THE RESEARCH FOUNDATION
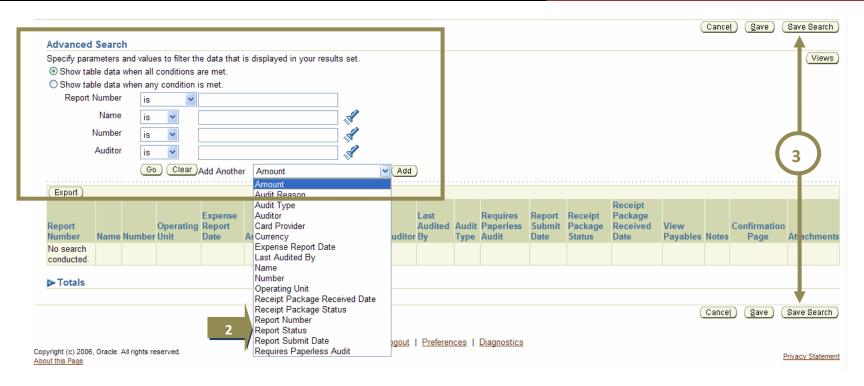*The State University of New York*

Contact: rftravel@rfsuny.org

Use this job aid to save an expense report search in iExpense. Internet Expenses module allows you to create a customized search and save it for future use.

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The State University of New York   **Expenses Audit**

Home   Logout   Preferences   Diagnostics

1 → **Audit Expense Reports** | Manage Expense Reports | Auditor Setup | Receive Receipt Package | Payments Search

Search by Expense Report Number [_____] (Go)   Advanced Search   **2**

Expense Report

No search conducted or no data found.

Verify Expenses | Process Exceptions | Review Allocations

Line	Policy Violations	Expense Type	*Amount	Allowable Amount	Receipt Amount	Receipt Verified	Receipt Required	Receipt Missing	Justification	Expense Date	Details
No results found.											

Verify Expenses | Process Exceptions | Review Allocations

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1	Once logged into *Internet Expenses Audit Manager*, it will bring you to the **Audit Expense Reports** tab
2	Use the *Advanced Search* link if you are not looking for a specific report or do not know the report number **Note:** The **Manage Expense Reports** tab will also take you to the *Advanced Search* screen

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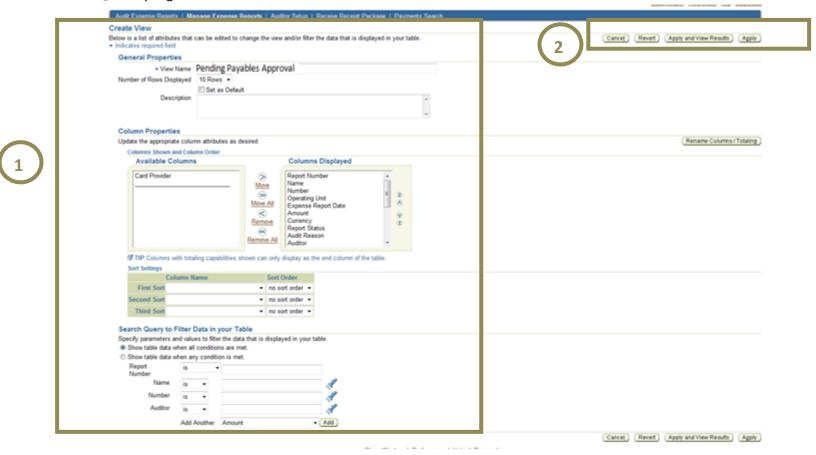*The State University of New York*

