Company 13 Expense Report Guide

How to Approve an Expense Report

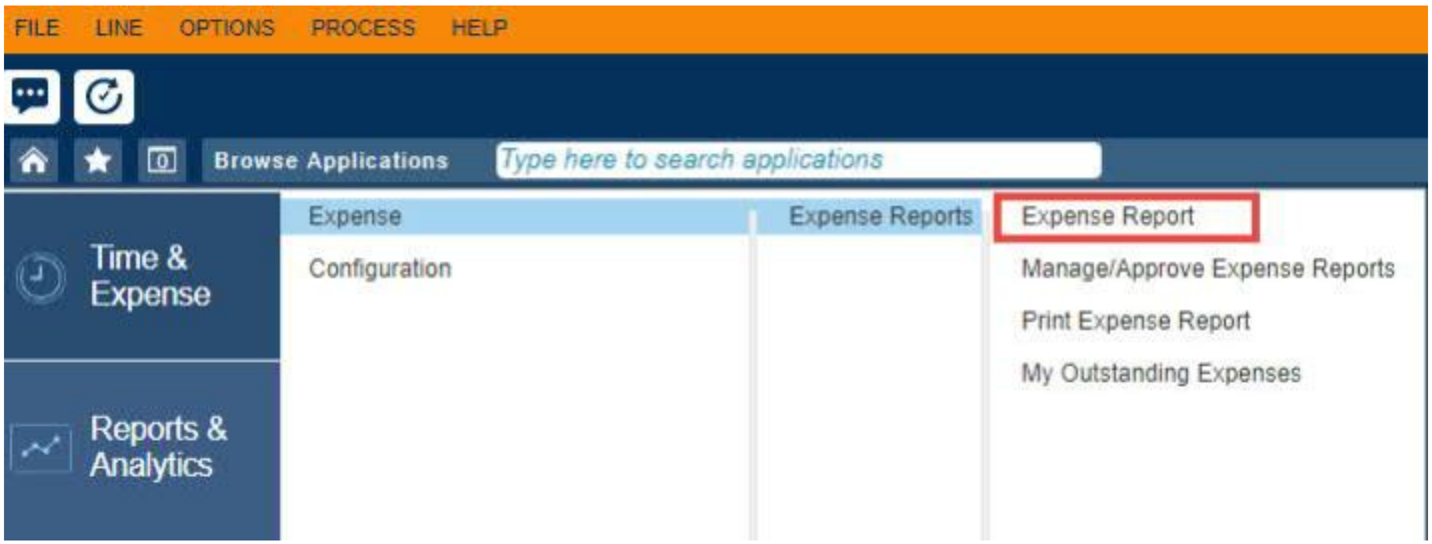
This guide contains steps and information to approve an expense report.

Contents

Creating an Expense Report as a Proxy Using Expense Wizard

1. After logging into Costpoint, select **Time and Expense > Expense > Expense Reports > Expense Report**.

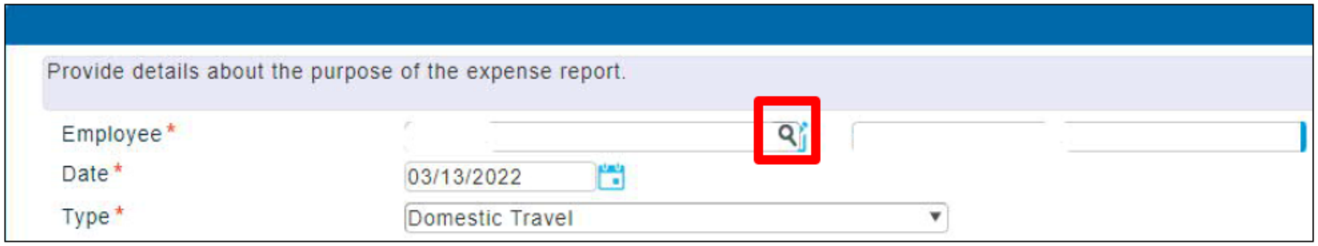
   Expense Wizard is the default view.



2. Select New Expense Report

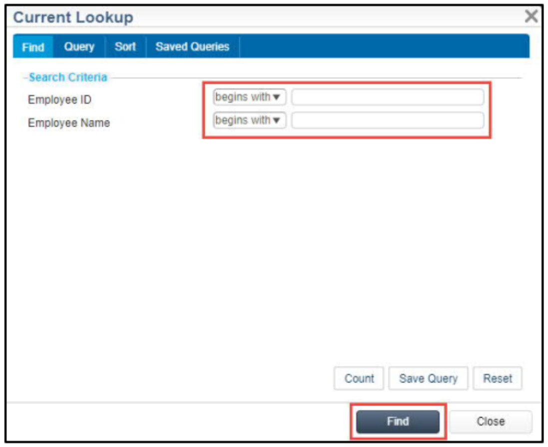
   Select **New Expense Report** from the options at the top of the window.

