



WaveWorks!

Expenses User Guide

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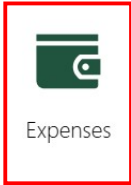

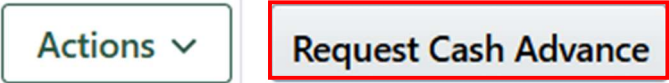
Cash Advances

A cash advance is an advance payment to an employee that covers incidental expenses while traveling or for business related activities. Cash advances may also be requested for grant-related participant payments (not allowed by every unit). Requests should be made 3-4 weeks prior to the date needed to allow time for approvals and funding. Advances should be cleared within 90 days.

Students who need to request a travel cash advance will do so through a separate process outside of WaveWorks.

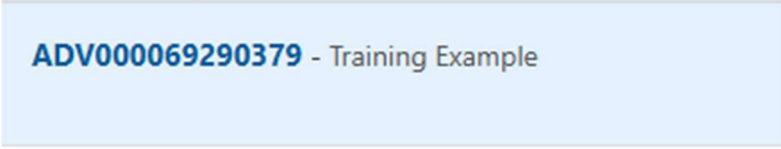
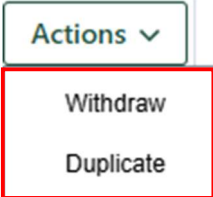
Cash Advances are cleared by completing an expense report to reconcile the activity from the cash advance.

Create a Cash Advance



Once signed into WaveWorks click on the Me tab.	
Find and click on the Expenses Tile.	
Click on the Cash Advance icon.	 <p>The suitcase is the bottom icon and represents cash advances</p>
Click on Request Cash Advance	
Enter the Advance Amount.	<p>* Advance Amount <input data-bbox="807 1640 1135 1709" type="text"/> USD - US Dollar</p>

<p>Enter the Purpose.</p>	<p>* Purpose <input type="text"/></p> <p>**This is why you are requesting the advance Please indicate which Project this will be reconciled to Please indicate the Study Number (if applicable)</p>
<p>Choose the Advance Type from the dropdown.</p>	<p>Advance Type <input type="text" value="Travel"/></p> <p>Travel- travel request Gift Card- request involving gift card purchases Grants- request to be reconciled with a grant Non-Grants- request to be reconciled with a non-grant project Other- other requests</p>
<p>Enter a Trip Start Date.</p>	<p>Trip Start Date <input type="text" value="mm/dd/yyyy"/> </p> <p>This is only required for travel advances</p>
<p>Enter a Trip End Date.</p>	<p>Trip End Date <input type="text" value="mm/dd/yyyy"/> </p> <p>This is only required for travel advances</p>
<p>Add Required Documentation by clicking the Plus Sign.</p>	<p>Attachment None <input type="button" value="+"/></p> <p>Attachments could include spending approval or grant documentation justifying the request</p>
<p>Save or Submit the request.</p>	<p><input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/></p> <p>If your request is not ready to submit, save it for later Only by clicking the submit button will the request be sent for approval and funding The advance will be funded to the account in an employee's HR record The advance will be reconciled after the activity is complete and within 90 days</p>

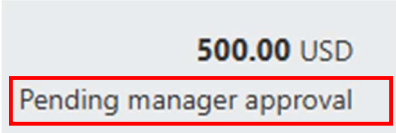
Manage a Cash Advance

<p>From the Cash Advance Page, click on the advance to manage.</p>	
<p>Click on the Actions drop down to withdraw or duplicate the request.</p>	

View the Details of a Cash Advance



<p>From the Cash Advance Page, click on the advance view.</p>																	
<p>View Details</p>	<p>Cash Advance: ADV000069290379</p> <table border="0" data-bbox="813 1119 1076 1392"> <tr> <td>Advance Number</td> <td>ADV000069290379</td> </tr> <tr> <td>Status</td> <td>Pending manager approval</td> </tr> <tr> <td>Purpose</td> <td>Training Example</td> </tr> <tr> <td>Advance Type</td> <td>Travel</td> </tr> <tr> <td>Advance Amount</td> <td>500.00 USD</td> </tr> <tr> <td>Trip Start Date</td> <td>04/11/2026</td> </tr> <tr> <td>Trip End Date</td> <td>04/17/2026</td> </tr> <tr> <td>Attachment</td> <td>None</td> </tr> </table>	Advance Number	ADV000069290379	Status	Pending manager approval	Purpose	Training Example	Advance Type	Travel	Advance Amount	500.00 USD	Trip Start Date	04/11/2026	Trip End Date	04/17/2026	Attachment	None
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Trip End Date	04/17/2026																
Attachment	None																
<p>Click Done to close.</p>																	

View the Workflow for a Cash Advance

<p>From the Cash Advance Home Screen.</p>	 <p>Look to the right of the cash advance line under the amount</p>
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<p>From the Cash Advance Details Screen.</p>	<p style="text-align: center;">Cash Advance: ADV000069290379</p> <p style="text-align: center;"> Advance Number ADV000069290379 Status Pending manager approval Purpose Training Example Advance Type Travel Advance Amount 500.00 USD Trip Start Date 04/11/2026 Trip End Date 04/17/2026 Attachment None </p> <p style="text-align: center;">The status line will show the current workflow step</p>
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Return Unused Cash Advances

<p>Sign into WaveWorks.</p> <p>Click on the Me tab.</p>	<p style="text-align: center;">Me</p>
<p>Find and click on the Expenses Tile.</p>	<p style="text-align: center;"> Expenses</p>
<p>Click the Create Item button under Expense Items.</p>	<p style="text-align: center;">Available Expense Items</p> <p style="text-align: center;"> Actions ▾ + Create Item </p>
<p>Enter the Expense Date.</p>	<p style="text-align: center;">* Date <input type="text" value="mm/dd/yyyy"/> </p> <p style="text-align: center;">You can manually enter or use the calendar</p>
<p>Select the Tulane Employee Expense Template.</p>	<p style="text-align: center;">* Template <input type="text" value="Tulane Employee Expense Template"/></p>
<p>Select Return Unused Cash Advance as the Type.</p>	<p style="text-align: center;">* Type Return Unused Cash Advance ▾</p> <p style="text-align: center;">Selecting this will load all required fields for this expense type</p>

Enter Unused Portion of the Advance.	<p>* Amount <input type="text" value="USD"/> <input type="text"/></p>
Enter the Description of the Expense.	<p>* Description <input type="text"/></p> <p>Give as much detail as possible for approvers</p>
Enter Return Unused Cash Advance as the Merchant.	<p>* Merchant Name <input type="text" value="Return Unused Cash Advance"/></p>
Itemize the Expense Item.	<p>* Itemization <input type="button" value="+"/> <input type="button" value="v"/> <input type="button" value="☰"/></p> <p>* Type</p> <p><input type="text" value="Return Unused Cash"/></p>
Click on the Blue Box next to the Account line.	<p>Account <input type="text" value="139210.100.12156.670.00000.0000.GI"/> <input type="button" value="🔍"/></p>
Enter 00000000 into the Alias Box.	<p>Alias <input type="text" value="00000000-BALANCE SHEET"/> <input type="button" value="v"/></p> <p>There are 8 0's in this number</p>
Enter 000000 in the Cost Center Box.	<p>Cost Center <input type="text" value="000000"/> <input type="button" value="v"/> FIN Balance Sheet</p> <p>There are 6 0's in this number</p>
Enter 12156 in the Natural Account Box.	<p>Natural Account <input type="text" value="12156"/> <input type="button" value="v"/> Accounts Receivable - Cash/Travel Advance Return</p>
Click Ok.	<p><input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
DO NOT ENTER A PROJECT NUMBER.	<p>Project Number <input type="text"/> <input type="button" value="🔍"/></p> <p>DO NOT ENTER A PROJECT NUMBER.</p>

Save and Close or Add to a Report.	<div style="display: flex; justify-content: space-around; align-items: center;"> Add to Report ▼ Create Another Save and Close ▼ Cancel </div>
Apply the Cash Advance upon submitting the report.	<div style="border: 1px solid black; padding: 10px;"> <p>Apply Cash Advances</p> <p>Amount Reimbursable to You 20.00 USD</p> <p>Cash Advance Selected 0.00 USD</p> <hr/> <p><input type="checkbox"/> ADV000045163565 800.00 USD available Refund Due 3/20/2025</p> <hr/> <p><input type="checkbox"/> Don't apply a cash advance</p> <div style="text-align: right; margin-top: 10px;"> Apply and Submit Cancel </div> </div>

Expense Reports

Create and submit expense reports for T&E purchases and/or reimbursements for out-of-pocket expenses. P-card purchases will be available for reconciliation throughout the month and submittal after the 26th of each month.

