



WaveWorks!

Expenses User Guide

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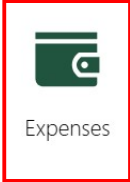


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Cash Advances

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.

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 type="text"/> USD - US Dollar</p>
Enter the Purpose.	<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 style="text-align: center;">Advance Type Travel ▼</p> <p style="text-align: center;">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 style="text-align: center;">Trip Start Date mm/dd/yyyy </p> <p style="text-align: center;">This is only required for travel advances</p>
<p>Enter a Trip End Date.</p>	<p style="text-align: center;">Trip End Date mm/dd/yyyy </p> <p style="text-align: center;">This is only required for travel advances</p>
<p>Add Required Documentation by clicking the Plus Sign.</p>	<p style="text-align: center;">Attachment None +</p> <p style="text-align: center;">Attachments could include spending approval or grant documentation justifying the request</p>
<p>Save or Submit the request.</p>	<p style="text-align: center;"> Save ▼ Submit Cancel </p> <p style="text-align: center;"> 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

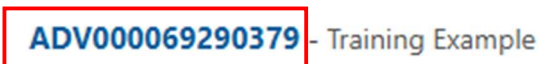
<p>From the Cash Advance Page, click on the advance to manage.</p>	<div style="background-color: #e1f5fe; padding: 10px; border: 1px solid #ccc; text-align: center;"> <p>ADV000069290379 - Training Example</p> </div>
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Click on the Actions drop down to withdraw or duplicate the request.



View the Details of a Cash Advance

From the Cash Advance Page, click on the advance view.



View Details

Cash Advance: ADV000069290379

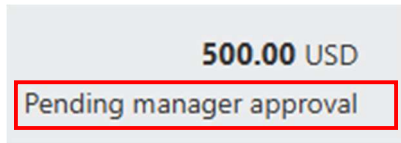
Advance Number	ADV000069290379
Status	Pending manager approval
Purpose	Training Example
Advance Type	Travel
Advance Amount	500.00 USD
Trip Start Date	04/11/2026
Trip End Date	04/17/2026
Attachment	None

Click Done to close.



View the Workflow for a Cash Advance

From the Cash Advance Home Screen.



Look to the right of the cash advance line under the amount

<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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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.

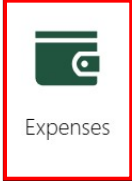



Purchasing Card (P-Card) transactions will automatically be placed into a monthly report for itemization, receipt attachment and submittal. **Reports should not be submitted before the 26th of each month.**

Create an Expense Report

Create the Expense Report

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

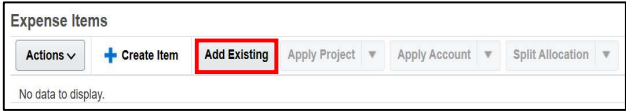
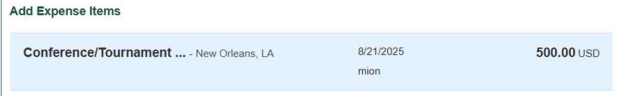
<p>Sign into WaveWorks.</p> <p>Click on the Me tab.</p>	<p style="text-align: center;">Me</p>
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<p>Find and click on the Expenses Tile.</p>	 <p>Expenses</p>										
<p>Click on Expenses.</p>	 <p>The wallet is the top icon and represents expenses</p>										
<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>Attach Report Level Attachments.</p>	<p>Attachments None +</p> <p>This is NOT for receipts. 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. 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" value=""/></p> <table border="1" data-bbox="570 1465 1312 1665"> <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>


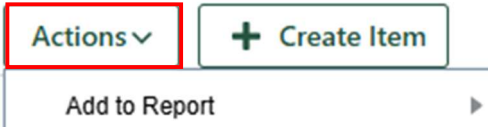
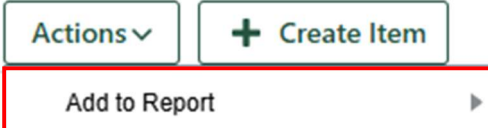
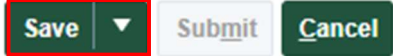
Add Existing Expenses from within the Report

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

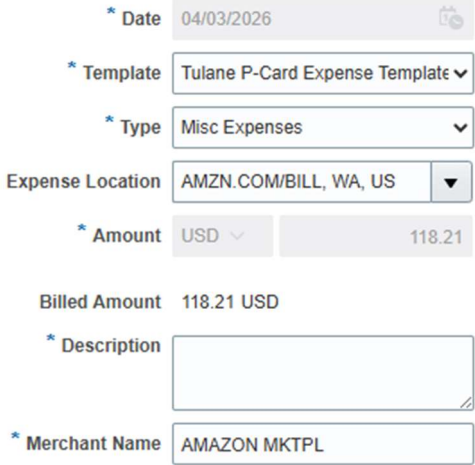


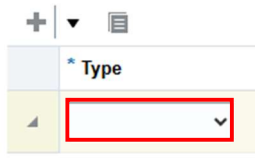
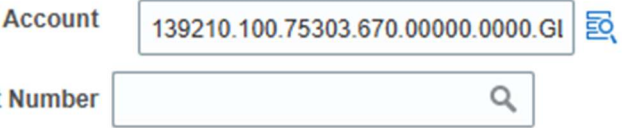
Add T&E charges to the appropriate reports. P-Card charges will create their own report for itemization.


