

Expense Management Dashboard

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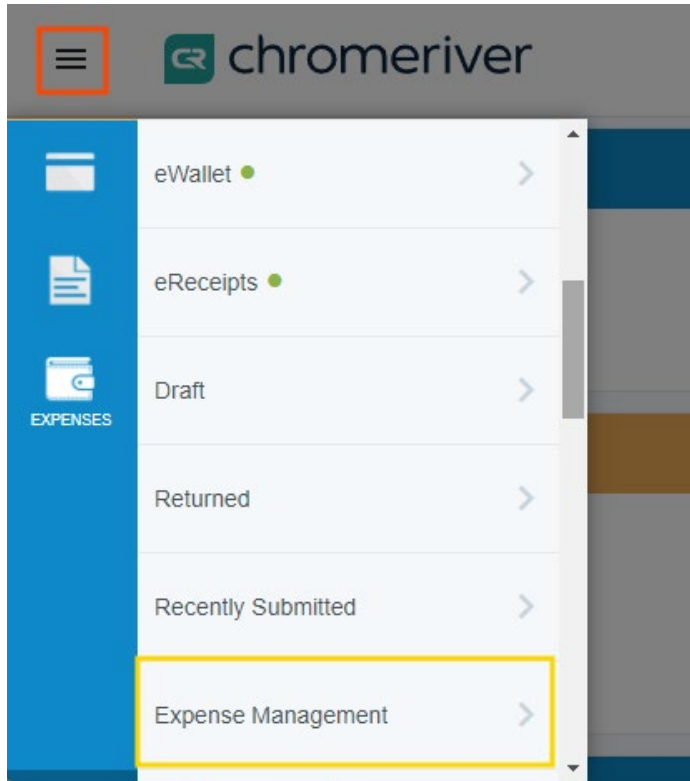
Expense Management Dashboard

The Expense Management Dashboard allows users with Banner Finance Access to view all the expense reports of individual expense owners in a central location, eliminating the need to delegate into individual users' accounts. Users may open expense reports and view them as the expense owner would, including line items, attachments, and tracking details.

Expense Management Grid

1. Click the **MENU** button in the upper left corner, then click **EXPENSE MANAGEMENT**.

- *Note: Only users of wide-screen devices may access Expense Management; the menu item will not display on narrow-screen mobile devices.*



2. The Expense Management Dashboard will open.

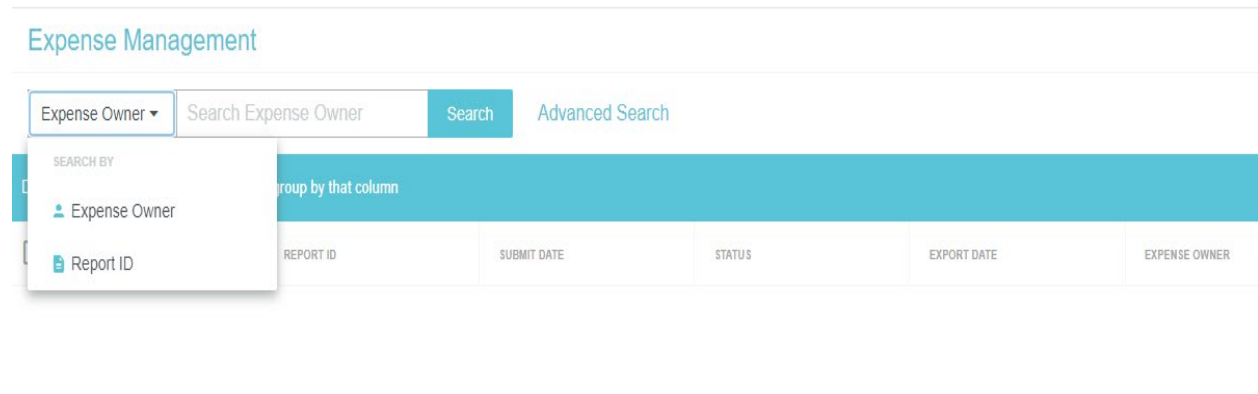
Expense Management

Expense Owner ▾ Search Expense Owner Search Advanced Search

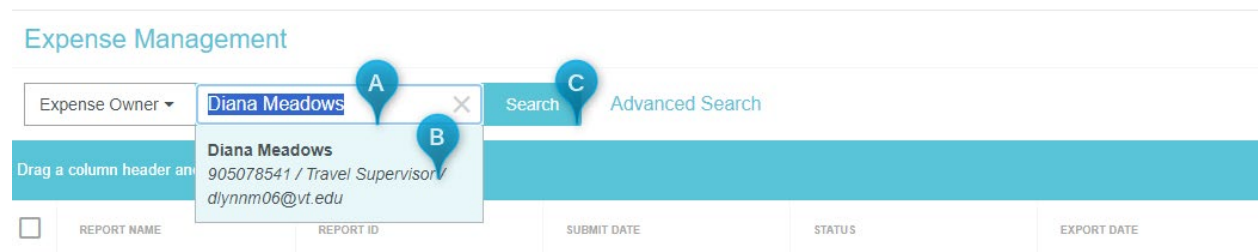
Drag a column header and drop it here to group by that column

