EASTERN INSTITUTE OF TECHNOLOGY, NINGBO

Eastern Institute of Technology, Ningbo

Expense Control System End-User Training

2026



EIT 寧波東方理工大學
EASTERN INSTITUTE OF TECHNOLOGY, NINGBO

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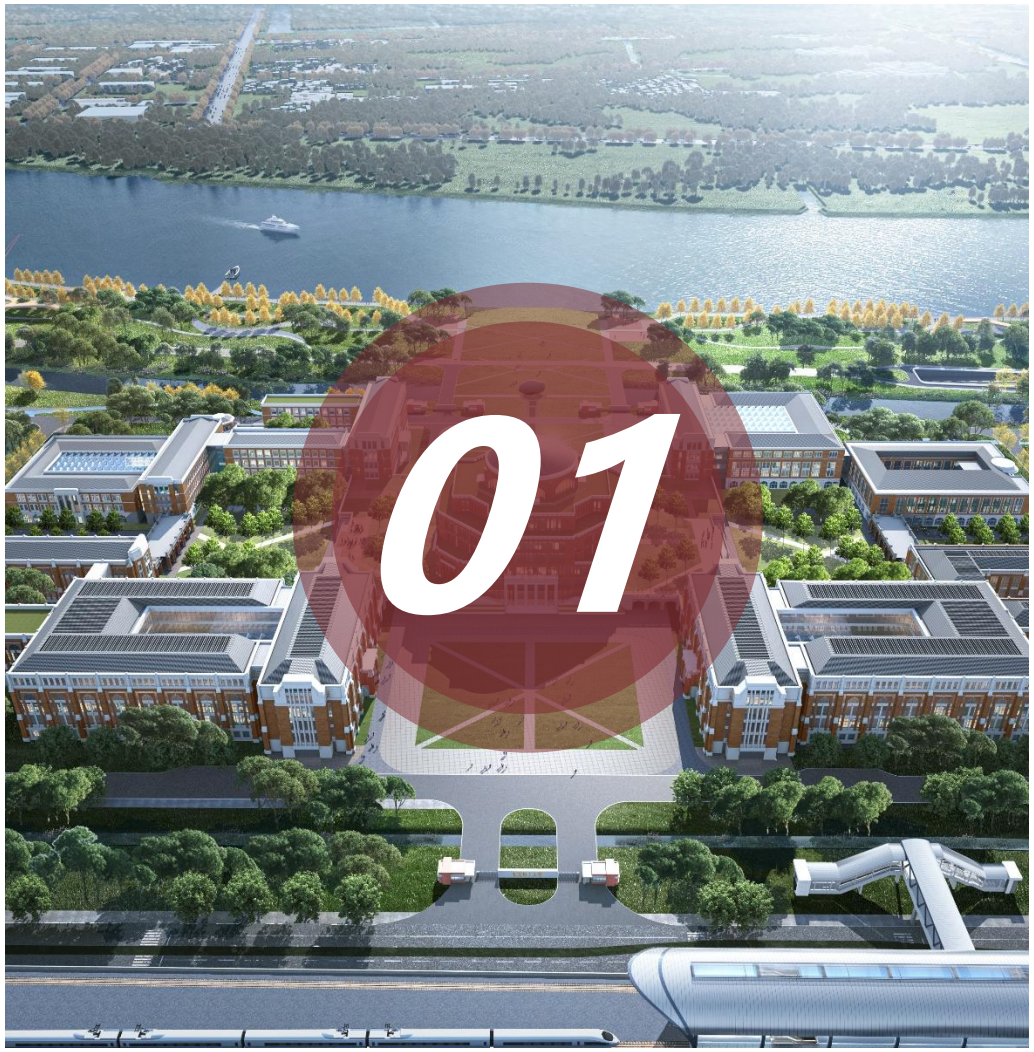
Prior Application &

Reimbursement Mgmt.

04

Advance Payment &

Write-off Mgmt.



System Functions Introduction

- Login and logout
- Homepage overview

Expense Claim System
Introduction

Login and Logout

1. Login URL: https://authserver.eitech.edu.cn/authserver/login Enter your username and password (unified identity authentication account)
2. In the application platform, select [Finance & Expense Control Management System]





Mobile Login and Logout

1. Log in to DingTalk, go to the Workbench and find the "Campus Service Platform" application
2. Find the functions of the Finance Department under Application Services
3. After entering, click the + button to select the document type to create, or click the x button at the top left to exit the application

Note: documents can be submitted from the DingTalk mobile app, but for complex business or many invoices, it is recommended to fill in and submit on a PC







Homepage Overview



Notes:

User Center: track the progress of submitted documents and delegate document permissions to designated persons, enter the to-do approval page, maintain personal bank accounts

2. **Basic Data: maintain supplier information**
3. Expense Management: the handler initiates prior applications, expense reimbursements, advance payments and other documents, and checks document status
4. **Contract Management: view purchase contracts imported from the procurement system and their execution progress**
5. **Homepage: common functions and shortcuts (issue registration, bank branch No. lookup), approvals and applications, system announcements**

To-do Approval Entry

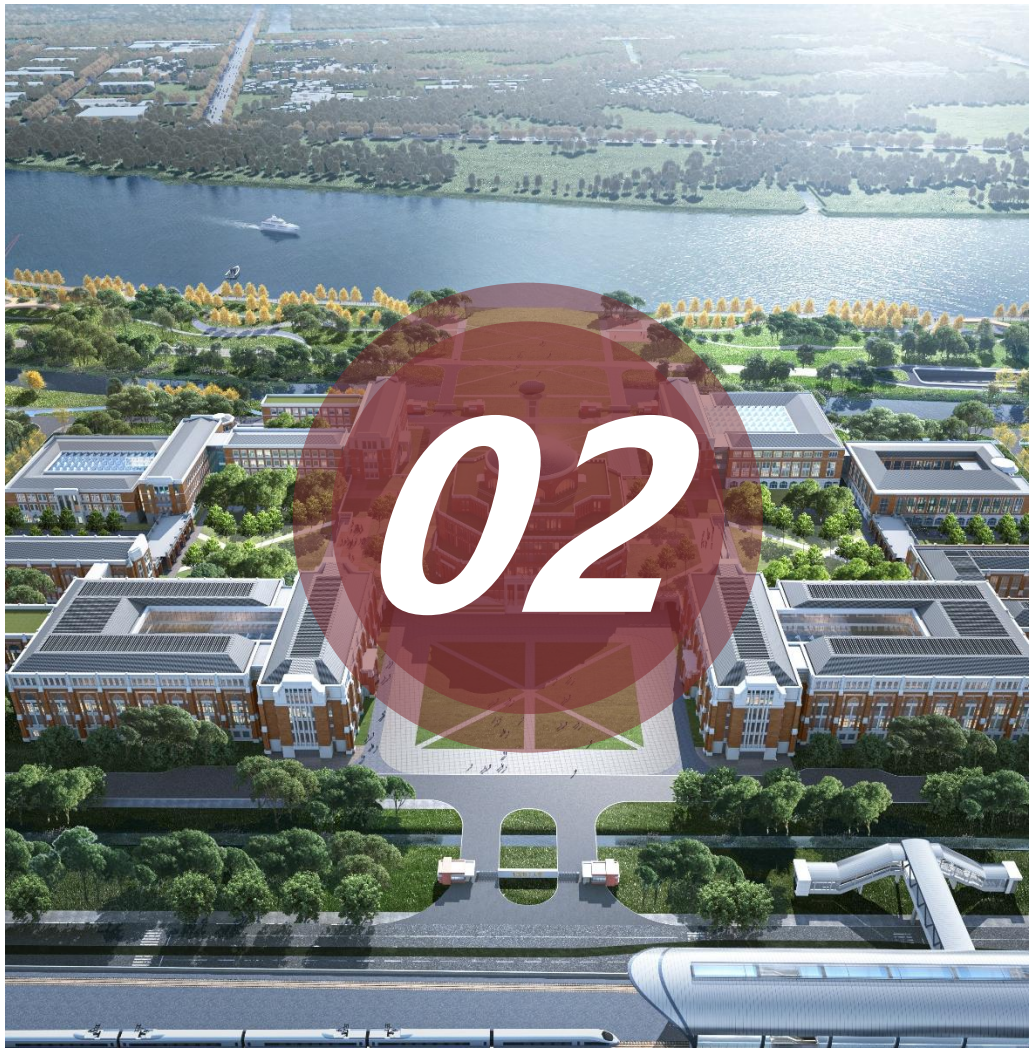
PC approval entry:



Mobile approval entry:







Information Maintenance & Document Info

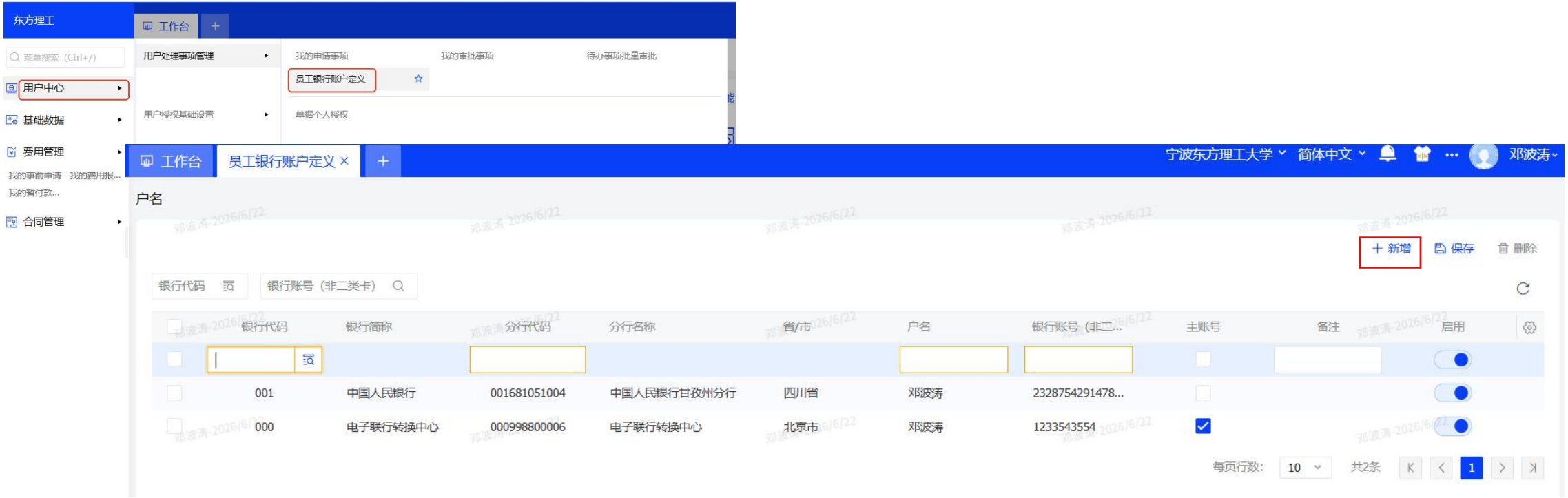
- Personal bank account maintenance
- Supplier & bank account maintenance
- Invoice upload
- Document creation page guide
- Document approval progress & status

