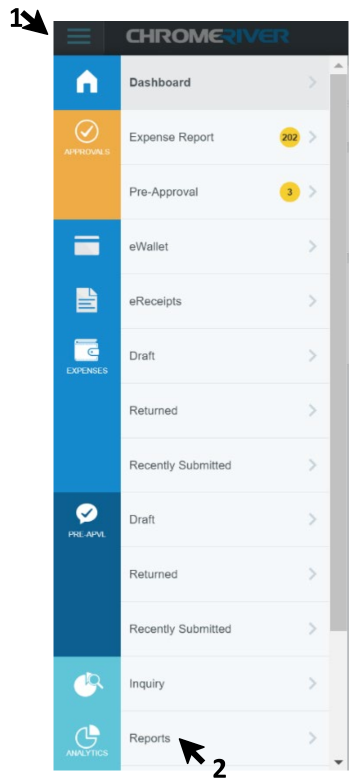
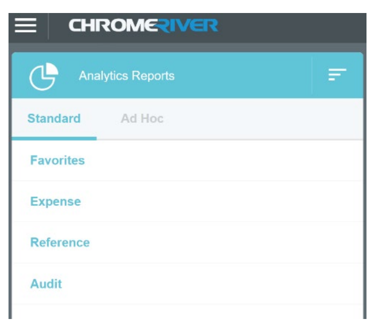
GETTING STARTED WITH REPORTS MODULE

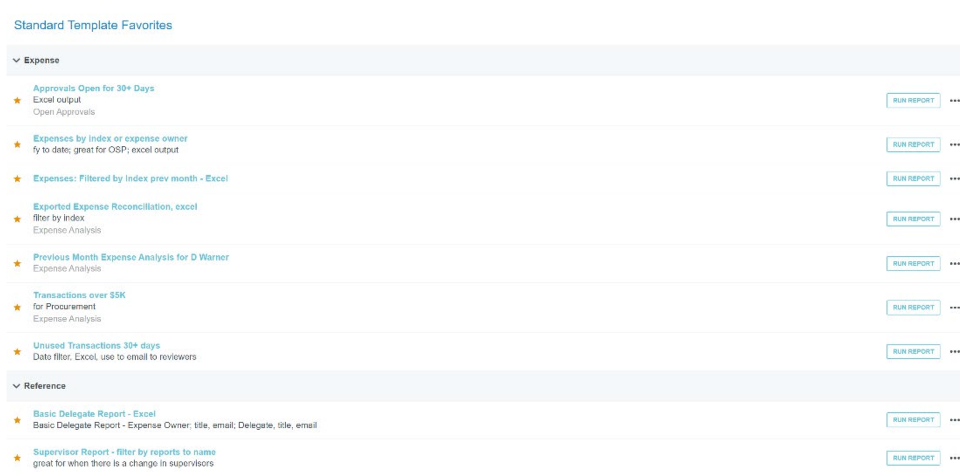
1. Click 3-bar Menu (1) and "Reports" (2)



The subsequent screen provides report type options.



"Favorites" will lead to those reports you have saved as a favorite. Use for reports you access often.



"Expense" will lead to the majority of the useful reports. Including:

Credit Card Reconciliation: Detailed information about credit card transactions and whether or not they have been attached to an expense report.

Expense Analysis: List of all expenses within a specified date range.

Expense Report Tracking: Lists approval tracking information for submitted expense reports.

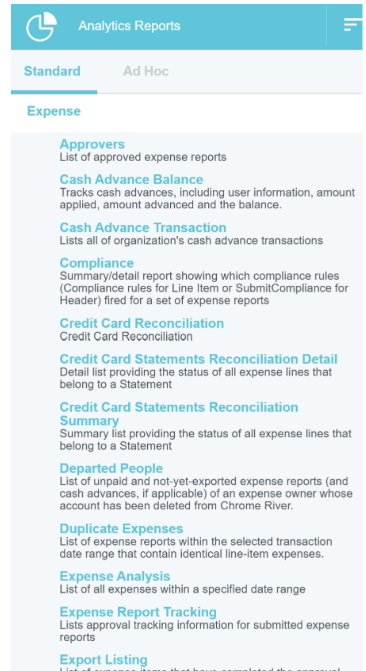
Export Totals: Lists the line items that have been exported.

Open Approvals: Approvers can see all items or reports that have been pending approval for more than a certain period.

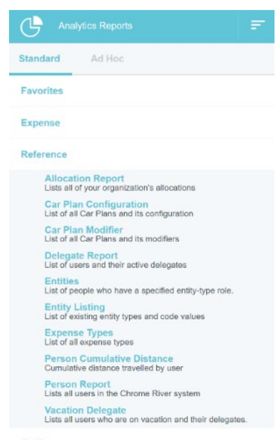
Pre-Approval Request Tracking: Search all pre-approvals by Report ID, Expense Owner, Approver, Status and/or Submit Date.

Submitted Reports: Lists all reports that have been submitted.

Transactions Not Exported: Lists all credit card transactions that have not yet been exported.