<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: 5px; 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;"> Account 139210.100.75303.670.00000.0000.GI  </div> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-top: 5px;"> Project Number  </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 search for an Alias, click the drop-down arrow on the alias field.

CP400002-CP COO TE...	700000.170.680.000000.0000.CP400002.000000.0...	CP400002-CP COO TEST 032...
CP123456-CP Library T...	700000.170.680.000000.0000.CP123456.000000.0...	CP123456-CP Library TEST 03...
RG100001-WaveWorks ...	432201.420.670.000000.0000.RG100001.000000...	RG100001-WaveWorks ERP C...
DR100001-WaveWorks ...	423201.141.614.000000.0000.DR100001.000000.0...	DR100001-WaveWorks Resear...
EU100001-F. Vickers En...	131220.121.610.000000.0000.00000000.000000.0...	EU100001-F. Vickers Endowment
FL100001-Emerging Ca...	364900.130.630.000000.0000.FL100001.000000.0...	FL100001-Emerging Cardio Proj 1
GLPAYSUS	131210.100.670.000000.0000.GLPAYSUS.000000...	GLPAYSUS
CP100001-ERP Wavew...	700000.170.680.000000.0000.CP100001.000000.0...	CP100001-ERP Waveworks Co...
FC100002-Role of Mate...	449100.130.630.000000.0000.FC100002.000000.0...	FC100002-Role of Maternal- Fe...
JO100003-WaveWorks ...	384310.170.680.000000.0000.JO100003.000000.0...	JO100003-WaveWorks Job Ord...

Click the blue search button.

Search in the Alias field.

Click Search.

****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.

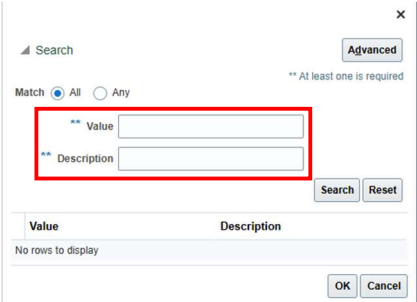
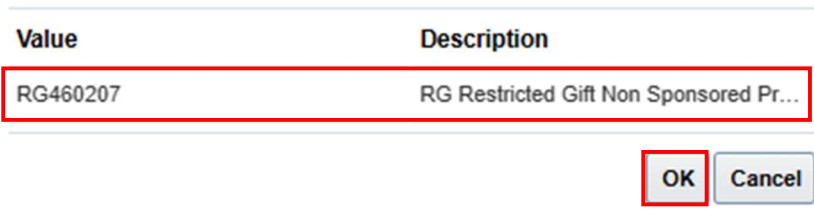
Add the amount, receipt and save

Itemize Expenses using a Non-Sponsored or Sponsored Project

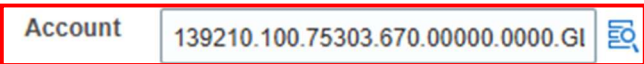
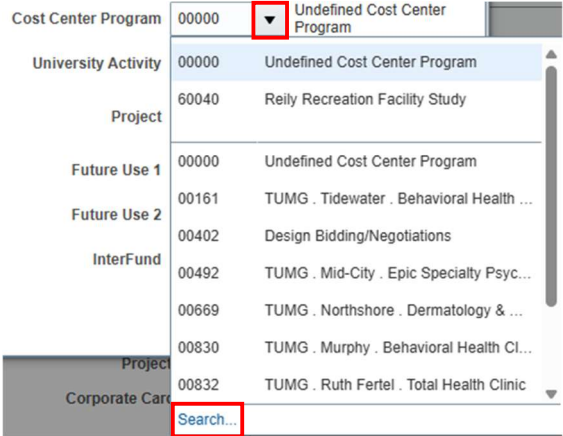
If an employee is charging a Non-Sponsored or Sponsored Project outside of their cost center, the report will still route to their Cost Center Manager for approval.

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.

