Expenses: Withdraw to Edit an Expense Report
*For employees withdrawing an expense report to make changes*

Purpose:	Withdraw to edit an Expense Report.
How to Access:	Log into the Bear Trax application. Select the **About Me** task in the Navigator.
Helpful Hints:	Be sure to keep in mind that… • Users can withdraw an expense report to edit information and resubmit for approval • If an expense report has been rejected, users can withdraw the expense report to make changes
Procedure:	Complete the following steps to Withdraw to edit an Expense Report:

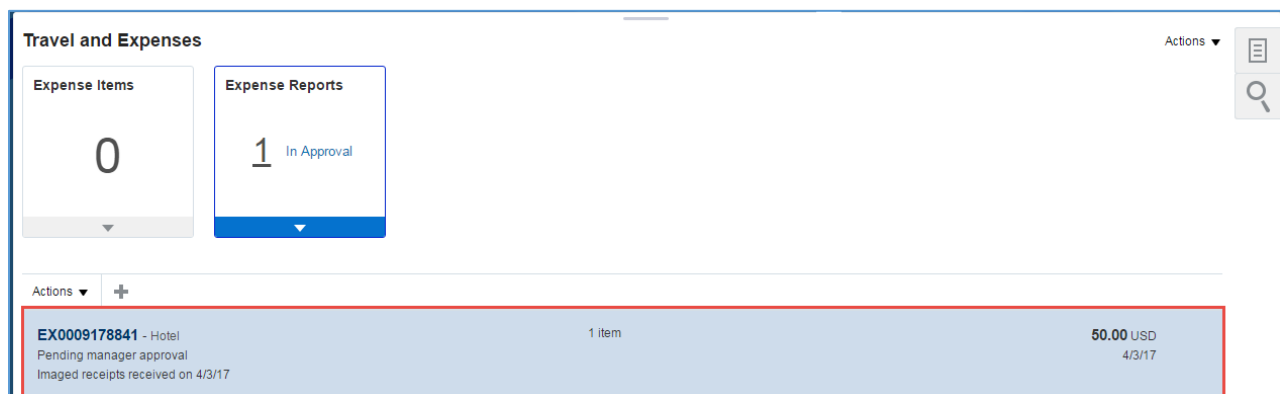**1.** Click on the **About Me** icon.
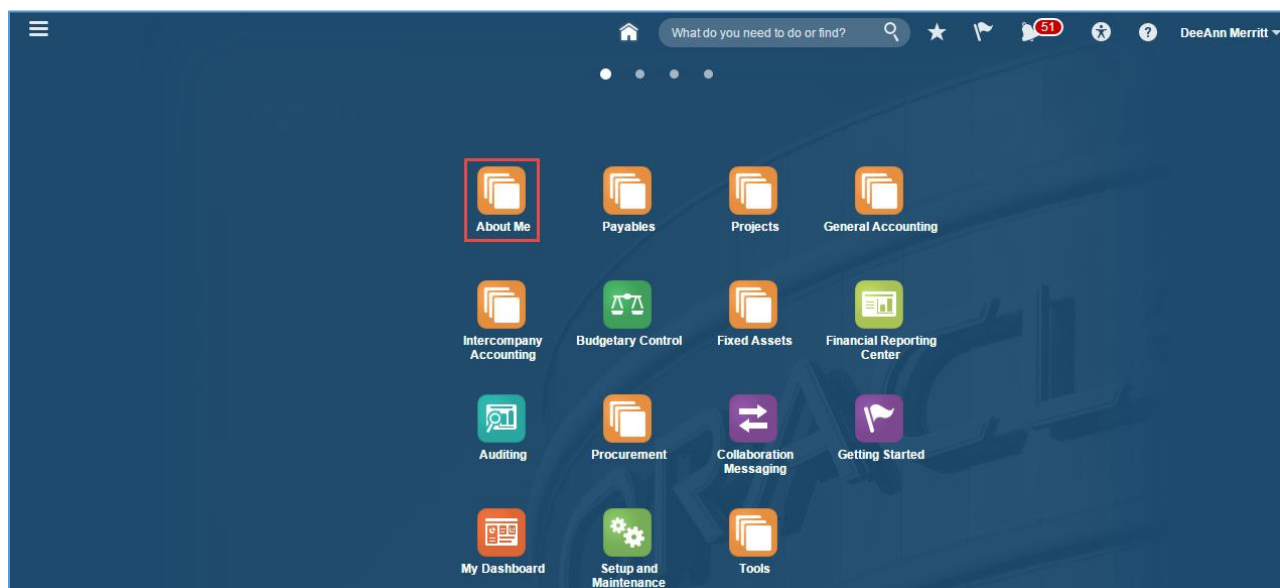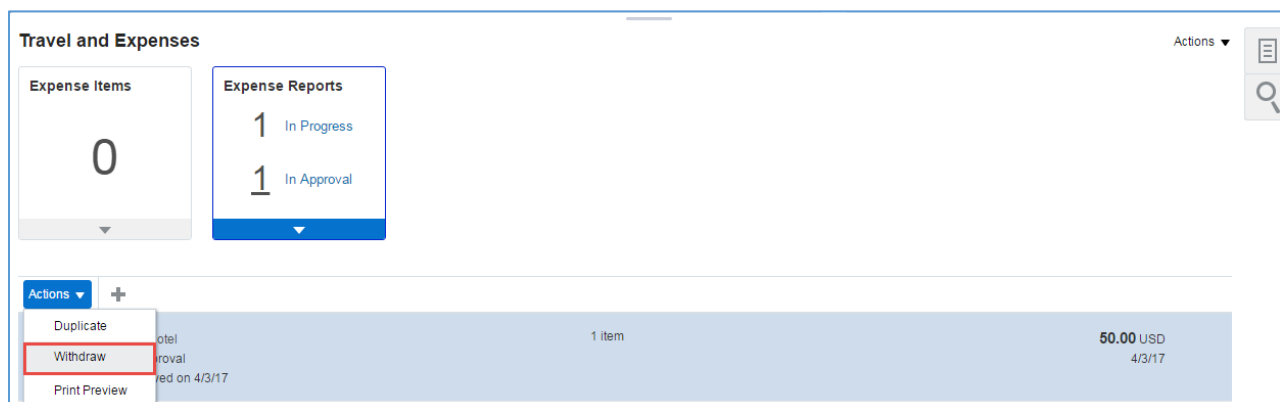
2. Click on the **Expenses** icon.
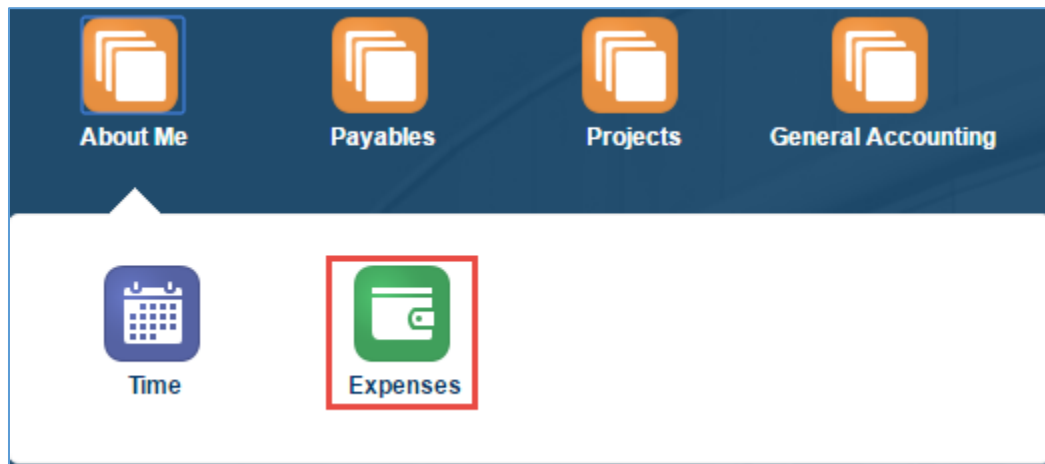
The page will show any expense reports that are **"In Approval"** status.