This is for faculty and staff only. Students should speak to their funding department about reimbursement.

Note: **Corporate Card** (T&E) transactions will automatically import and be found under available expense items for placement onto a report.

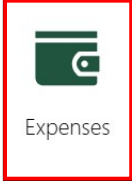



Purchasing Card (P-Card) transactions will automatically be placed into a monthly report for itemization, receipt attachment and submittal. **Reports should not be submitted before the 26th of each month nor should the report purpose be changed.**

Create an Expense Report

Create the Expense Report

Reports can be created for the month, per event or per trip.

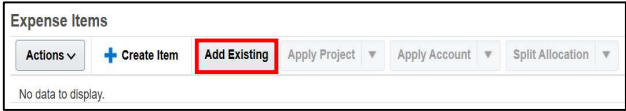
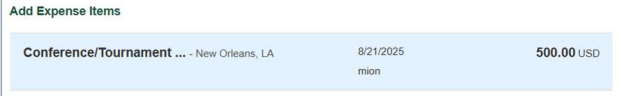
<p>Sign into WaveWorks.</p> <p>Click on the Me tab.</p>	<div style="border: 1px solid red; display: inline-block; padding: 5px 10px;">Me</div>
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<p>Find and click on the Expenses Tile.</p>	 <p>Expenses</p>										
<p>Click on Expenses.</p>	 <p>The wallet is the top icon and represents expenses</p>										
<p>Click on Create Report.</p>	 <p>Create Report</p>										
<p>Enter the Purpose.</p>	<p>* Purpose <input type="text"/></p> <p>This is the report title and must start with FYxx</p> <p>P-Card report purposes will automatically populate and should NOT be changed from the assigned format</p>										
<p>Attach Report Level Attachments.</p>	<p>Attachments None +</p> <p>This is NOT for receipts.</p> <p>Attach conference agendas, proof of attendance, travel itemization forms, 45- day late form, funds authorization, etc</p>										
<p>Enter the trip, event or month end date.</p>	<p>Trip/Event/Month End Date <input type="text" value="mm/dd/yyyy"/> </p> <p>Manually enter or use the calendar icon.</p> <p>This date that will start your 45-day window for submission</p>										
<p>Choose a Business Purpose from the drop down.</p>	<p>Business Purpose <input type="text"/></p> <table border="1" data-bbox="573 1581 1317 1780"> <tr> <td>Athletic Team Travel</td> <td>Athletic Team Travel</td> </tr> <tr> <td>Clinical</td> <td>Clinical</td> </tr> <tr> <td>Conference Travel - Academic</td> <td>Conference Travel - Academic</td> </tr> <tr> <td>Conference Travel - Administration</td> <td>Conference Travel - Administration</td> </tr> <tr> <td>Conference Travel - Research</td> <td>Conference Travel - Research</td> </tr> </table> <p>This is a required field.</p>	Athletic Team Travel	Athletic Team Travel	Clinical	Clinical	Conference Travel - Academic	Conference Travel - Academic	Conference Travel - Administration	Conference Travel - Administration	Conference Travel - Research	Conference Travel - Research
Athletic Team Travel	Athletic Team Travel										
Clinical	Clinical										
Conference Travel - Academic	Conference Travel - Academic										
Conference Travel - Administration	Conference Travel - Administration										
Conference Travel - Research	Conference Travel - Research										

Choose Yes, if travel has been booked outside of Concur or World Travel.	<p>* Does report have travel booked outside of Tulane Travel Program? NO ▾</p> <p>Choose Yes even if a conference hotel or airbnb was booked</p> <p>Choose Yes even if a pre-approved policy exception was obtained (attach to the report)</p>
Explain the possible policy violation.	<p>* Explain the reason for possible policy violation <input type="text"/></p>
Click Save.	<p>Save ▾ <input type="button" value="Submit"/> <input type="button" value="Cancel"/></p>


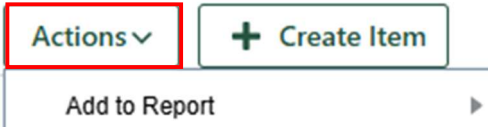
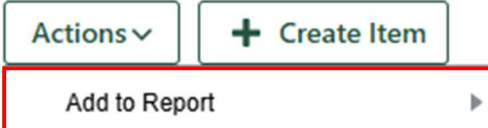
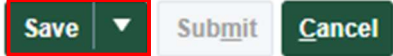
Add Existing Expenses from within the Report

Add T&E charges to the appropriate reports. P-Card charges will create their own report for itemization. The P-Card report should not be submitted until after the 26th of the month.

From the report, Click the Add Existing button under expense items.	
Choose the appropriate expense(s) from the popup box.	 <p>Click shift to choose more than one expense.</p>
Click Apply.	<p><input type="button" value="Apply"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
Click Ok.	<p><input type="button" value="Apply"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/></p> <p>Your items are now attached to your report.</p>
Click Save.	<p>Save ▾ <input type="button" value="Submit"/> <input type="button" value="Cancel"/></p>

Add Existing Expenses Outside of the Report

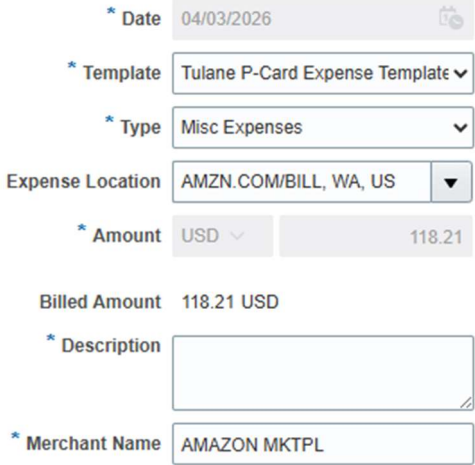


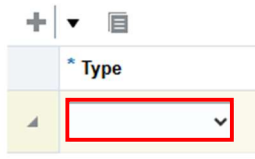
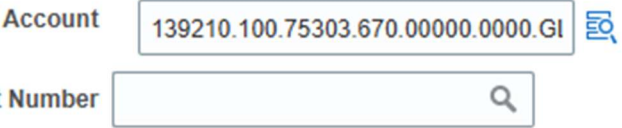
Add T&E charges to the appropriate reports. P-Card charges will create their own report for itemization.


<p>From the Expenses home page, click on the boxes of the expenses to add to a report.</p>	 <p><input type="checkbox"/> 03/28/2026 Conference/Tournament Re ▼ 1 itemization</p>
<p>Click Actions.</p>	 <p>Actions ▼ + Create Item Add to Report ▶</p>
<p>Click Add to Report.</p>	 <p>Actions ▼ + Create Item Add to Report ▶</p>
<p>Choose the Appropriate Report.</p>	<p>EXP000069290381 03/28/2026 FY26 Test</p>
<p>Click Save.</p>	 <p>Save ▼ Submit Cancel</p>

Reconciling Expenses



Every expense must be reconciled with the expenditure type, description, merchant, itemization, and receipt.

