

## What's New

- New browser based expense report entry and approval. Access from Chrome, Firefox, Safari, Edge, IE
- View Expense Report List and Detail on one screen. Saving changes to Expense Report doesn't close window
- Click-once and mobile expense report entries remain
- Submit & Approve multiple Expense Reports
- Manage attachments with new Has Attachments and Preview Attachments columns
- Print multiple Expense Reports
- View Expense Report Notes
- Separate Security from Timesheets

**Access: Manage > Expense Reports**

- ✓ New menu item for Expense Reports
- ✓ Separate Security Option
- ✓ Turned on for Administrators only
- ✓ Widget Open and New actions will use this if Role has access

## Browser Based Expense Reports

The screenshot shows the 'Expense Reports' page in the AJERA system. Callout 1 points to the 'My Expenses' and 'Employee Expenses' tabs. Callout 2 points to the gear icon in the top right of the report detail area. Callout 3 points to the gear icon in the top right of the report list area. Callout 4 points to the action icons (View, Submit, Import, Delete) in the report list table.

**1 My Expenses and Employee Expenses Tab**  
Display based on accounting and supervisor rights

**2 Expense Report Detail Optional Columns**  
Click on the gear icon to view Expense Report Detail Optional Columns

**Expense Report Detail**

- Import
- Notes
- Manager Notes
- Rejected By
- Reference

Cancel OK

**3 Expense Report List Optional Columns**  
Click on the gear icon to view Expense Report List Optional Columns

**Expense Reports Optional Columns**

**Expense Reports List**

- Department
- Advance
- Credit Card Amount
- Personal Expense
- Reimbursement Amount
- Submitted
- Supervisor Approved
- Accounting Approved
- Expense Rejected
- Processed
- Needs Reapproval
- Reapproved
- Has Attachments
- Preview Attachments
- Submitted Date
- Submitted By
- Reapproved Date
- Reapproved By
- Accounting Approved Date
- Accounting Approved By
- Supervisor Approved Date
- Supervisor Approved By

Cancel OK

**4 Expense Report Actions**  
Click on the Action icon to:

- View expense report notes
- Submit an expense report
- Access the Import Credit and List to insert new detail rows based on imported items
- Delete a non-submitted expense report

## Adding Attachments

- 1 **Attachments**  
Click on Expense Detail Row and select **Attachments**
- 2 **Add Link/URL**  
Same attachment functionality as JE. Enter full path or URL for attachment.
- 3 **Add Upload**  
Use this to add an Upload attachment
- 4 **Add File**  
Select **File & Save**
- 5 **Save to Upload attachment**  
Attachment is not saved until Expense Report is saved or on Attachment Action select **Save to Upload attachment**

## Expense Report Approval /Reject

Approve using Actions on expense report row or Select expense report(s) and use **Approve** button

Reject using Actions on detail row