1	*Advanced Search* allows you to search by various criteria. You can search using multiple conditions or one condition, depending on which radio button is selected. When searching by *Name*, use the **Flashlight** icon to bring up a search window. Use the drop-down menu next to each condition name to choose between is or is not. You also have the ability to *Add Another* search criterion. In the example shown above, Amount is chosen. **Note:** Use *Flashlight* icons to enter information into the search fields you will use; **Clear** button will reset all data entry fields and **Go** button will execute the search
2	Select criteria to search on immediately or create a saved search, i.e., A saved criteria, if choosing Report Status, could be 'Pending Payables Approval'
3	Then, click the **Save Search** button from either the top or bottom menu to save the added criterion to the *Advanced Search* list and advance to the next page. This allows you to create a view. The expense report search can be saved either before or after being executed

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1	Complete all required fields indicated by an asterisk. Select search criteria, rename columns, and sort columns based on your needs.
2	Use the appropriate button: **Cancel -** cancels the creation of the search; **Revert -** returns form fields to original values; **Apply and View Results -** apply the changes to the saved search and run it; **Apply -** apply the changes to the saved search

		Personalize Views screen appears after you click the *Apply* button once
1		**Note:** Clicking the *Apply* button twice brings up the *Advanced Search* screen. From there, click the *Views* button to choose a saved search
		Use the appropriate button:
		Cancel - cancels the creation of the search
		Apply - adds the saved search to your personalized views and returns you to the *Advanced Search* screen
2		Use the *Pencil* icon to update the saved search
		Use the *Trashcan* icon to delete the saved search

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Expenses Audit

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Audit Expense Reports | **Manage Expense Reports** | Auditor Setup | Receive Receipt Package | Payments Search

Manage Expense Reports >

Expense Reports

The table below shows the expense reports based on the view you select.

Cancel   Save

Views

1 → View [▼] Go   Personalize

Export

Report Number	Name	Number	Operating Unit	Expense Report Date	Amount	Currency	Report Status	Audit Reason	Auditor	Last Audited By	Audit Type	Requires Paperless Audit	Report Submit Date	Receipt Package Status	Receipt Package Received Date	View Payables	Notes	C
No search conducted.																		

▶ **Totals**

Cancel   Save

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1	Use the drop-down menu to select a saved search, then use the **Go** button to execute the search

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| Export |
Report Number	Name	Number	Operating Unit	Expense Report Date	Amount	Currency	Report Status	Audit Reason	Auditor		Last Audited By	Audit Type	Requires Paperless Audit	Report Submit Date	Receipt Package Status	Receipt Package Received Date	View Payables	Notes	Confirmation Page	Attachments
IE10190	Deyette, Ms. Stephanie M.	44841	The Research Foundation of SUNY	15-Oct-2010	134.50	USD	Pending Payables Approval	Random Selection		🖊		Receipt-based audit	No	25-Jan-2011	Not Required		👓	👓	📋	✚
IE10113	Reagan, Ms. Mary E	1815	The Research Foundation of SUNY	15-Jan-2011	516.71	USD	Pending Payables Approval	Random Selection		🖊		Receipt-based audit	No	14-Jan-2011	Required		👓	👓	📋	📎 ✚
IE10165	Moran, Ms. Megan	37846	The Research Foundation of SUNY	11-Jan-2011	298.26	USD	Pending Payables Approval	Random Selection		🖊		Receipt-based audit	No	20-Jan-2011	Required		👓	👓	📋	📎 ✚
IE10189	Coates, Ms. Aimee E.	52642	The Research Foundation of SUNY	19-Nov-2010	566.28	USD	Pending Payables Approval	Random Selection		🖊		Receipt-based audit	No	25-Jan-2011	Required		👓	👓	📋	📎 ✚
IE10110	Reagan, Ms. Mary E	1815	The Research Foundation of SUNY	15-Nov-2010	307.76	USD	Pending Payables Approval	Random Selection		🖊		Receipt-based audit	No	14-Jan-2011	Required		👓	👓	📋	📎 ✚

▶ Totals

| Cancel | | Save | | Save Search |

| **1** | Report Status = Pending Payables Approval |

You have successfully saved a search and executed a saved search in iExpense.