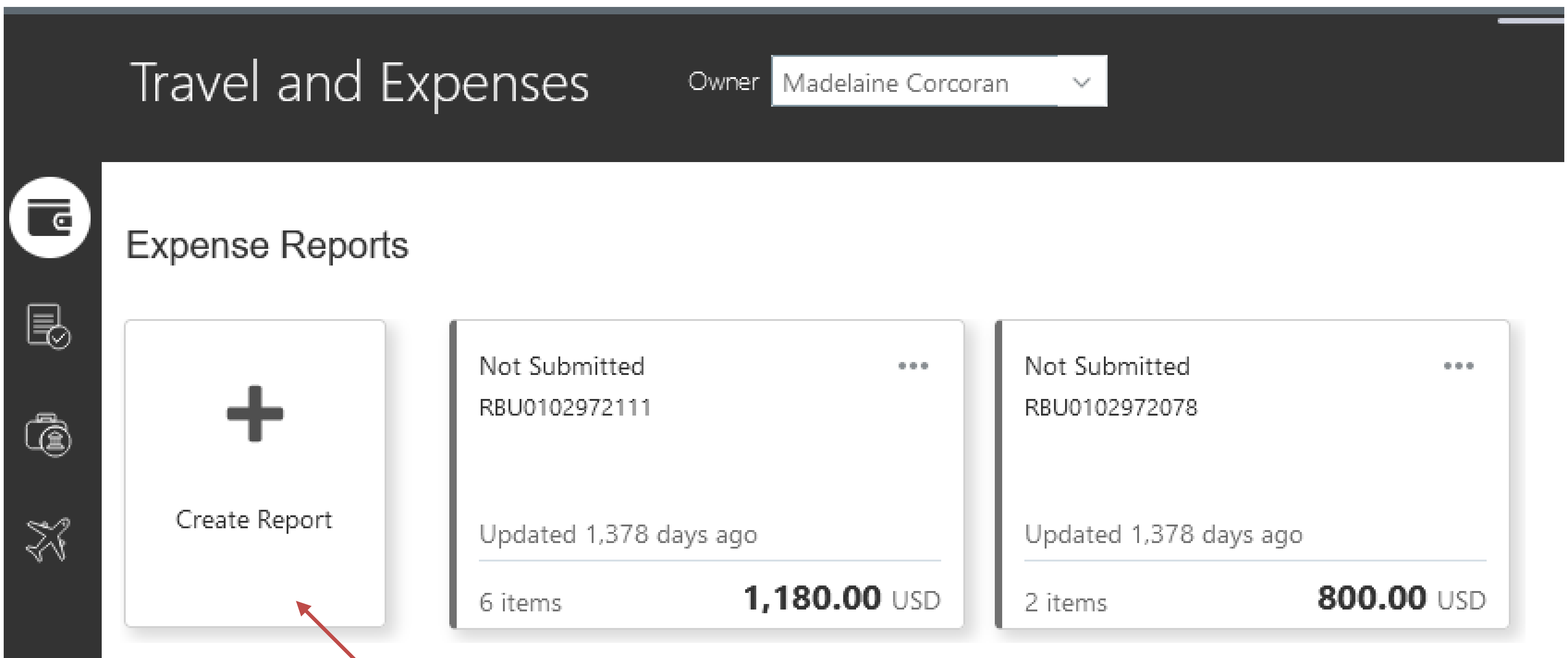


- Final step, click Save and Close.

Enter Expense Reports

After entering your bank information and delegates, you are ready to begin entering expenses.

Click on the Create Report tile.



Click here

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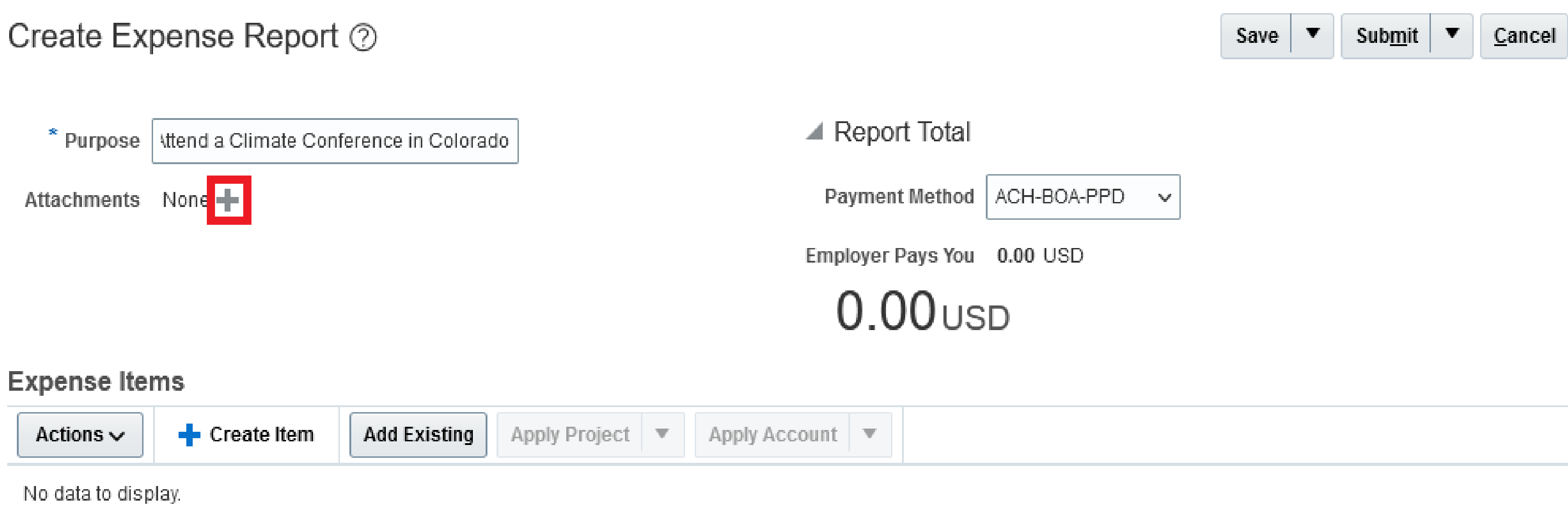
Enter Expense Reports (continued)

- Type the purpose of your business expense in the Purpose field.
- Click + below to attach all supporting documents: completed travel and business expense (TABER) spreadsheet, receipts, conference agenda or itinerary. Or you may send the documents to business_admin@ejb.rutgers.edu and your business delegate will do it for you.
- Click the Save button when done. Send an email to business_admin@ejb.rutgers.edu to let the business staff know your expense report is ready for review and submission. Do NOT click on the Submit button.



Request Cash Advances

You may request cash advances for work-related expenses that you are going to incur while traveling using the Expense Management System. **Delegates cannot request a cash advance on behalf of someone else**. Cash Advances of more than $100 per day for meals and incidentals require a justification letter to be submitted along with the Cash Advance request. To request a cash advance:

- Click on the suitcase icon on the left side of the screen.
- Click on Request Cash Advance button.
- Enter the required fields and click the **Submit** button to submit the Cash Advance for approval