Expenses: Duplicate an Expense Report
For employees duplicating an expense report

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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.
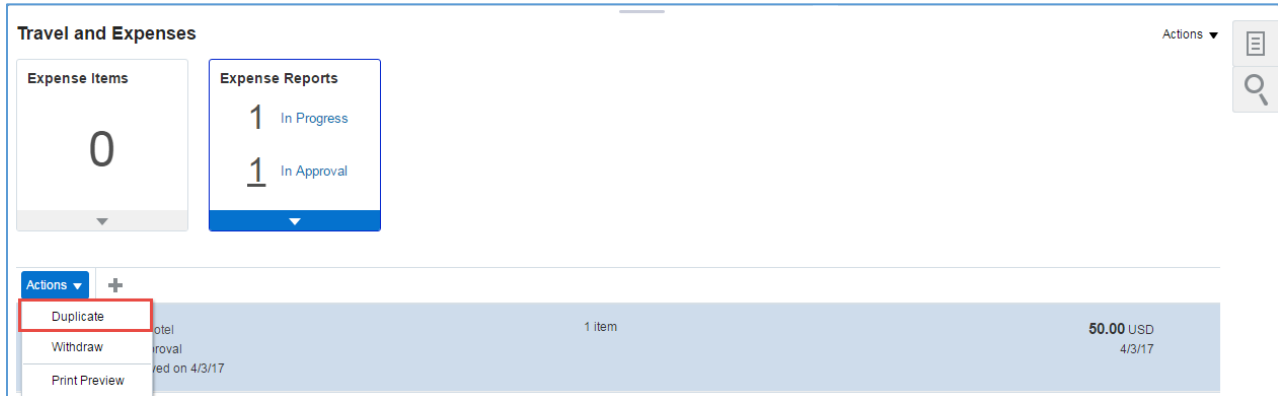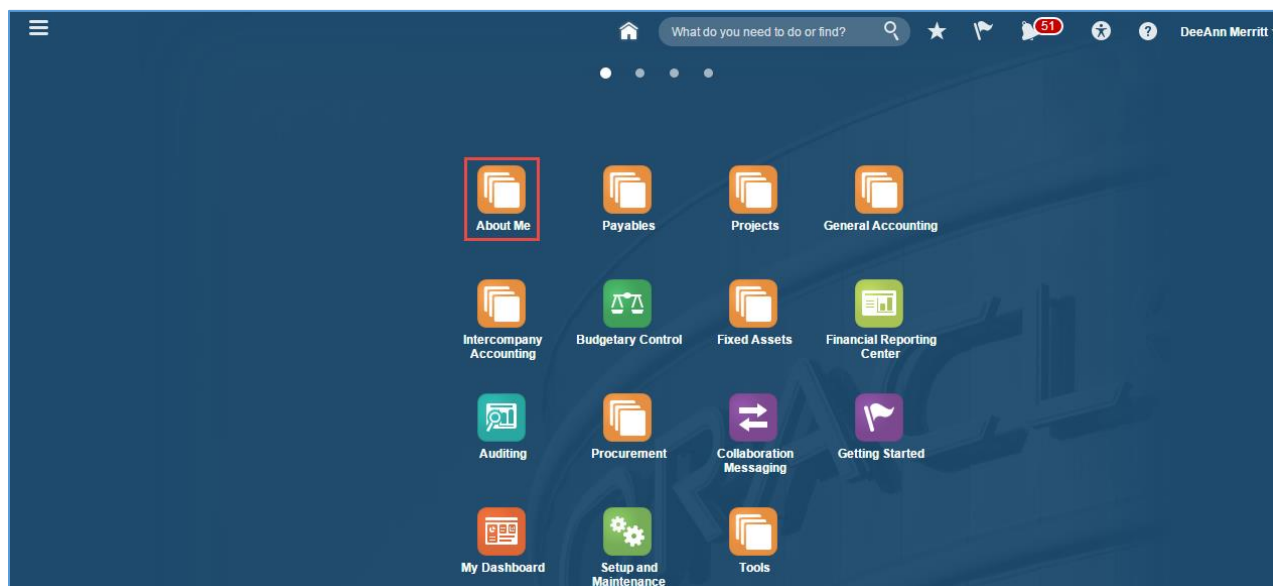
2. Click on the **Expenses** icon.
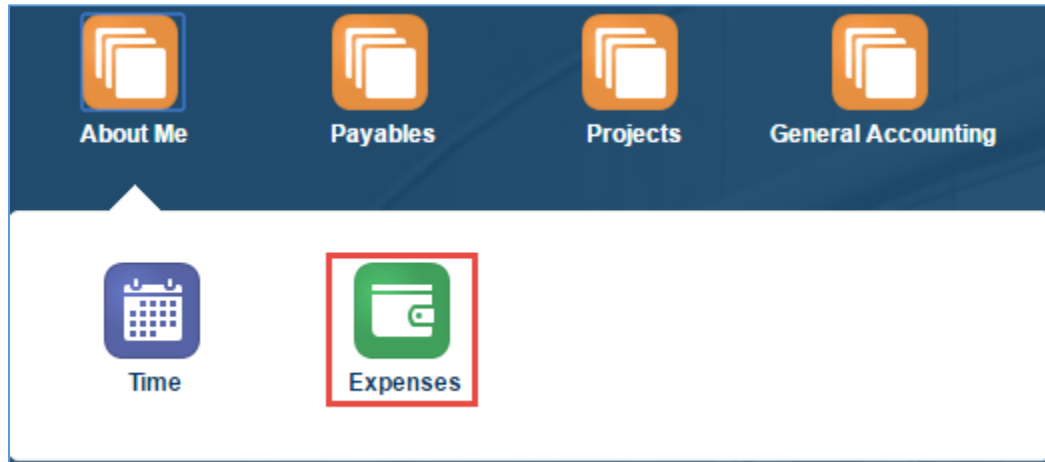
Under Expense Reports, select a report status to view existing reports. For example, **click "In Approval"** under Expense Reports to see expense reports which have yet to be approved.

