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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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Search by Expense Report Number [Advanced Search](#)

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Expense Report

No search conducted or no data found.

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

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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



1

Advanced Search
Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.
 Show table data when any condition is met.

Report Number is []
Name is []
Number is []
Auditor is []

[Go] [Clear] Add Another [Amount] [Add]

[Export]

Report Number	Name	Number	Operating Unit	Expense Report Date	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
No search conducted.															
Totals															

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1	<p><i>Advanced Search</i> 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 <i>Name</i>, 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 <i>Add Another</i> search criterion. In the example shown above, Amount is chosen.</p> <p>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</p>
2	<p>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'</p>
3	<p>Then, click the Save Search button from either the top or bottom menu to save the added criterion to the <i>Advanced Search</i> 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</p>



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Create View
Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.
* Indicates required field

General Properties
View Name: Pending Payables Approval
Number of Rows Displayed: 10 Rows
Set as Default:
Description:

Column Properties
Update the appropriate column attributes as desired.
Columns Shown and Column Order
Available Columns: Card Provider
Columns Displayed: Report Number, Name, Number, Operating Unit, Expense Report Date, Amount, Currency, Report Status, Audit Reason, Auditor
Rename Columns / Totaling

Sort Settings

Column Name	Sort Order
First Sort	no sort order
Second Sort	no sort order
Third Sort	no sort order

Search Query to Filter Data in your Table
Specify parameters and values to filter the data that is displayed in your table.
Show table data when all conditions are met.
Show table data when any condition is met.
Report Number is
Name is
Number is
Auditor is
Add Another Amount Add

Buttons: Cancel, Revert, Apply and View Results, Apply

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

Below is a list of all pre-configured and/or personalized views applicable to "Search Results" table on the previous screen. Pre-configured views are read only. Duplicate a pre-configured view to see its definition or to create a variation of the same.

Select View: |

Select View Name	Description	Display View	Default	Update	Delete
<input type="radio"/> Pending Payables Approval		Yes <input type="button" value="v"/>		<input type="button" value="pencil"/>	<input type="button" value="trash"/>
<input type="radio"/> Pending Status Approval		Yes <input type="button" value="v"/>		<input type="button" value="pencil"/>	<input type="button" value="trash"/>
<input type="radio"/> Pending Payables Approval2		Yes <input type="button" value="v"/>		<input type="button" value="pencil"/>	<input type="button" value="trash"/>
<input type="radio"/> Pending Payment		Yes <input type="button" value="v"/>		<input type="button" value="pencil"/>	<input type="button" value="trash"/>
<input type="radio"/> Paperless Audit Queue	Seeded View for Paperless Audit Queue	Yes		<input type="button" value="pencil"/>	<input type="button" value="trash"/>

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



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Expense Reports

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

Views

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View

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

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1

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



1

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	<input type="text"/>		Receipt- No 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	<input type="text"/>		Receipt- No 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	<input type="text"/>		Receipt- No 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	<input type="text"/>		Receipt- No 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	<input type="text"/>		Receipt- No 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.