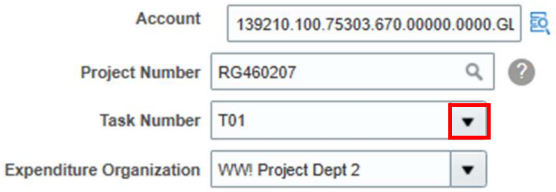
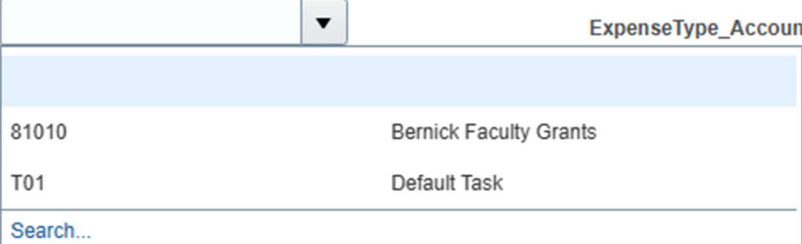
<p>Use the Project number field to charge to a project.</p>	<p style="text-align: center;">Account <input style="width: 200px;" type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p style="text-align: center;">Project Number <input style="width: 200px;" type="text"/></p> <p style="text-align: center;">This field is for accounts with prefixes not GL</p> <p style="text-align: center;">Do not use the Account field if the expense item is being charged to a project with a prefix other than GL</p> <p style="text-align: center;">**TIP** DO NOT erase the account field when using the project number field</p>
<p>Enter the project number in the Project Number field.</p> <p>Non-Sponsored Project</p>	<p style="text-align: center;">Account <input style="width: 200px;" type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p style="text-align: center;">Project Number <input style="width: 200px;" type="text" value="RG460207"/></p> <p style="text-align: center;">Task Number <input type="text" value="T01"/></p> <p style="text-align: center;">Expenditure Organization <input type="text" value="WW! Project Dept 2"/></p> <p style="text-align: center;">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 style="text-align: center;">Do not remove or change the account line</p>
<p>Enter the Expenditure Organization.</p>	<p style="text-align: center;">Expenditure Organization <input style="width: 200px;" type="text"/></p> <p style="text-align: center;">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 style="text-align: center;">* Merchant Name <input style="width: 150px;" type="text"/></p> <p style="text-align: center;">Account <input style="width: 200px;" type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p style="text-align: center;">Project Number <input style="width: 200px;" type="text" value="FC561989"/></p> <p style="text-align: center;">Task Number <input type="text" value="T01"/></p> <p style="text-align: center;">Expenditure Organization <input type="text" value="WW! Project Dept 8"/></p> <p style="text-align: center;">* Contract Number <input type="text" value="561989K1"/></p> <p style="text-align: center;">* Funding Source <input type="text" value="University of North Carolina, Ch"/></p> <p style="text-align: center;">Project_CCValue <input type="text"/></p> <p style="text-align: center;">Corporate Card Program</p> <p style="text-align: center;">ExpenseType_Account <input type="text"/></p> <p style="text-align: center;">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 style="text-align: center;">Do not remove or change the account line</p>
<p>Search for a Project with the magnifying glass.</p>	<p style="text-align: center;">Account <input style="width: 200px;" type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p style="text-align: center;">Project Number <input style="width: 200px;" type="text"/></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 **TIP** Click Advanced and search with contains</p>
<p>Highlight the project.</p> <p>Click OK.</p>	

How to add a Cost Center Program with a GL Project

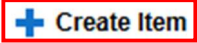

<p>Click on the account field.</p>	 <p>Project Number <input type="text"/></p> <p>This is only for projects with a GL prefix</p>
<p>Enter the Cost Center Program.</p>	<p>Cost Center Program <input type="text" value="00000"/> ▾ Undefined Cost Center Program</p> <p>DO NOT update the Cost Center, Fund, Classification, Future or Interfund Fields.</p>
<p>Search by using the Down Arrow and the Search button.</p>	


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>**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>
<p>Chose the correct Cost Center Program.</p>	

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.

<p>Click the Create Item button under Expense Items.</p>	
<p>Enter the Expense Date.</p>	<p>* Date <input type="text" value="mm/dd/yyyy"/> </p> <p>You can manually enter or use the calendar</p>
<p>Select the Template.</p>	<p>* Template <input type="text" value=""/></p> <p>This should always be the Expense Template for out-of-pocket expenses</p>

Select the Type.	<p>* Type <input type="text" value=""/></p> <p>This is the natural account Selecting this will load all required fields for this expense type</p>
Enter the Amount of the Expense.	<p>* Amount <input type="text" value="USD"/> <input type="text" value=""/></p>
Enter the Description of the Expense.	<p>* Description <input type="text" value=""/></p> <p>Give as much detail as possible for approvers</p>
Enter the Merchant Name.	<p>* Merchant Name <input type="text" value=""/></p> <p>Save your expense to save this information in the itemization</p>
Complete the Itemization.	 <p>See Reconciling Expenses for more information Attach the receipt and save</p>

Split 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>Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p>Project Number <input type="text" value=""/></p> <p>See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>
Click the Plus Sign.	<p>* Itemization <input type="button" value="+"/></p>
Enter the next project's information.	<p>Account <input type="text" value="139210.100.75303.670.00000.0000.GI"/></p> <p>Project Number <input type="text" value=""/></p> <p>See detailed instructions for using a GL, Non-Sponsored and Sponsored Project</p>

<p>Add the amount to charge each project.</p>	<div style="text-align: right;">Remaining Balance 0.00</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">* Amount (USD)</th> <th style="width: 40%;">Remove</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0.00+</td> <td style="text-align: center;">×</td> </tr> <tr> <td style="text-align: center;">0.00+</td> <td style="text-align: center;">×</td> </tr> </tbody> </table> <p style="text-align: center;">The remaining balance must be \$0.00</p>	* Amount (USD)	Remove	0.00+	×	0.00+	×
* Amount (USD)	Remove						
0.00+	×						
0.00+	×						

Correcting Errors


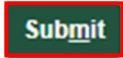

Error notifications will appear in many places on the report and give the specific error to correct.