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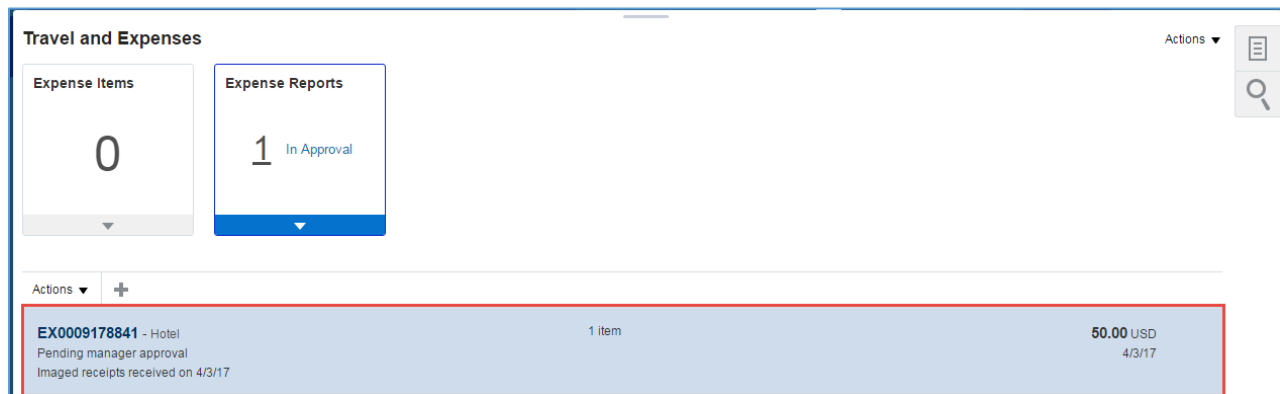
4. Select the **Actions** drop down menu. Here, a duplicate expense report can be created, the expense can be withdrawn, or you can choose to preview the document before printing it (Print Preview). Click **Duplicate**.

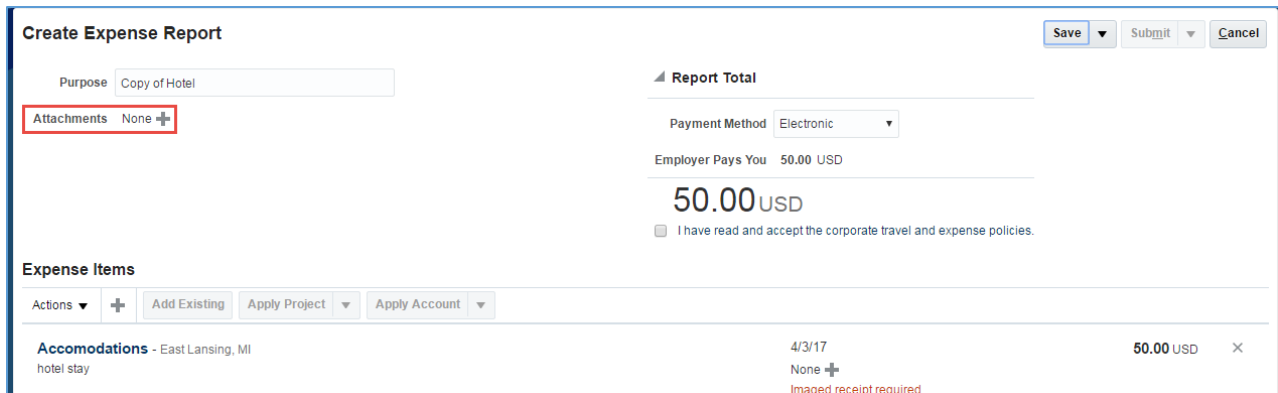A new expense report will open with duplicate details from the original report.

5. Update any relevant information on this page.

Add any necessary attachments.

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

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

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

Purpose: Copy of Hotel

Attachments: None ➕

Status: Saved

◢ **Report Total**

Payment Method: Electronic ▾

Employer Pays You: 50.00 USD

50.00 USD

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

Expense Items

Actions ▾ | ➕ | Add Existing | Apply Project ▾ | Apply Account ▾

Accomodations - East Lansing, MI | 3/29/17 | 50.00 USD | ✕
hotel room | None ➕
| 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.