Employee Bank Account Maintenance

Employee bank account definition: in User Center - User To-do Items Management - Employee Bank Account Maintenance, click Add and select the bank name; the bank code, branch name and address are filled in automatically. Enter the account name (employee name). If the bank name cannot be found in the query, locate the bank via its CNAPS number.

Note: 1. If there are multiple bank accounts, the system automatically uses the primary account when filling in reimbursement documents

2. Personal bank card info can only be maintained by the individual



Supplier & Bank Account Maintenance

Supplier info maintenance: Basic Data - Supplier Info Maintenance - Add: enter the supplier name & taxpayer name and save; then add a bank account below; select the bank name and the bank code / branch / address fill in automatically;

the account name is the supplier name

Note: if no bank account is maintained, the supplier cannot be selected when filling in reimbursement documents.



Adding Invoices (1/2)



Notes: Mobile homepage -> Invoice Folder supports photo recognition, QR-code scanning and file upload of invoice info

Adding Invoices (2/2)



Notes:

1. PC -> My Invoice Pool / My Expense Reimbursement supports uploading invoices and recognizing invoice info; uploaded invoices are kept in the invoice pool for later reimbursement linking

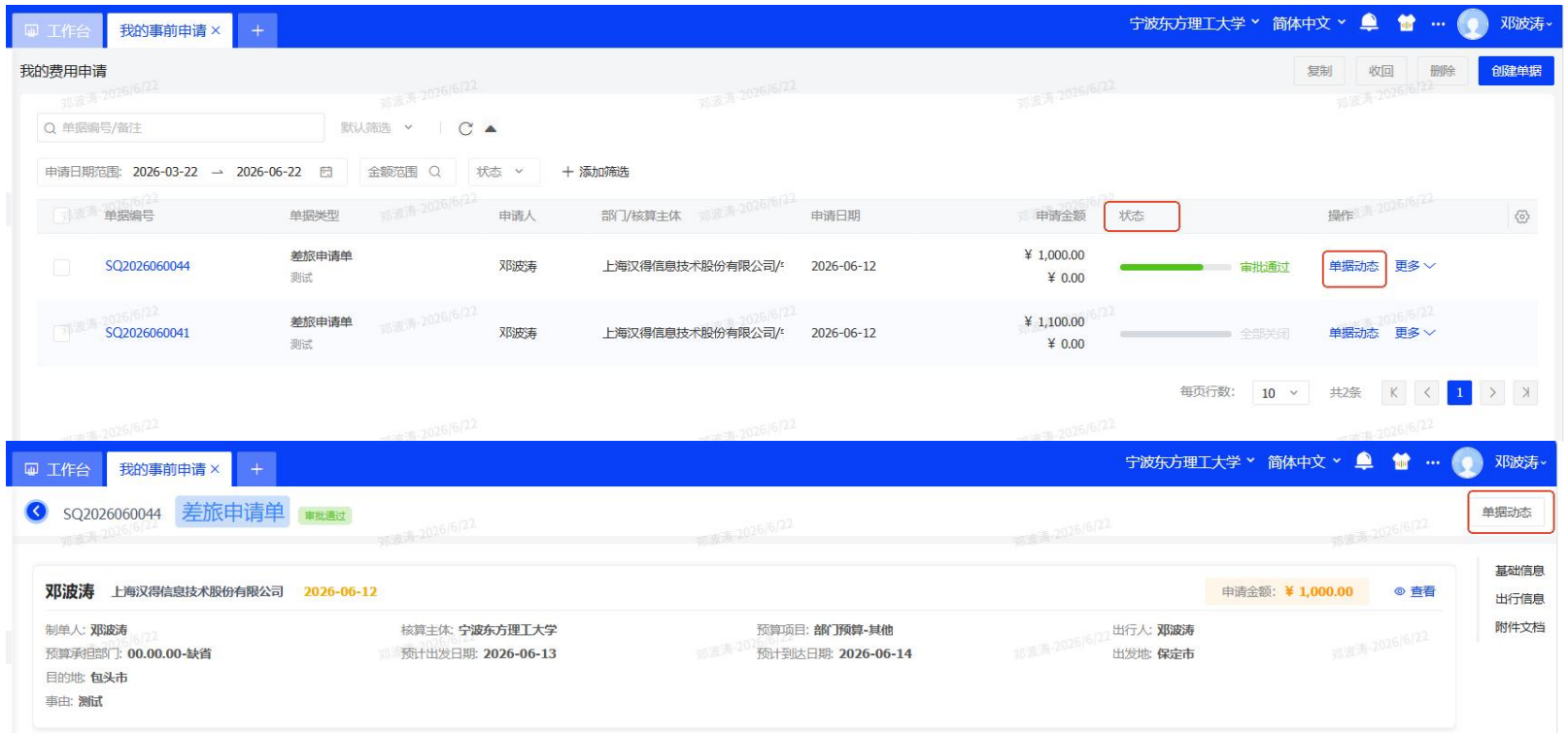
2. If an invoice entered into the Expense Control System needs to be used by another employee, use [Invoice Transfer] in My Invoice Pool to transfer it to a colleague for reimbursement

Document Creation Page Guide

Create document: Expense Management -> My Prior Applications, My Expense Reimbursement, My Advance Payment Applications



Document Approval Progress & Status

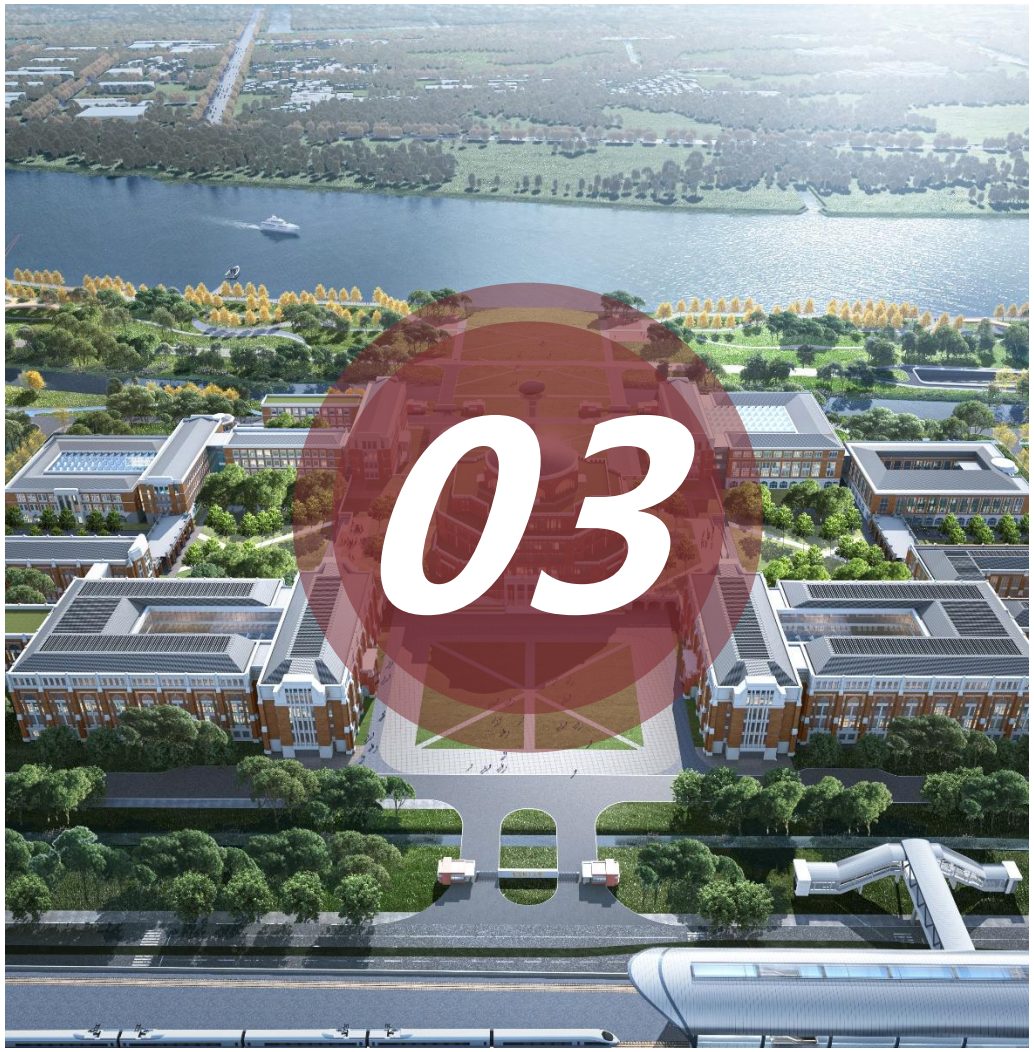




Notes: taking prior application as an example

1. Document approval progress: in My Prior Applications, click Document Log on the document page to view the current approver or approval progress; expand to view all approvers