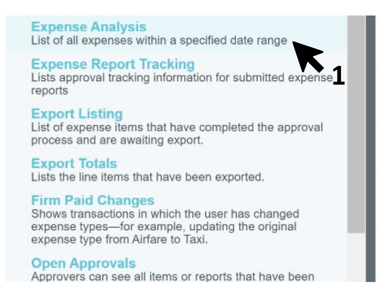


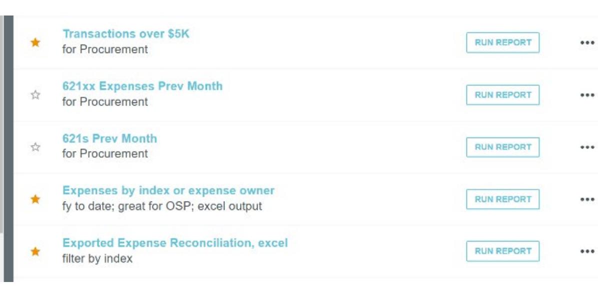
"Reference" & "Audit" lead to other reports that you may or may not have access to or need.



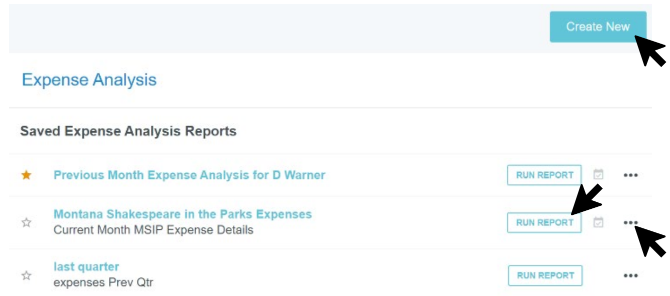
"Expense Analysis" is one of the most useful Standard Reports

2. Click Expense Analysis (1) under "Standard Reports"





3. Click “Run Report” or the 3-dot menu for additional options on a previously saved report <u>or</u> “Create New.”



4. Clicking “Create New” or “Edit” from the 3-dot menu takes you to the report builder screen where you can add filters, data columns, and select the output format.

   The top section allows you to give the report a name and a description if you wish to save the report for future use with the parameters you are about to enter.

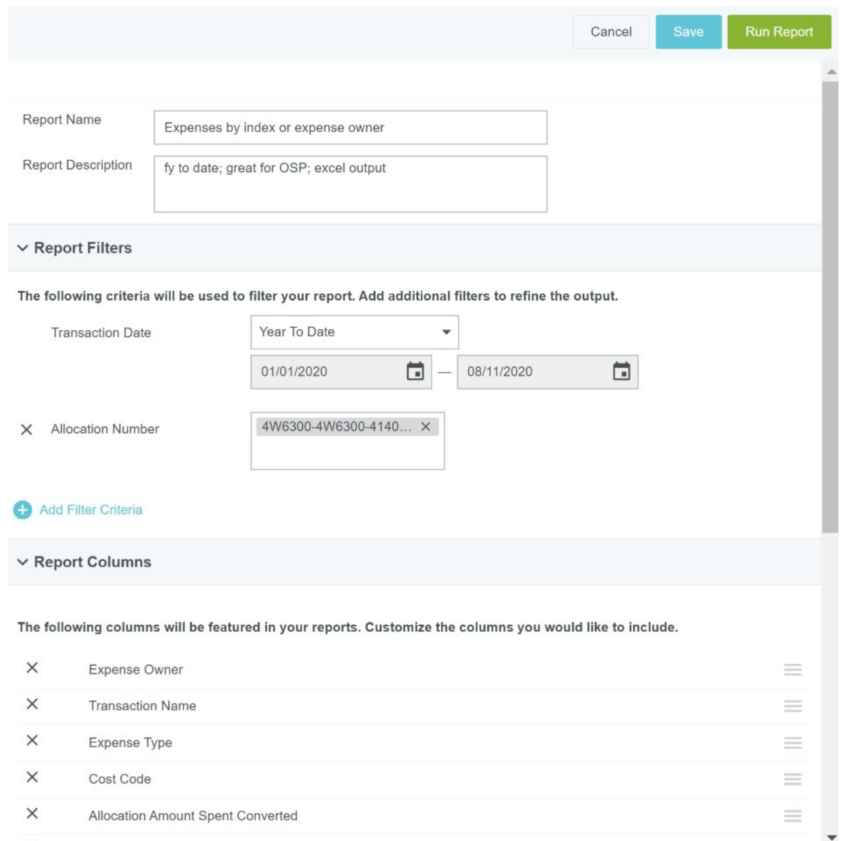
   Use the arrows to expand or collapse the other sections of the report.

   Each Standard report has a default set of report columns. You may add, remove and rearrange the columns.

   Remove: Tap the X to the left of the column name to remove it from the report.

   Add: Tap ADD COLUMNS to select additional columns for the report.

   Re-Order: Touch the three lines to the right of a column name and drag to rearrange where it appears in the order of columns.



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