| <input type="checkbox"/> | REPORT NAME | REPORT ID | SUBMIT DATE | STATUS | EXPORT DATE | EXPENSE OWNER | PAY ME | APPROVED | CURRENCY |
|--------------------------|-------------|-----------|-------------|--------|-------------|---------------|--------|----------|----------|
|--------------------------|-------------|-----------|-------------|--------|-------------|---------------|--------|----------|----------|

3. Use the text box in the upper left to search for expenses by Expense Owner or Report ID.



Search by Expense Owner



- Type in the Expense Owner's name
- Select the expense owner's name from the drop down
- Click search for a list of reports

Search by Report ID

Expense Management

Report ID ▾ X Search

Drag a column header and drop it here to group by that column

| <input type="checkbox"/> | REPORT NAME | REPORT ID | SUBMIT DATE | STATUS |
|--------------------------|-------------|-----------|-------------|--------|
|--------------------------|-------------|-----------|-------------|--------|

- Type in the Report ID#
- Click the Search button

Sort order criterion

Expense Management

Expense Owner ▾ Steve Vance Search Advanced Search

Submit Date ▾

| <input type="checkbox"/> | REPORT NAME | REPORT ID | SUBMIT D... | STATUS | EXPORT D... | EXPENSE ... | PAY ME | APPROVED | CURRENCY |
|--------------------------|--------------------------------------|------------|-------------|----------|-------------|-------------|--------|----------|----------|
| ▼ | Submit Date: 2019-02-06 12:37:13:000 | | | | | | | | |
| <input type="checkbox"/> | Expenses on 02/06/2019 02:35 PM | QA00308... | 02/05/2019 | Exported | 02/06/2019 | Steve Vance | 5.00 | 5.00 | USD |
| ▼ | Submit Date: 2019-02-06 12:51:16:000 | | | | | | | | |
| <input type="checkbox"/> | Expenses on 02/06/2019 02:49 PM | QA00308... | 02/05/2019 | Exported | 02/20/2019 | Steve Vance | 20.00 | 20.00 | USD |
| ▼ | Submit Date: 2019-05-08 07:22:10:000 | | | | | | | | |

Items per page

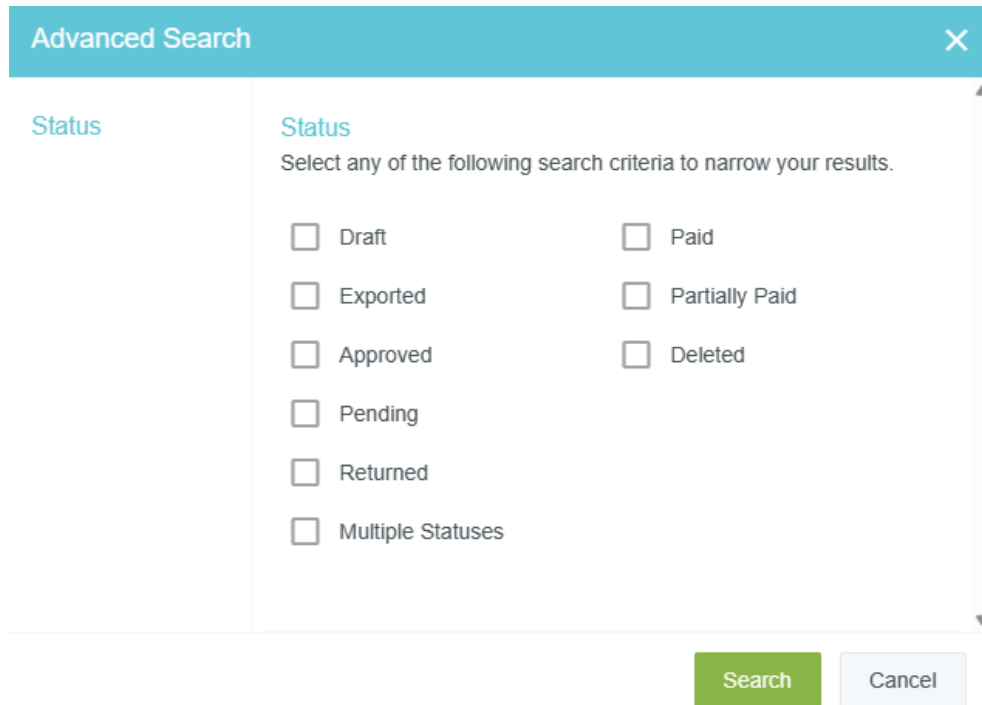
Click a column header to sort the list of expenses by that criterion.

