EX.020.110 - MODIFYING AN EXPENSE REPORT

Purpose	To modify an existing expense report.
Description	An expense report must be in a '*Pending'* status to be modified. In other words, users cannot modify a transaction after it is submitted. Users can only modify transactions that are/were: • Saved for Later by Traveler • Sent back by an Approver • Submitted and then withdrawn by Traveler. For more information, see EX.020.113 – Withdrawing an Expense Report
Security Role	**BOR PeopleSoft User**
Assumptions	None
Dependencies/ Constraints	Expense Report is in a '*Pending'* status.
Additional Information	None

Procedure: Modifying a Fluid Expense Report

Below are step by step instructions on how to modify a Fluid Expense Report. Although a Fluid Expense Report is easy to create and gives users the option of using a mobile device. However, users cannot apply a Cash Advance or Travel Authorization to a Fluid Expense Report in '*Pending*' status.

Step	Action
1.	Click the **My Expense Reports** tile.
2.	Select the **Not Submitted** option in the left menu.
3.	Select the **Report ID** to modify.
4.	Examine the expense report for needed changes. Examples of possible changes are: • Add a line • Change a line (Expense Type, Amount) • Change Accounting Details • Add Attachment(s)
5.	Once the user completes editing, the Expense Report can either be saved for later or submitted for approval. • To save, proceed to Step 6. • To submit for approval, proceed to Step 7.
6.	Click the **Save** button located at the top right. ***Note:*** *Lines or fields with errors are flagged or highlighted and these errors must be addressed before submitting the Expense Report.*
7.	To submit, click the **Review and Submit** button. ***Note:*** *If lines or fields contain errors, a message displays which reads, "Errors exist in this expense report, submission not possible until the errors are corrected." Users must address these errors before submitting the Expense Report.*
8.	The Expense Summary page displays. Review details and when ready, click the **Submit** button.
9.	The State of Georgia submission statement displays. Users must read and acknowledge this statement and click the **Submit** button.
10.	The expense report is submitted. The system navigates to the My Expense Reports page and a submission confirmation statement temporarily displays in a green bar at the top of the page.

Procedure: Modifying a Classic Plus Expense Report

Below are step by step instructions on how to modify a Classic Plus Expense Report.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Employee Self-Service** link.
4.	Click the **Travel and Expenses** link.
5.	Click the **Expense Reports** link.
6.	Click the **Create/Modify** link.
7.	Select the **Find an Existing Value** tab.
8.	Enter or search for the **Report ID** that needs to be modified. ***Note:*** *If users do not know the Report ID number, search criteria may be entered to locate the transaction.*
9.	Click the **Search** button. The system generates search results based on Search Criteria entered in the step above. ***Note:*** *If a Report ID was entered, the Expense Report automatically displays and users must skip to Step 10. Otherwise, look for Expense Reports in a Pending status. An Expense Report in a Pending status has either not been submitted (it was "Saved for Later"), or it was sent back by an approver.*
10.	Examine the expense report for needed changes. Examples of possible changes are: • Add a line • Change a line (Expense Type, Amount) • Change Accounting Details • Add Attachment(s)
11.	Once the user completes editing, the Expense Report can either be saved for later or submitted for approval. • To save, proceed to Step 12. • To submit for approval, proceed to Step 13.

Step	Action
12.	To save, click **Save for Later**. ***Note:*** *Lines or fields with errors are flagged or highlighted and these errors must be addressed before submitting the Expense report.*
13.	To submit, click **Summary and Submit**.
14.	The Expense Summary page displays. The Submit Expense Report button is grayed out. Users must click the checkbox to acknowledge the submission statement. Once the box is checked, the Submit Expense Report button becomes available.
15.	Click the **Submit Expense Report** button. ***Note:*** *Lines or fields with errors are flagged or highlighted and these errors must be addressed before submitting the expense report.*
16.	The Expense Report Submit Confirm window displays. Click the **OK** button.
17.	The expense report is submitted. Note the red text below the traveler's name confirming that "Your Expense Report has been submitted for approval."
18.	Click the **Refresh Approval Status** button.
19.	The page refreshes and the Status updates to Submitted for Approval. The Approval History also displays and show the at-a-glance approval history for the Expense report.