

Expenses: View an Expense Report

For employees viewing an expense report

Purpose:

View an Expense Report that has not been approved.

How to Access:

Log into the [Bear Trax](#) application. Select the **About Me** task in the Navigator.

Helpful Hints:

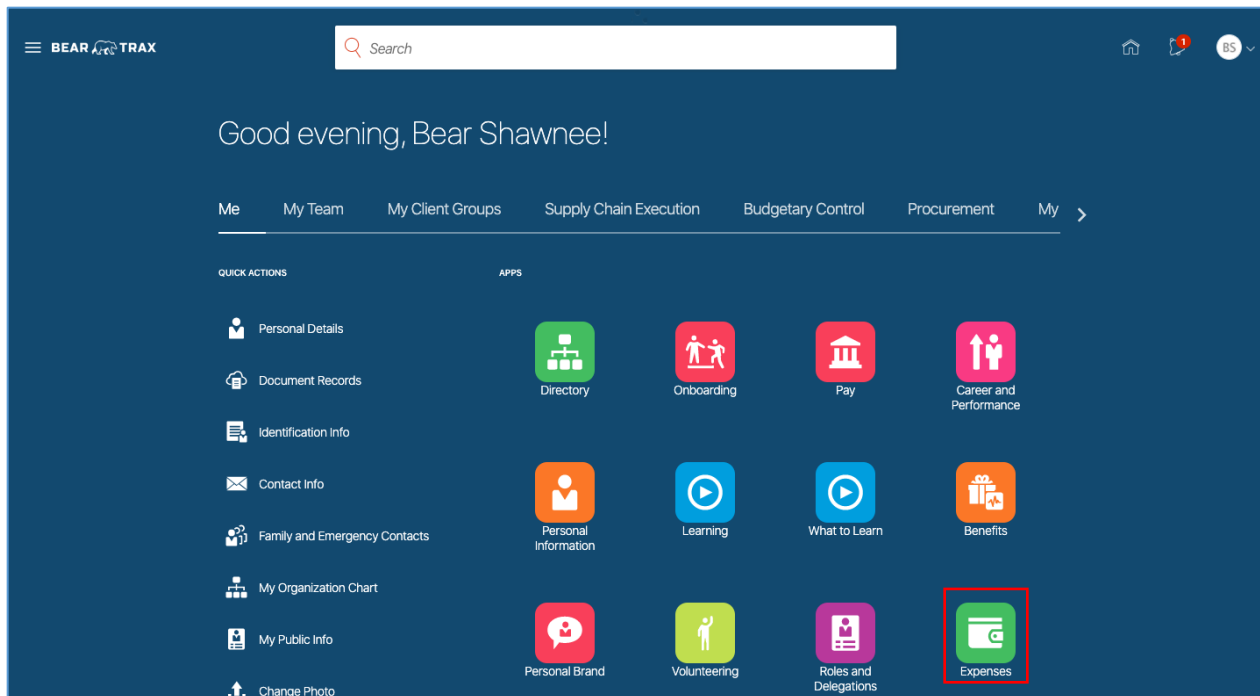
Be sure to keep in mind that...

- You can use this job aid to view an expense report that is in progress or has been submitted for approval
- Expense reports which have been submitted or approved can be searched and viewed up to 6 months later

Procedure:

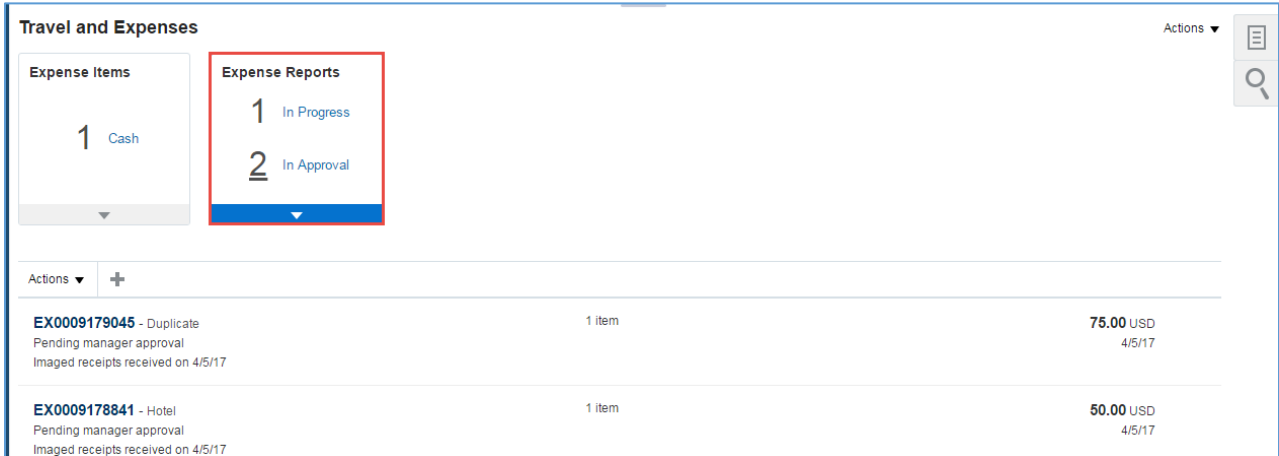
Complete the following steps to view an Expense Report:


1. Click on the **Expenses** tile.



The page will show expense reports that are **"In Progress"** or **"In Approval"** status.

2. Click **"In Progress"** or **"In Approval"** to see the list of reports in that status.



Travel and Expenses Actions ▾ 

Expense Items

1

Cash

Expense Reports

1

In Progress

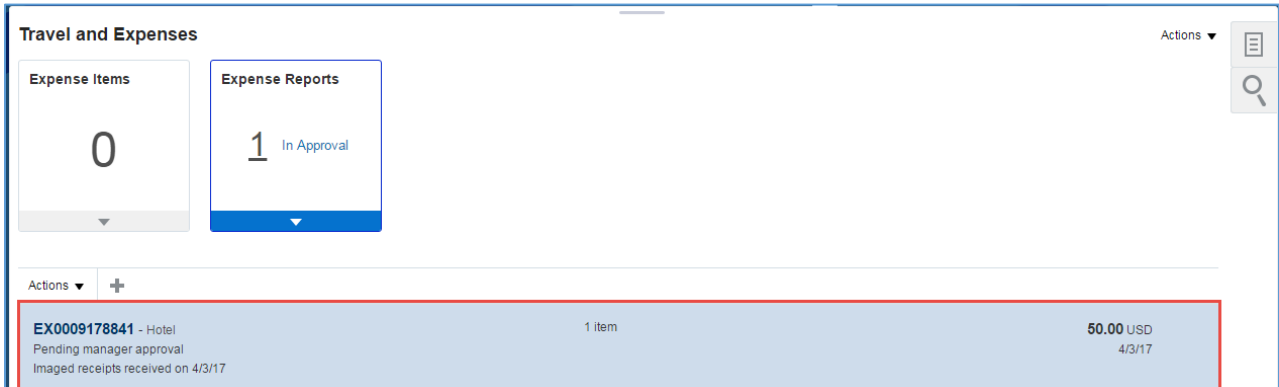
2


In Approval

Actions ▾ +

EX0009179045 - Duplicate Pending manager approval Imaged receipts received on 4/5/17	1 item	75.00 USD 4/5/17
EX0009178841 - Hotel Pending manager approval Imaged receipts received on 4/5/17	1 item	50.00 USD 4/5/17