2. Document status: My Prior Applications has a status column (New, Withdrawn, Submitted, Approved, All Closed)



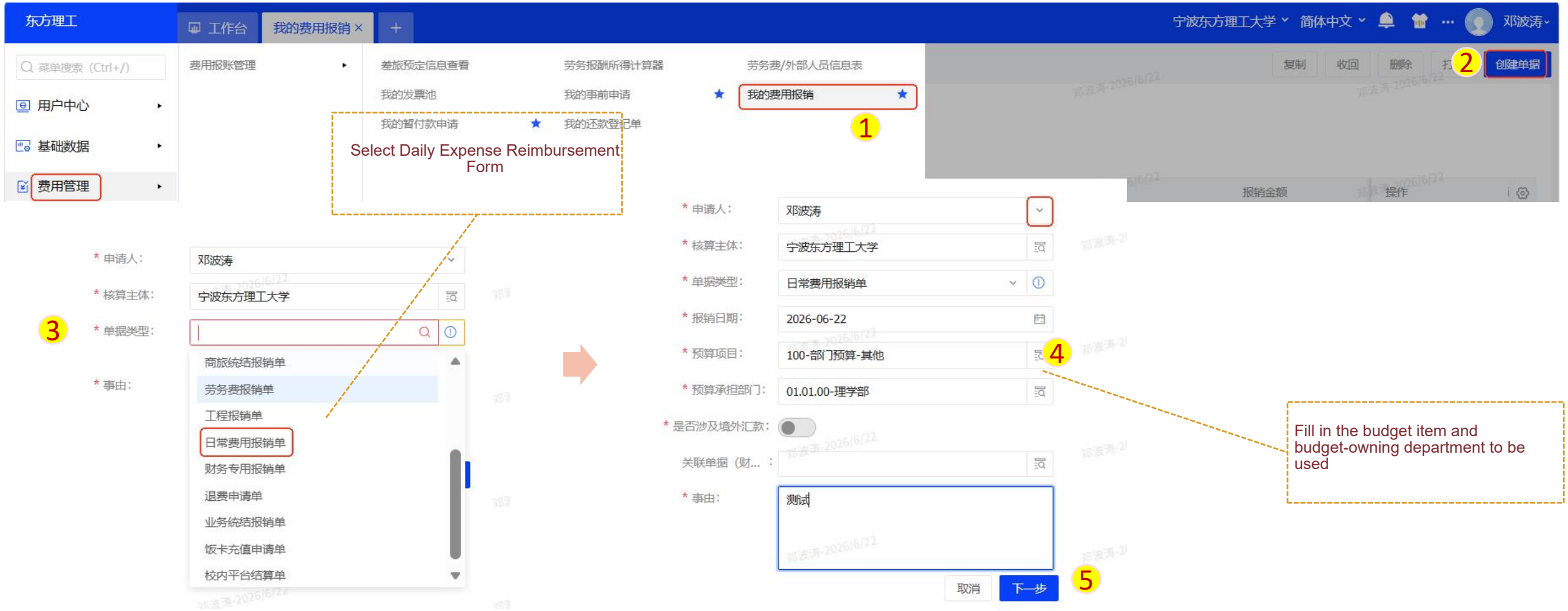
Prior Application & Reimbursement Mgmt.

- Daily expense reimbursement
- Travel expense reimbursement
- Entertainment expense reimbursement
- Labor fee reimbursement
- Procurement expense reimbursement

Daily Expense Claim

Create Daily Expense Reimbursement Form (1/4)

1. Expense Management -> My Expense Reimbursement -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Daily Expense Reimbursement Form (2/4)

2. Click the [Add], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



Notes:

1. **Add: create expense line details manually, then link application lines and invoices as appropriate**
2. **Import from Invoice Pool: start reimbursement from invoices saved in your own invoice pool**
3. **Manual Invoice Entry / Invoice Upload: add invoice info directly on the document page, then fill in expense item, reimbursable amount, etc.**
4. **Import: for many expense lines, download the import template via the Import function, fill in the expense info and import**

Create Daily Expense Reimbursement Form (3/4)

2. Click the [New], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.





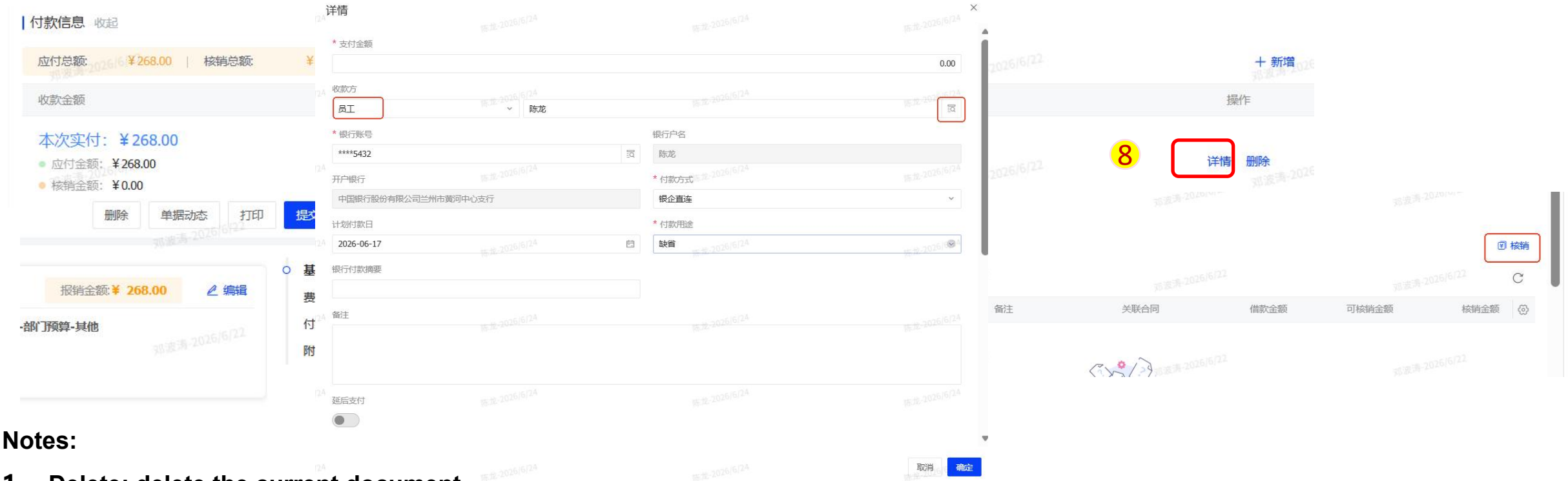
Fill in the amount, budget item, budget-owning department etc. per the actual business (budget item and budget-owning department are brought in from the document header and can be modified)

After filling in the expense info, click here to link invoices; if the invoice amount exceeds the amount to be reimbursed, modify the actual reimbursement amount

Note: daily expense reimbursement does not require a prior application

Create Daily Expense Reimbursement Form (4/4)

3. If there is a prior advance payment to write off, click "Details" under "Payment Info", enter the write-off amount and click "Write Off"
4. If the document has multiple payees, click "Add" in the payment info line and select the payee type and payee name



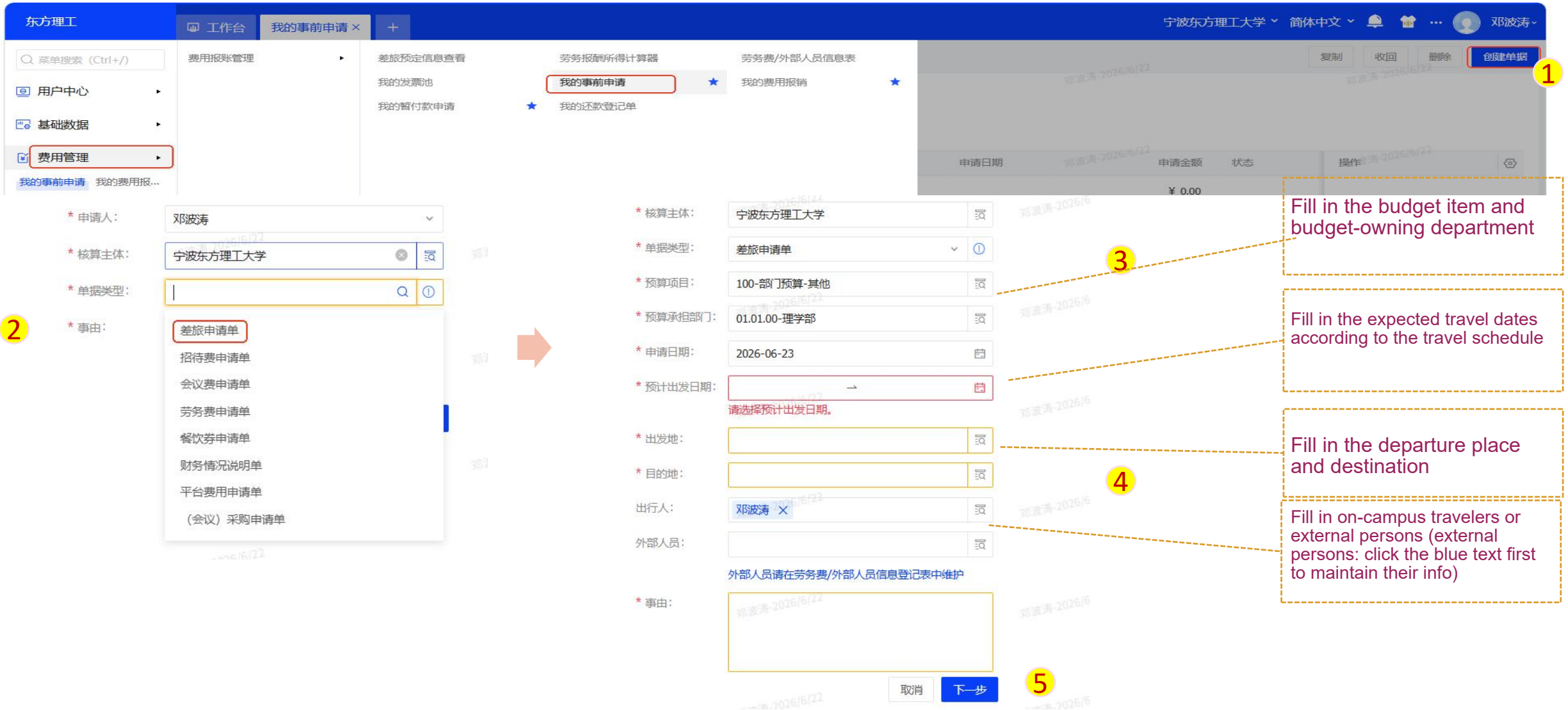
Notes:

1. **Delete: delete the current document**
2. **Document log: preview the approval workflow after submission via this button before submitting**
3. **Submit for approval: if no advance payment needs to be written off, fill in expense info, link invoices, upload attachments, then submit for approval directly**

Travel Expenses Claim

Create Travel Application Form (1/4)

1. Expense Management -> My Prior Applications -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



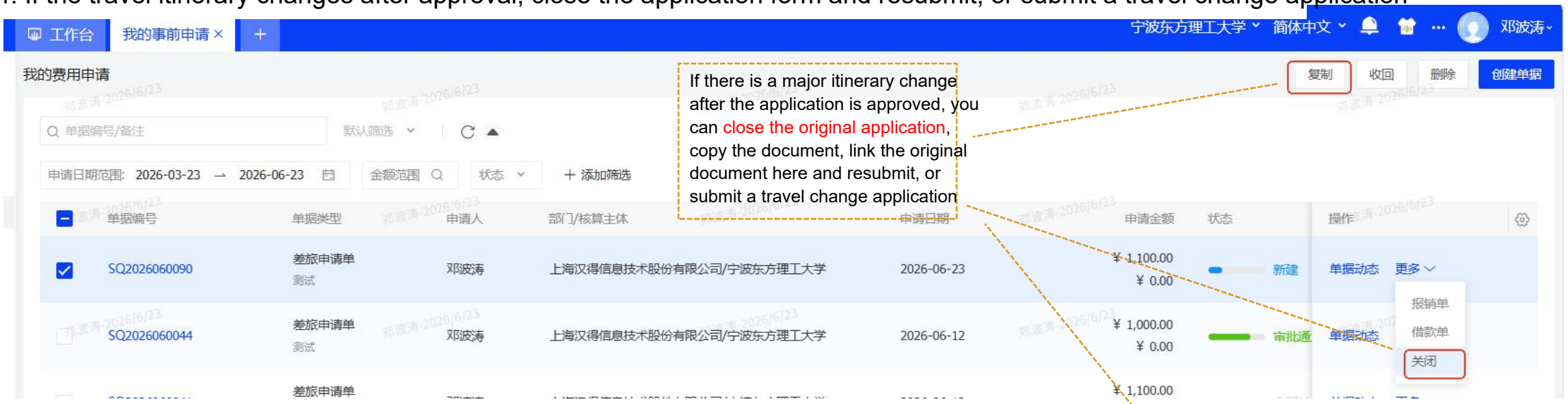
Create Travel Application Form (2/4)

2. Click the "New" button in "Document Info", fill in the budget item, budget-owning department, amount, etc., then click "Save"
3. Upload attachments as needed; after all document info is completed, click "Submit for Approval" at the top right



Create Travel Application Form (3/4)

4. If the travel itinerary changes after approval, close the application form and resubmit, or submit a travel change application





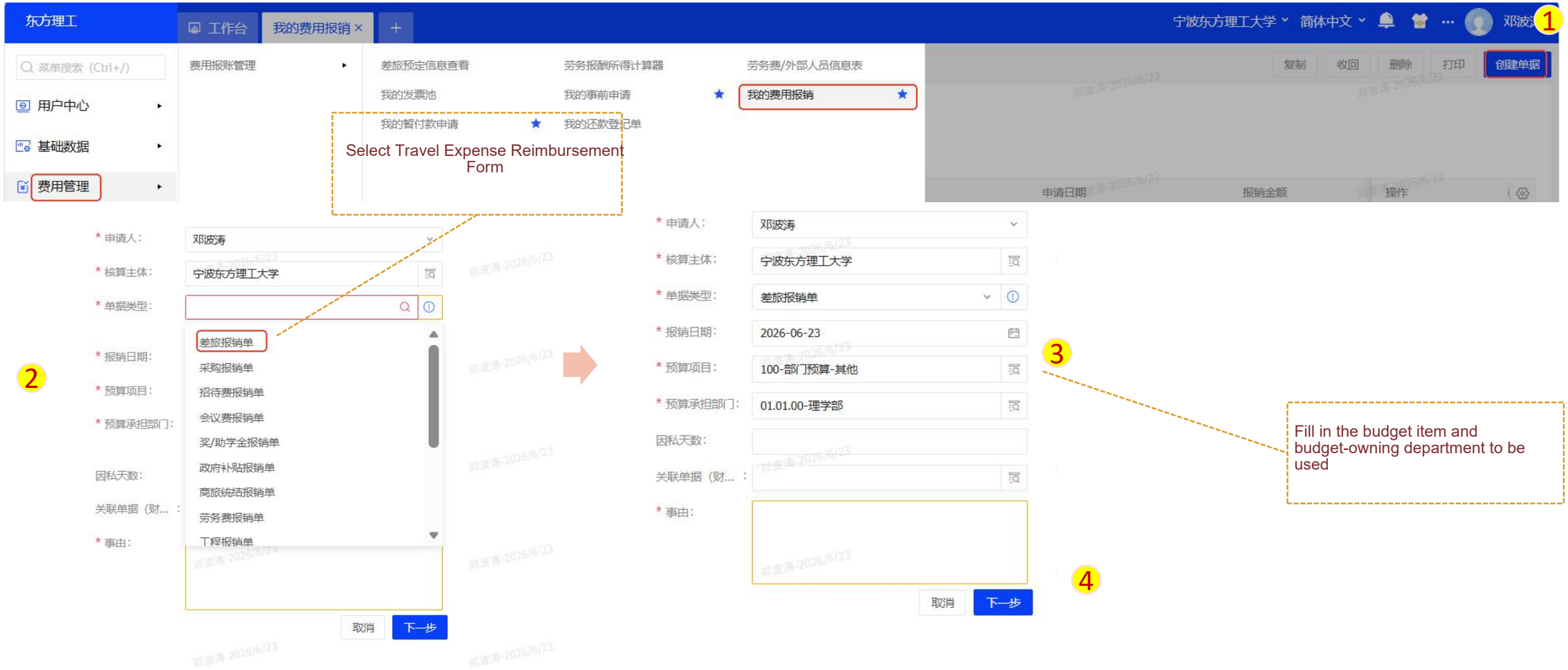
Create Travel Application Form (4/4)

4. If the travel itinerary changes after approval, close the application form and resubmit or submit a travel change application; after filling in the travel change reason and saving, the travel info can be maintained again and submitted for approval



Create Travel Expense Reimbursement Form (1/4)

1. Expense Management -> My Expense Reimbursement -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Travel Expense Reimbursement Form (2/4)

2. Click the [Add], [Import from Application], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



Notes:

1. **Add: create expense line details manually, then link application lines and invoices as appropriate**
2. **Import from Application: select the corresponding travel application lines to import and link**
3. **Import from Invoice Pool: start reimbursement from invoices saved in your own invoice pool**
4. **Manual Invoice Entry / Invoice Upload: add invoice info directly on the document page, then fill in expense item, reimbursable amount, etc.**
5. **Import: for many expense lines, download the import template via the Import function, fill in the expense info and import**

Create Travel Expense Reimbursement Form (3/4)

2. Click the [New], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



6



After importing from the application, the basic info of the application is brought into the reimbursement form

When importing invoices, the info recognized from the invoice is automatically brought into the expense lines

Note: for intercity transport and accommodation, to validate travel standards one expense line can only link one invoice when importing; if there are multiple invoices, split the expense lines.

Create Travel Expense Reimbursement Form (4/4)

3. If there is a prior advance payment to write off, click "Details" under "Payment Info", enter the write-off amount and click "Write Off"



Notes:

1. **Delete: delete the current document**
2. **Document log: preview the approval workflow after submission via this button before submitting**
3. **Submit for approval: if no advance payment needs to be written off, fill in expense info, link invoices, upload attachments, then submit for approval directly**

Note: all submitted application forms occupy budget. If the expenses of an application have been linked to a reimbursement, the applicant should close the application form to release the budget.

