

Expenses: Duplicate an Expense Report

For employees duplicating an expense report

Purpose: Duplicate an expense report.

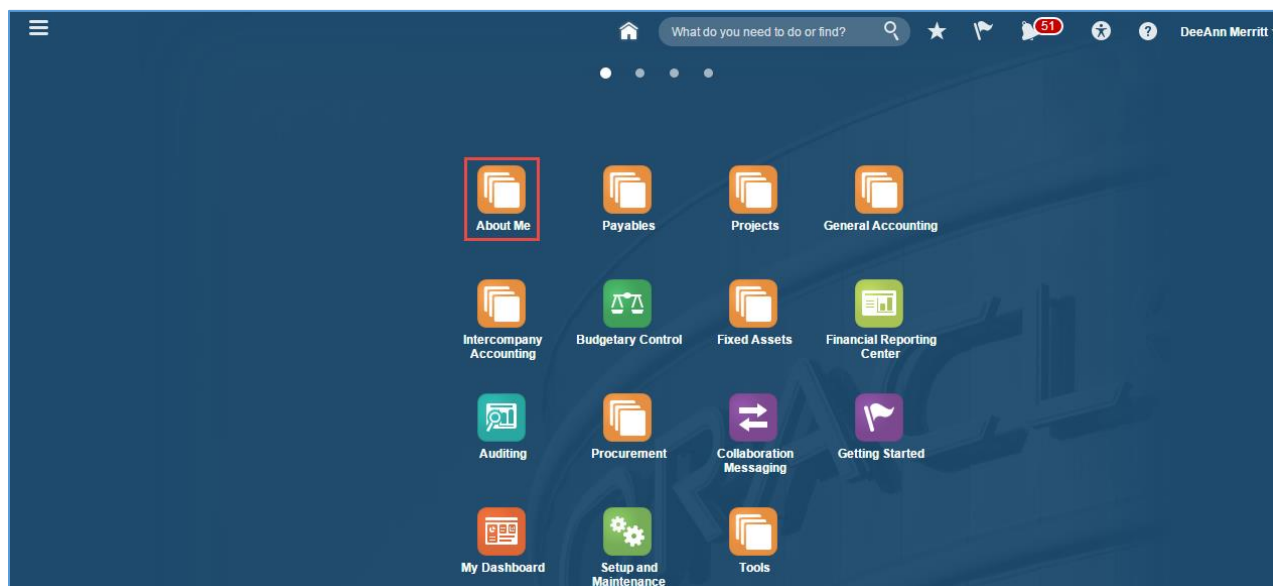
How to Access: Log into the [Bear Trax](#) application. Select the **About Me** tile or task in the Navigator.

Helpful Hints: Be sure to keep in mind that...

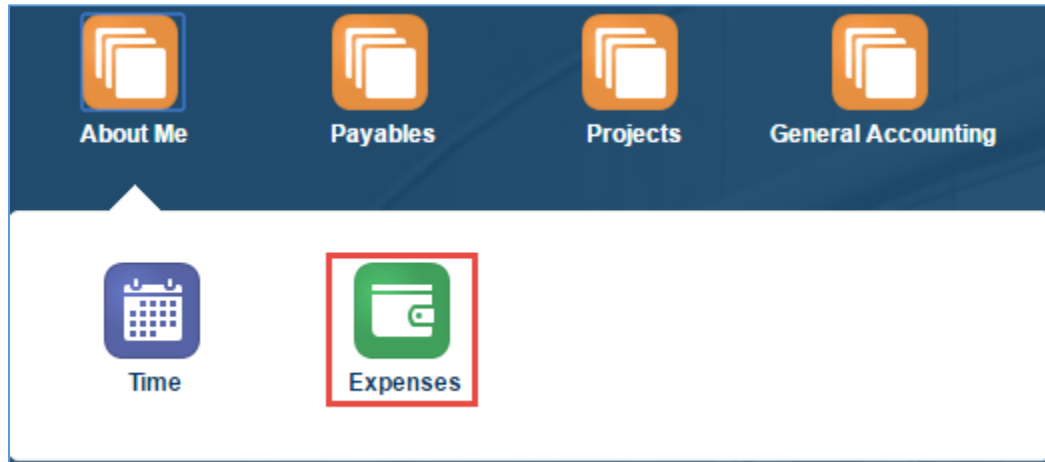
- Employees and faculty will use this for recurring travel (IUC meeting, etc.)
- Employees and faculty can use this for recurring purchases (e.g. uniforms)
- This saves time spent entering information into each field for repetitive spending
- Staff can still edit the expense report before submission

