

Modifying an Existing Expense Report

When an expense report is sent back to be revised, or is saved for later, the user will need to find and re-open the report. By doing this, the user does not have to create a new report avoiding duplicates and extra work.

Click on Expense Report Create/Modify (1) link in the “Expenses WorkCenter”, then click on the Find an Existing Value tab (2). Finally, click the Search button (3) and the expense report should populate, or will show amongst a list of other expense reports.

The screenshot displays the 'Expenses WorkCenter' interface. At the top, there is a navigation bar with a red background containing a '< Employee Home' button on the left and 'Expenses' on the right. Below this, the 'Expenses WorkCenter' header includes a settings gear icon and a back arrow. Two tabs are visible: 'Main' and 'Reports/Queries'. A 'Links' section on the left contains a list of actions: 'Approve Transactions', 'Expense Report Create/Modify' (highlighted with a red circle '1'), 'Expense Report View', 'Expense Report Print', and 'Expense Report Delete'. The main content area is titled 'Expense Report' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this instruction are two buttons: 'Find an Existing Value' (highlighted with a red circle '2') and 'Add a New Value'. A 'Search Criteria' section follows, with fields for 'Report ID' (dropdown 'begins with'), 'Report Description' (dropdown 'begins with'), 'Name' (dropdown 'begins with'), 'Empl ID' (dropdown 'begins with'), and 'Creation Date' (dropdown '=' and a date picker). A 'Case Sensitive' checkbox is also present. At the bottom, there are buttons for 'Search' (highlighted with a red circle '3'), 'Clear', 'Basic Search', and 'Save Search Criteria'.