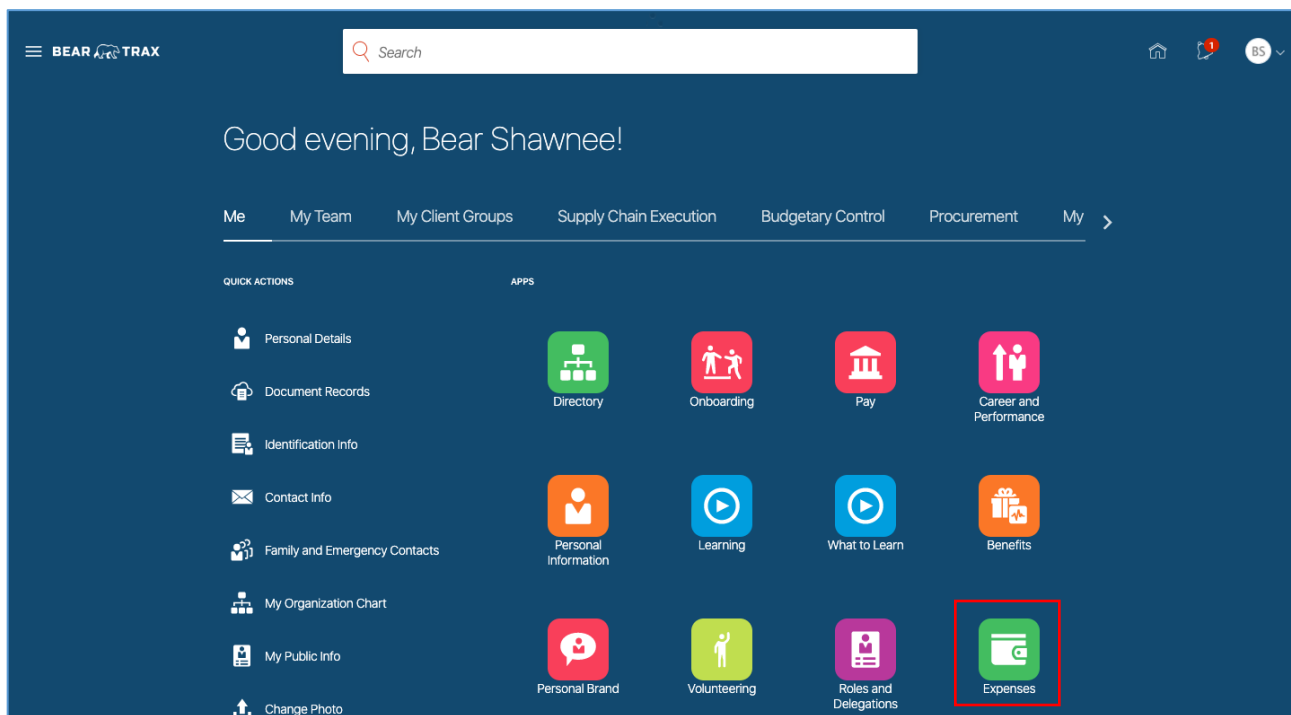


Expenses: Withdraw to Edit an Expense Report

For employees withdrawing an expense report to make changes

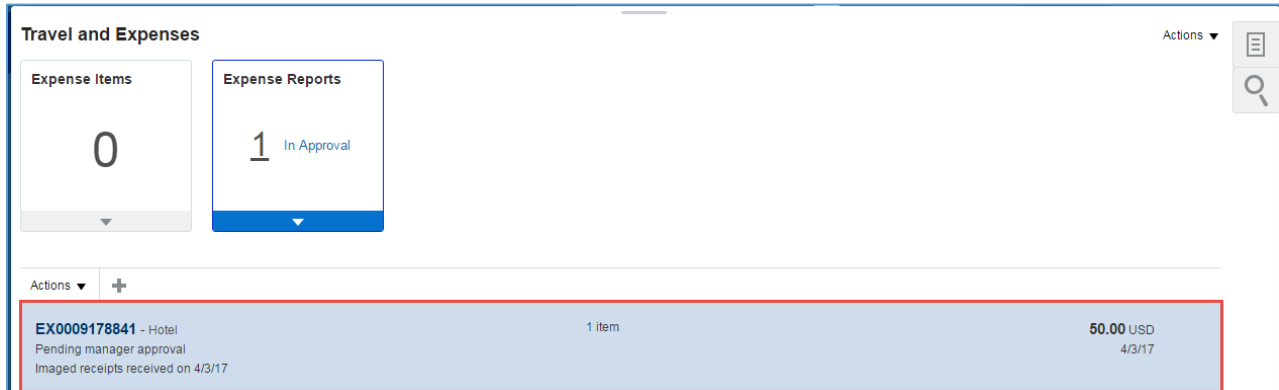
| | |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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... <ul style="list-style-type: none">• 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 **Expenses** tile.