Procedure: Complete the following steps to duplicate an Expense Report:

1. Click on the **About Me** icon.

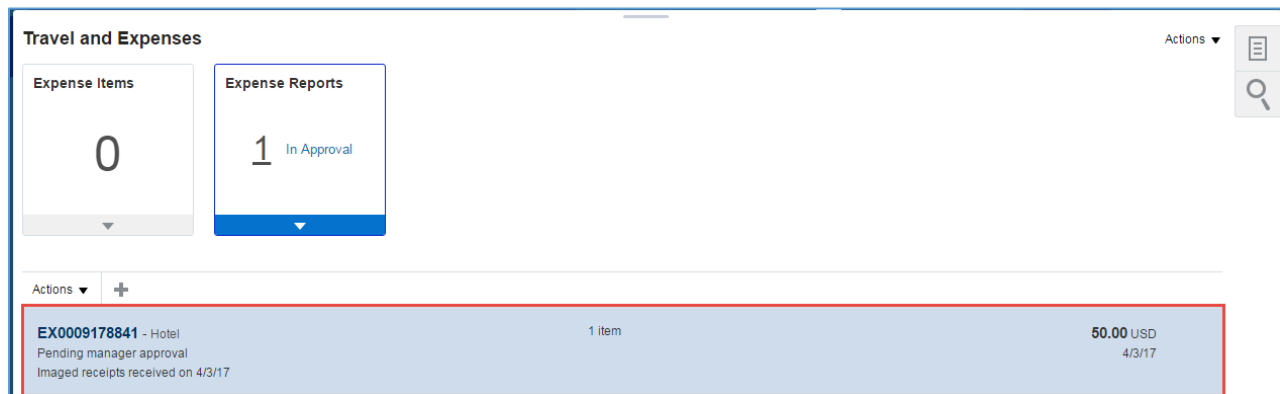


2. Click on the **Expenses** icon.

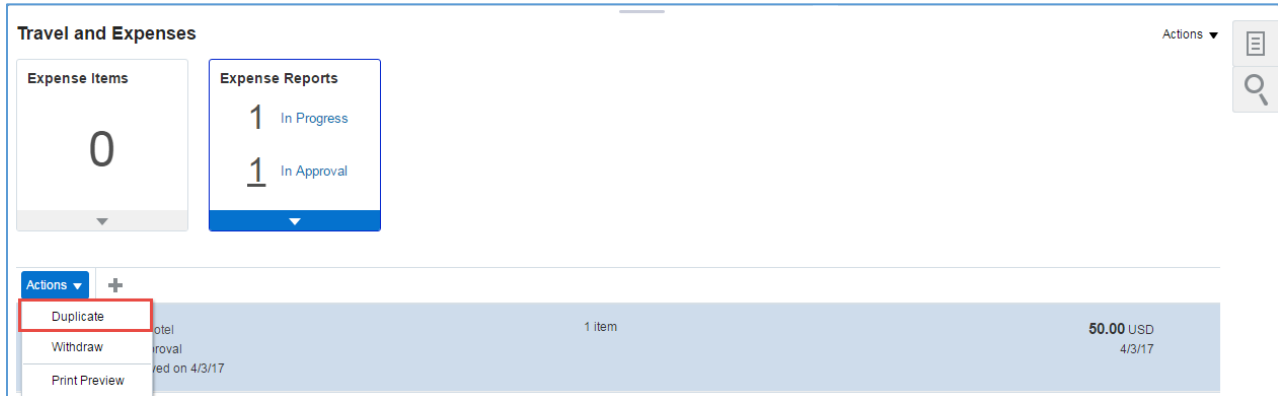


Under Expense Reports, select a report status to view existing reports. For example, **click “In Approval”** under Expense Reports to see expense reports which have yet to be approved.

3. **Highlight** the expense report you would like to take action on.



4. Select the **Actions** drop down menu. Here, a duplicate expense report can be created, the expense can be withdrawn, or you can choose to preview the document before printing it (Print Preview). Click **Duplicate**.