	✖ Missing required fields, Itemization out of balance
	Show Errors ?
	<div style="border: 1px solid gray; padding: 5px;"> <p>✖ Error ✕</p> <p>Messages for this page are listed below.</p> <ul style="list-style-type: none"> ✖ The total of all itemized lines must equal the original receipt amount. (EXM-630146) ✖ You must complete the required fields. <p style="text-align: right;">OK</p> </div>
	<div style="border: 1px solid gray; padding: 5px;"> <p>✖ Error ✕</p> <p>You must fix any errors and submit an expense report. (EXM-630602)</p> <p style="text-align: right;">OK</p> </div>

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 Month.

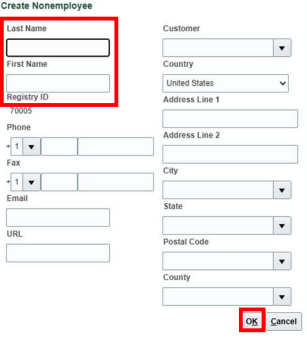

<p>Click the policy box.</p>	<div style="text-align: center;"> <input style="width: 20px; height: 15px; border: 1px solid gray; margin-right: 5px;" type="checkbox"/> I have read and accept the corporate travel and expense policies. </div> <p>You will be unable to submit until you attest to following Tulane policies.</p> <p>**TIP** If you need to read the policy, click on the blue hyperlink to be taken to the policy.</p>
------------------------------	---

Click Submit.	<div style="text-align: center;">    </div> <p style="text-align: center;">If you are not ready to submit, save for later.</p>
---------------	--

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.

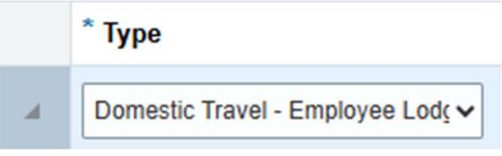
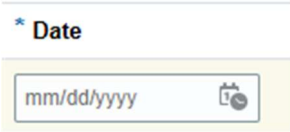


Click Manage Attendees	<p style="text-align: center;">Attendees 1 others</p> <p style="text-align: center;">Manage Attendees</p> <p>**TIP** This will only appear if a date is chosen in the itemization</p>						
Click the plus sign to add Tulane Employee Attendees.	<p style="text-align: center;">Employee Attendees</p> <p style="text-align: center;"></p>						
Click on the box next to the attendee's name.	<p style="text-align: center;">Direct Reports Search</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 35%;">Name</th> <th style="width: 35%;">Email</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> <td></td> </tr> </tbody> </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;"> <input type="button" value="Advanced"/> ** Name Contains ▼ smith </p>		Name	Email	<input type="checkbox"/>		
	Name	Email					
<input type="checkbox"/>							
Click the star to add the attendee to favorites.	<p style="text-align: center;"></p>						
Click the plus sign to create a Non-Tulane Attendee.	<p style="text-align: center;">Nonemployee Attendees</p> <p style="text-align: center;"> Find Attendees</p> <p style="text-align: center;">For previously created non-Tulane attendees, search under Find Attendees</p>						

<p>Add the attendee first and last name.</p> <p>Click OK.</p>	
<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>

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>	

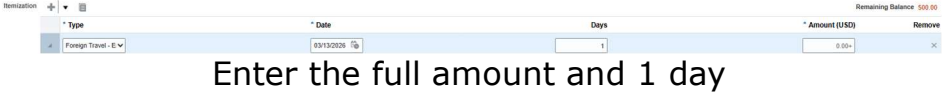

The Daily Amount will calculate.	<p style="text-align: center;">Daily Amount</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;">0.00+</div>
Choose Itemization Penny Adjustment if applicable.	<p style="text-align: center;">* Type</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;">Itemization Penny Adjustment ▼</div> <p style="text-align: center;">This step may not be necessary This item should have it's own line, allocation and amount</p>

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.





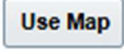
Select the Date.	<p style="text-align: center;">* Date <input type="text" value="03/13/2026"/></p> <p style="text-align: center;">This should be the last date of the trip</p>
Select the Template.	<p style="text-align: center;">* Template <input type="text" value="Tulane Employee Expense Temp"/></p> <p style="text-align: center;">This should be the expense template</p>
Choose the Expenditure Type.	<p style="text-align: center;">* Type <input type="text" value="Domestic Travel - Employee Fixe"/> ?</p> <p style="text-align: center;">The form, GSA, and State Department are linked in the question mark</p>
Enter the Amount.	<p style="text-align: center;">* Amount <input type="text" value="USD"/> <input type="text"/></p> <p style="text-align: center;">This is the total for the entire trip</p>
Enter the Description.	<p style="text-align: center;">* Description <input type="text"/></p>
Enter the Merchant Name.	<p style="text-align: center;">* Merchant Name <input type="text"/></p> <p style="text-align: center;">This can be entered as per diem</p>