The page will show any expense reports that are **“In Approval”** status.

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



Travel and Expenses Actions ▾

Expense Items

0

Expense Reports

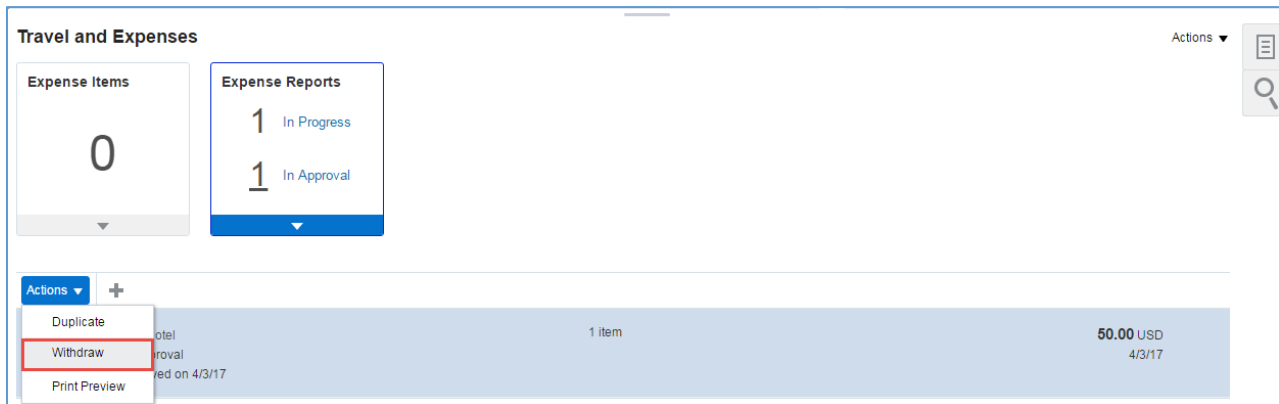
1

In Approval

Actions ▾ +

| | | |
|--------------------------------------------------------------------------------------------------------------------------|--------|-------------------------------------------|
| EX0009178841 - Hotel <small>Pending manager approval Imaged receipts received on 4/3/17</small> | 1 item | 50.00 USD <small>4/3/17</small> |
|--------------------------------------------------------------------------------------------------------------------------|--------|-------------------------------------------|

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



Travel and Expenses Actions ▾

Expense Items

0

Expense Reports

1

In Progress

1

In Approval

Actions ▾ +

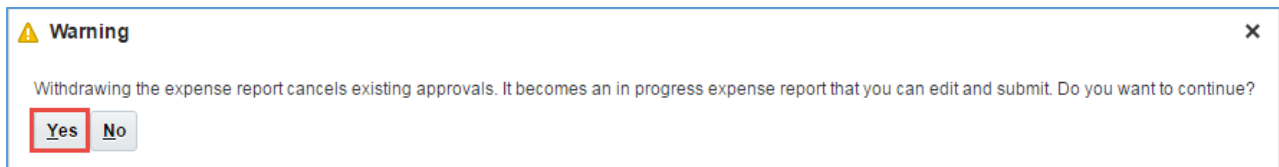
Duplicate

Withdraw

Print Preview

| | | |
|--------------------------------------------------------------------------------------------------------------------------|--------|-------------------------------------------|
| EX0009178841 - Hotel <small>Pending manager approval Imaged receipts received on 4/3/17</small> | 1 item | 50.00 USD <small>4/3/17</small> |
|--------------------------------------------------------------------------------------------------------------------------|--------|-------------------------------------------|

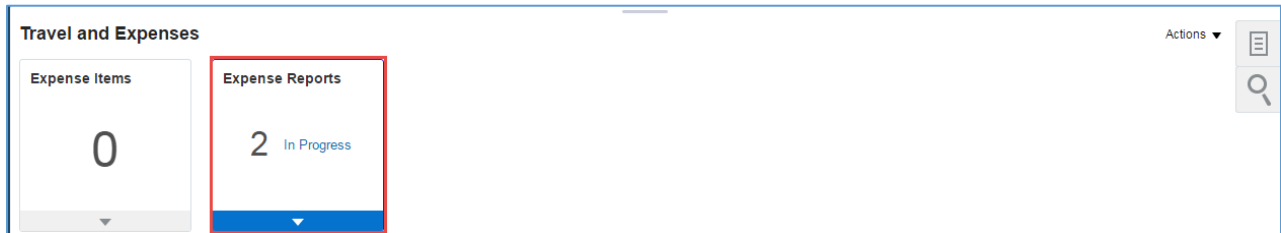
4. A warning will appear. Select **Yes** to withdraw.