- **Report Name**
- **Report ID**
- **Submit Date**
- **Status**
- **Export Date**
- **Expense Owner**
- **Pay Me (Amount)**
- **Approved (Amount)**
- **Currency**

You may drag a column header into the blue bar at the top of the screen to group the list of expenses by that column. To remove the group, click the **X** next to the column header name.

Advanced Search

Click **ADVANCED SEARCH** to filter reports based on status.



The screenshot shows a modal window titled "Advanced Search" with a close button (X) in the top right corner. On the left side, there is a sidebar with the heading "Status". The main area of the dialog is titled "Status" and contains the instruction "Select any of the following search criteria to narrow your results." Below this instruction, there are ten checkboxes arranged in two columns. The first column contains: Draft, Exported, Approved, Pending, and Returned. The second column contains: Paid, Partially Paid, and Deleted. At the bottom of the dialog, there are two buttons: a green "Search" button and a grey "Cancel" button.

- **Draft:** Report hasn't been submitted.
- **Exported:** Report has been exported.
- **Approved:** Report is in approved status but hasn't exported to Banner yet.
- **Pending:** Report is awaiting approval in Chrome River. Check Tracking to locate where in the approval process the report is waiting.
- **Returned:** The report has been returned during the approval process.
- **Multiple Statuses:** The report has multiple statuses
- **Paid:** Report has been paid.
- **Partially Paid:** Report has been partially paid. This can occur if the direct deposit or check was returned by the bank or the report didn't post correctly to Banner.
- **Deleted:** Report has been deleted in Chrome River. Only the header information for the report is retained. The report is not available to review.

Preview Expenses

Click once on an expense in the list to open a preview. Click the **back arrow** in the upper left to return to the Expense Management Dashboard.

The screenshot shows the 'Expense Management' dashboard on the left and a detailed expense preview on the right. The dashboard includes a search bar with 'Expense Owner' and 'Diana Meadows 905078...' and a table of expenses. The preview on the right shows the title 'Meadows, Lynn 9/20-25/19 Bellevue, WA' and fields for Report Owner, Submit Date, Expense Report ID, and Business Purpose. A 'Tracking' button is visible in the top right of the preview.

| REPORT NAME | REPORT ID | SUBMIT DATE | STATUS |
|--|--------------|-------------|--------|
| Meadows L 3/28/22 Williamsburg VA | 010052123917 | 06/09/2022 | Paid |
| Meadows, L, January 7, 2020, Atlanta, GA | 010039198956 | 01/13/2020 | Paid |
| Meadows, Lynn 9/20-25/19 Bellevue, WA | 010036603844 | 10/04/2019 | Paid |

Expense Preview: Meadows, Lynn 9/20-25/19 Bellevue, WA

- Report Owner: Diana Meadows (905078541 / Travel Supervisor / dlynnm06@vt.edu)
- Submit Date: 10/04/2019
- Expense Report ID: 010036603844
- Business Purpose: SCTEM Board Meeting and Conference

There are several actions you may perform directly from the preview:

- **Profile Card:** Click on the Report Owner's name to view their profile card.
- **Open:** Click to open the full report.
- **Tracking:** Click to view the approval routing path.

Access the Expense Report







1. Clicking **OPEN** in the expense preview will allow you to view the report as the expense owner would, including line items and attachments.

This screenshot shows the expense preview interface with two callouts. Callout 1 points to the 'Open' button in the top left, and callout 2 points to the 'Tracking' button in the top right. The main content area shows the expense details for 'Meadows, Lynn 9/20-25/19 Bellevue, WA'.