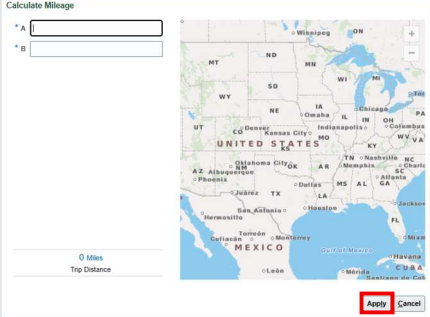



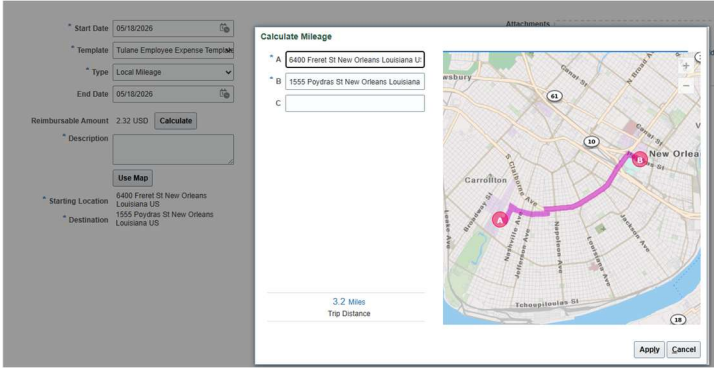
Itemize the expense.	 <p style="text-align: center;">Enter the full amount and 1 day</p>
Add attachments.	 <p style="text-align: center;">The travel form and screenshot of the GSA or State Department site is required</p>

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 lesser amount will be reimbursed. You do not need to attach a receipt if using the map function in WaveWorks.

Enter the Start Date.	
Select the Template.	 <p style="text-align: center;">This should always be the Expense Template</p>
Select the Type.	 <p style="text-align: center;">Can be Domestic Travel- Employee Mileage, Local Mileage, or Athletics Mileage (only for Athletics use)</p>
Add a Description.	
Click Use Map.	 <p style="text-align: center;">Do not manually add in a starting location and destination</p>

<p>Enter the addresses for the round trip.</p> <p>Click Apply.</p>	 <p>Each round trip should be its own expense item</p>
<p>The Distance will calculate.</p>	<p>* Trip Distance <input type="text" value="0"/> Miles</p>
<p>Calculate the reimbursed amount.</p>	<p>Reimbursable Amount 0.00 USD <input type="button" value="Calculate"/></p>
<p>Itemize the expense.</p>	<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>
<p>Attach a screenshot of the map with the calculation as a receipt.</p>	

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>	<div data-bbox="581 751 1295 1094"><p>Apply Cash Advances</p><table><tr><td>Amount Reimbursable to You</td><td>20.00 USD</td></tr><tr><td>Cash Advance Selected</td><td>0.00 USD</td></tr></table><hr/><p><input type="checkbox"/> ADV000045163565 Refund Due 3/20/2025 800.00 USD available</p><p><input type="checkbox"/> Don't apply a cash advance</p><p><input type="button" value="Apply and Submit"/> <input type="button" value="Cancel"/></p></div>	Amount Reimbursable to You	20.00 USD	Cash Advance Selected	0.00 USD
Amount Reimbursable to You	20.00 USD				
Cash Advance Selected	0.00 USD				

Personal Expenses/Accidental charges

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

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

Check a Report's Workflow

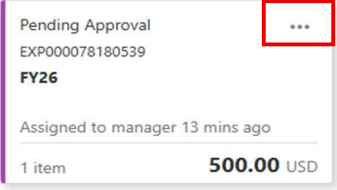
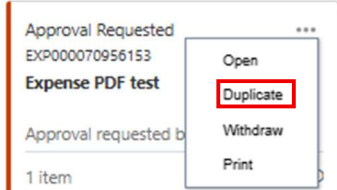
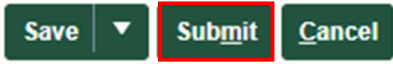
<p>Click on the Report.</p>	<p style="text-align: center;">Expense Reports</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> + Create Report </div> <div style="border: 2px solid red; padding: 5px;"> <p>Pending Approval EXP000078180539 FY26</p> <p>Assigned to manager 13 mins ago</p> <hr/> <p>1 item 500.00 USD</p> </div> </div> <p style="text-align: center;">The current workflow step is shown here</p>
<p>Click on pending manager approval.</p>	<p style="text-align: center;">Purpose FY26</p> <p style="text-align: center;">Attachments None + ?</p> <p style="text-align: center;">Status Pending manager approval View report history</p> <p style="text-align: center;">The entire workflow is seen in this step The report history will show the entire report history</p>

Withdraw a Submitted Report

<p>Click on the three dots.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Pending Approval EXP000078180539 FY26</p> <p>Assigned to manager 13 mins ago</p> <hr/> <p>1 item 500.00 USD</p> <div style="text-align: right; border: 1px solid red; padding: 2px;">...</div> </div>
<p>Click Withdraw.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Approval Requested EXP000070956153 Expense PDF test</p> <p>Approval requested by</p> <hr/> <p>1 item</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <p>Open</p> <p>Duplicate</p> <p style="border: 2px solid red; padding: 2px;">Withdraw</p> <p>Print</p> </div> </div>
<p>Click Yes.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>⚠ Warning ×</p> <p style="font-size: 0.8em;">Withdrawing the expense report cancels existing approvals. It becomes an in progress expense report that you can edit and submit. Do you want to continue?</p> <div style="text-align: right;"> Yes No </div> </div>

