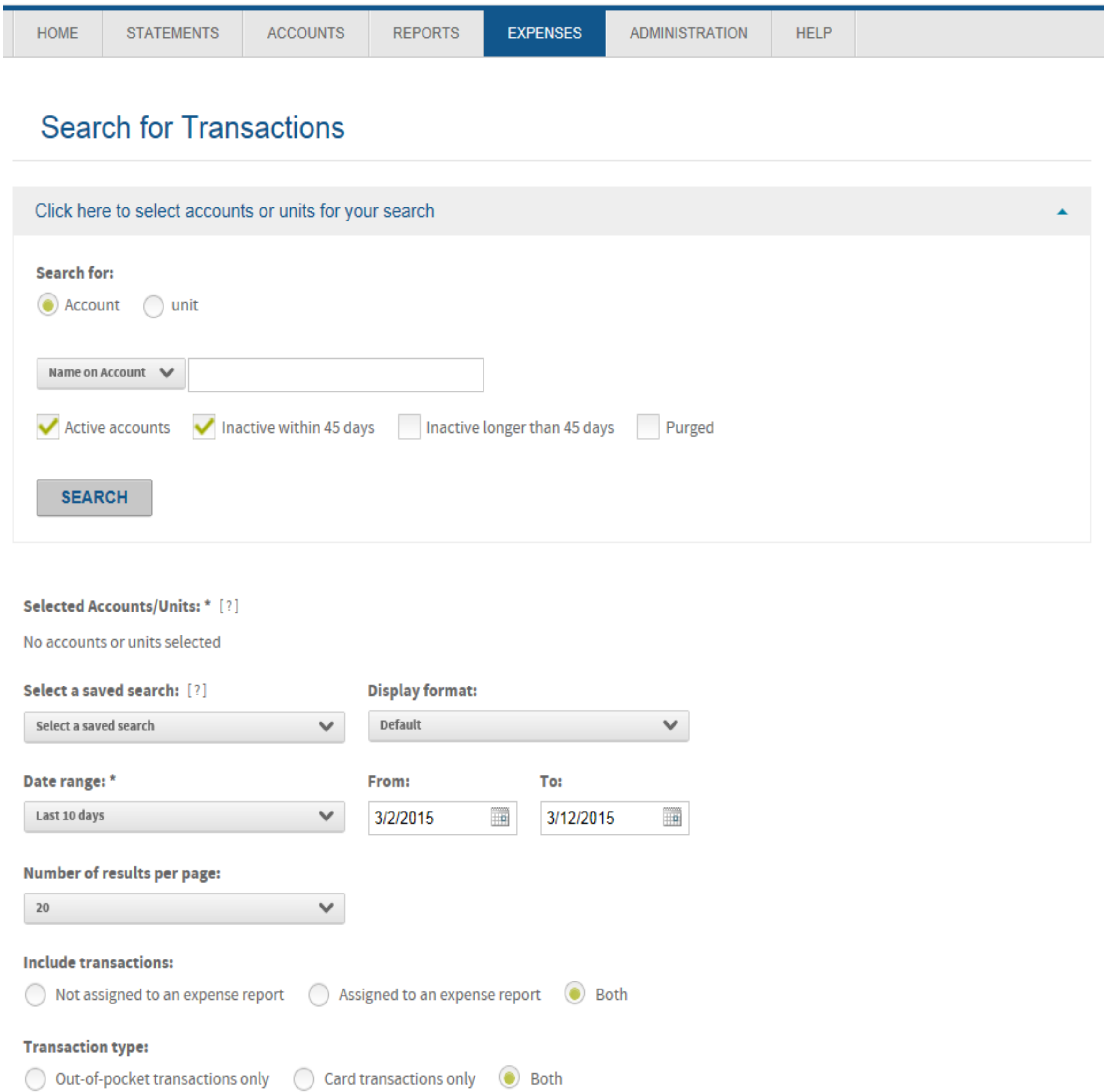
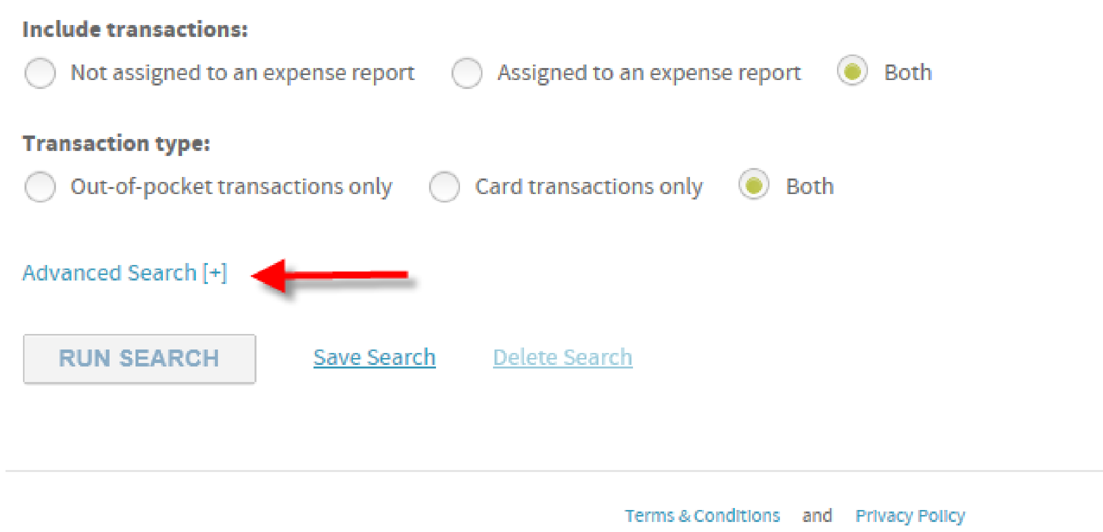
# Expense Module Overview – View Transactions