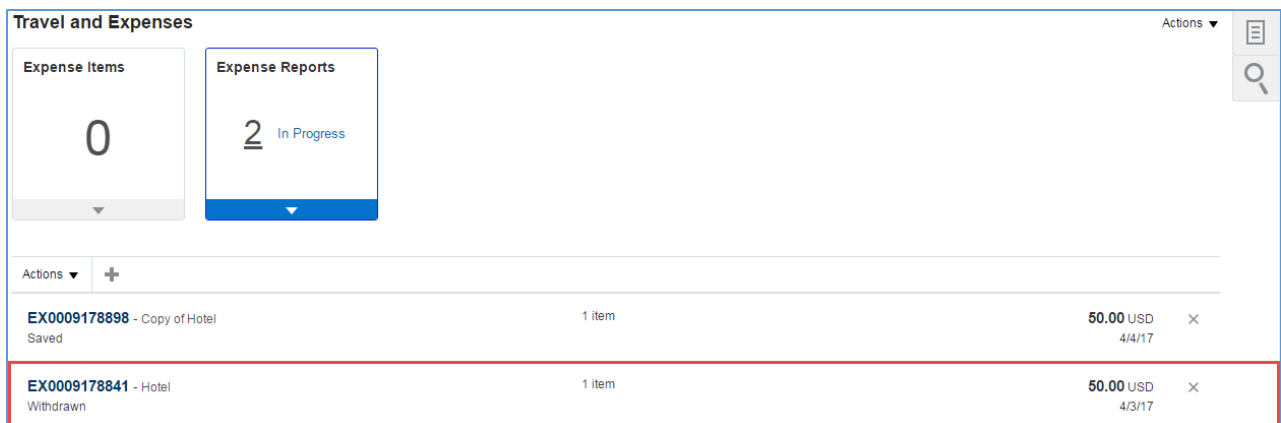
Warning ✕

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?

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.

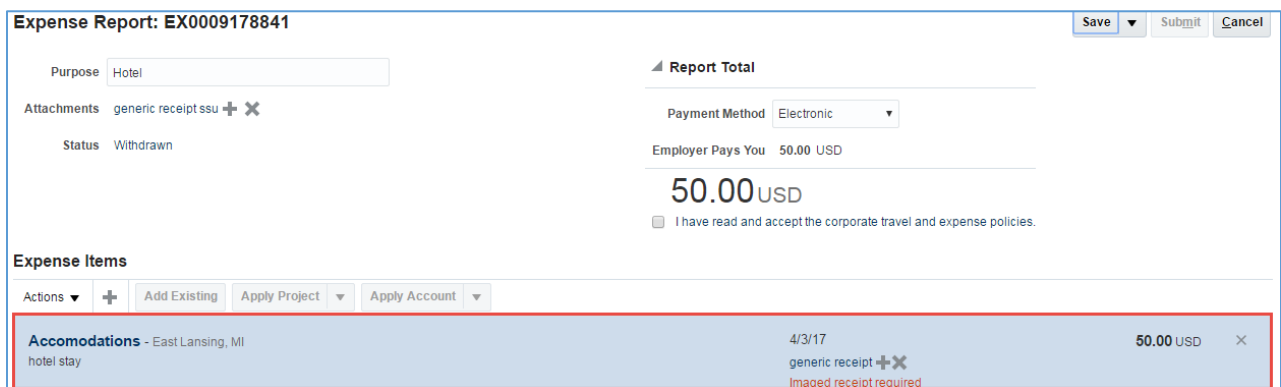


5. Click on the expense report whose status beneath the number says **“Withdrawn”** to open it for editing.



| Expense Report ID | Description | Status | Items | Amount | Date |
|-------------------|---------------|-----------|--------|-----------|--------|
| 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.



Expense Report: EX0009178841 Save Submit Cancel

Purpose:

Attachments: generic receipt ssu + x

Status: Withdrawn

Report Total

Payment Method:

Employer Pays You: 50.00 USD

50.00 USD

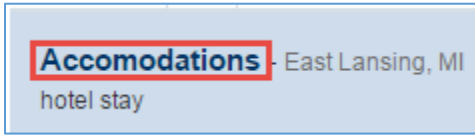
I have read and accept the corporate travel and expense policies.