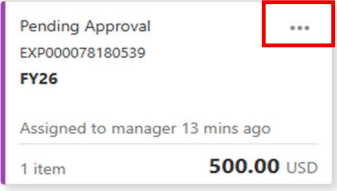
Duplicate a Report

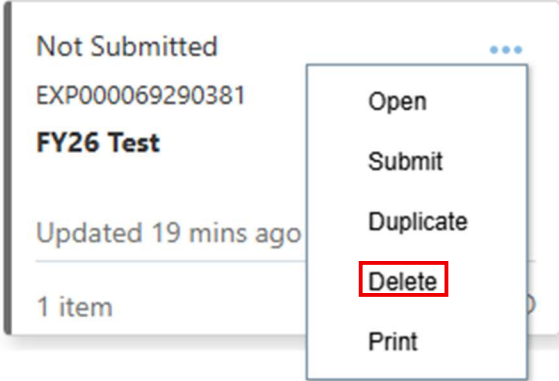

Copying reports saves time in creating the same expense items frequently. Once a duplicate is created, editing, adding, or removal of items is allowed.

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

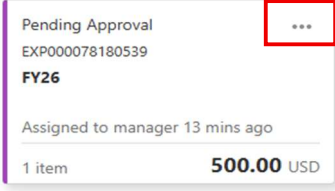
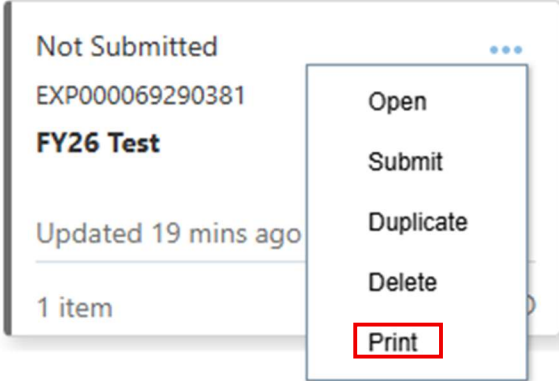
Delete a Report

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

<p>Click on the three dots.</p>	
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Click Delete.	
Click Yes.	


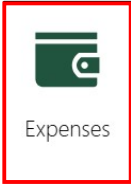

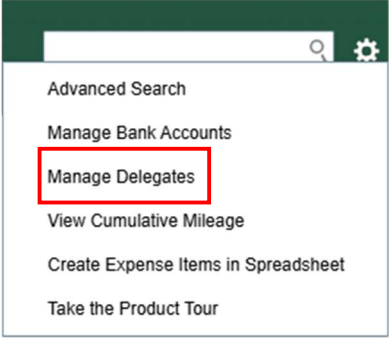



Print a Report

Click on the three dots.	
Click Print.	 <p style="text-align: center;">A pdf will download</p>


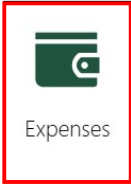

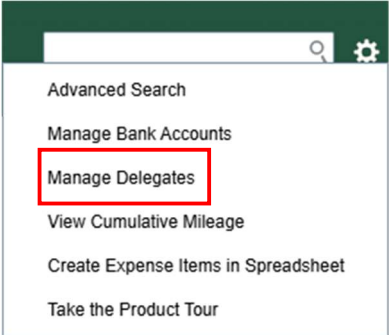



Delegates


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


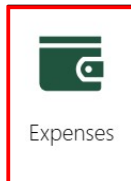
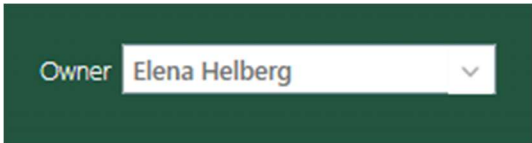
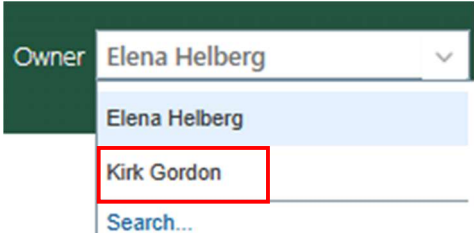
<p>Once signed into WaveWorks click on the Me tab.</p>	 <p>The tabs are in the bar under your name.</p>
<p>Find and click on the Expenses Tile.</p>	
<p>Click on the Gear.</p>	 <p>The gear is in the upper right hand corner</p>
<p>Click Manage Delegates.</p>	
<p>Click on the plus sign.</p>	 <p>All of your current delegates will be listed here</p>
<p>Search for the employee to be your delegate.</p>	 <p>This search is first last name Click on their name when found</p>
<p>Click Save.</p>	 <p>Click Save to add more delegates Click Save and Close to return to the Expenses homepage</p>