<p>Click on the expense date to reconcile.</p>	 <p><input type="checkbox"/> 03/28/2026 Conference/Tournament Re ▼ 1 itemization</p>
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<p>Verify that all imported fields are correct.</p>	 <p>Expenditure Type is the new term for natural account The date cannot be updated</p>
<p>Update the Type.</p>	 <p>**TIP** The default will be Misc Update before making other edits</p>
<p>Enter the item Description.</p>	 <p>Description is a required field and should have detail for the specific expense item</p>
<p>Itemize the expense. Click on the drop down to choose type.</p>	 <p>Itemize is the new term for allocation Only one option will be found in the drop down based on the expenditure type chosen above</p>
<p>Complete the accounting fields.</p>	 <p>See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>


<p>Enter the amount being charged to the project.</p>	<div style="text-align: center;"> <p>* Amount (USD)</p> <div style="border: 1px solid red; padding: 2px; display: inline-block;">0.00+</div> </div> <p>Each project being charged must have it's own line- see splitting itemizations for more information</p>
<p>Add the receipt for this item.</p>	<p>Attachments</p> <div style="border: 1px dashed gray; padding: 10px; text-align: center;">  <p>Drag files here or click to add attachment ▾</p> </div> <p>Receipts are required for all transactions except travel agent fees, international transaction fees, and taxis under \$75 (Uber and Lyft require receipts)</p>
<p>Save the expense item.</p>	<div style="text-align: center;"> <div style="border: 1px solid red; padding: 2px; display: inline-block; background-color: #2e7d32; color: white;">Save and Close ▾</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;">Save</div> </div> <p>Save and close the item or use the arrow to just save</p>

Itemize Expenses using a GL Project

<p>Use the Account field to charge to a project beginning with a GL prefix.</p>	<div style="text-align: center;"> <div style="border: 1px solid red; padding: 2px; display: inline-block;"> <p>Account 139210.100.75303.670.00000.0000.GI </p> </div> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;"> <p>Project Number </p> </div> <p>Only use the account field for accounts that begin with the GL prefix</p> <p>If using the account field, do not use the project number field- to split an allocation 2 or more accounting lines are required</p> </div>
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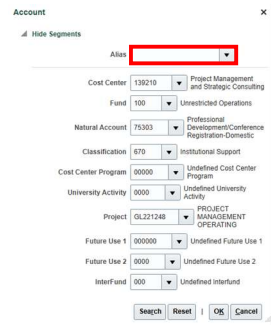
Hover over the blue icon next to the account field to see employee expense default.

Segment	Value	Description
Cost Center	139210	Project Management and Strategic Consulting
Fund	100	Unrestricted Operations
Natural Account	75301	Travel-Domestic
Classification	670	Institutional Support
Cost Center Program	00000	Undefined Cost Center Program
University Activity	0000	Undefined University Activity
Project	GL221248	PROJECT MANAGEMENT OPERATING
Future Use 1	000000	Undefined Future Use 1
Future Use 2	0000	Undefined Future Use 2
InterFund	000	Undefined Interfund

Account 139210.100.75301.670.00000.0000.GI 

If the expense default is the correct project, add the amount, attach the receipt and save

To change the GL Project, click on the blue icon.

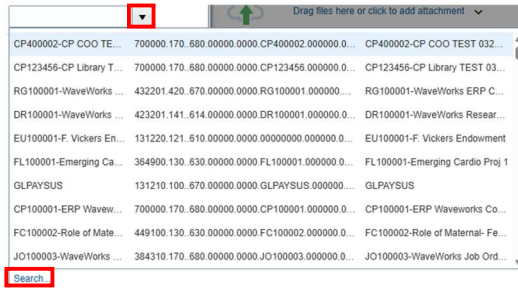


If the GL project is known, enter in the alias box.

****TIP**** Use the format GLxxxxxx% and hit the enter key

To use a deposit or clearing account, search for the GL000000 account for your Cost Center (example GL000000-Student Depos)

To search for an Alias, click the drop-down arrow on the alias field.



Account	Value	Description
CP400002-CP COO TE...	700000.170.680.00000.0000	CP400002.000000.0...
CP123456-CP Library T...	700000.170.680.00000.0000	CP123456.000000.0...
RG100001-WaveWorks ...	432201.420.670.00000.0000	RG100001.000000...
DR100001-WaveWorks ...	423201.141.614.00000.0000	DR100001.000000...
EU100001-F. Vickers En...	131220.121.610.00000.0000	EU100001-F. Vickers Endowment
FL100001-Emerging Ca...	364900.130.630.00000.0000	FL100001.000000.0...
GLPAYSUS	131210.100.670.00000.0000	GLPAYSUS.000000...
CP100001-ERP Wavew...	700000.170.680.00000.0000	CP100001.000000.0...
FC100002-Role of Mate...	449100.130.630.00000.0000	FC100002-Role of Maternal- Fe...
JO100003-WaveWorks ...	384310.170.680.00000.0000	JO100003.000000.0...

Click the blue search button.

Search in the Alias field.

Click Search.

Search

Basic

Alias

Search

Reset

****TIP**** Enter capital GL and the known numbers with a % at the end to search

If searching with a partial set of numbers use a % at the beginning and end of the search

This will search for non GL projects but do not use this field for any project prefix

Re-enter the natural account.

****TIP**** The natural account can be found on the original string- move the Alias box over to see it. It is the 3rd set of

numbers **Account** 139210.100 **75303**.670.00000.0000.GI

****TIP**** Erase any spaces before entering the correct natural account

Click Ok.

DO NOT update the Cost Center, Fund, Classification, Future or Interfund Fields.

Add the amount, receipt and save

Itemize Expenses using a Non-Sponsored or Sponsored Project

If an employee is charging a Non-Sponsored or Sponsored Project outside of their cost center, the report will still route to their Cost Center Manager for approval.

The employee should add information to the description field of the expense to indicate this so their Cost Center Manager can just approve and move the report to the appropriate task manager for approval.

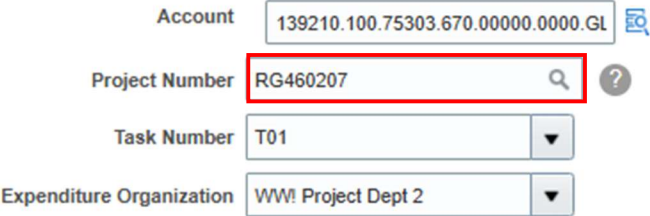

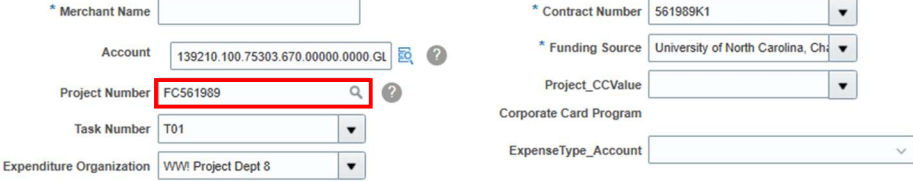
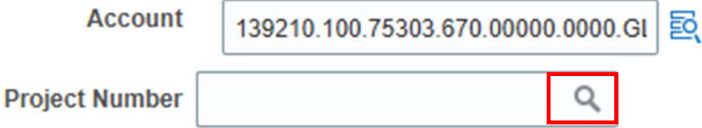
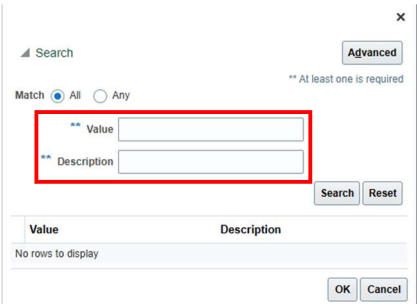
Use the Project number field to charge to a project.

Account

This field is for accounts with prefixes **not** GL

Do not use the Account field if the expense item is being charged to a project with a prefix other than GL

****TIP** DO NOT** erase the account field when using the project number field

<p>Enter the project number in the Project Number field.</p> <p>Non-Sponsored Project</p>	 <p>The task number will populate for a Non-Sponsored Project if you press the enter key or click on the white space of the screen</p> <p>Do not remove or change the account line</p>
<p>Enter the Expenditure Organization.</p>	 <p>There should only be one choice in the drop down</p>
<p>Enter the project number in the Project Number field.</p> <p>Sponsored Project</p>	 <p>The task number, Expenditure Organization, Award Number and Funding Source will populate for a Sponsored Project if you press the enter key or click on the white space of the screen</p> <p>Do not remove or change the account line</p>
<p>Search for a Project with the magnifying glass.</p>	
<p>Enter the Value or Description.</p> <p>Click Search.</p>	 <p>Value is the prefix and numbers of the project Description is the name of the project</p> <p>**TIP** Click Advanced and search with contains</p>

<p>Highlight the project.</p> <p>Click OK.</p>	<table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>RG460207</td> <td>RG Restricted Gift Non Sponsored Pr...</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p>	Value	Description	RG460207	RG Restricted Gift Non Sponsored Pr...
Value	Description				
RG460207	RG Restricted Gift Non Sponsored Pr...				