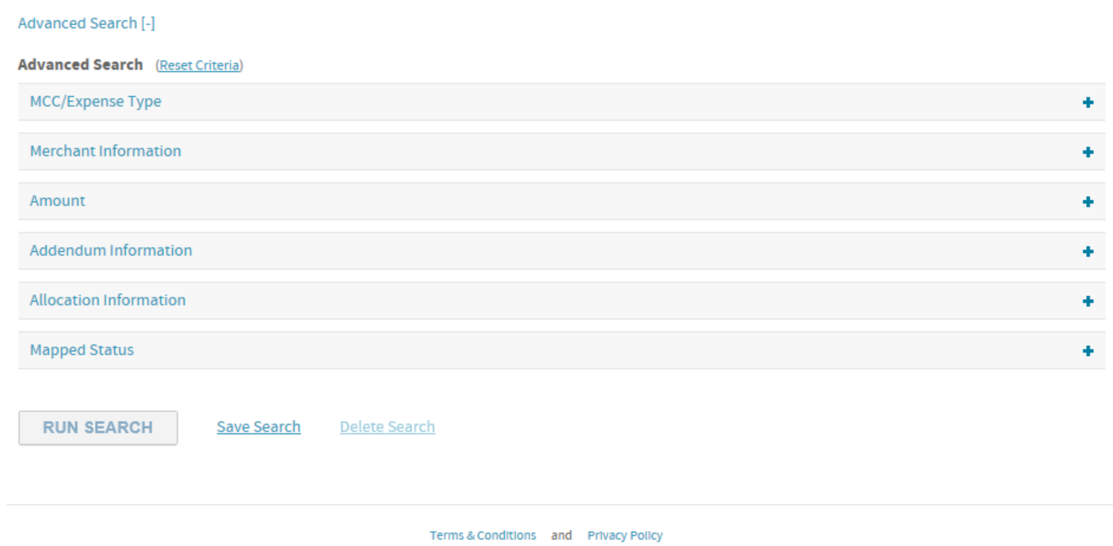
Within the Expense Module, the View Transaction screens will be modified to support the ongoing goal to improve the user experience including a responsive design along with improved system stability. The base functionality will remain the same as it is today with a few flow changes. Users will still access the functionality by navigating to Expenses > View Transactions:



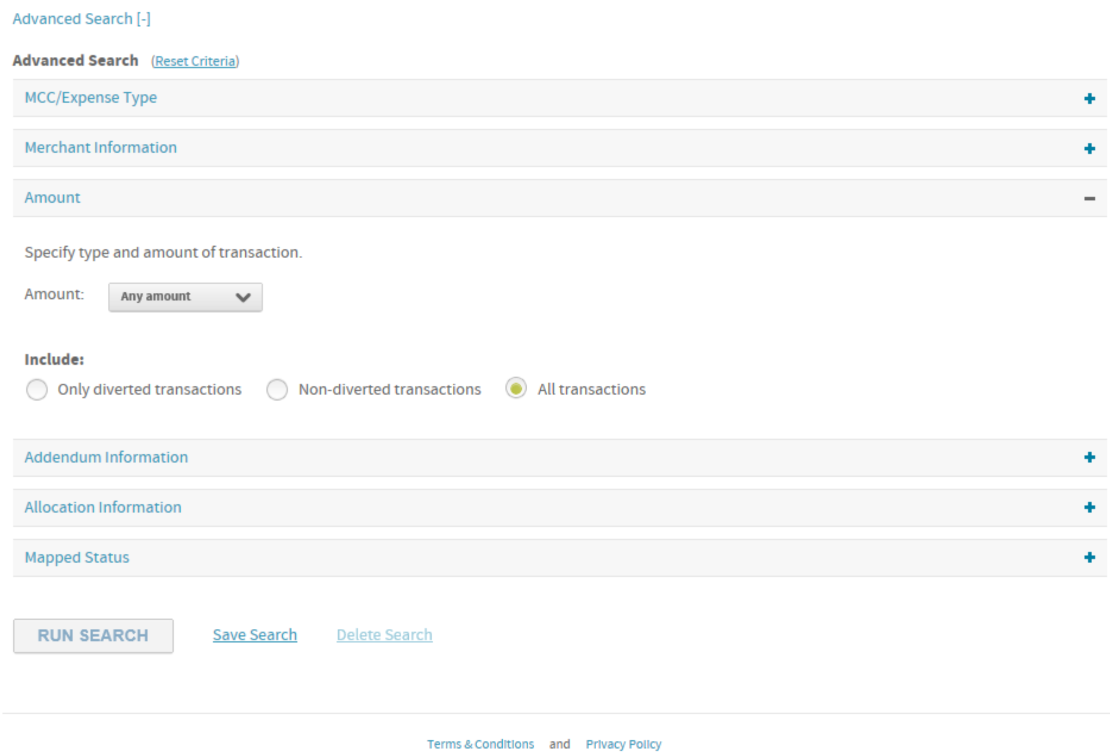

As noted above, the flow remains the same and options will display based on the users access and enabled functionality. The option to set up additional filter criteria has been moved to the main page below the transaction type option and displays as “Advanced Search [+]”:



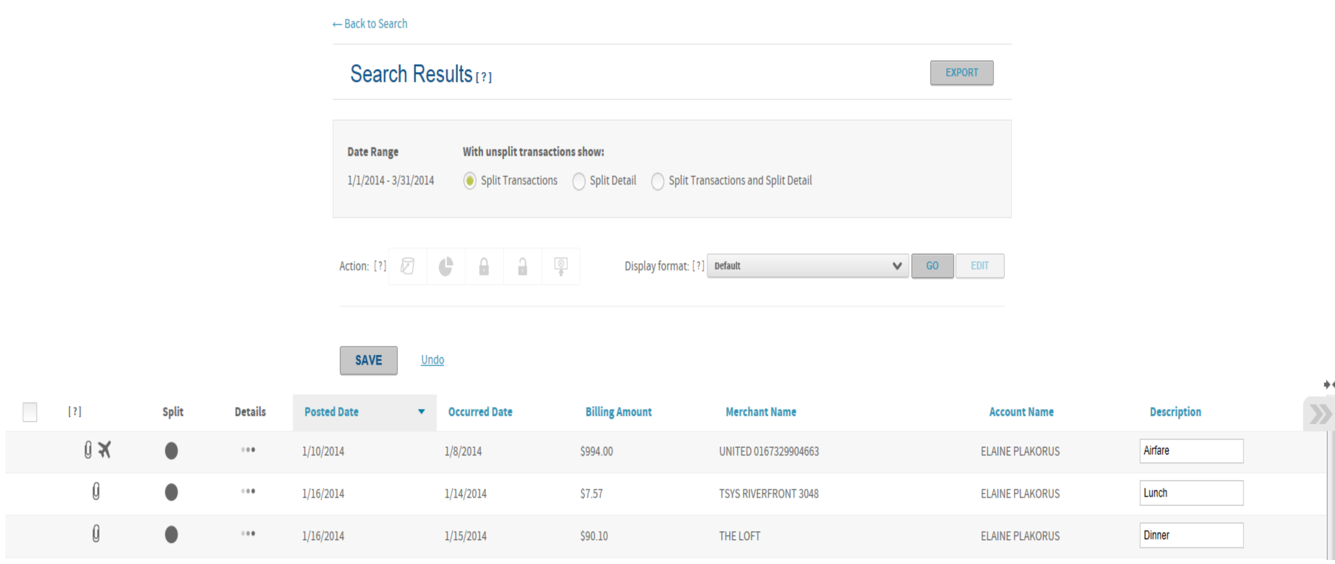

To set up additional search criteria click on the “Advanced Search [+]” link:



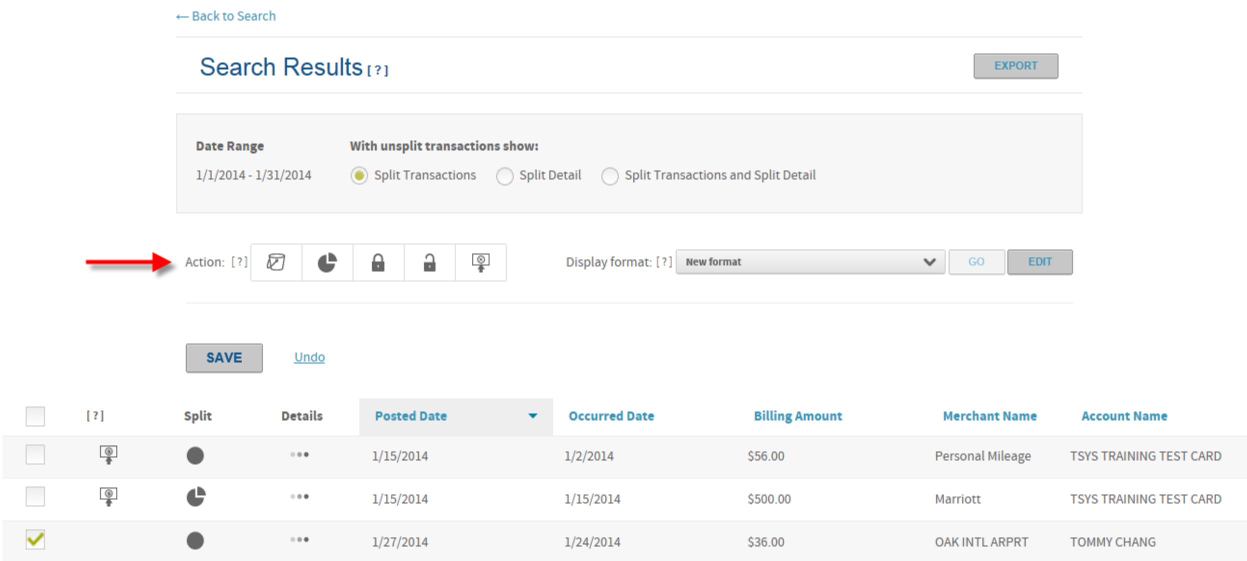

Users can then expand any one of the sections to set up their filter criteria as they do today. In addition, the options for Run Search, Save Search and Delete Search now display at the bottom of the screen:



