

GreenEmployee.com

Expense Reports

This quick start guide describes how employees may complete and submit expense reports while logged into GreenEmployee.com to be reimbursed for expenses incurred.

Overview

The Expense Reports module allows you to complete various types of expense reports for expenses incurred while conducting company business. These reports are submitted for approval so that you may be reimbursed on your next paycheck. You have the ability to upload receipts and provide specific information about each expense such as date, vendor name, description, expense category/subcategory, and amount. You may also download the GreenEmployee Apple or Android app, which makes storing expenses and submitting expense reports quick and easy.

Viewing Expense Reports

Once you are logged into GreenEmployee.com locate the HR Documents navigation button at the top of your page. Hovering over that button will open a drop down that contains several pages, including Expense Reports.



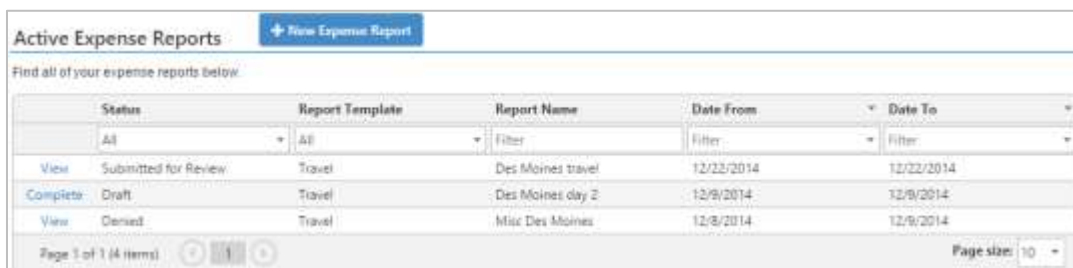
Clicking that will taking you into the Expense Report page, which has two sub-pages: All Expenses and Active Reports.

The All Expenses page shows a grid containing all of your expense reports in any state. Any Submitted, Approved, or Denied reports will have a View link; only Denied reports will be editable though. If a report has been denied, then you will be able to make changes and re-submit it. Any Drafts will also show in this grid with a Complete link. Since these are unfinished reports, they are editable as well.



Status	Report Template	Report Name	Date From	Date To
All	All	Filter	Filter	Filter
View	Submitted for Review	Travel	Des Moines travel	12/22/2014
Complete	Draft	Travel	Des Moines day 2	12/9/2014
View	Approved	Business Dining	Des Moines	12/8/2014
View	Denied	Travel	Misc Des Moines	12/8/2014

The Active Reports page will contain any reports that are Active, meaning any status except Approved. This is a good way to keep track of reports you need to attend to.

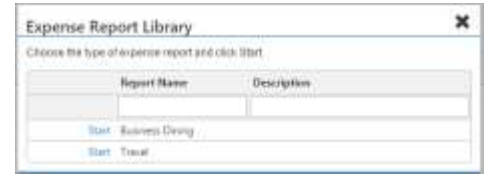


Status	Report Template	Report Name	Date From	Date To
All	All	Filter	Filter	Filter
View	Submitted for Review	Travel	Des Moines travel	12/22/2014
Complete	Draft	Travel	Des Moines day 2	12/9/2014
View	Denied	Travel	Misc Des Moines	12/8/2014

Choosing an Expense Report Template

[+ New Expense Report](#)

Submitting a new expense report can be done from Active Reports or from All Expenses. To begin a new report click the New Expense Report button. Then choose the report template applicable to your incurred expenses and click Start. The report will open in a new page ready to be filled out.



At the top of the page is an About this Expense Report section. It will show your name, the Status of the report, you're your manager. The current status will display information such as when the report was approved or denied, who approved or denied it, and any comments made, which is helpful if you are editing a report that has been denied or viewing an approved report.

For new reports, you must give the report a name; you may also provide a Description of Expenses, but this field is optional. Next, you must choose a date range for the expenses. If the expenses were all incurred on one day, use the same date for the start and end dates. If you have uploaded receipts to your Green Space using the mobile phone application, you may also see a message below the date section indicating that you have receipts available to upload (see Mobile Phone Application section below).



Adding Expenses

The next section of your expense report is the Expenses section. At the top of this section, you may see a link to an expense reporting policy document; click to view it.



The page will open with the first expense field ready. Enter information about your expense including the date, vendor, description, category/subcategory and amount. All of these fields are required for each expense; you will see a warning if you forget to complete one of them.

Some expenses may require you to attach a receipt showing details about the expense. To do this, click on the Add Receipt button. A window will open for you to locate your image on your computer. If you have set up your Green Space and added images of receipts, you will also see an option to choose a file from your Green Space.

To add another expense item, click on the Add New Expense button above this first expense entry box on the page.

Category	Credit	Amount Total	Reimbursement Amount Total
Food & Entertainment - Breakfast	1	\$80.00	\$80.00
Food & Entertainment - Dinner	1	\$150.00	\$150.00
Food & Entertainment - Lunch	1	\$18.00	\$18.00
		Amount Total: \$238.00	Reimbursement Amount Total: \$238.00

While editing, your expenses will save to the report automatically. At the bottom of the page, you will see a sum of expenses on this report. Your administrators have the option to limit amounts for each kind of expense, either by line item or total of one type. If you go over that limit, you will see an alert icon in the Totals section. The report can still be submitted though.

At the bottom of the page, there is a place for you to add optional comments on your report. Under the comments box, there are three buttons. On the right is a Submit button, which completes the report and sends it to whomever your approver is. To the left of that is a Save as Draft button; this will save your report for you to complete later. On the far left is a Back button; this will take you to the Expense Reports home and *discard any changes you have made*.

Mobile Phone Application

Storing and uploading receipts is made quick and easy using Greenshades' Mobile Phone App for Android and iPhones. This app allows you to quickly capture an image of a receipt, complete information about the receipt, and send it to your Green Space. Once you have returned to your computer and started an expense report, simply select the date range that the receipts were uploaded. Then, choose to import those receipts from your Green Space. Each receipt will import as an expense on your report. Simply sign the report and submit it for approval. If you do wish to edit any expense information, you may do so by clicking on the edit and remove options in front of the expense.