How to add a Cost Center Program with a GL Project

<p>Click on the account field.</p>	<p>Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/> </p> <p>Project Number <input type="text"/></p> <p>This is only for projects with a GL prefix</p>																																												
<p>Enter the Cost Center Program.</p>	<p>Cost Center Program <input type="text" value="00000"/> Undefined Cost Center Program</p> <p>DO NOT update the Cost Center, Fund, Classification, Future or Interfund Fields.</p>																																												
<p>Search by using the Down Arrow and the Search button.</p>	<table border="1"> <tr> <td>Cost Center Program</td> <td>00000</td> <td></td> <td>Undefined Cost Center Program</td> </tr> <tr> <td>University Activity</td> <td>00000</td> <td></td> <td>Undefined Cost Center Program</td> </tr> <tr> <td>Project</td> <td>60040</td> <td></td> <td>Reily Recreation Facility Study</td> </tr> <tr> <td>Future Use 1</td> <td>00000</td> <td></td> <td>Undefined Cost Center Program</td> </tr> <tr> <td>Future Use 2</td> <td>00161</td> <td></td> <td>TUMG . Tidewater . Behavioral Health ...</td> </tr> <tr> <td>InterFund</td> <td>00402</td> <td></td> <td>Design Bidding/Negotiations</td> </tr> <tr> <td></td> <td>00492</td> <td></td> <td>TUMG . Mid-City . Epic Specialty Psyc...</td> </tr> <tr> <td></td> <td>00669</td> <td></td> <td>TUMG . Northshore . Dermatology & ...</td> </tr> <tr> <td>Project</td> <td>00830</td> <td></td> <td>TUMG . Murphy . Behavioral Health Cl...</td> </tr> <tr> <td>Corporate Car</td> <td>00832</td> <td></td> <td>TUMG . Ruth Fertel . Total Health Clinic</td> </tr> <tr> <td></td> <td></td> <td><input type="text" value="Search..."/></td> <td></td> </tr> </table>	Cost Center Program	00000		Undefined Cost Center Program	University Activity	00000		Undefined Cost Center Program	Project	60040		Reily Recreation Facility Study	Future Use 1	00000		Undefined Cost Center Program	Future Use 2	00161		TUMG . Tidewater . Behavioral Health ...	InterFund	00402		Design Bidding/Negotiations		00492		TUMG . Mid-City . Epic Specialty Psyc...		00669		TUMG . Northshore . Dermatology & ...	Project	00830		TUMG . Murphy . Behavioral Health Cl...	Corporate Car	00832		TUMG . Ruth Fertel . Total Health Clinic			<input type="text" value="Search..."/>	
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		<input type="text" value="Search..."/>																																											


How to add a Cost Center Program with a Non-Sponsored or Sponsored Project

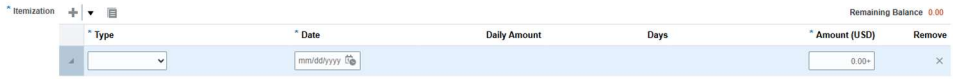
<p>Add the Project in the Project Number field.</p> <p>Click the Task Number Dropdown.</p>	<p>Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/> </p> <p>Project Number <input type="text" value="RG460207"/> </p> <p>Task Number <input type="text" value="T01"/> </p> <p>Expenditure Organization <input type="text" value="WW! Project Dept 2"/> </p> <p>**TIP** If a Cost Center Program was not previously used on a project, it will not be an option</p> <p>**TIP** To request access to a Cost Center Program, complete the Service Now request</p>
--	---

Chose the correct Cost Center Program.	Task Number	<input type="text"/>	ExpenseType_Account
	re Organization	<input type="text"/>	
		81010	Bernick Faculty Grants
		T01	Default Task
		<input type="text" value="Search..."/>	

Create Out of Pocket/Cash Expenses







Out of Pocket/Cash Expenses are those not paid by T&E or P-Card. As a reminder, if an employee has a T&E card they should be using that card for the appropriate purchases.

Click the Create Item button under Expense Items.	<input type="button" value="+ Create Item"/>
Enter the Expense Date.	* Date <input type="text" value="mm/dd/yyyy"/>  You can manually enter or use the calendar
Select the Template.	* Template <input type="text"/> This should always be the Expense Template for out-of-pocket expenses
Select the Type.	* Type <input type="text"/> This is the natural account Selecting this will load all required fields for this expense type
Enter the Amount of the Expense.	* Amount <input type="text" value="USD"/> <input type="text"/>
Enter the Description of the Expense.	* Description <input type="text"/> Give as much detail as possible for approvers

Enter the Merchant Name.	<p style="text-align: center;">* Merchant Name <input style="border: 2px solid red;" type="text"/></p> <p style="text-align: center;">Save your expense to save this information in the itemization</p>
Complete the Itemization.	 <p style="text-align: center;">See Reconciling Expenses for more information Attach the receipt and save</p>


Spilt an Itemization between 2 or more Projects




Each project being charged must have its own line for the charges to be accounted correctly.

Enter the first project's information.	<p style="text-align: center;">Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/> </p> <p style="text-align: center;">Project Number <input type="text"/>  </p> <p style="text-align: center;">See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>						
Click the Plus Sign.	<p style="text-align: center;">* Itemization <input data-bbox="1008 1010 1057 1062" style="border: 2px solid red;" type="button" value="+"/></p>						
Enter the next project's information.	<p style="text-align: center;">Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/> </p> <p style="text-align: center;">Project Number <input type="text"/>  </p> <p style="text-align: center;">See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>						
Add the amount to charge each project.	<p style="text-align: right;">Remaining Balance <input style="border: 2px solid red;" type="text" value="0.00"/></p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>* Amount (USD)</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="0.00+"/></td> <td><input type="button" value="x"/></td> </tr> <tr> <td><input type="text" value="0.00+"/></td> <td><input type="button" value="x"/></td> </tr> </tbody> </table> <p style="text-align: center;">The remaining balance must be \$0.00</p>	* Amount (USD)	Remove	<input type="text" value="0.00+"/>	<input type="button" value="x"/>	<input type="text" value="0.00+"/>	<input type="button" value="x"/>
* Amount (USD)	Remove						
<input type="text" value="0.00+"/>	<input type="button" value="x"/>						
<input type="text" value="0.00+"/>	<input type="button" value="x"/>						

Correcting Errors


Error notifications will appear in many places on the report and give the specific error to correct.

	 Missing required fields, Itemization out of balance
--	---

	Show Errors 
	
	

Submit a Report

Once all T&E expenses are added to a report, they are ready to be submitted. P-Card reports should not be submitted until after the 26th of the second month listed in the purpose (example 26May2026_25Jun2026 should not be submitted until June 26, 2026).


Click the policy box.	<input type="checkbox"/> I have read and accept the corporate travel and expense policies. You will be unable to submit until you attest to following Tulane policies. **TIP** If you need to read the policy, click on the blue hyperlink to be taken to the policy.
Click Submit.	 If you are not ready to submit, save for later.

Add Attendees to an Expense

Attendees are required for certain Types such as meals, entertainment, etc. If the chosen Type requires attendees those fields will appear on the itemization line.

Attendee lists may be added either to the report header (if the report is for one event) or to the expense item (if there are multiple expenses with attendees). Please indicate that the list is attached in the description box. One attendee is required on the expense item.