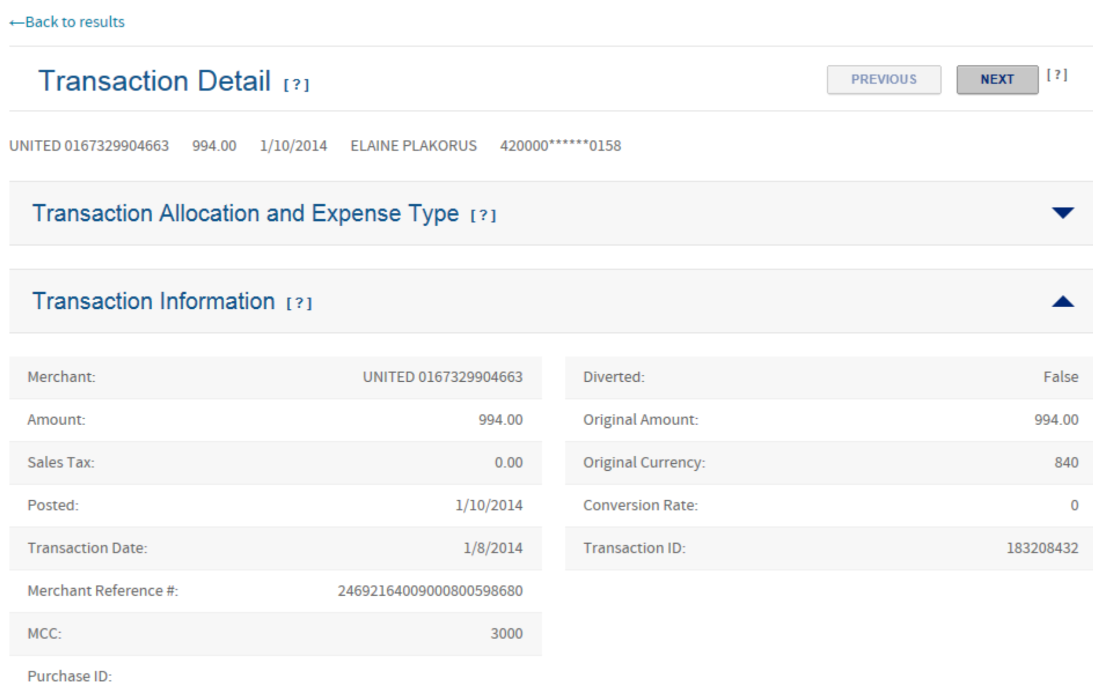

The result query will display much as it does today with a few modifications:



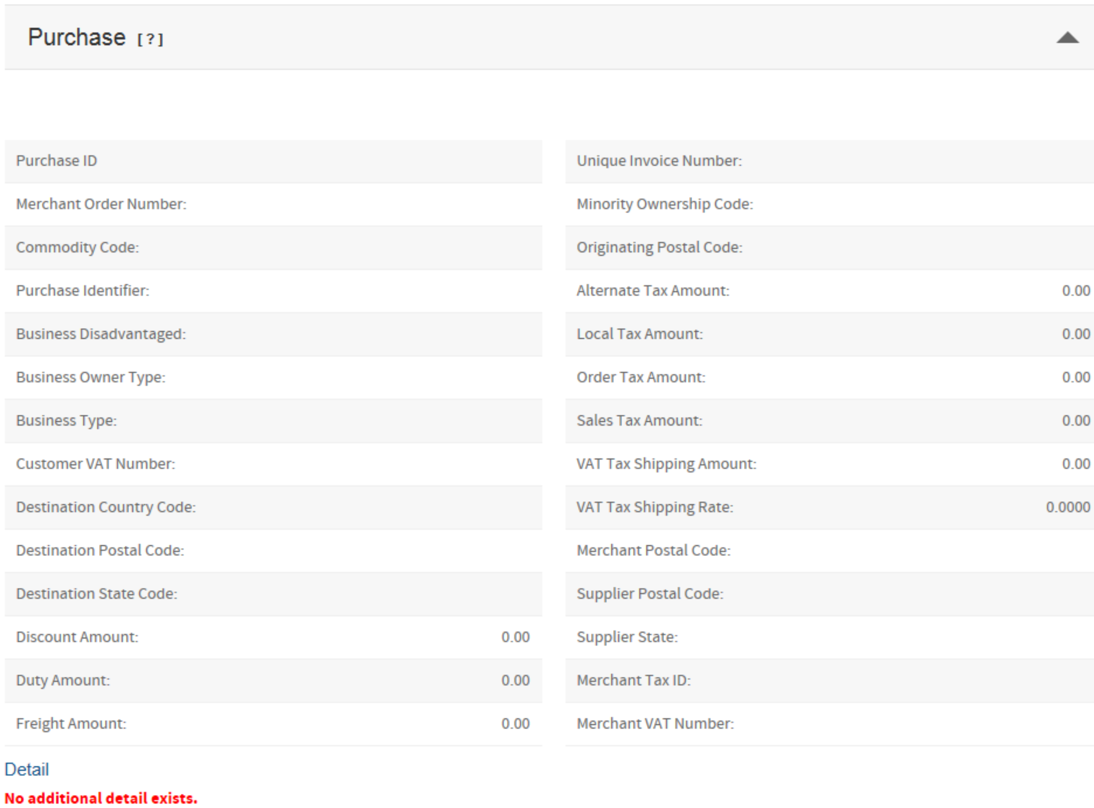

Actions that can be applied to transactions which currently display in a dropdown will now be available via icons directly on the screen. Once a transaction(s) has been selected the appropriate icons will become enabled. Users can then click on the icon to allocate, split, lock, unlock or delete (out of pocket) transactions. The process to complete each action remains the same as it is today.



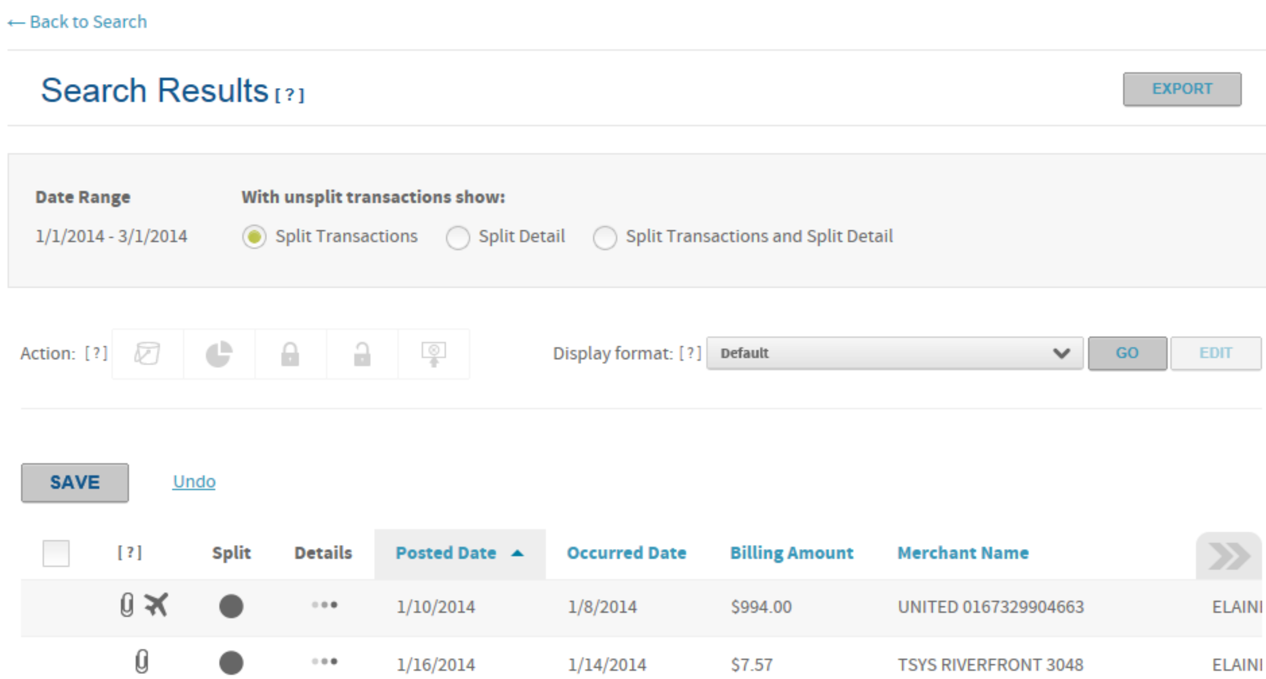

Users will continue to have the ability to view the detail of a transaction by clicking on the icon within the Details column. Users will navigate to other transactions by clicking on the Previous and Next buttons. To return to the results grid, users will click on the “Back to results” link at the top of the screen.