Application Form Closing Page

Expense Management > My Prior Applications: select the document line "More" and click Close

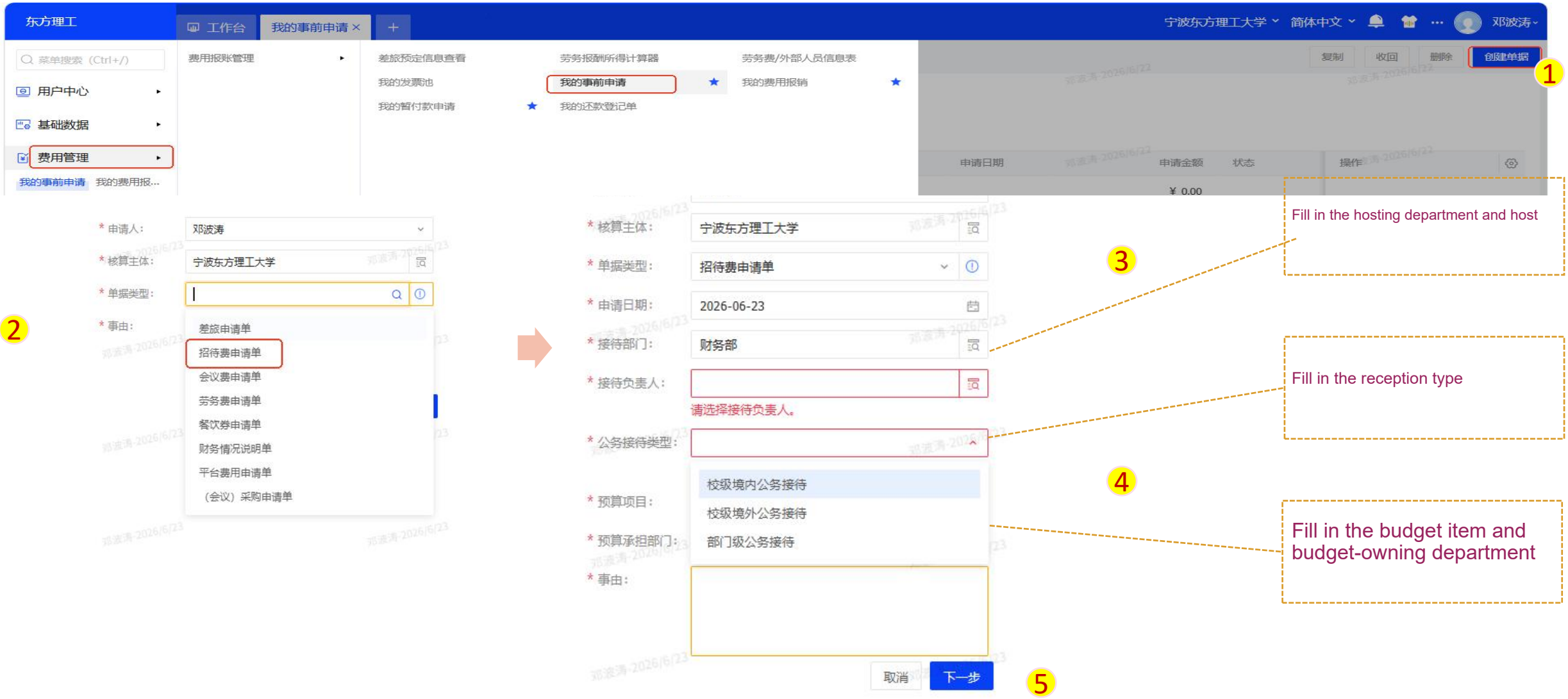


Note: only approved prior applications can be closed. If the linked reimbursement form or advance payment form has not completed approval and payment, closing is not allowed.

Reception Expenses Claim

Create Entertainment Application Form (1/3)

1. Expense Management -> My Prior Applications -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Entertainment Application Form (2/3)

2. Click the "New" button in "Document Info", fill in the budget item, budget-owning department, amount, etc., then click "Save"

3. Upload attachments as needed; after all document info is completed, click "Submit for Approval" at the top right



Create Entertainment Application Form (3/3)

4. When the line items of the entertainment application form are Entertainment - Buffet/Sit-down Meal or Entertainment - Working Meal, the expense line requires visit date, meal time, our hosting staff, reception target, guests, total number of people, reception level, etc.

Guests: names of the guests, separated by commas

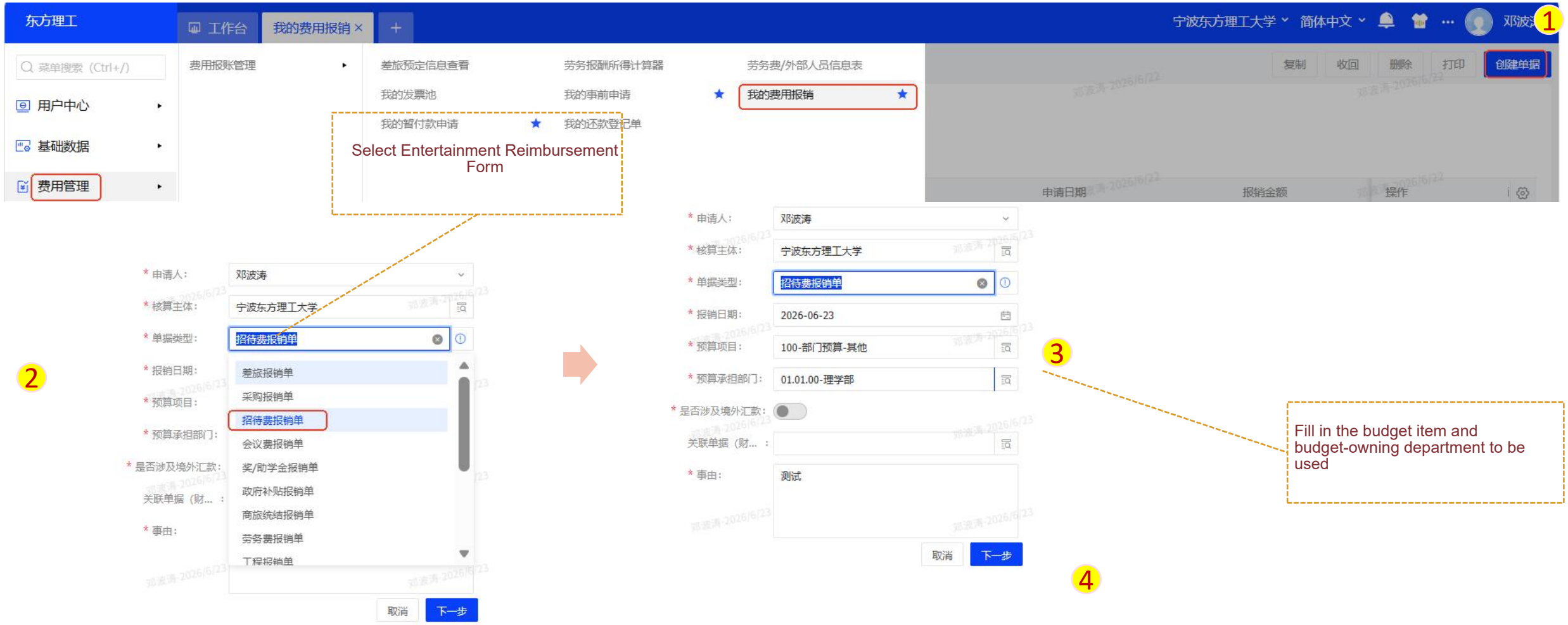


Reception target: name of the guest organization

Total number: our hosting staff plus guests

Create Entertainment Reimbursement Form (1/3)

1. Expense Management -> My Expense Reimbursement -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Entertainment Reimbursement Form (2/3)

2. Click the [Add], [Import from Application], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



Notes:

1. **Add: create expense line details manually, then link application lines and invoices as appropriate**
2. **Import from Application: select the corresponding entertainment application lines to import and link**
3. **Import from Invoice Pool: start reimbursement from invoices saved in your own invoice pool**
4. **Manual Invoice Entry / Invoice Upload: add invoice info directly on the document page, then fill in expense item, reimbursable amount, etc.**
5. **Import: for many expense lines, download the import template via the Import function, fill in the expense info and import**

Create Entertainment Reimbursement Form (3/3)

3. If there is a prior advance payment to write off, click "Details" under "Payment Info", enter the write-off amount and click "Write Off"



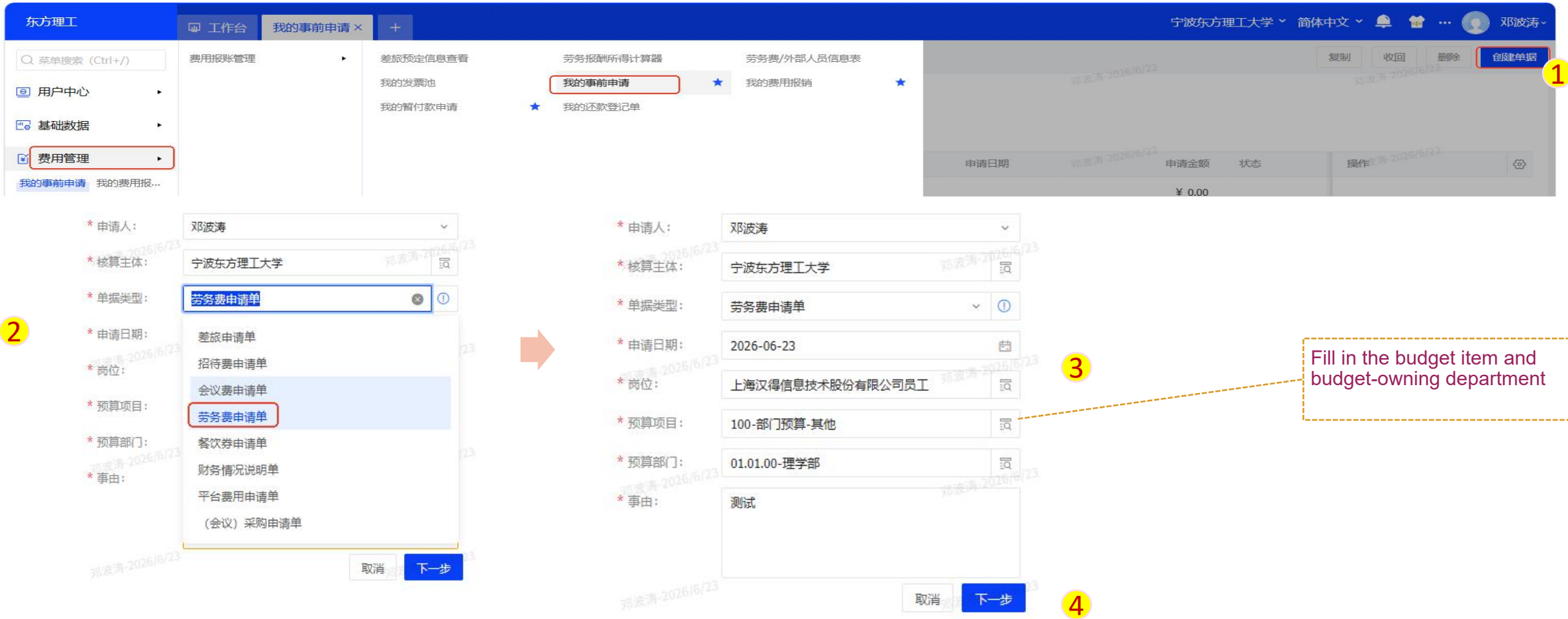
Notes:

1. **Delete: delete the current document**
2. **Document log: preview the approval workflow after submission via this button before submitting**
3. **Submit for approval: if no advance payment needs to be written off, fill in expense info, link invoices, upload attachments, then submit for approval directly**

Services Expenses Claim

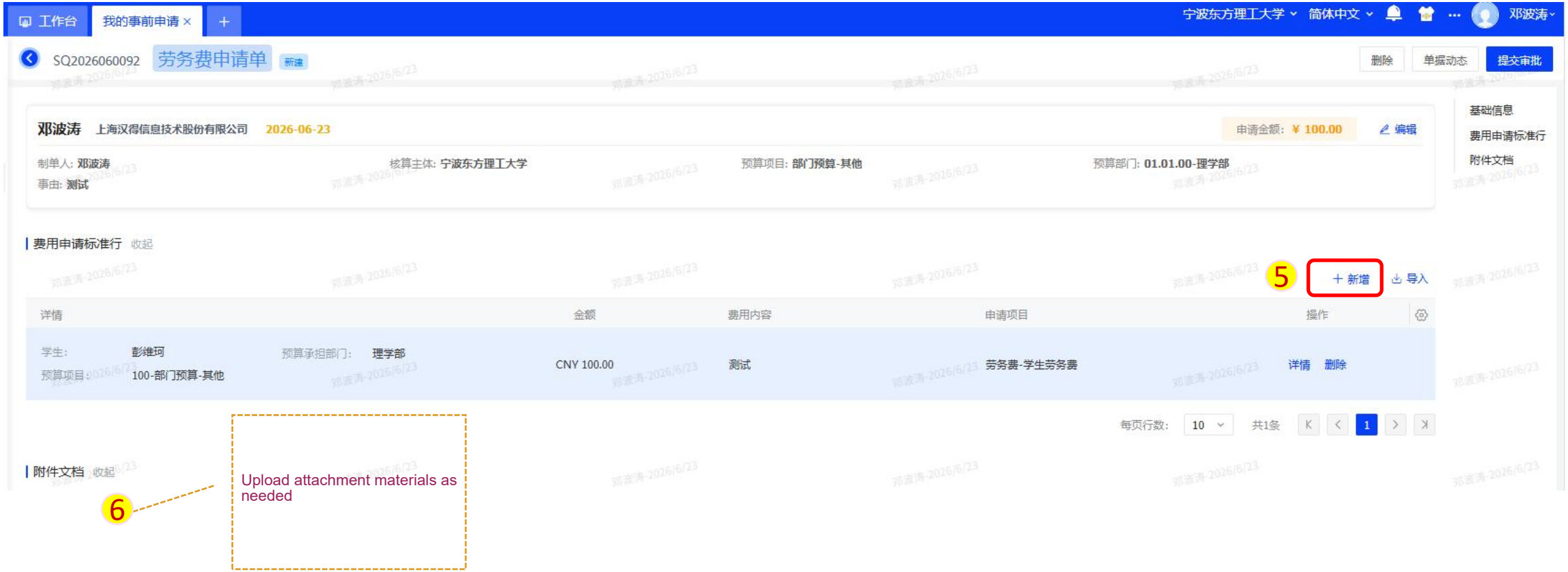
Create Labor Fee Application Form (1/3)

1. Expense Management -> My Prior Applications -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Labor Fee Application Form (2/3)

2. Click the "New" button in "Document Info", fill in the budget item, budget-owning department, amount, etc., then click "Save"
3. Upload attachments as needed; after all document info is completed, click "Submit for Approval" at the top right



Create Labor Fee Application Form (3/3)

4. When the labor fee application line items are Labor Fee - Consulting Fee, Labor Fee - Review Fee, Labor Fee - Lecture Fee or Labor Fee - Project Personnel Labor Fee, the expense line requires labor personnel, employing unit, employment dates, employment type, etc. When maintaining the amount and labor personnel, click the blue text to calculate the tax and maintain the labor personnel's basic info and bank account.







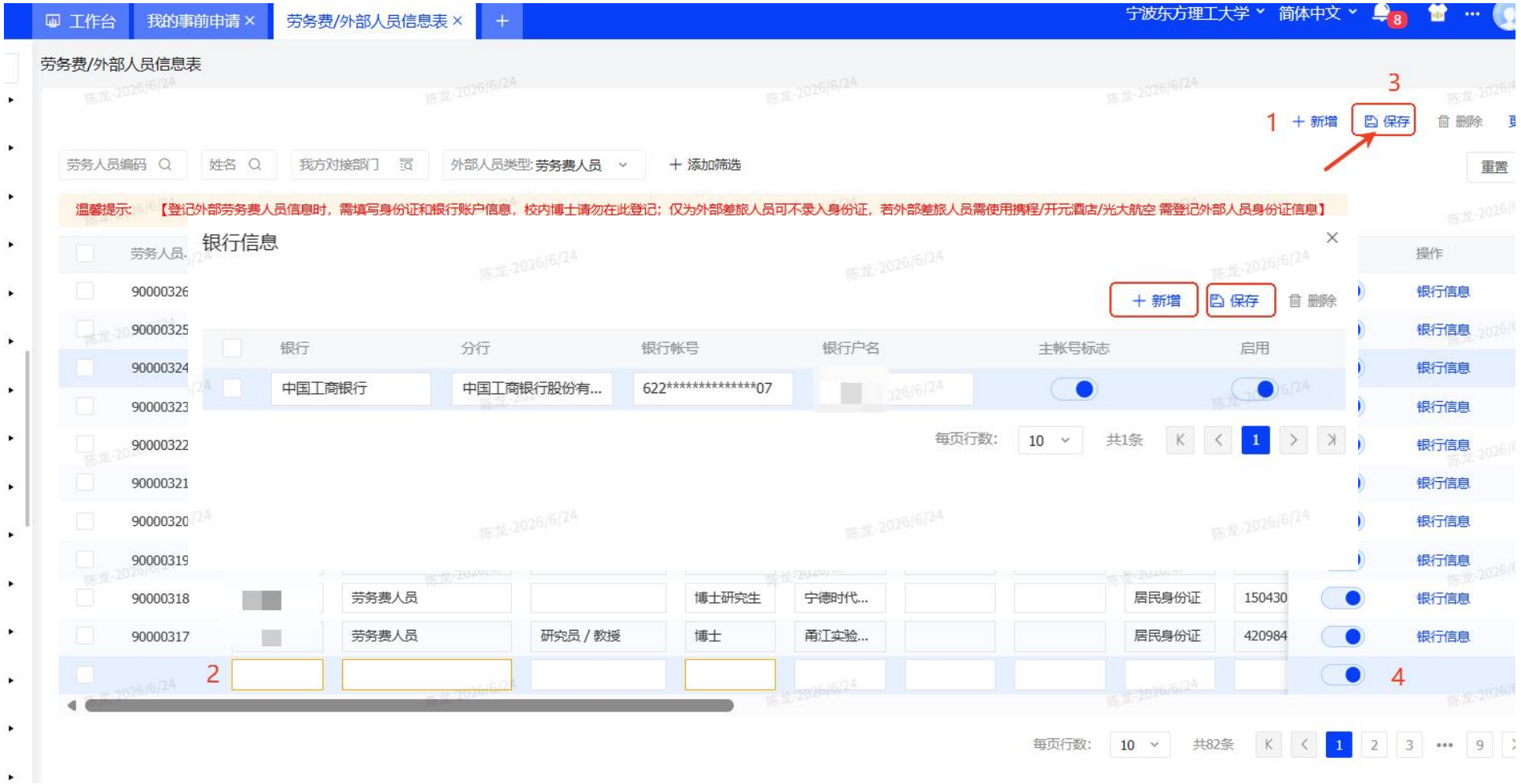
Labor Fee Calculator

For labor fee calculation, select the calculation method (amount incl. / excl. tax) and personnel type (domestic / overseas), enter the corresponding income amount and click Calculate to get the after-tax income and individual income tax payable, then enter the amount incl. tax.