Travel and Expenses

Expense Items: 0

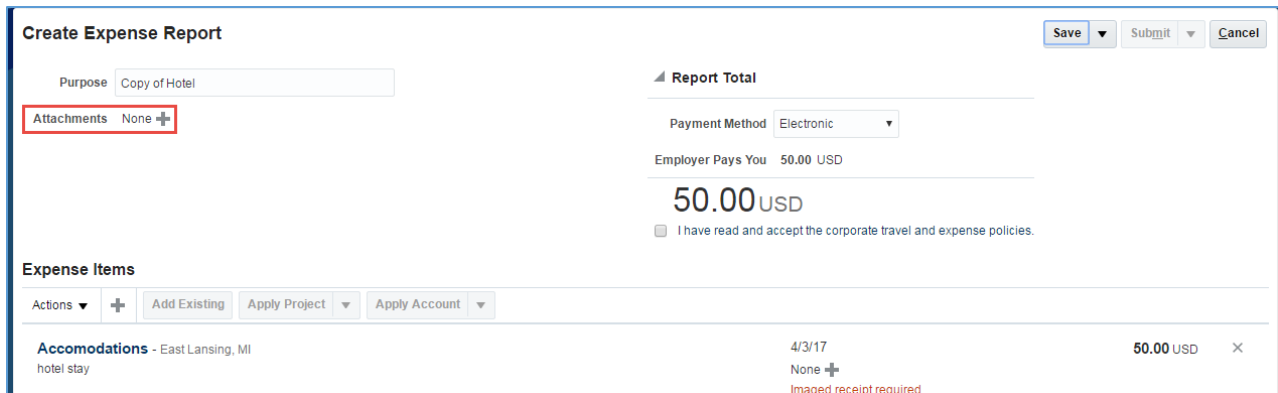
Expense Reports: 1 In Progress, 1 In Approval

Actions: Duplicate, Withdraw, Print Preview

Item	Amount
Hotel	50.00 USD

A new expense report will open with duplicate details from the original report.

5. **Update** any relevant information on this page.



Create Expense Report

Purpose: Copy of Hotel

Attachments: None

Report Total: 50.00 USD

Payment Method: Electronic

Employer Pays You: 50.00 USD

Expense Items: Accommodations - East Lansing, MI (50.00 USD)

Add any necessary attachments.

6. If you need to update the information on an expense item, click on it to select it.

Create Expense Report

Purpose

Copy of Hotel

Attachments

None

Report Total

Payment Method

Electronic

Employer Pays You

50.00 USD

50.00USD

☐ I have read and accept the corporate travel and expense policies.

Save

Submit

Cancel

Expense Items

Actions

+

Add Existing

Apply Project

Apply Account

Accommodations	East Lansing, MI	4/3/17	50.00 USD	X
hotel room		None		

7. Update all of the relevant fields (e.g. date, location) and then click **Save and Close**.

Accommodations 4/3/17

Save and Close

Cancel

Date

4/3/17

Type

Accommodations

Expense Location

East Lansing, Ingham, MI, United Stati

Amount

USD -

50.00

Number of Days

1

Daily Amount

50.00 USD

Reimbursable Amount

50.00 USD

Attachments

None

☐ Receipt missing

Details

Description

hotel room

Merchant Name

Holiday Inn

Checkout Date

3/27/17

Account

10-1010-50-10074-62105-10000-000

Note: Make sure to place a check mark next to the travel and agreement policy. If not familiar with Shawnee State University corporate policy, click the link to review before submission.

8. Click **Save** to come back to the report at a later time or **Submit** to send it through the approval process.

Expense Report: EX0009179054

Save Submit Cancel

PurposeCopy of Hotel

AttachmentsNone

StatusSaved

Report Total

Payment MethodElectronic

Employer Pays You50.00 USD

50.00USD

☒ I have read and accept the corporate travel and expense policies.

Expense Items

ActionsAdd ExistingApply ProjectApply Account

Accomodations - East Lansing, MI hotel room	3/29/17 None	50.00 USD	X
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Imaged receipt required

Final Notes

By following these steps, you have successfully duplicated an existing expense report, made necessary changes, and submitted it for approval.