# Expense Report Step by Step Guide

1. Creating an Expense Report
   1. Click the green and black plus icon to initiate creation of a new expense report.
      1. 
      2. This will create a new record at the bottom of the screen for you, right above the icon.
   2. Enter the information you want and click
      1. 
      2. If you want to cancel “the create an expense report process”, you can click the cancel button.
         1. 
   3. Your record is now created.
2. List all expense reports
   1. When you load up the application, you will see a list of all the expense reports. This list is paged and allows only 2 items per page to be visible. You have the ability to search for expense reports, sort them by Name, # of Items, Total and view different pages.
   2. **Searching for Expense Reports**
      1. There is a search bar in the right top hand corner of the expense reports screen.
         1. 
      2. Once you type in your criteria, click the search button and the expense reports you see on the page will be filtered for you. The search function will only search through the Name field.
   3. **Sorting Expense Reports**
      1. You can sort the reports by clicking the heading right above the table. You can sort by clicking either # of Items, Name or Total. If you want to reverse the sort (from ascending to descending or vice versa) click the same heading again and the order will be reversed.
3. Editing an expense report
   1. Click the Edit button to the right of the report you want to edit. This will switch the row to the editable mode.
      1. 
   2. Change the name of the report and click save and your edit will be done.
      1. If you want to cancel your edit, you can click cancel and the report name will revert to original.
4. Adding an expense item
   1. First you need to click the report’s name to get to the report details view. This screen shows you the expense items and the receipts on a report.
   2. To add a new expense item to a report, click the Add New Item link towards the right bottom of your expense items grid.
      1. 
   3. This action will take you the add new expense item page. Fill out the form and click Save to save your new expense item.
      1. 
   4. You can use the built-in calendar for the date field using the button on the right of the field
      1. 
   5. Amount field only accepts numbers and will not let the user enter any letters or special characters.
   6. Once you save your information, you will be taken back to the Expense Report Details page and you can see your expense item there.
5. Editing an expense item
   1. If you want to edit an expense item, click the small pencil icon to the right of the item and it will take you to the edit screen
      1. 
   2. This screen will look almost identical to the add new expense item screen and functions the same.
6. Removing an expense item
   1. Click the red trash can icon to the right of the expense item.
      1. 
   2. This action will prompt you with a question to confirm that you want to delete this item or not. Once you confirm, the item will be deleted from the screen. (The item is still saved in the database but will not be visible to the screen. QA can display this item in the ExpenseItems table by looking at the records that have RowDeleted column set to 1.)
7. List the Expense Items in an Expense Report
   1. Click the Expense report name from the homepage and it will take you to the details of that expense report. (Same 1st step you followed on Adding an expense item).
   2. If you at any point want to go back to the main screen, click the blue arrow to the left of the expense report title.
   3. Sorting expense items
      1. You can click any of the headers to sort the items by that category. If you click a header twice it will reverse the order of the sorting. (You can also click the receipt header to sort by expense items that have receipts vs that do not.)
   4. Filtering expense items
      1. You can filter your expense items by typing into the search box to the right top of the expense items grid.
      2. This will instantaneously filter the results for you. The filtering is done on all the fields.
8. Uploading a receipt
   1. To upload a receipt you need to click the Upload Receipt link to the right top of the Expense Report Details page.
   2. You will be prompted with a file explorer screen that lets you select only image files.
   3. Once you select your file or files (you can upload multiple at a time), select Open and your receipts will automatically upload to the expense report. You can view them towards the bottom of the screen once they become available on the page.
   4. **Assigning a receipt to an Expense Item**
      1. Click the plus icon to the left of the expense item you want to attach the receipt to.
         1. 
      2. This will highlight the expense item.
      3. Scroll down on the page where all your receipts are, and click the receipt you want attached. Your receipt is now attached to the expense item.
      4. You can remove the receipt from an expense item by clicking the remove link below the receipt next to the expense item.
9. Removing a receipt
   1. Scroll to the receipt on the Expense Report Details page.
   2. You will see a red trash can icon right below it.
      1. 
   3. Once you click it, you will be prompted with a confirmation window. Once confirmed the receipt will be deleted from the system.
      1. If a receipt is currently assigned to an expense item, the receipt will also be removed from this expense item.