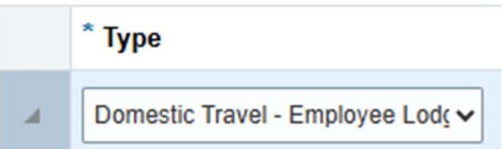
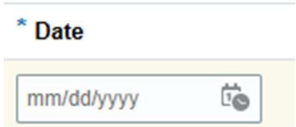
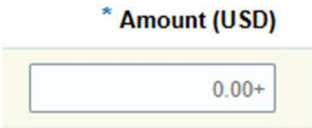


<p>Click Manage Attendees</p>	<p style="text-align: center;">Attendees 1 others Manage Attendees</p> <p>**TIP** This will only appear if a date is chosen in the itemization</p>			
<p>Click the plus sign to add Tulane Employee Attendees.</p>	<p style="text-align: center;">Employee Attendees</p> <p style="text-align: center;">+</p>			
<p>Click on the box next to the attendee's name.</p>	<p style="text-align: center;">Direct Reports Search</p> <hr/> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"><input style="border: 1px solid red;" type="checkbox"/></th> <th style="width: 35%; text-align: center;">Name</th> <th style="width: 35%; text-align: center;">Email</th> </tr> </thead> </table> <p>Direct reports will be listed or Tulane employees can be found under the search</p> <p>**TIP** Search is by first name. To search by last name filter to advanced and contains</p> <p style="text-align: center;"> Advanced ** Name Contains smith </p>	<input style="border: 1px solid red;" type="checkbox"/>	Name	Email
<input style="border: 1px solid red;" type="checkbox"/>	Name	Email		
<p>Click the star to add the attendee to favorites.</p>	<p style="text-align: center;">★</p>			
<p>Click the plus sign to create a Non-Tulane Attendee.</p>	<p style="text-align: center;">Nonemployee Attendees</p> <p style="text-align: center;">+ Find Attendees</p> <p>For previously created non-Tulane attendees, search under Find Attendees</p>			
<p>Add the attendee first and last name.</p> <p>Click OK.</p>	<div style="border: 1px solid gray; padding: 5px;"> <p style="margin: 0;">Create Nonemployee</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;">Last Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">First Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Registry ID</div> <div style="margin-bottom: 5px;">7005</div> <div style="margin-bottom: 5px;">Phone</div> <div style="margin-bottom: 5px;">Fax</div> <div style="margin-bottom: 5px;">Email</div> <div style="margin-bottom: 5px;">URL</div> </td> <td style="width: 50%; vertical-align: top;"> <div style="margin-bottom: 5px;">Customer</div> <div style="margin-bottom: 5px;">Country</div> <div style="margin-bottom: 5px;">United States</div> <div style="margin-bottom: 5px;">Address Line 1</div> <div style="margin-bottom: 5px;">Address Line 2</div> <div style="margin-bottom: 5px;">City</div> <div style="margin-bottom: 5px;">State</div> <div style="margin-bottom: 5px;">Postal Code</div> <div style="margin-bottom: 5px;">County</div> <div style="text-align: right; margin-top: 10px;"> OK Cancel </div> </td> </tr> </table> </div>	<div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;">Last Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">First Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Registry ID</div> <div style="margin-bottom: 5px;">7005</div> <div style="margin-bottom: 5px;">Phone</div> <div style="margin-bottom: 5px;">Fax</div> <div style="margin-bottom: 5px;">Email</div> <div style="margin-bottom: 5px;">URL</div>	<div style="margin-bottom: 5px;">Customer</div> <div style="margin-bottom: 5px;">Country</div> <div style="margin-bottom: 5px;">United States</div> <div style="margin-bottom: 5px;">Address Line 1</div> <div style="margin-bottom: 5px;">Address Line 2</div> <div style="margin-bottom: 5px;">City</div> <div style="margin-bottom: 5px;">State</div> <div style="margin-bottom: 5px;">Postal Code</div> <div style="margin-bottom: 5px;">County</div> <div style="text-align: right; margin-top: 10px;"> OK Cancel </div>	
<div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;">Last Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">First Name</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Registry ID</div> <div style="margin-bottom: 5px;">7005</div> <div style="margin-bottom: 5px;">Phone</div> <div style="margin-bottom: 5px;">Fax</div> <div style="margin-bottom: 5px;">Email</div> <div style="margin-bottom: 5px;">URL</div>	<div style="margin-bottom: 5px;">Customer</div> <div style="margin-bottom: 5px;">Country</div> <div style="margin-bottom: 5px;">United States</div> <div style="margin-bottom: 5px;">Address Line 1</div> <div style="margin-bottom: 5px;">Address Line 2</div> <div style="margin-bottom: 5px;">City</div> <div style="margin-bottom: 5px;">State</div> <div style="margin-bottom: 5px;">Postal Code</div> <div style="margin-bottom: 5px;">County</div> <div style="text-align: right; margin-top: 10px;"> OK Cancel </div>			

<p>Check the Divide Amount Equally box.</p> <p>Click OK.</p>	 <p>To manually divide the expense use the boxes for each attendee</p>
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Lodging Itemization

Lodging paid on a T&E card will have the charge automatically import to WaveWorks. Reimbursement of lodging should be done as an out-of-pocket expense.

Lodging no longer needs to be itemized by day and by category (i.e. taxes vs room rate).

<p>To itemize, choose the lodging option.</p>	
<p>Enter the date of the transaction.</p>	
<p>Enter the Amount to be charged.</p>	
<p>Enter the number of Days of the stay.</p>	
<p>The Daily Amount will calculate.</p>	

Choose Itemization Penny Adjustment if applicable.

* Type

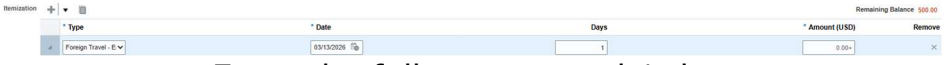
Itemization Penny Adjustment


This step may not be necessary
This item should have it's own line, allocation and amount

Per Diem

Per Diem is an employee only option and allows the employee to be reimbursed at a set rate depending on location. Complete the per diem or travel itemization form and attach this plus a screenshot from either GSA (domestic rates) or the State Department (international rates) as your receipt.

Students and Business guests requiring per diem should be reimbursed through the Candex punchout in procurement.

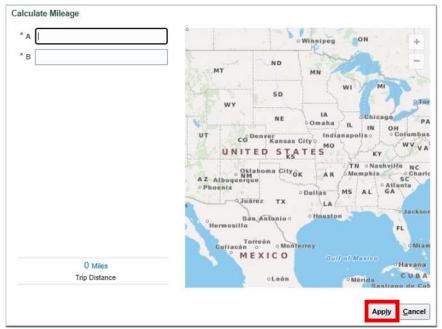
Select the Date.	<p>* Date 03/13/2026</p> <p>This should be the last date of the trip</p>
Select the Template.	<p>* Template Tulane Employee Expense Temp</p> <p>This should be the expense template</p>
Choose the Expenditure Type.	<p>* Type Domestic Travel - Employee Fixe ?</p> <p>The form, GSA, and State Department are linked in the question mark</p>
Enter the Amount.	<p>* Amount USD</p> <p>This is the total for the entire trip</p>
Enter the Description.	<p>* Description</p>
Enter the Merchant Name.	<p>* Merchant Name</p> <p>This can be entered as per diem</p>
Itemize the expense.	 <p>Enter the full amount and 1 day</p>




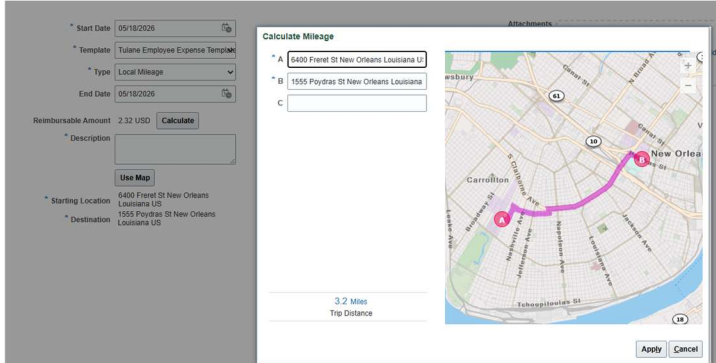
Add attachments.	<div style="text-align: center;">  <p>The travel form and screenshot of the GSA or State Department site is required</p> </div>
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Mileage

Mileage is only for employees. Business guests and students requiring mileage should be reimbursed through the Candex punchout in procurement.

Local mileage is anywhere in Louisiana and Mississippi. Mileage outside Louisiana and Mississippi requires a flight comparison and the lessor amount will be reimbursed. You do not need to attach a receipt if using the map function in WaveWorks.

