GRAM Credit Card System
Search for Expense Reports

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Search for Reports

1. Login to GRAM.

2. User Role:
   - To search for reports an allocator must be on one of their Account Group Manager roles. You may have
     more than one User Role (i.e. if you are an allocator and a cardholder you would have two roles). Allocators
     can also have more than one Account Group Manager role depending on how many groups they allocate. If you
     have more than one User Role you will see User Role on the Home page. Your Home page is based on the role
     chosen.
   - To change User Role, click on drop down and choose a role. Your Home page will reload.

3. Under the Financial menu, click Manage Expense Reports.

4. To search for reports for one card, click on drop down and choose All (Account) then click Search.
   - All card accounts you allocate will be listed. Click on cardholder name in blue.

5. To search Expense Reports for all cards you allocate, under QUICK LINK, click on name in blue.
6. Un-check box next to *Assigned*.

![Search criteria](image)

7. To reduce number of results, add one or more filters in the search criteria area. For example, click on drop down next to *Report Status* and choose *In Progress* to only see reports that are in progress or in *Submitted Date Range* enter beginning and ending dates to only see reports for a certain time period.

![Search criteria with filters](image)

8. Click *Search*.

![Search results](image)

9. All reports for the one card you chose or your reporting level will be listed.

10. List is sorted in create date order newest to oldest. Change sort by clicking on one of the headers.

![Sorted search results](image)

**Review Report Status**

1. The current status of the expense report will be listed, this tells you where the report is in the process.

- *In Progress* – Created but not submitted yet by allocator.
- *Submitted* – Submitted but not approved yet by department approver.
- *Approved* – Approved by department approver but not approved yet by Controller’s Office.
- *Rejected* – Returned by department approver or Controller’s Office and not yet re-submitted by allocator.
- *Completed* – Approved and locked by Controller’s Office.
Open Report to Finish the Allocate and Submit Expenses Process

1. To open an *In Progress* report, click on *Expense Report Description* in blue.

2. You will be on the Name Report/Choose Dates step of the allocate and submit expenses process.

3. Click on *Next* and *Back* buttons to navigate through the report.

4. You can edit/update any parts of the report you would like following the steps in the allocate and submit expenses document located on the Finance-Purchases and Payments-College Credit Card webpage.

Open any Report to View

1. Click on *Expense Report Description* in blue.

2. Click on *Next* and *Back* buttons to navigate through the report.

3. To open attached file, navigate to the last step, click *View Receipt* button, then *View* or *Download*. 