Expense Preview: Meadows, Lynn 9/20-25/19 Bellevue, WA

- Report Owner: Diana Meadows (905078541 / Travel Supervisor / dlynnm06@vt.edu)
- Submit Date: 10/04/2019
- Expense Report ID: 010036603844
- Business Purpose: SCTEM Board Meeting and Conference

When you click on the OPEN button, the screen on the left will show the line items of the expense report.

| Expenses For Diana Meadows | | | |
|---------------------------------------|--|--|----------|
| Meadows, Lynn 9/20-25/19 Bellevue, WA | | | |
| 3 Comments | | 54 Attachments | |
| DATE | EXPENSE | Amount | PAY ME |
| Fri 09/20/2019 |  Meals - Per Diem | 57.00 USD | 57.00 ✓ |
| Fri 09/20/2019 |  Mileage - Personal Vehi... | 47.51 USD | 47.51 ✓ |
| Fri 09/20/2019 |  Baggage Fee | 30.00 USD | 30.00 ✓ |
| Fri 09/20/2019 |  Hotel | 569.15 USD | 569.15 ✓ |
| Sat 09/21/2019 |  Meals - Per Diem | 5.00 USD | 5.00 ✓ |
| Sun 09/22/2019 |  Meals - Per Diem | 42.00 USD | 42.00 ✓ |
| Expense Report 010036603844 | | Total Pay Me Amount 905.66 USD | |

Click on a line- item expense on the left- hand side of the screen to view the entry:

|  Meals - Per Diem | |
|--|--|
| Date | 09/20/2019 |
| Amount | 57.00 USD |
| Business Purpose | SCTEM Board Meeting and Conference |
| Description | Travel Day |
| Location  | Bellevue-King County, Washington (WA), United States |
| Activity Code | --None-- |

To continue looking at each expense line item on the report, click the Next button on the lower right-hand side of the screen. To go back to the previous expense line item, click the Previous button:


To view the comments or attachments for an expense, use the down arrow to scroll down the right- hand side of the screen to view.

Comments (0)

Add Comment Post

Attachments (1) Grid Icon

Drag image here to upload Add Attachments



Expense Management Navigation

To return to the Expense Management screen, click on the back arrow on the top left-hand side of the screen:

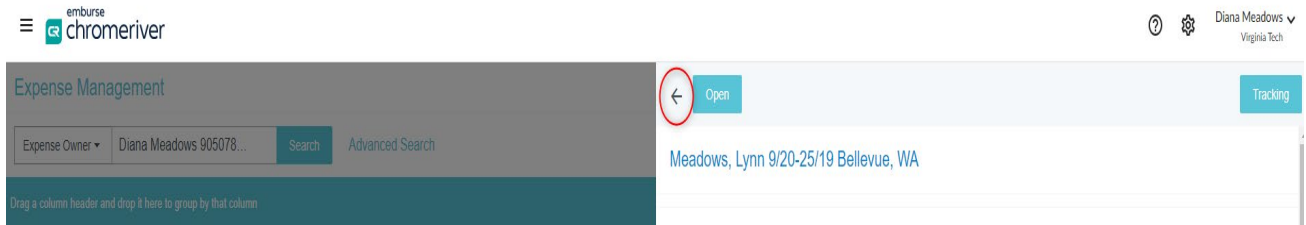
emburse
chromeriver

Expenses For
Diana Meadows

Meadows, Lynn 9/20-25/19 Bellevue, WA

3 Comments 54 Attachments

Click on the back arrow next to the Open button in order to return to the Expense Management screen to conduct a new search.



To conduct a new search, click the backspace or delete key on your keyboard to clear the expense owner or report ID# field.

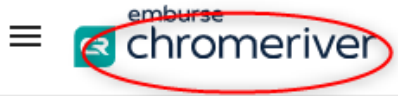


Type in an expense owner name or use drop down to select Report ID# to conduct a new search.

Expense Management

| | | | |
|-----------------|---|---------------------------------------|---------------------------------|
| Expense Owner ▾ | <input type="text" value="Search Expense Owner"/> | <input type="button" value="Search"/> | Advanced Search |
|-----------------|---|---------------------------------------|---------------------------------|

Click on ChromeRiver to return to the main screen of Chrome River.



Expense Management

Expense Owner ▾ Search Expense Owner Search Advanced Search

2. Clicking **TRACKING** in the expense preview will allow you to view the tracking of the report for each line item.

The image shows a mobile application interface for an expense report. At the top right, there is a blue button labeled 'Tracking' which is circled in red. Below the header, the report title is 'Meadows, Lynn 9/20-25/19 Bellevue, WA'. The report details are as follows:

| | |
|-------------------|---|
| Report Owner | Diana Meadows 905078541 / Travel Supervisor / dlynm06@vt.edu |
| Submit Date | 10/04/2019 |
| Expense Report ID | 010036603844 |
| Business Purpose | SCTEM Board Meeting and Conference |

Click on an expense line item to see the tracking for the approval routing.