Enter the Start Date.	<div style="text-align: center;"> <p>* Start Date <input type="text" value="03/13/2026"/></p> </div>
Select the Template.	<div style="text-align: center;"> <p>* Template <input type="text" value="Tulane Employee Expense Temp"/></p> <p>This should always be the Expense Template</p> </div>
Select the Type.	<div style="text-align: center;"> <p>* Type <input type="text" value="Local Mileage"/></p> <p>Can be Domestic Travel- Employee Mileage, Local Mileage, or Athletics Mileage (only for Athletics use)</p> </div>
Add a Description.	<div style="text-align: center;"> <p>* Description <input type="text"/></p> </div>
Click Use Map.	<div style="text-align: center;"> <p><input type="button" value="Use Map"/></p> <p>Do not manually add in a starting location and destination</p> </div>
Enter the addresses for the round trip. Click Apply.	<div style="text-align: center;">  <p>Each round trip should be its own expense item</p> </div>

The Distance will calculate.	<p>* Trip Distance <input type="text" value="0"/> Miles</p>
Calculate the reimbursed amount.	<p>Reimbursable Amount 0.00 USD Calculate</p>
Itemize the expense.	<p>Account <input type="text" value="139210.100.75301.670.60040.0000.GI"/> </p> <p>Project Number <input type="text"/>  </p> <p>See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>
Attach a screenshot of the map with the calculation as a receipt.	

Foreign Currency

For cash transactions/out-of-pocket expenses purchased in a currency other USD, please update the currency amount on that transaction. T&E charges will automatically convert in WaveWorks to USD.

* Amount

* Conversion Rate

* Amount

Reimbursable Amount 0.00 USD

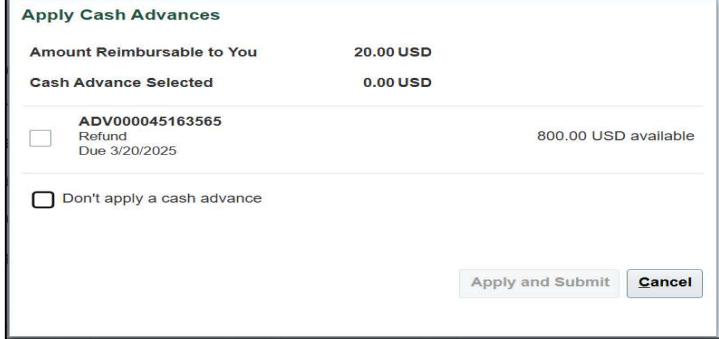
Charging a Project outside of the home Cost Center

If an employee is charging a Non-Sponsored or Sponsored Project outside of their cost center, the report will still route to their Cost Center Manager for approval.

The employee should add information to the description field of the expense to indicate this so their Cost Center Manager can just approve and move the report to the appropriate task manager for approval.

Apply a Cash Advance to a Report

If an approved cash advance is available, you will be prompted to attach it upon submitting a report.

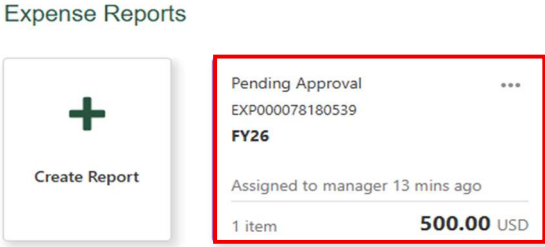
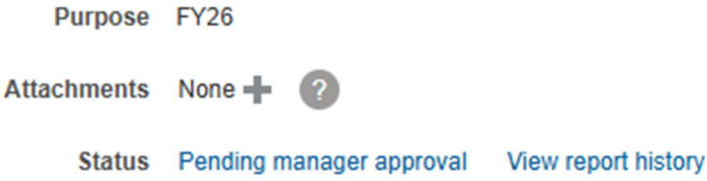
<p>Click the box next to the advance to attach or the don't apply box.</p> <p>Click apply and submit.</p>	
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Personal Expenses/Accidental charges

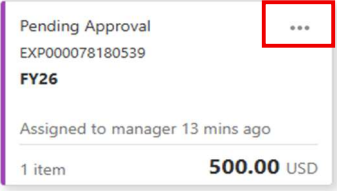
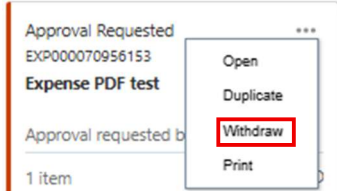

If an employee has mistakenly charged their T&E or P-card take the following steps to reimburse Tulane.

- a. The employee writes a check made to Tulane University.
- b. Deposit the funds into the appropriate project (typically an operational account).
- c. Allocate the expense to the same project.
- d. Attach the expense receipt and the completed deposit from the Bursar's office to the expense item.
- e. Submit the report.

Check a Report's Workflow

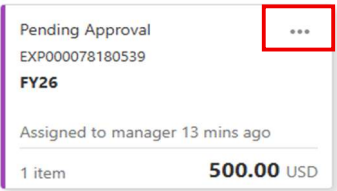
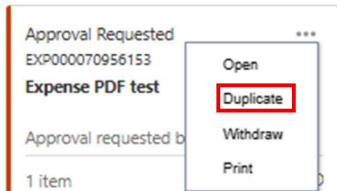

<p>Click on the Report.</p>	 <p>The current workflow step is shown here</p>
<p>Click on pending manager approval.</p>	 <p>The entire workflow is seen in this step The report history will show the entire report history</p>

Withdraw a Submitted Report

Click on the three dots.	
Click Withdraw.	
Click Yes.	

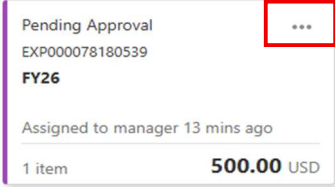
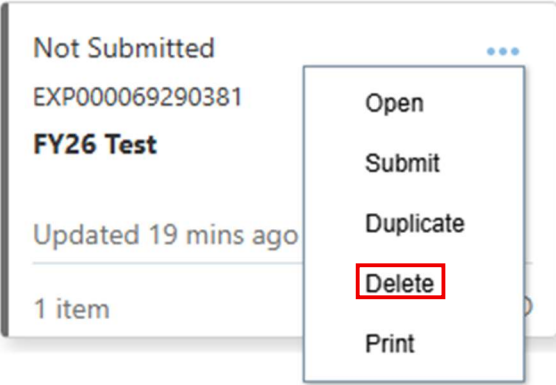

Duplicate a Report

Copying reports saves time in creating the same expense items frequently. Once a duplicate is created, editing, adding, or removal of items is allowed.

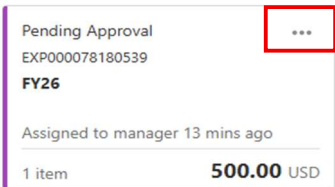
Click on the three dots.	
Click Duplicate.	
A copy will open. Make all necessary changes.	<p>* Purpose <input type="text" value="Copy of FY26"/></p> <p>Delete all duplicate charges</p>
Click Submit.	 <p>If you are not ready to submit, save for later.</p>

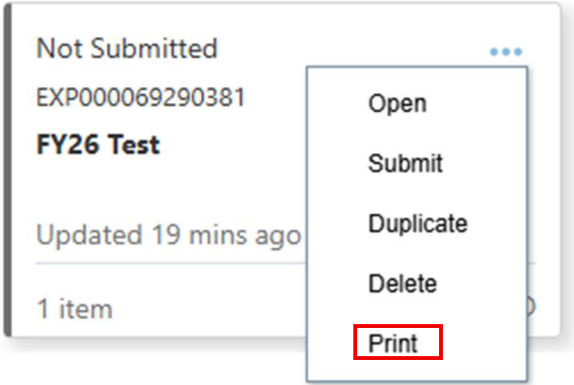
Delete a Report

Only reports that have not been submitted may be deleted. If a report has been submitted, it must be withdrawn first to be deleted.

Click on the three dots.	 <p>Pending Approval EXP000078180539 FY26 Assigned to manager 13 mins ago 1 item 500.00 USD</p>
Click Delete.	 <p>Not Submitted EXP000069290381 FY26 Test Updated 19 mins ago 1 item</p> <ul style="list-style-type: none">OpenSubmitDuplicateDeletePrint
Click Yes.	 <p>Warning If you delete this expense report, the expense items included in this report will be available for you to add to future reports. Do you want to continue? Yes No</p>

Print a Report


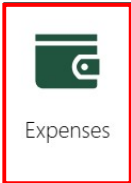

Click on the three dots.	 <p>Pending Approval EXP000078180539 FY26 Assigned to manager 13 mins ago 1 item 500.00 USD</p>
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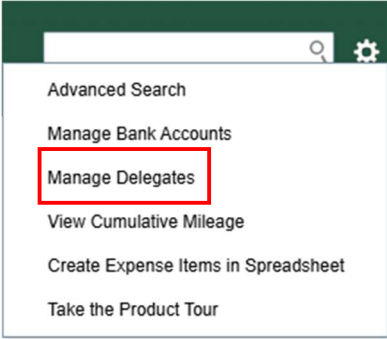
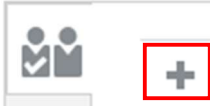
Click Print.	 <p>A pdf will download</p>
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Delegates


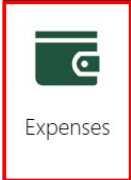

Delegates are allowed to create and submit cash advances and reports on an employee's behalf. The travel team will be assigned as every employee's delegate, this is correct and should not be changed.

