

Finance

Identifying “In Progress” Credit Card Transactions


Corporate Cards (Expense Reports)

A. Identify In Progress Expense Reports

1. Type in **My Expense Reports**
2. Expense Report Status - Select **In Progress** from the drop-down menu.
3. **Report Date On or After** should be defaulted to MM/DD/YYYY. If not, click into date box and delete each date field listed.
4. Enter today’s date for **Report Date On or Before**
5. Click **OK**

All In Progress expense reports will display on the screen.

B. Find out where Expense Report is in approval process

1. Hover to right of magnifying glass located in the first left column until orange brick-like icon appears  .
2. Click on “orange brick”.
3. Click on expense report number (EXP-XXXXXX) in **Blue Font**. The expense report will open.
4. Click on heading **Business Process** located under the blue banner next to Expense Lines.
5. Scroll down column labeled **Status** until you see **Awaiting Action**. This will show whose inbox the Expense Report is in.
6. If in YOUR inbox, review what needs to be corrected and re-submit Expense Report, otherwise reach out to co-worker to remind them it’s awaiting their approval.


Procurement Cards (Procurement Card Transaction Verification)

A. Identify In Progress Procurement Card Verifications

1. Type in My Procurement Card Transaction Verifications
2. Click on column heading **Status** to make filter box appear.
3. Select **In Progress** from drop-down menu for **Value** field

All In Progress Verifications will display on the screen

B. Find out where Verification is at in approval process

1. Hover to right of magnifying glass located in the first left column until “orange brick”  appears.
2. Click on “orange brick”.
3. Click on Verification number in **Blue Font**. The Verification will open.
4. Click on heading **Process History** located under blue header next to heading Attachments.
5. Scroll down column labeled **Status** until you see **Awaiting Action**. This will show whose inbox the Verification is in.
6. If in YOUR inbox, review what needs to be corrected and resubmit Procurement Card Verification. Otherwise, reach out to co-worker to remind them it’s awaiting their approval.