Manage a Delegate

<p>Once signed into WaveWorks click on the Me tab.</p>	 <p>The tabs are in the bar under your name.</p>
<p>Find and click on the Expenses Tile.</p>	
<p>Click on the Gear.</p>	 <p>The gear is in the upper right hand corner</p>
<p>Click Manage Delegates.</p>	
<p>Click on the plus sign.</p>	 <p>All of your current delegates will be listed here</p>
<p>Highlight the Delegate to manage.</p>	
<p>Click the X.</p>	
<p>Click Yes.</p>	<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.	<div style="text-align: center;">  <p>Click Save to manage more delegates Click Save and Close to return to the Expenses homepage</p> </div>
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Act as a Delegate

Once signed into WaveWorks click on the Me tab.	<div style="text-align: center;">  <p>The tabs are in the bar under your name.</p> </div>
Find and click on the Expenses Tile.	<div style="text-align: center;">  </div>
Click on Owner Drop Down.	<div style="text-align: center;">  </div>
Choose who to work as.	<div style="text-align: center;">  <p>Complete reports as normal once acting as a delegate</p> </div>

Approvals

Approvers will receive email notifications of pending approvals.

Once signed into WaveWorks click on the Bell Icon.	<div style="text-align: center;">  </div>
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Approve or Reject from the list.

The screenshot shows a notification window titled 'Notifications' with a 'Show All' link. A notification for 'ACTION REQUIRED' is shown, dated 'Yesterday'. The notification text is 'Cash Advance Approval ADV000069290379 for Michelle Illidge (500.00 USD)' by 'Michelle Illidge'. At the bottom right of the notification card, there are two buttons: 'Approve' and 'Reject', both of which are highlighted with a red rectangular box.

Add any comments or attachments.
Click Submit.

The screenshot shows an 'Approve' dialog box. At the top right are 'Submit' and 'Cancel' buttons, both highlighted with red boxes. Below the title is a 'Comment' text area. At the bottom is an attachment area with a green upload icon and the text 'Drag files here or click to add attachment'. The entire dialog box is outlined with a red border.

Click on Approval to see more detail.

The screenshot shows a notification list titled 'Notifications' with a 'Show All' link. The first notification is 'TRANSFERRED' from '9 minutes ago'. The notification text is 'Expense Report Approval EXP000062550059 for Peter Parker (8,020.00 USD)' by 'Peter Parker'. The 'Expense Report Approval' text is highlighted with a red box. Below the notification are 'Approve' and 'Reject' buttons. A second notification for 'FYI' is shown below, dated '12 hours ago'.

Click on Actions, Approve or Reject.

The screenshot shows a 'Cash Advance Approval' card for 'Michelle Illidge (500.00 USD)'. The card includes the amount '500.00 USD', the name 'Illidge, Michelle', and submission details. Below the card, 'Company Policies' are listed. At the top right of the card, there is an 'Actions' dropdown menu, an 'Approve' button, and a 'Reject' button. The 'Actions' dropdown menu is highlighted with a red box.

Click Show All to see all approvals.



The screenshot shows the 'Notifications' header with a 'Show All' button highlighted in a red box.

Approval Actions

Request Information from the report owner.

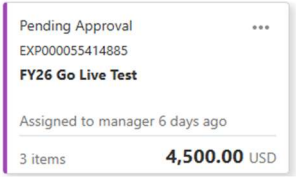


The screenshot shows an 'Actions' dropdown menu. The menu items are: 'Request Information', 'Delegate', 'Reassign', 'Add Comments', 'Add Attachment', 'Add Assignee', and 'View Approvals'. The 'Request Information' item is highlighted with a red box.

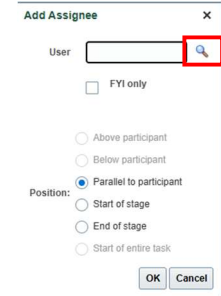
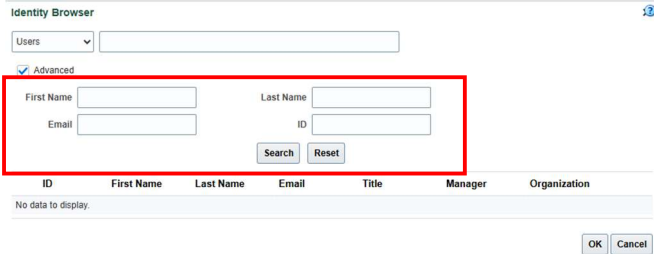


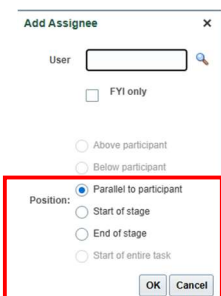
<p>Do not change the name.</p> <p>Enter a Comment.</p> <p>Choose return Option.</p>	<div data-bbox="646 205 1263 531" data-label="Form"> </div> <p data-bbox="581 535 1328 609" style="text-align: center;">Back to me skips earlier approvers Follow approval flow starts the workflow again</p>
<p>Delegate or Reassign the approval.</p>	<div data-bbox="857 636 1047 877" data-label="Form"> </div>
<p>Choose the person to delegate or reassign.</p> <p>Add a comment.</p> <p>Click Submit.</p>	<div data-bbox="646 913 1263 1234" data-label="Form"> </div> <p data-bbox="581 1239 1328 1276" style="text-align: center;">You can search by user name, user id or email</p>
<p>Add Comments or Attachments.</p>	<div data-bbox="857 1304 1047 1545" data-label="Form"> </div>