| Tracking for Meadows, Lynn 9/20-25/19 Bellevue, WA | | | |
|--|--------------|--------|--------------------|
| EXPENSE TYPE | AMOUNT (USD) | STATUS | CURRENTLY ASSIGNED |
| ▶ Hotel | 569.15 | | |
| P Parking | 54.00 | Paid | |
| 🍴 Meals - Per Diem | 39.00 | Paid | |
| 🍴 Meals - Per Diem | 57.00 | Paid | |
| 🧳 Baggage Fee | 30.00 | Paid | |
| 🍴 Meals - Per Diem | 57.00 | Paid | |
| 🚗 Mileage - Pers... | 47.51 | Paid | |
| 🍴 Meals - Per Diem | 5.00 | Paid | |



Parking

Spent Converted 54.00 USD

Amount Spent 54.00 USD

Routing Status Paid

Routing Steps



Step Number 1

Assigned To Auto Bot (Budget Checker)

Step Number 1

Assigned To Auto Bot (Budget Checker)

Approver Auto Bot (Budget Checker)

Assigned Date 10/04/2019 10:36 AM

Step Status Approved

Completed Date 10/04/2019 10:37 AM

Completed By ExpenseAPI

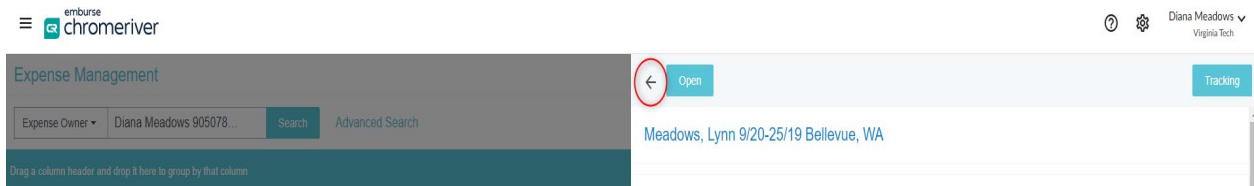
For each step in the approval process, Chrome River tracks each step as to when the report was assigned to the step, the approver, assigned date and completed date.

This enables you to view where delays may have taken place in the approval process.

To leave the tracking step, click the X in the upper right-hand corner of the screen:



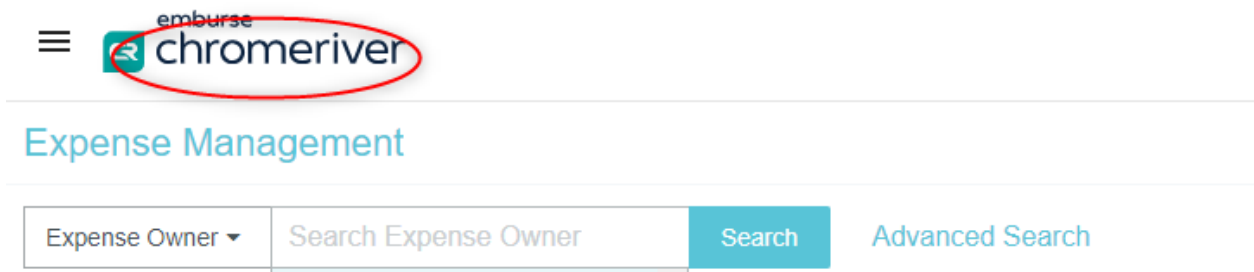
Click on the back arrow next to the Open button in order to return to the Expense Management screen to conduct a new search.



To conduct a new search, press the delete key or backspace key on your keyboard to clear the Expense Owner or Report ID# field.



Click on ChromeRiver to return to the main screen of Chrome River.



FREQUENTLY ASKED QUESTIONS

Does the Expense Management Dashboard include preapprovals?

No, the expense management dashboard only includes expense reports at this time.

Does the Expense Management Dashboard include departed employees?

Employees who have left Virginia Tech employment are in deleted status in Chrome River and are not currently available. Contact travel@vt.edu for assistance regarding reports for employees who are no longer employed at Virginia Tech.

How do I search for students or non-employees?

Students and Non-Employees expense reports are entered on the dashboard of a Virginia Tech employee. Search for the expense owner who entered the report or by the report ID#.

Is a pdf available of the expense report?

A pdf of the expense report is not available from the expense management dashboard. A pdf is available of the expense report either by having a delegate access the expense report in Chrome River or using Banner Document Manager.

Can changes be made to the expense report through the Expense Management Dashboard?

The Expense Management Dashboard is a query of the Chrome River System with read only access. Changes to reports can't be made using the Expense Management Dashboard.