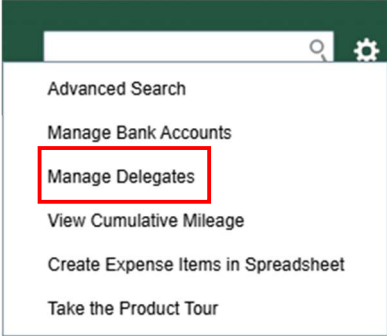


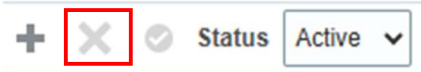
Create a Delegate

Once signed into WaveWorks click on the Me tab.	 <p>The tabs are in the bar under your name.</p>
Find and click on the Expenses Tile.	
Click on the Gear.	 <p>The gear is in the upper right hand corner</p>

Click Manage Delegates.	
Click on the plus sign.	 <p>All of your current delegates will be listed here</p>
Search for the employee to be your delegate.	<p>* Person <input type="text"/></p> <p>This search is first last name Click on their name when found</p>
Click Save.	<p>Save Save and Close Cancel</p> <p>Click Save to add more delegates Click Save and Close to return to the Expenses homepage</p>


Manage a Delegate

Once signed into WaveWorks click on the Me tab.	 <p>The tabs are in the bar under your name.</p>
Find and click on the Expenses Tile.	
Click on the Gear.	 <p>The gear is in the upper right hand corner</p>

Click Manage Delegates.	
Click on the plus sign.	 <p>All of your current delegates will be listed here</p>
Highlight the Delegate to manage.	
Click the X.	
Click Yes.	<p>Warning</p> <p>If you remove this person, the delegate can no longer manage expense reports for you. Do you want to continue?</p> <p><input checked="" type="button" value="Yes"/> <input type="button" value="No"/></p>
Click Save.	<p><input type="button" value="Save"/> <input type="button" value="Save and Close"/> <input type="button" value="Cancel"/></p> <p>Click Save to manage more delegates Click Save and Close to return to the Expenses homepage</p>

Act as a Delegate

Once signed into WaveWorks click on the Me tab.	 <p>The tabs are in the bar under your name.</p>
Find and click on the Expenses Tile.	

Click on Owner Drop Down.	
Choose who to work as.	 <p data-bbox="521 606 1386 642">Complete reports as normal once acting as a delegate</p>

How to Activate and Inactivate Bank Accounts for Expense Reimbursements

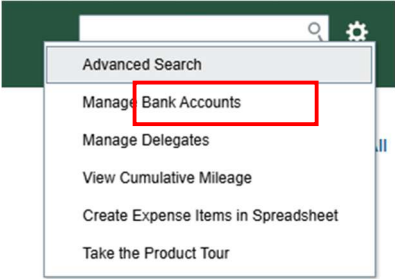
Employees using the Expenses Module may add a specific bank account for expense reimbursements.

From the Me tab,
click on
Expenses.



Expenses

Click the gear
wheel and
choose Manage
Bank Accounts.



The Gear wheel is in the upper right corner

Verify the
Account and
Routing Numbers
on the Primary
Account.



To Add a New Bank Account, click the Plus Sign.

Manage Bank Accounts

+ Primary

✓ JPMORGAN CHASE BANK, NA Account Number
Routing # JPMORGAN CHASE BANK, NA, United States
Routing Transit Number Routing Number

Enter the appropriate banking information.

Click Save and Close.

Create Bank Account

* Country United States

* Account Number 123456789

* Account Type Checking

Check Digit

Account Holder Michelle Illidge

Secondary Account Reference

Search using Routing Number

* Routing Number 011000138

Bank BANK OF AMERICA

Bank Branch 011000138-BANK OF AMERICA

BIC Code

Save and Close Cancel

Highlight the Account to be used for Expense Reimbursement.

BANK OF AMERICA 123456789
011000138-BANK OF AMERICA, United States
Routing Transit Number 011000138

Checking
Valid 06/21/2026

Click Primary.



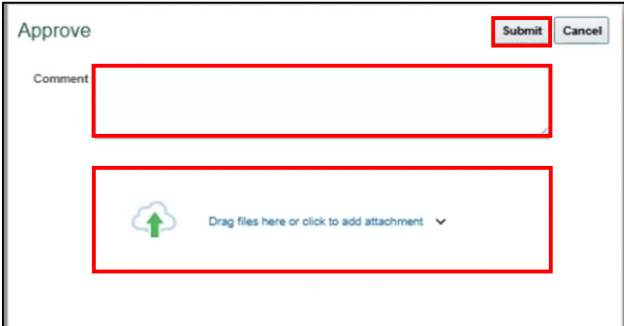

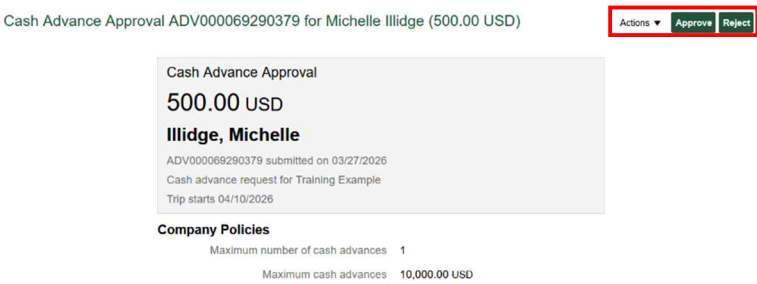

✓ Primary

Verify that the check mark is on the proper bank.

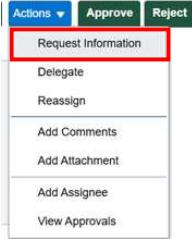
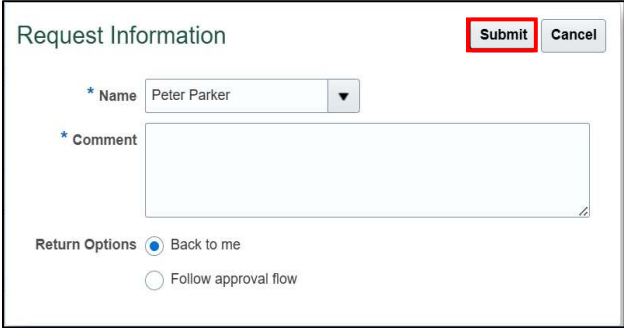
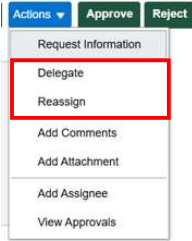
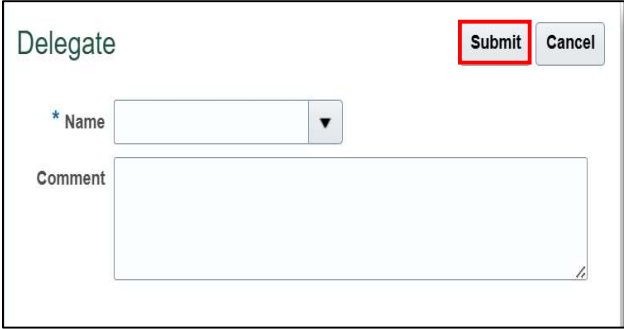
✓ **BANK OF AMERICA 123456789**
011000138-BANK OF AMERICA, United States
Routing Transit Number 011000138

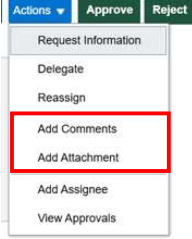


Approvals

Approvers will receive email notifications of pending approvals.