Labor Personnel Info Maintenance

When maintaining labor personnel info, fill in in order: 1. Add 2. Maintain the labor personnel's basic info 3. Save 4. Bank info can only be maintained after the labor personnel info is saved



Create Labor Fee Reimbursement Form (1/4)

1. Expense Management -> My Expense Reimbursement -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Labor Fee Reimbursement Form (2/4)

2. Click the [Add], [Import from Application], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



Notes:

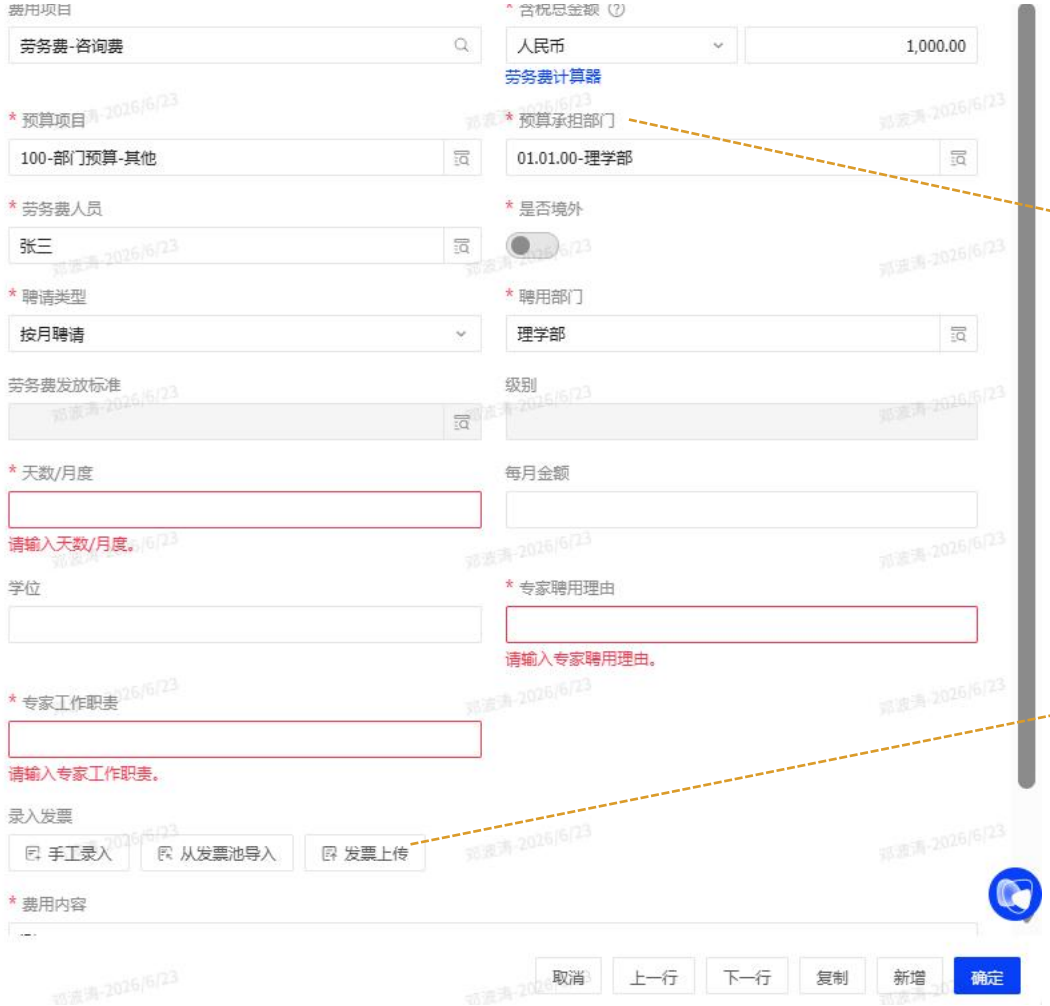
1. **Add: create expense line details manually, then link application lines and invoices as appropriate.**
2. **Import from Application: select the corresponding labor fee application lines to import and link**
3. Import from Invoice Pool: start reimbursement from invoices saved in your own invoice pool (if invoices exist)
4. **Manual Invoice Entry / Invoice Upload: add invoice info directly on the document page, then fill in expense item, reimbursable amount, etc.**
5. **Import: for many expense lines, download the import template via the Import function, fill in the expense info and import**

Create Labor Fee Reimbursement Form (3/4)

2. Click the [New], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



6



After importing from the application, the basic info of the application is brought into the reimbursement form

If there are invoices, upload and link the corresponding invoices

Create Labor Fee Reimbursement Form (4/4)

3. After the expense line info is saved, the labor personnel's bank info is brought in automatically and the tax is calculated automatically



Notes:

1. **Delete: delete the current document**
2. **Document log: preview the approval workflow after submission via this button before submitting**
3. **Submit for approval: if no advance payment needs to be written off, fill in expense info, link invoices, upload attachments, then submit for approval directly**

Purchase Reimbursement Claim

Create Purchase Requisition Form

Purchase requisition forms are filled in the procurement system and pushed to the Expense Control System after submission; applicants can view the status and approval progress of purchase requisition forms in My Prior Applications

(Before the procurement system goes live, purchase requisition forms are applied for via DingTalk, and at reimbursement time are uploaded as attachments to the purchase reimbursement form in the Expense Control System)



Create Contract

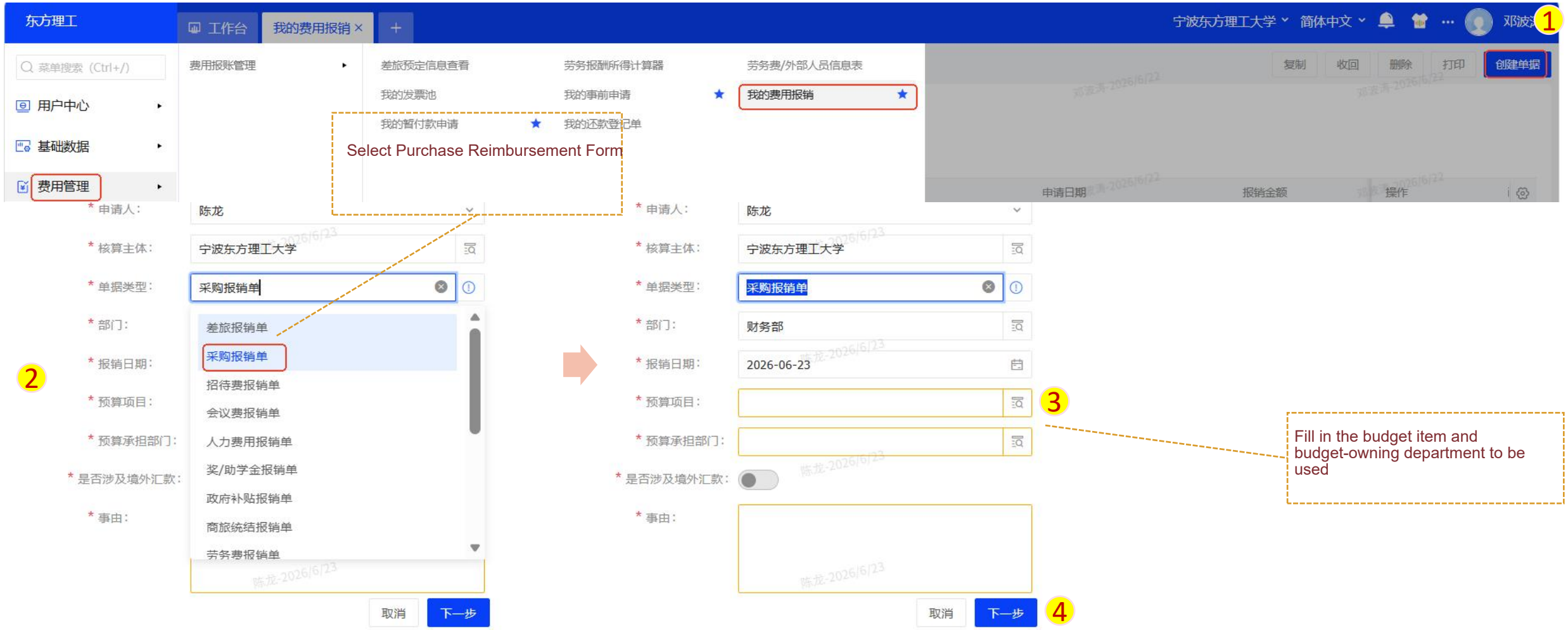
Contracts are filled in the procurement system and pushed to the Expense Control System after approval; applicants can view contract status and execution progress under My Contracts

(Before the procurement system goes live, contracts are uploaded as attachments to the purchase reimbursement form)



Create Purchase Reimbursement Form (1/4)

1. Expense Management -> My Expense Reimbursement -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next"



Create Purchase Reimbursement Form (2/4)

2. Click the [Add], [Import from Application], [Import from Invoice Pool], [Manual Invoice Entry], [Invoice Upload] buttons at the top right of "Expense Info" to maintain the details of the expenses to be reimbursed, then click Save.



Notes:

1. **Add: create expense line details manually, then link application lines and invoices as appropriate**
2. **Import from Application: select the corresponding purchase requisition lines to import and link**
3. **Import from Invoice Pool: start reimbursement from invoices saved in your own invoice pool**
4. **Manual Invoice Entry / Invoice Upload: add invoice info directly on the document page, then fill in expense item, reimbursable amount, etc.**
5. **Import: for many expense lines, download the import template via the Import function, fill in the expense info and import**

Create Purchase Reimbursement Form (3/4)

3. If there is a prior advance payment to write off, click "Details" under "Payment Info", enter the write-off amount and click "Write Off"
4. If a contract needs to be linked, find the linked-contract area in the payment info details and link the corresponding contract



Note: when a reimbursement form is linked to a contract, the contract supplier and the reimbursement form's payment supplier must be the same

Create Purchase Reimbursement Form (4/4)

5. Judge whether to upload attachments according to the policy; after all document info is completed, click "Submit for Approval" at the top right



