

FINDING SIGNED OFF TRANSACTIONS OR EXPENSE FOLDERS

You may want to find older transactions or expense folders for information purposes or for reprinting the cover page. There are two methods to search for transactions or expense folders – one method lists all of the data (Method 1) and one method allows you to narrow your search (Method 2)

Method 1

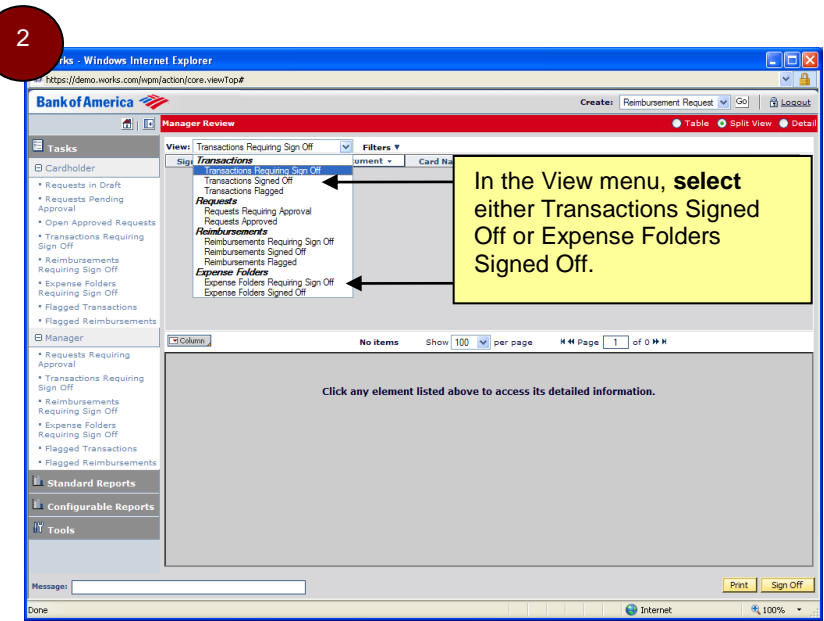


1

In the Left Navigation Bar, Click on Tasks.

Click on either Cardholder or Manager, depending on whether you are looking for transactions or expense folders you signed off as a Cardholder or a Manager.

Click on Transactions Requiring Sign Off or Expense Folders Requiring Signoff.



2

In the View menu, select either Transactions Signed Off or Expense Folders Signed Off.

3

You will be presented with a listing of transactions or expense folders in the upper portion of the screen. Find the transaction or expense folder and click on it. Below you will find all the information where you can verify it or print it again.

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Method 2

1
In the Left Navigation Bar, **Click on Tools, then Search.**

Click on either Transactions or Expense Folders.

2
You will be presented with one of the search criteria windows, depending on whether you clicked on Transactions or Expense Folders in the previous step.

Complete any fields to narrow your search. Example: Posting Date (date it entered in the system). **Click Search** when done.

3
You will be presented with a listing of transactions or expense folders in the upper portion of the screen. Find the transaction or expense folder and click on it. Below you will find all the information where you can verify it or print it again.