<p>Once signed into WaveWorks click on the Bell Icon.</p>	
<p>Approve or Reject from the list.</p>	
<p>Add any comments or attachments. Click Submit.</p>	
<p>Click on Approval to see more detail.</p>	
<p>Click on Actions, Approve or Reject.</p>	
<p>Click Show All to see all approvals.</p>	

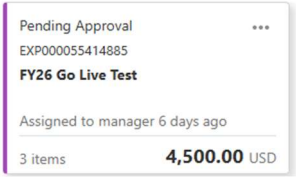

Approval Actions




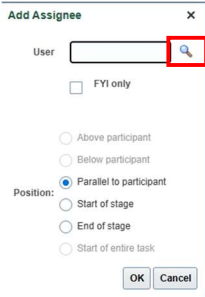
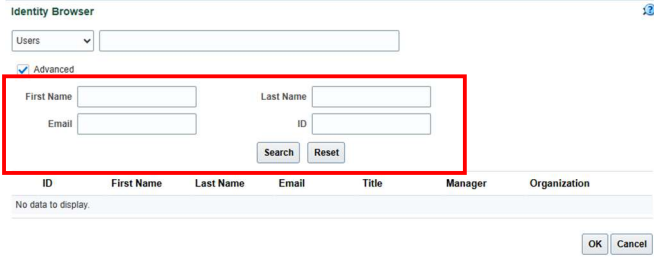


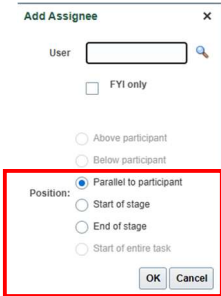
<p>Request Information from the report owner.</p>	
<p>Do not change the name.</p> <p>Enter a Comment.</p> <p>Choose return Option.</p>	 <p>Back to me skips earlier approvers Follow approval flow starts the workflow again</p>
<p>Delegate or Reassign the approval.</p>	
<p>Choose the person to delegate or reassign.</p> <p>Add a comment.</p> <p>Click Submit.</p>	 <p>You can search by user name, user id or email</p>

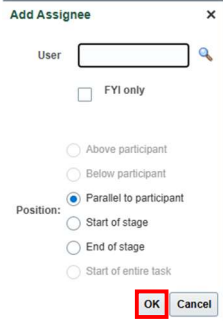
<p>Add Comments or Attachments.</p>	
<p>Once added, click Save.</p>	
<p>Click Approve or Reject.</p>	 <p>Approving will move the item to the next approver</p>

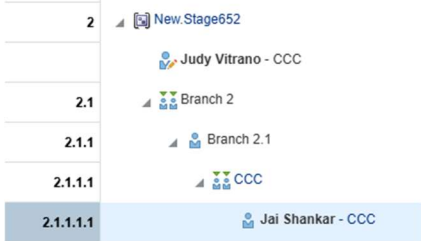
How to add an Expense Approver as a report owner

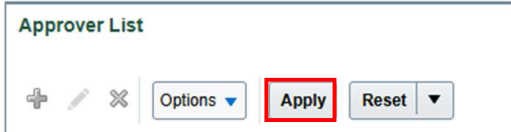
A report owner may add an ad hoc approver to their workflow.

<p>Click on the expense report that needs the ad hoc approver.</p>	
<p>Click on the Pending Approval Link.</p>	<p>Status Pending manager approval</p> <p>Click on the blue hyperlink to open</p>
<p>Highlight the step to add an approver before.</p>	 <p>Only future steps may be chosen.</p>

<p>Click the Plus Sign.</p>	<p style="text-align: center;">Approver List</p> <p style="text-align: center;">    Options ▼ </p> <p style="text-align: center;">The plus sign shade will change when a correct step is chosen</p>
<p>Search for the approver using the magnifying glass.</p>	
<p>Search for the approver.</p>	
<p>Choose the approver.</p>	
<p>Click Ok.</p>	
<p>Choose the stage to add the approver.</p>	 <p style="text-align: center;">Parallel to participant will allow either approver in that stage to approve</p> <p style="text-align: center;">Start of stage will send to the added approver first</p> <p style="text-align: center;">End of stage will send to the added approver last</p>


<p>Click Ok.</p>	
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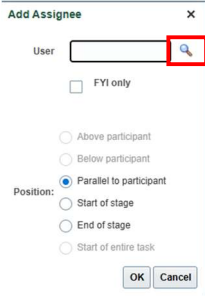
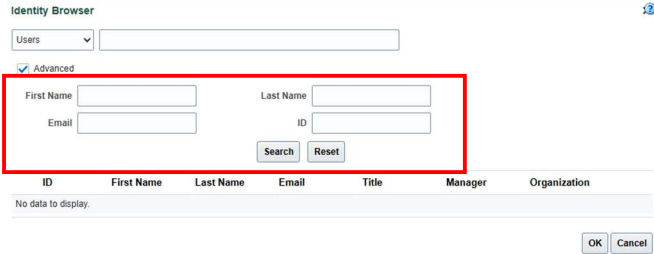


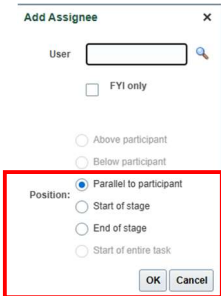
<p>Click Apply.</p>	
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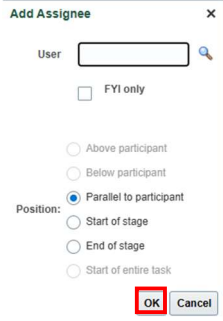
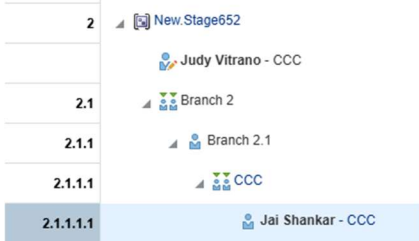
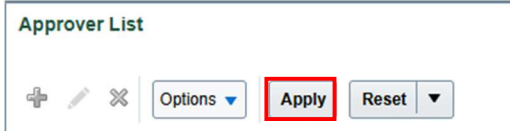
How an Approver adds another Expense Approver

An approver may add an ad hoc approver to the workflow.

<p>From the Approval, Click on the Actions down arrow.</p> <p>Click Assignee.</p>	
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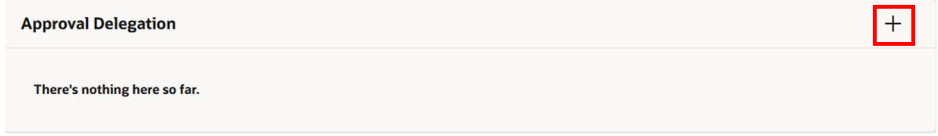


<p>Highlight the step where the approver should be added.</p>	 <p>Only future steps may be chosen</p>
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<p>Click the Plus Sign.</p>	<p style="text-align: center;">Add Assignee</p>  <p style="text-align: center;">The plus sign shade will change when a correct step is chosen</p>
<p>Search for the approver using the magnifying glass.</p>	
<p>Search for the approver.</p>	
<p>Choose the approver.</p>	
<p>Click Ok.</p>	
<p>Choose the stage to add the approver.</p>	 <p style="text-align: center;">Parallel to participant will allow either approver in that stage to approve</p> <p style="text-align: center;">Start of stage will send to the added approver first</p> <p style="text-align: center;">End of stage will send to the added approver last</p>

Click Ok.	
	
Click Apply.	

Approval Delegation

An approval delegation may be set to accommodate employees who will be out of the office for a period of time.

Click on Roles and Delegations from the Me tab.	
Click on the Plus Sign under Approval Delegations.	
Add a Rule Name.	
Enter a Start Date.	

Enter an End Date.	<div data-bbox="516 201 1385 300"> End Date </div>
Enter a Category.	<div data-bbox="516 321 1385 428"> Category </div> <p data-bbox="623 436 1281 474">You should choose the Expense Approval</p>
Choose the employee to Delegate To.	<div data-bbox="516 491 1385 598"> Delegate To </div> <p data-bbox="756 604 1149 638">Search is first last name</p>
DO NOT Click the box to allow a user to approve their own transaction.	<div data-bbox="548 659 1354 774"> <input type="checkbox"/> Allow this user to approve their own transaction </div>
Click Save.	<div data-bbox="797 911 1115 1016"> Cancel Save </div>