3. Highlight the expense report you would like to take action on.



Travel and Expenses Actions ▾ 

Expense Items

0

Expense Reports

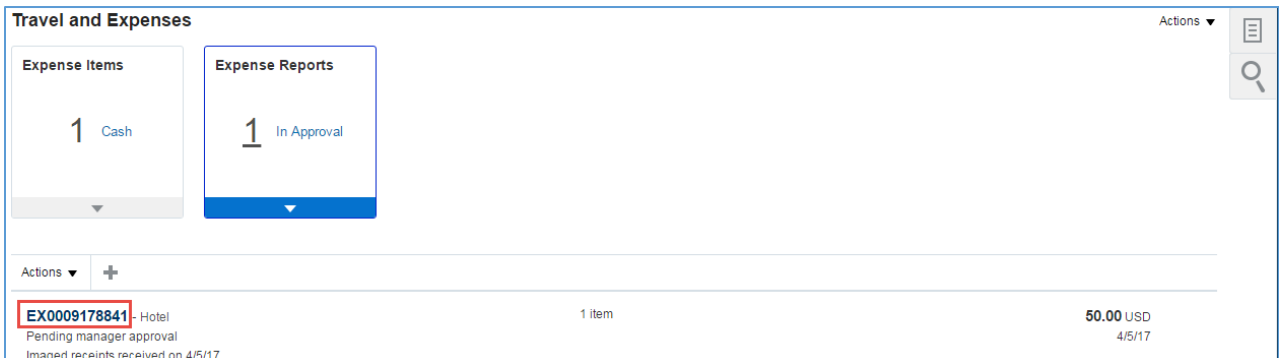
1


In Approval

Actions ▾ +

EX0009178841 - Hotel Pending manager approval Imaged receipts received on 4/3/17	1 item	50.00 USD 4/3/17
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4. Click on the report number to open the expense report and see more details.



Travel and Expenses Actions ▾ 

Expense Items

1

Cash

Expense Reports

1

In Approval

Actions ▾ +

EX0009178841 - Hotel Pending manager approval Imaged receipts received on 4/5/17	1 item	50.00 USD 4/5/17
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5. Click on **Pending manager approval** in the Status section to view the Approver List for reports "In Approval" status.

Expense Report: EX0009178841 Submit Receipts Cancel

<p>Purpose: Hotel</p> <p>Attachments: generic receiptssu +</p> <p>Status: Pending manager approval</p>	<p>Report Total</p> <hr/> <p>Payment Method: Electronic</p> <p>Employer Pays You: 50.00 USD</p> <p style="font-size: 1.2em; font-weight: bold;">50.00 USD</p>
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Expense Items

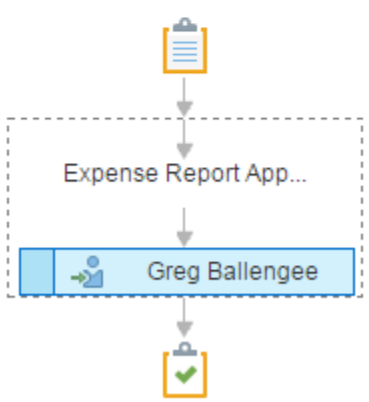
<p>Accommodations - East Lansing, MI hotel room</p>	<p>4/3/17 generic receipt + <small>Imaged receipt required</small></p>	<p>50.00 USD</p>
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6. Click **OK** once finished reviewing.

Approver List

+ | ✎ | ✕
Options ▾
Apply | Reset ▾

1	▾	Parallel Stages
1.1	▾	Expense Report Approval Stage
1.1.1	▾	Parallel
1.1.1.1	➔	<p>Greg Ballengee - Expense Report Approvers</p> <p>Assigned Apr 5, 2017 📷</p> <p>DeeAnn Merritt</p>



OK

This page indicates that DeeAnn Merritt has submitted this report to Greg Ballengee for approval.

7. Click the Expense Item detail link to see more details about an expense item included in the report.

Expense Report: EX0009178841 Submit Receipts [Cancel](#)

<p>Purpose: Hotel</p> <p>Attachments: generic receipt ssu +</p> <p>Status: Pending manager approval</p>	<p>Report Total</p> <hr/> <p>Payment Method: Electronic</p> <p>Employer Pays You: 50.00 USD</p> <p style="font-size: 1.2em; font-weight: bold;">50.00 USD</p>
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Expense Items

Accomodations - East Lansing, MI hotel room	4/3/17 generic receipt + Imaged receipt required	50.00 USD
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8. Review information, then click **Done** to return to the main page.