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

4. Select the **Actions** drop-down menu and click **Withdraw**.

5. A warning will appear. Select **Yes** to withdraw.

⚠ **Warning**   ✕

Withdrawing the expense report cancels existing approvals. It becomes an in progress expense report that you can edit and submit. Do you want to continue?

Yes   No

Note: In this example, there was 1 report In Approval and 1 report In Progress. There are now 2 reports In Progress. The report that was withdrawn is now **In Progress**. Click **In Progress** to view all incomplete reports.

Travel and Expenses   Actions ▾ ▤

Expense Items	Expense Reports
0	2 In Progress
▾	▾

6. Click on the expense report whose status beneath the number says **"Withdrawn"** to open it for editing.

Travel and Expenses   Actions ▾ ▤

Expense Items	Expense Reports
0	2 In Progress
▾	▾

Actions ▾ ✚

EX0009178898 - Copy of Hotel Saved	1 item	50.00 USD 4/4/17	✕
EX0009178841 - Hotel Withdrawn	1 item	50.00 USD 4/3/17	✕

Make changes to the details in this page.

7. Click an expense item (e.g. Accommodations) to open and edit it.

8. Make changes and then click on the **Save and Close** button.
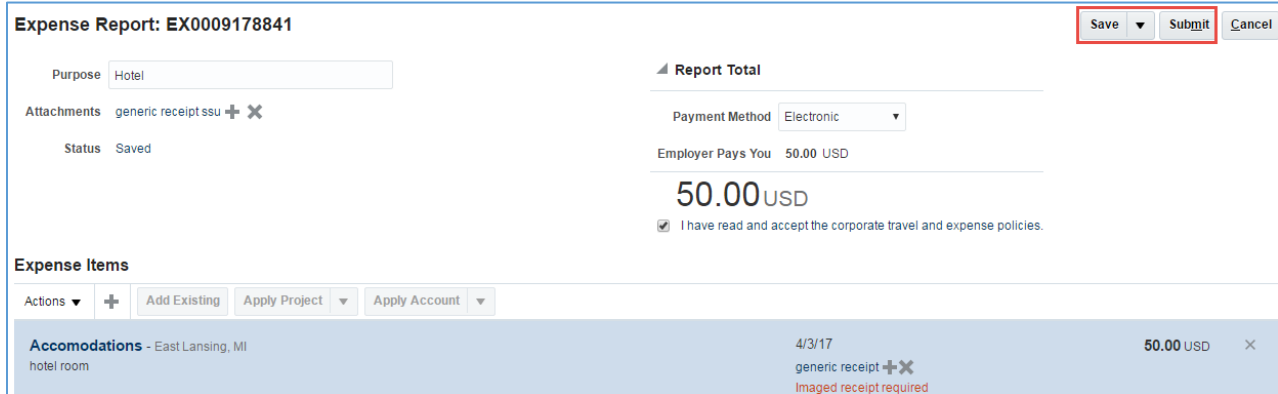
9. Click on **Save** in order to save and submit at a later date or **Submit** to send for approval immediately.

Note: The policy agreement box (above) has to be checked before the expense report can be submitted. If you are not familiar with Shawnee State University corporate travel and expense policies, review them before submitting your expense report.

Expense Report: EX0009178841	Save ▼ Submit Cancel

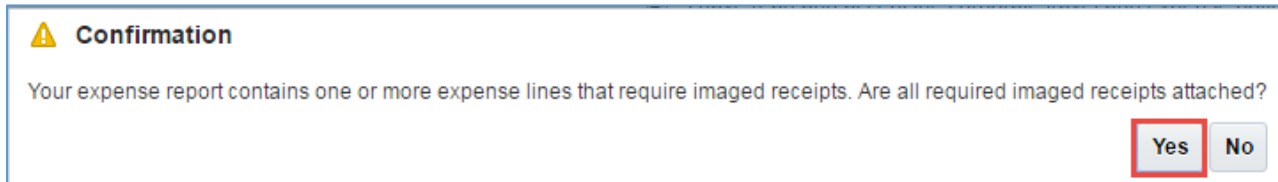|		
Purpose	Hotel	◢ **Report Total**
Attachments	generic receipt ssu ➕ ✖	Payment Method Electronic ▼
Status	Saved	Employer Pays You 50.00 USD
		50.00 USD
		☑ I have read and accept the corporate travel and expense policies.

Expense Items

Actions ▼ ➕   Add Existing   Apply Project ▼   Apply Account ▼

Accomodations - East Lansing, MI	4/3/17	50.00 USD ✖
hotel room	generic receipt ➕✖	
	Imaged receipt required	

10. A confirmation message will appear, click **Yes** if all receipts are attached.

⚠ **Confirmation**

Your expense report contains one or more expense lines that require imaged receipts. Are all required imaged receipts attached?

Yes No

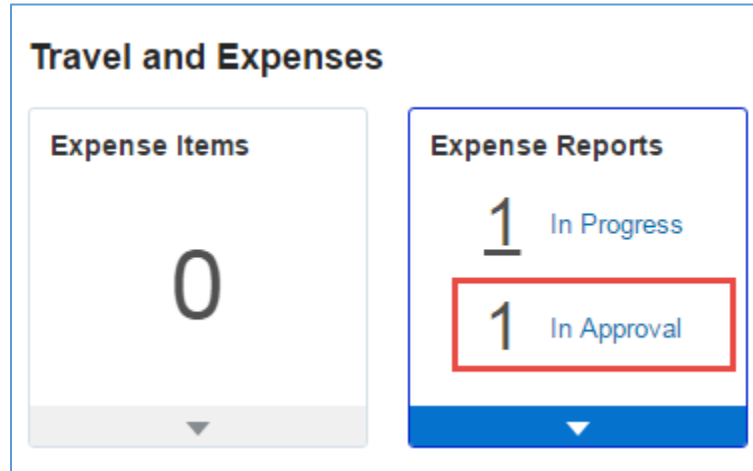**11**. Click **Ok** to continue, or Print to print the report from here.

✅ **Confirmation**

Expense report EX0009178841 for 50.00 USD has been submitted for approval.

OK Print

The expense report is now back **In Approval** status.

Final Notes

By following these steps, you have successfully withdrawn an expense report, made necessary changes, and resubmitted it for approval.