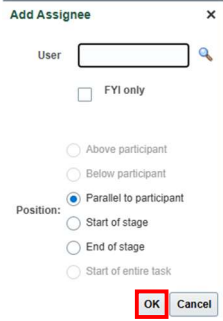
<p>Once added, click Save.</p>	
<p>Click Approve or Reject.</p>	 <p>Approving will move the item to the next approver</p>

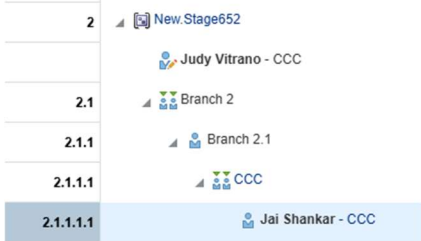
How to add an Expense Approver as a report owner

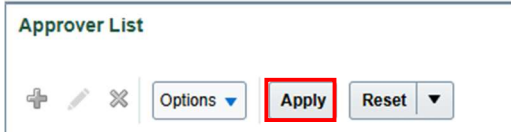
A report owner may add an ad hoc approver to their workflow.

<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>Approver List</p>  <p>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>Parallel to participant will allow either approver in that stage to approve Start of stage will send to the added approver first End of stage will send to the added approver last</p>


<p>Click Ok.</p>	
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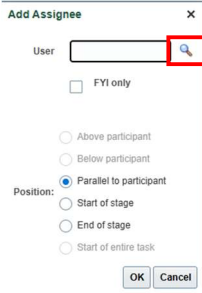
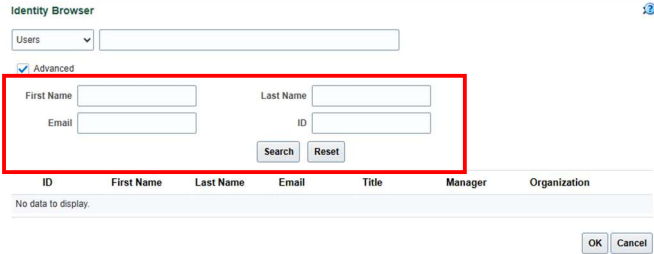


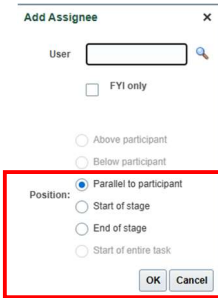
<p>Click Apply.</p>	
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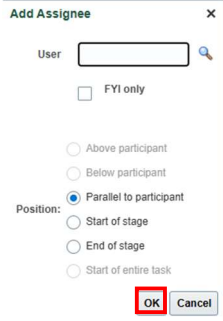
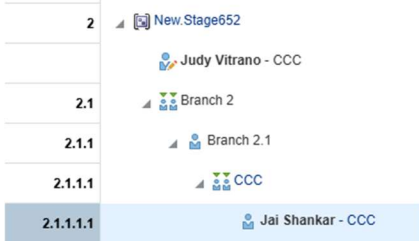
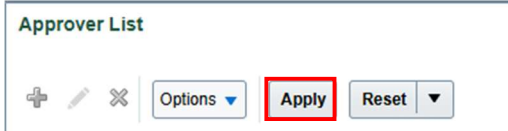
How an Approver adds another Expense Approver

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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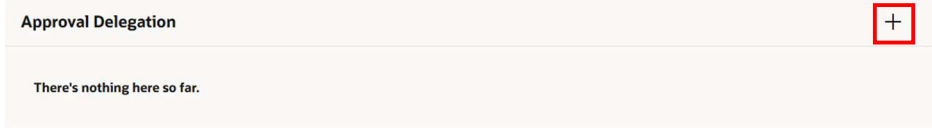

<p>Highlight the step where the approver should be added.</p>	 <p>Only future steps may be chosen</p>
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<p>Click the Plus Sign.</p>	<p style="text-align: center;">Add Assignee</p>  <p style="text-align: center;">The plus sign shade will change when a 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 Start of stage will send to the added approver first 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.	<input data-bbox="521 1640 1385 1745" type="text" value="Rule Name"/>
Enter a Start Date.	<input data-bbox="521 1766 1385 1850" type="text" value="Start Date"/> 

Enter an End Date.	<div style="border: 1px solid #ccc; padding: 5px;"> End Date  </div>
Enter a Category.	<div style="border: 1px solid #ccc; padding: 5px;"> Category ▼ </div> <p style="text-align: center;">You should choose the Expense Approval</p>
Choose the employee to Delegate To.	<div style="border: 1px solid #ccc; padding: 5px;"> Delegate To ▼ </div> <p style="text-align: center;">Search is first last name</p>
DO NOT Click the box to allow a user to approve their own transaction.	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <input type="checkbox"/> Allow this user to approve their own transaction </div>
Click Save.	<div style="text-align: center; margin-top: 10px;"> Cancel Save </div>