Accomodations 4/3/17 Done

Date: 4/3/17

Template: SSU_Expenses

Type: Accomodations

Expense Location: East Lansing, Ingham, MI, United States

Amount: 50.00 USD

Number of Days: 1

Daily Amount: 50.00 USD

Reimbursable Amount: 50.00 USD

Details

Description: hotel room	Account: 10-1010-50-10074-62105-10000-000
Merchant Name: Holiday Inn	
Checkout Date: 3/27/17	

Attachments: generic receipt + X
— Receipt missing

9. Click **Cancel** to exit the report.

☰
DeeAnn Merritt

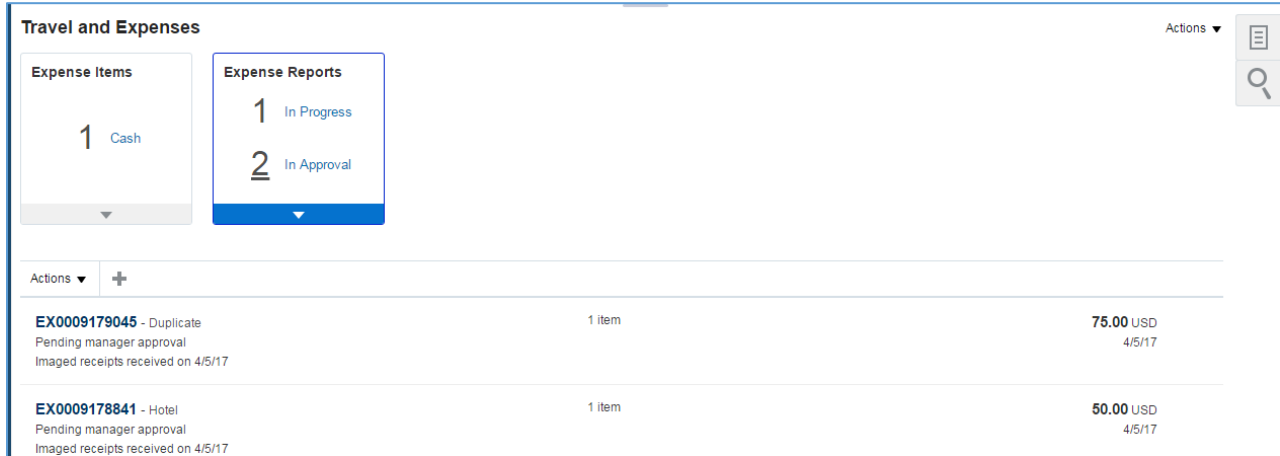
Expense Report: EX0009178841 Submit Receipts Cancel


<p>Purpose: Hotel</p> <p>Attachments: generic receipt ssu +</p> <p>Status: Pending manager approval</p>	<p>Report Total</p> <hr/> <p>Payment Method: Electronic</p> <p>Employer Pays You: 50.00 USD</p> <p style="font-size: 1.2em; font-weight: bold;">50.00 USD</p>
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Expense Items

Accomodations - East Lansing, MI hotel room	4/3/17 generic receipt + Imaged receipt required	50.00 USD
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This will take you back to the Travel and Expenses page.