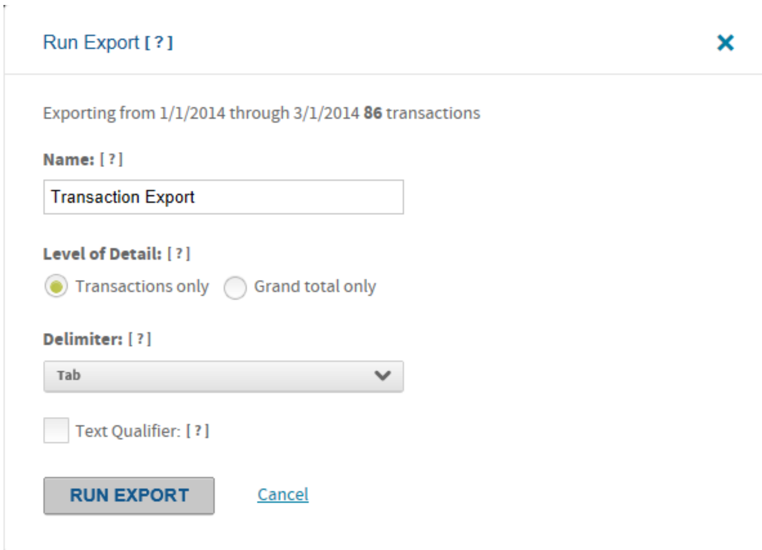

All information will display within the Transaction Information section instead of requiring users to click on the “More” link to see additional information. The same modification has been made to each of the addendum sections (if applicable). All information will display versus selecting the “More” link:



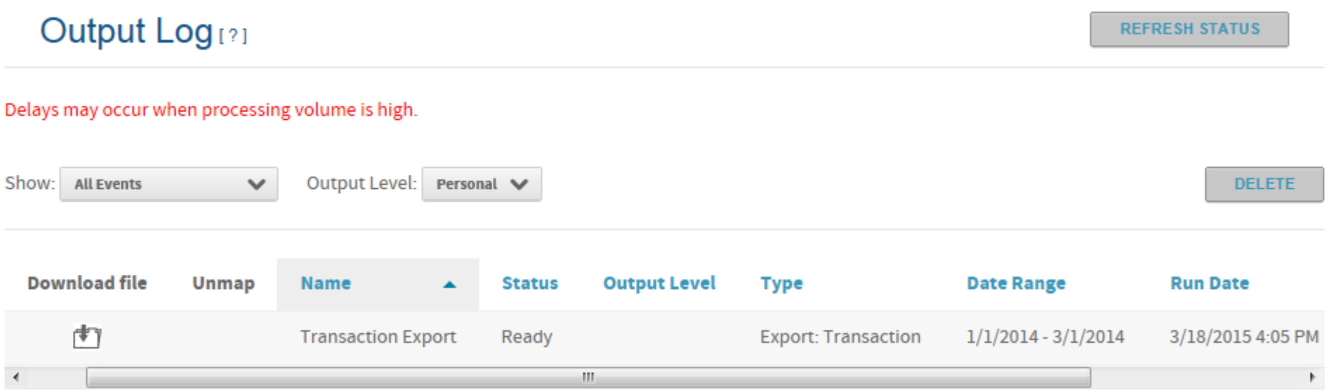

The option to export the grid results has been moved to the "Search Results" header section.




Once the option is selected the same confirmaiton message will display:




Users will navigate to the Output log as they do today to retrieve the output file:




Users will click on the download icon to open and/or save the file.