3. Search for the employee’s name by selecting the magnifying glass in the **Employee** field.



4. Select **Query**

5. In the **Current Lookup** window, enter the **Employee ID** or **Employee Last Name**. Then, Select **Find**.



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6. Select on the **employee's name** in the lookup window and click select.

7. Select **Continue** at the bottom righthand corner of the screen to create the expense report as a proxy for the selected employee.

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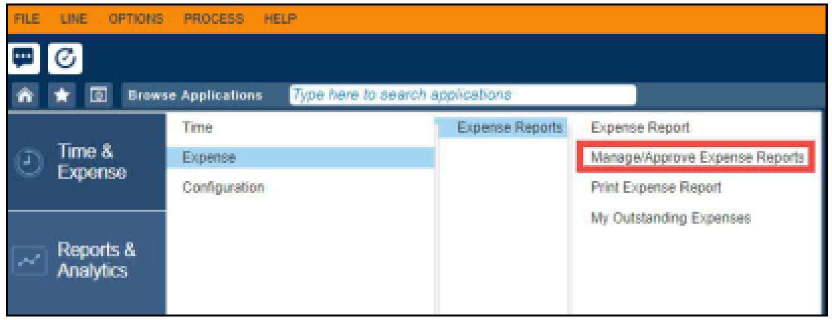
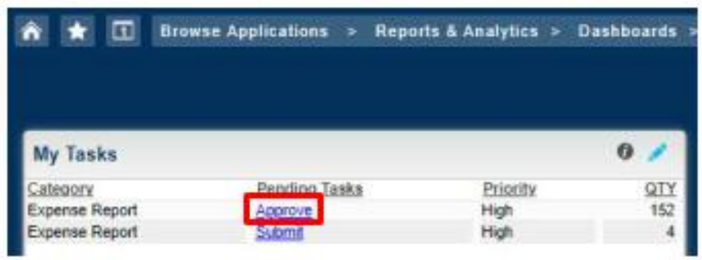
Approving an Expense Report

1. After logging into Costpoint, select **Time and Expense > Expense > Expense Reports > Manage/Approve Expense Reports**



Alternatively, on the Home Page, select **Show My Tasks** and select the blue **Approve** Link.



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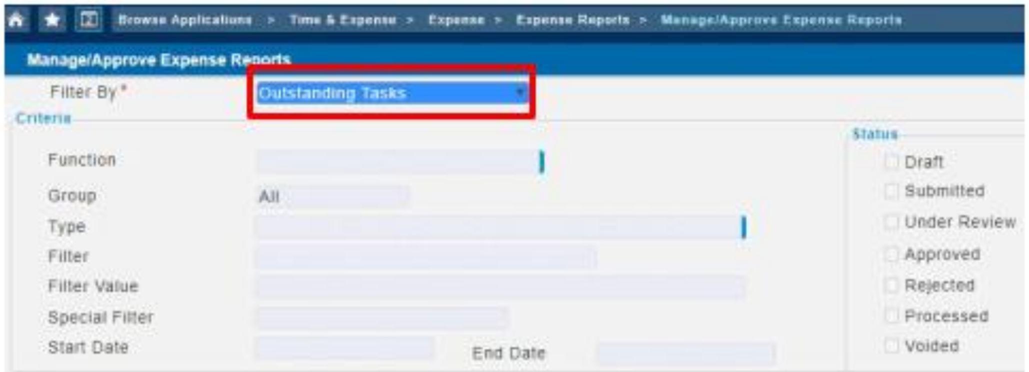
2. **View Outstanding Tasks**
   Ensure Filter By is set to display Outstanding Tasks. By Default, Outstanding Tasks will be selected.

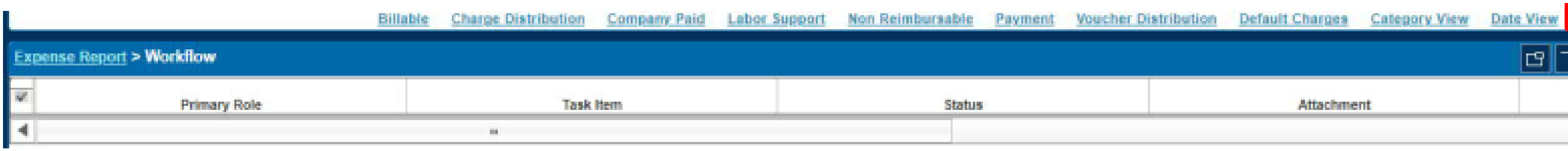


3. Select Form
   Select the Form option for an easy-to-review list of all submitted expense reports.

When approving an expense report, the following menu options are useful:

- **Voucher distribution:** lists all expenses and the project and account to which they are aligned.
- **Workflow**: used to approve expense reports and view receipts.

4. To approve the expense report, click on **Workflow**, if not open already.



5. Click on the Attach Line to view receipts. If one file is attached, click the View button. If adding more than one file, select the **Number** to view the list of receipts.

Within the Workflow window, items highlighted in yellow are in pending status.

Review attached receipts by selecting the line labeled Attach; then, select View.

After viewing the receipts, select the yellow Approve line and choose either Approve or Reject.