Travel and Expenses Actions ▾ 

Expense Items

1

Cash

Expense Reports

1

In Progress

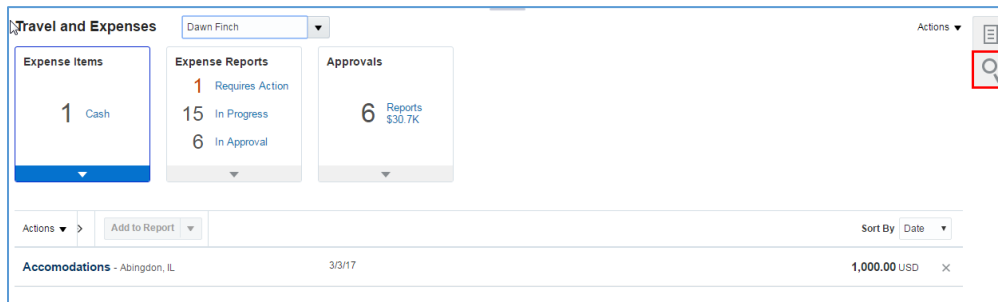
2


In Approval

Actions ▾ +

EX0009179045 - Duplicate	1 item	75.00 USD
Pending manager approval Imaged receipts received on 4/5/17		
EX0009178841 - Hotel	1 item	50.00 USD
Pending manager approval Imaged receipts received on 4/5/17		

10. View Past Approved Expense Reports up to 6 months in history by clicking the **Search** icon on the right side of the page.



Travel and Expenses Dawn Finch ▾ Actions ▾ 

Expense Items

1

Cash

Expense Reports

1

Requires Action

15

In Progress

6

In Approval

Approvals

6

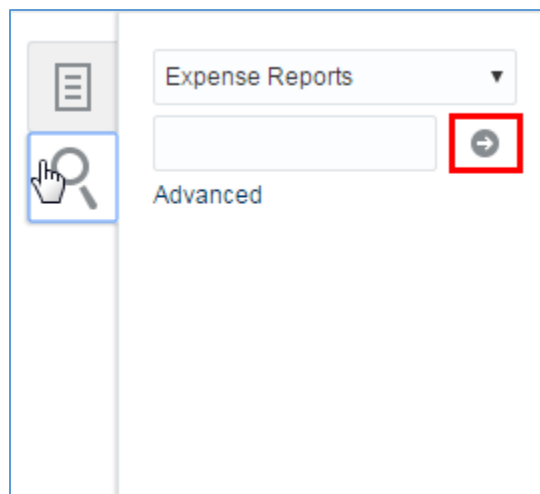
Reports


\$30.7K

Actions ▾ Add to Report ▾ Sort By | Date ▾


Accomodations - Abingdon, IL	3/3/17	1,000.00 USD x
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11. The search panel will open from the right. **Click the Search arrow** without entering anything into the field to search for all expense reports.





Expense Reports ▾



Advanced

12. You will see all expense reports created or submitted in the last 6 months.

Manage Expense Reports Done

Search Note that you can specify your search by expanding this section here

Saved Search

Actions

Report Number	Date	Report Status	Report Total (USD)	Purpose	Trip Name	Amount	Payment Date
EX0009113327	3/8/17	Saved	1,583.00	Travel to Hawaii			
EX0009796793	4/24/17	Manager requested more infor...	100.00	AZ			
EX0010244301	5/12/17	Saved	250.00				
EX0010281946	5/18/17	Pending manager approval	200.00	ER_APPRVL_144_10097			
EX0010197493	5/9/17	Saved	1.00	ZXCV			
EX0010210249	5/12/17	Ready for payment	5,000.00	COURSE FEE TEST APPROVALS			
EX0009178326	3/21/17	Saved	150.00	A			
EX0010202585	5/10/17	Pending manager approval	21.00				
EX0009796787	4/24/17	Saved	120.00	ZZ			
EX0010202670	5/10/17	Ready for payment	5,000.00	Test COURSE fee travel			
EX0009180164	3/18/17	Saved	0.00	test11			
EX0009113769	3/10/17	Saved	1,156.71	Michelle's Hawaii Trip			
EX0009113568	3/8/17	Pending manager approval	5,000.00	test app 21			
EX0010244586	5/16/17	Saved	10.00				
EX0008874087	3/8/17	Saved	0.00	XX			
EX0008874171	3/8/17	Saved	100.00	test app 2			

Note: You can view the status of all submitted and approved expense reports using this search.

13. Click **Done** to return to the main page.

Manage Expense Reports Done

Search

Saved Search

Actions

Final Notes

By following these steps, you have successfully viewed an expense report and its expense items or viewed a search of all expense reports which have been submitted or approved over the last 6 months.