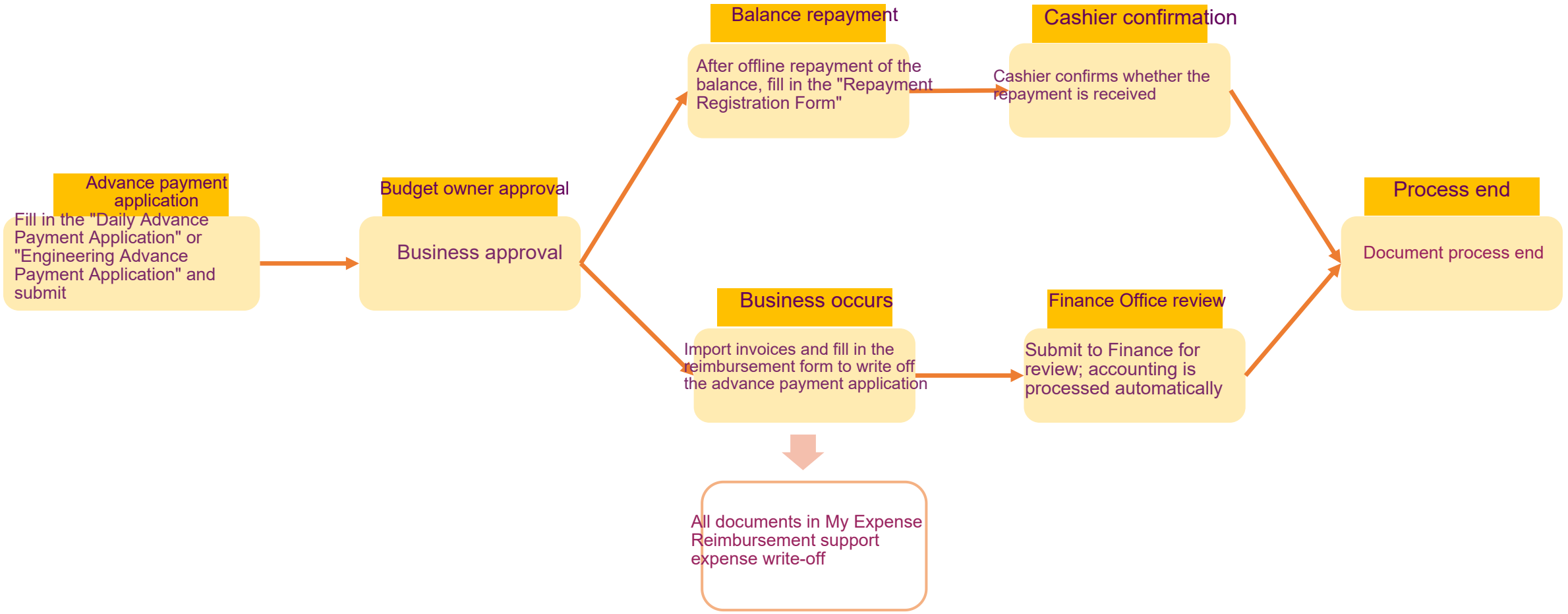


Advance Payment & Write-off Mgmt.

- Overall advance payment process
- Daily advance payment application
- Advance payment repayment management

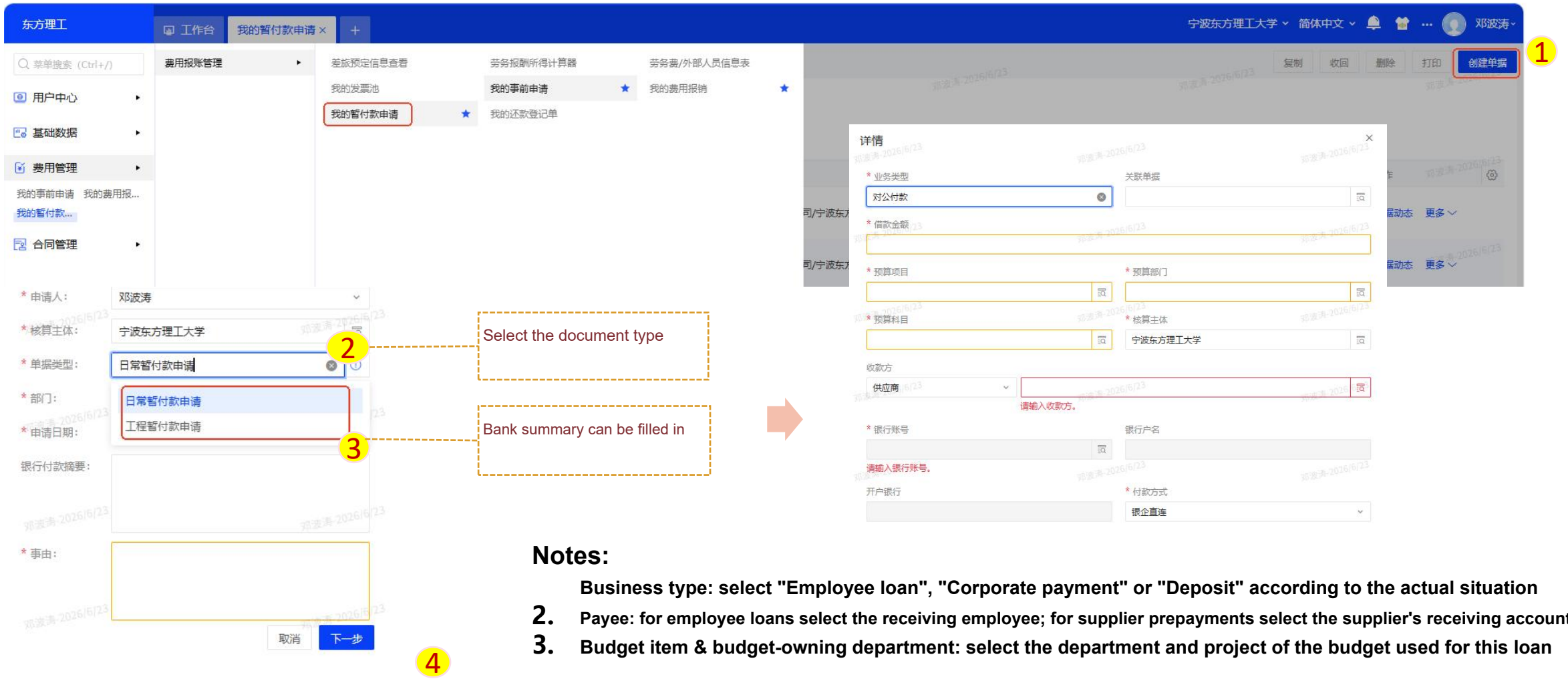
Repayment

Advance Payment & Repayment Flow (4/4)



Create Advance Payment Application Form

1. Expense Management -> My Advance Payment Applications -> click "Create Document" -> select the document type as needed, edit the reason -> click "Next", fill in the payment info and submit the document

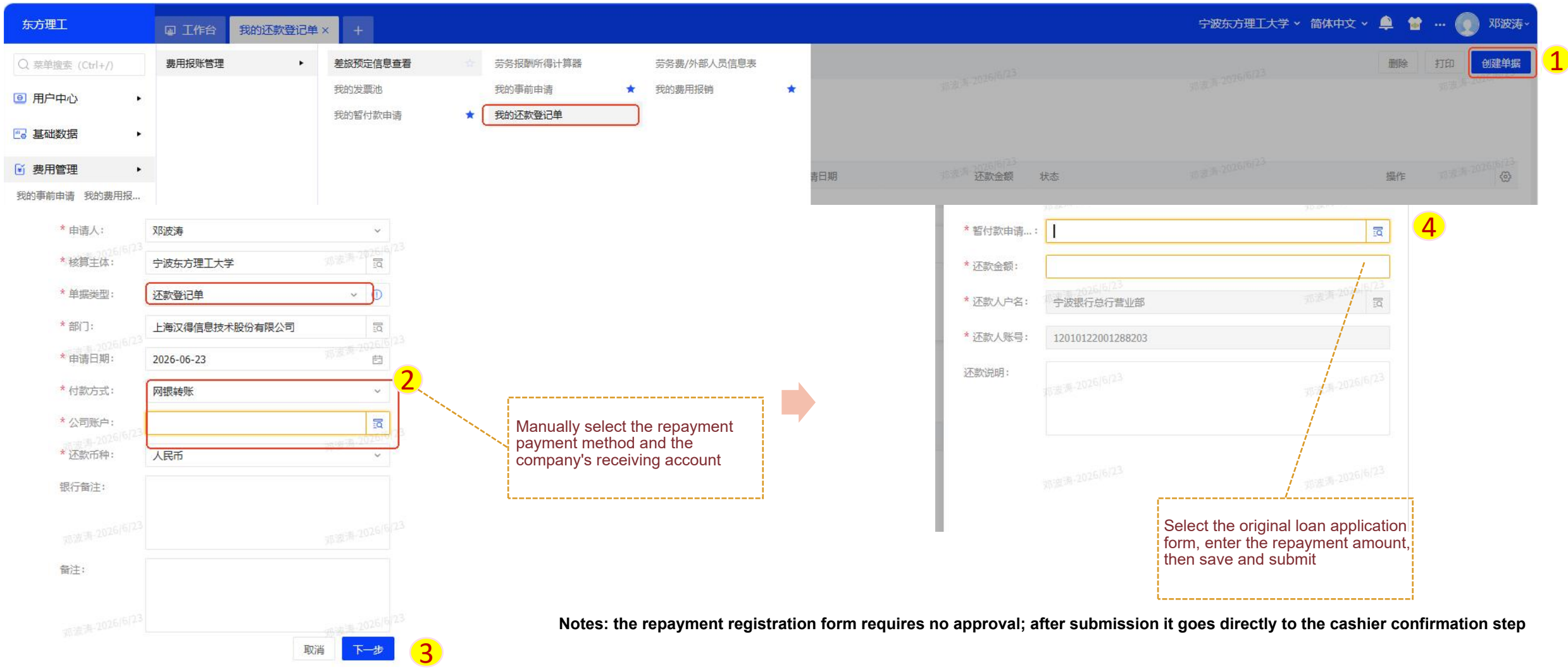


Notes:

1. **Business type: select "Employee loan", "Corporate payment" or "Deposit" according to the actual situation**
2. **Payee: for employee loans select the receiving employee; for supplier prepayments select the supplier's receiving account**
3. **Budget item & budget-owning department: select the department and project of the budget used for this loan**

Create Repayment Registration Form

1. Expense Management -> My Repayment Registration Forms -> click "Create Document" -> select the document type, edit the remarks -> click "Next", fill in the repayment info and submit the document



Notes: the repayment registration form requires no approval; after submission it goes directly to the cashier confirmation step

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THANKS

Thank you / Comments welcome

2026

