

## Expenses: Duplicate an Expense Report

*For employees duplicating an expense report*

**Purpose:** Duplicate an expense report.

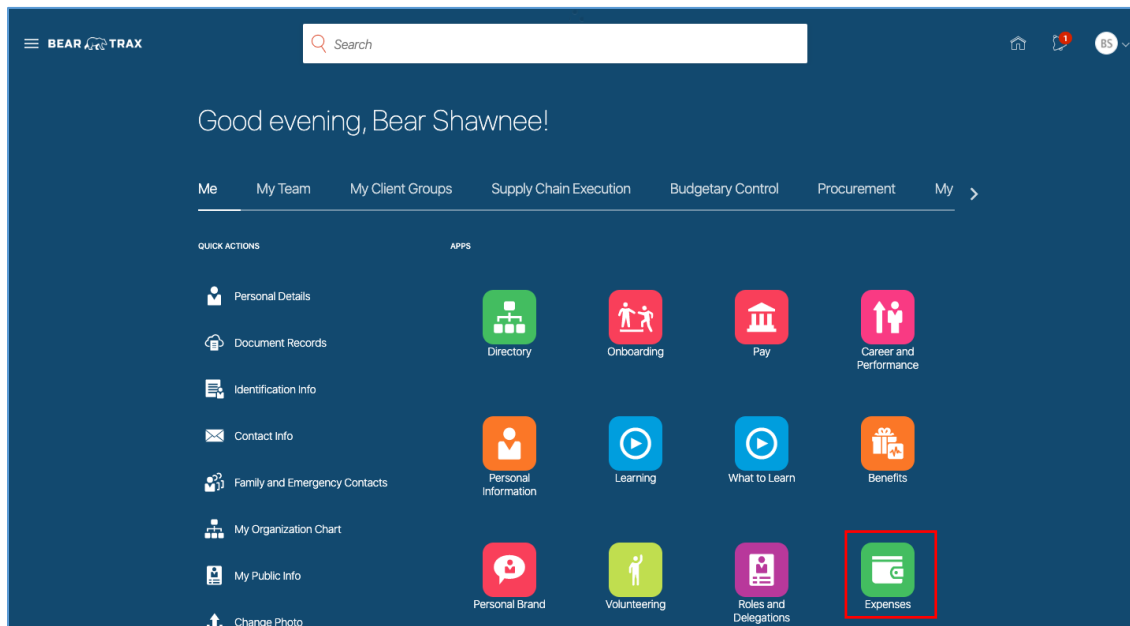
**How to Access:** Log into the [BearTrax](#) application. Select the **About Me** tile or task in the Navigator.

**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

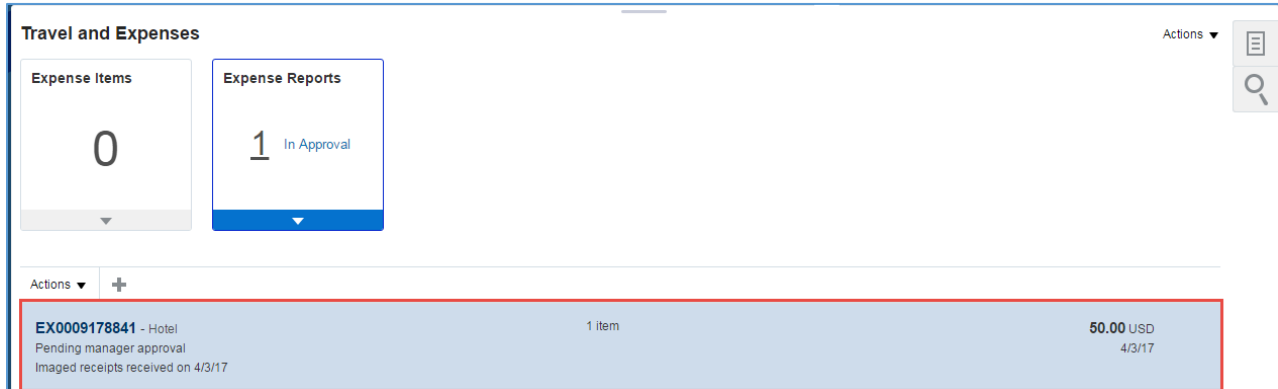
**Procedure:** Complete the following steps to duplicate an Expense Report:

1. Click on the **Expenses** tile.



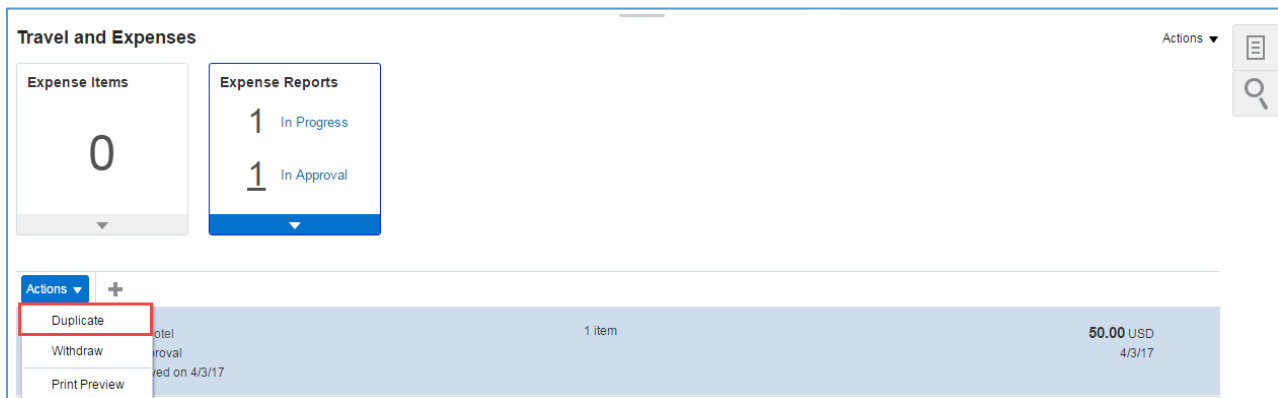
Under Expense Reports, select a report status to view existing reports. For example, click **“In Approval”** under Expense Reports to see expense reports which have yet to be approved.

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



The screenshot shows the 'Travel and Expenses' dashboard. On the left, there are two summary cards: 'Expense Items' with a value of 0 and 'Expense Reports' with a value of 1 and the status 'In Approval'. Below these is an 'Actions' dropdown menu with a plus sign. A table below shows one expense report entry: 'EX0009178841 - Hotel' with a value of '50.00 USD' and a date of '4/3/17'. The entry is highlighted with a red border. The text below the entry reads: 'Pending manager approval' and 'Imaged receipts received on 4/3/17'.

3. 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 Here, a duplicate expense report can be created, the expense can be withdrawn, or you can choose to preview the document before printing it (Print Preview).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**.



The screenshot shows the same 'Travel and Expenses' dashboard as the previous one. The 'Expense Reports' card now shows 1 'In Progress' and 1 'In Approval'. The 'Actions' dropdown menu is open, showing three options: 'Duplicate', 'Withdraw', and 'Print Preview'. The 'Duplicate' option is highlighted with a red box. The table below still shows the same expense report entry, which is also highlighted with a red border.

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

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

**Create Expense Report**
Save Submit Cancel

Purpose

Attachments None +

**Report Total**

Payment Method

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

<b>Accommodations</b> - East Lansing, MI hotel stay	4/3/17 None + <span style="font-size: 0.8em; color: red;">Imaged receipt required</span>	50.00 USD X
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Add any necessary attachments.

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

**Create Expense Report**
Save Submit Cancel

Purpose

Attachments None +

**Report Total**

Payment Method

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

<span style="border: 1px solid red; padding: 2px;"><b>Accommodations</b></span> East Lansing, MI hotel room	4/3/17 None +	50.00 USD X
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6. 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

Type

Expense Location

Amount

Number of Days

Daily Amount

Reimbursable Amount 50.00 USD

Attachments None +  Receipt missing

**Details**

Description

Merchant Name

Checkout Date

Account

**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.

7. 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

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 ▼

<b>Accommodations</b> - East Lansing, MI hotel room	3/29/17 None <span>+</span> <span>Imaged receipt required</span>	50.00 USD	<span>×</span>
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## Final Notes

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