

Brief Directions to enter a reimbursement request in FileMaker.
Full directions are below.

1. In a web browser go to the Chemistry Department FileMaker page:
<http://chem-acct-svr.chem.rochester.edu/fmi/webd>
2. Click on the icon for “Chemistry FM Database” and “Sign In as Guest”.
3. Follow standard log-in procedure.
4. Click on “Enter a New Travel/Employee expense” button. Blue boxes contain instructions.
5. Payment Method is only available for employees of the University. Please choose one (Check or Direct Deposit).
6. Complete the form.
7. At the bottom of the page, click on the green button “Submit and Return to Main Page”. This notifies the Business Office that there is a reimbursement waiting for them to process.
8. If you leave before clicking on the green button, you can log back in and on the Main Page click on the orange “Edit Existing Reimbursements” button.
9. Make your changes and scroll to the bottom to click on the green button “Submit and Return to Main Page”.

Full Directions to enter a reimbursement request in FileMaker.

Purpose: To reimburse employees and students for travel and other employee reimbursements such as local purchases.

Documents:

Start by scanning in all your receipts and creating a PDF of them. You will need to upload them during the input section. Please make sure they are legible.

User Information:

1. In a web browser go to the Chemistry Department FileMaker page:
<http://chem-acct-svr.chem.rochester.edu/fmi/webd>
2. Click on the icon for “Chemistry FM Database”

3. Click on "Sign In as Guest".
4. If you are an existing user, you can log in now after clicking on "Existing User". If you have never used the system, click on "New User".
 - a) **Existing user:** put in your name and password and click "Login".
 - b) **New User:** Put in your desired user name and click on the green "Check Availability" button. You will be notified if the user name has already been used or if it is available.
If the user name is not available, you will need to choose another user name.
If the user name is available, you will be prompted to enter a password. Click on "Continue".
Fill in the information and click on "Finished Creating User Account".

New Users need to wait for their supervisor to approve them before they can put in an order. Requests for reimbursement may be entered right away.

Enter a Reimbursement Request:

1. Click on "Enter a Reimbursement Request" button. You will be taken to the "Input" layout. Blue boxes contain instructions.
2. Fill in the Brief Description next to your name. This is required. Keep it brief. Fill in the "General Justification" field with a more detailed description. Need only the pertinent facts. See examples on the form.
3. Fill in the fields:
 - a) date of the receipt.
 - b) Expense Category (drop down field – click on the down arrow).
 - c) Click on the box under "CB" if the "General Justification" applies to that line item.
 - d) Business Purpose is a required field. A description of the expenses. See examples on the input form.
 - e) Amount of this receipt.
Repeat **a** through **e** as needed.
When you have completed these fields, you can click on "Update Total". Scroll down.
- f) Fill in "Notes" field if you want to add more information i.e. include locations and list of attendees for group meals.
- g) Click on "Add Receipt or Backup (only click on this if you need to do an upload)" button. This is where you will upload the PDFs of all of your receipts. Also upload the "Mileage Log Form" and/or the "Missing Receipt Form" if necessary.
- h) Under Accounts to be charged fill in:
 1. The 6 digit account number.
 2. The Spend Category (drop down list. Click on the down arrow).
 3. The dollar amount being charged to that account

When finished click on the green "Update Total" button

- i) Fill in the dollar amount of any monies received in advance.
- j) Payment Method is only available for employees of the University. Please choose one (Check or Direct Deposit).
- k) The next section is mandatory for students. You are to fill out the address you have on file in HRMS. This is the default where your reimbursement check will be sent. If you want the check to come to the Chemistry Department instead fill out the address as follows:

Business Office, Room 408
Hutchison Hall, Chemistry Dept.
120 Trustee Road
Rochester
NY
14627

- 4. Scroll down. Read the statement; you will be certifying when you submit your request.
- 5. Make sure everything is correct.
- 6. At the bottom of the page, click on the green button "Submit and Return to Main Page". This notifies the Business Office that there is a reimbursement waiting for them to process.
- 7. If you leave before clicking on the green button, you can log back in and on the Main Page click on the orange "Edit Existing Reimbursements" button.
- 8. Make your changes and scroll to the bottom to click on the green button "Submit and Return to Main Page".
- 9. If you are having any problems with the input layout you can click on the bright red button "Click here if you are having problems with this input layout". It will bring up an email message. Please fill in the details of what your problem is and click on "Send".