View Employee Expense History Job Aid

The purpose of this job aid is to explain how to view employee expense history. The Employee Expense History page is used to view an employee’s expenses for travel authorizations, cash advances, and expense reports. This history can be helpful when tracking expenses for an employee.

1. To view an employee’s expense history, begin by navigating to: NavBar > Menu > Financials > Travel and Expenses > Process Expenses > Review Payments > Employee Expense History

2. The Employee Expense History page is displayed.
   a. Perform a search by Employee ID or Name. Enter the employee’s information into the appropriate field.
   b. Click Search. Select the appropriate employee from the search results below.

3. The Employee Expense History page is used to view all TAs, CAs, and ERs for an employee. If necessary, you can specify a date range for the expenses you want to display.

4. The Transaction Type field defaults to “All”. If necessary, this can be filtered to only CAs, TAs, or ERs.

5. The Expense History table displays the reports used to process the expense. This section provides a brief description, the status, dates, and dollar amount.

6. Click the ID link to view the document used to process the expense.