Expense Items

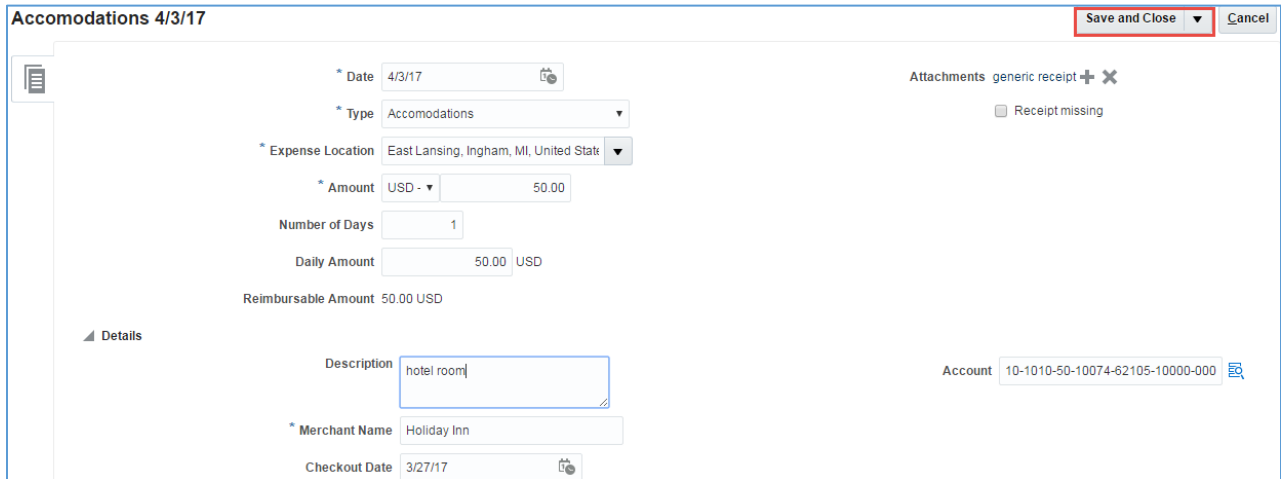
Actions + Add Existing Apply Project Apply Account

| | | |
|------------------------------------------|-----------------------------------------------|-----------|
| Accommodations - East Lansing, MI | 4/3/17 | 50.00 USD |
| hotel stay | generic receipt + x | |
| | Imaged receipt required | |

6. Click an expense item (e.g. [Accommodations](#)) to open and edit it.



7. Make changes and then click on the **Save and Close** button.



Accomodations 4/3/17 **Save and Close**

* Date: 4/3/17

* Type: Accomodations

* Expense Location: East Lansing, Ingham, MI, United Stat

* Amount: USD - 50.00

Number of Days: 1

Daily Amount: 50.00 USD

Reimbursable Amount: 50.00 USD

Attachments: generic receipt + X
 Receipt missing

Details

Description: hotel room

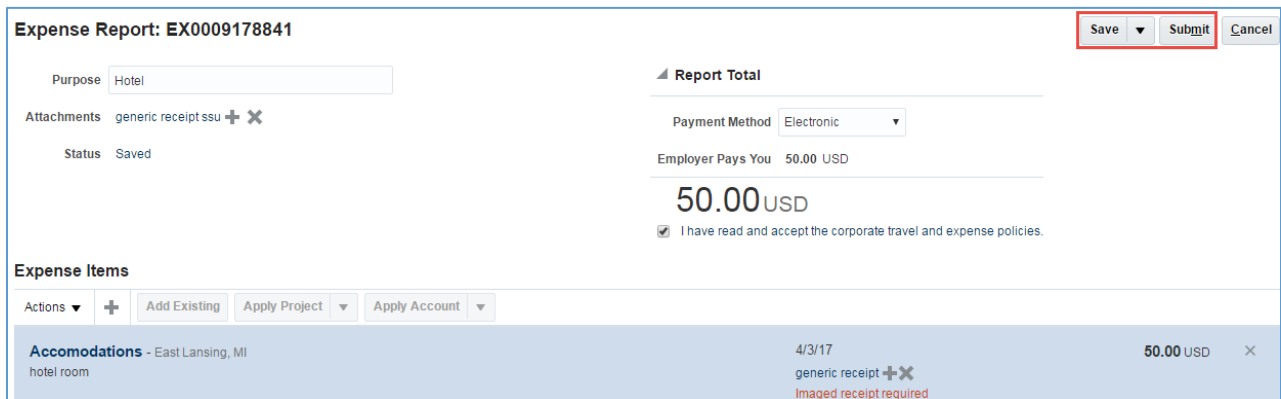
* Merchant Name: Holiday Inn

Checkout Date: 3/27/17

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

8. 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**

Purpose: Hotel

Attachments: generic receipt ssu + X

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 hotel room | 4/3/17 generic receipt + X Imaged receipt required | 50.00 USD X |
|-------------------------------------------------------|----------------------------------------------------------|-------------|

9. 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?

10. 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.

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

Travel and Expenses

| Expense Items | Expense Reports |
|---------------|----------------------|
| 0 | 1 In Progress |
| | 1 In Approval |

Final Notes

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