EX.060.024 – REVIEWING EMPLOYEE EXPENSE HISTORY

Purpose	To review travel & expense transaction history.
Description	The Review Expense History page is similar to the View page within each transaction type. However, the Review Expense History page displays transactions in a '*Paid*,' '*Denied*,' or '*Closed*' status only, whereas the View page displays all transactions regardless of status. If an authorized expense user is delegated authority for an employee, the authorized expense user will be able to review the employee's expense history on this page.
Security Role	• **BOR PeopleSoft User** • **BOR_EX_CASH_ADV**
Assumptions	None
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to review expense history.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Employee Self-Service** link.
4.	Click the **Travel and Expenses** link.
5.	Click the **Review Expense History** link. The Search Criteria page displays.
6.	Enter or search for Employee ID or Name. *Note: If you are an Authorized Expense User/delegate for another user, you must enter or select an Empl ID to view their history.*
7.	The system automatically displays the previous year's transactions. Users can search outside this range by entering/selecting dates in the **From Date** and **Through Date** fields.
8.	Users can also define search criteria by selecting a Transaction Type. The options are: • All • Cash Advances • Expense Reports • Travel Authorizations
9.	Click an entry in the **ID** column to view the details of this transaction.
10.	The summary page of the transaction displays. This is a read-only page to view the specifics of the transactions, but users cannot make any modifications. Users can view the Approval History section to review approval levels and names of approvers (if not pooled) as well as the approval history and totals.
11.	The details of Expense Reports and Travel Authorizations can be viewed by clicking the **Expense Details** link or **Travel Authorization Details** link.
12.	Click the **Return to Review History** link to select other transactions to review.