Expense Report – Tracking Reports

This training provides a brief overview on how to track Expense Reports. Pre-Approval tracking is very similar except the user can only track the entire Pre-Approval and without the ability to track individual line items (as the user can with an Expense Report).

1. **Report Name:** Select the Report to track under the Submitted Expense Reports (or Submitted Pre-Approvals) tab.
2. **Tracking:** Select this button to see the approval process for this report.
3. Expense Line Item (Returned): For Expense Reports, the tracking is done at the expense line item level. For Pre-Approvals, the tracking is done for the entire report. In this case, an approver has returned this line item. Select the line item to view the details.

4. Routing Status: The status for this line item is “Returned”
5. The information in regards to the Approver who returned it as well as the date, status, and complete date are shown in this detailed section.

6. The last expense line item is shown to have been sitting with another approver and has not been returned. Select this item to view the details.

7. Routing Status: The status for this expense line item is “Pending” as it has not gone through the entire approval process.

8. It has been assigned to the L1 Org Approver and at step number 3 of the 8-step approval process. The user can select either the check marks or numbers along the approval path to see both past and future approvers.