

## EX.030.501 – REVIEWING TOTAL PREDICTED EXPENSES

<b>Purpose</b>	To review total predicted expenses.
<b>Description</b>	<p>The Expenses Module is comprised of transactions that are in various stages. Expenses provides a tool for executives, managers, and auditors to easily identify and track transactions in progress so that they can gain insight into potential problem areas.</p> <p><b>Expense Reports:</b> Transactions in Process (TIP) data focuses attention on what needs to be resolved with regards to Expense Reports to ensure that your expenses system runs smoothly.</p> <p><b>Travel Authorizations:</b> Total Predicted Expenses (TPE) data focuses attention on what needs to be resolved with regards to Travel Authorizations to ensure that your expenses system runs smoothly.</p> <p><b>Expenses Pagelets:</b> Expenses Pagelets are an optional way for interested employees to see Real-Time Analysis figures on their initial log-in page to the Core Application.</p> <p>The Real-Time Analysis functionality is covered in 6 separate topics.</p> <ol style="list-style-type: none"> <li>1. EX.010.040 - Setting up Real-Time Analysis Defaults</li> <li>2. EX.010.043 - Setting up Transactions in Progress methods</li> <li>3. EX.010.041 - Setting up Expenses Pagelets</li> <li>4. EX.030.042 - Running the Update Expenses Pagelet Info Process</li> <li>5. EX.030.500 - Reviewing Transactions in Progress (Expense Reports)</li> <li>6. EX.030.501 - Reviewing Total Predicted Expenses (Travel Authorizations)</li> </ol> <p>Steps 1 and 4 from above must be completed before you can review Total Predicted Expenses.</p> <p>- The Total Predicted Expenses Summary information may be helpful in predicting upcoming expenses.</p>

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<b>Security Role</b>	BOR_EX_REPORTS
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	None

## **Procedure**

The Real-Time Analysis tool, Total Predicted Expenses, allows selected users to view approved travel authorizations based on their search criteria.

This information may be helpful in predicting upcoming expenses.

Below are instructions on how to review total predicted expenses.

<b>Step</b>	<b>Action</b>
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> link.
3.	Click the <b>Travel and Expenses</b> link.
4.	Click the <b>Real-Time Analysis</b> link.
5.	Click the <b>Predicted Expense Summary</b> link.
6.	Enter dates to filter on. You can only filter within the dates set by the administrator. If you enter dates outside the range, a message notifies you that it is not a valid date. The date is pre-populated with the date range that the administrator defined in the Administrator page.
7.	You will not need to enter an Expense Billing Code.
8.	Click the <b>Look up GL Business Unit (Alt+5)</b> button.
9.	Click an entry in the <b>Business Unit</b> column.
10.	You can specify a particular ChartField to search by.  For this exercise, we will search for ALL travel authorizations without entering any limiting criteria.
11.	Click the <b>Go</b> button.
12.	Navigate to the bottom of the page.
13.	A listing of travel authorizations which match your search criteria are displayed.
14.	Click an entry in the <b>Travel Authorization ID</b> column to drill down to a specific travel authorization report for further analysis.
15.	Click the <b>Return to Home</b> link.