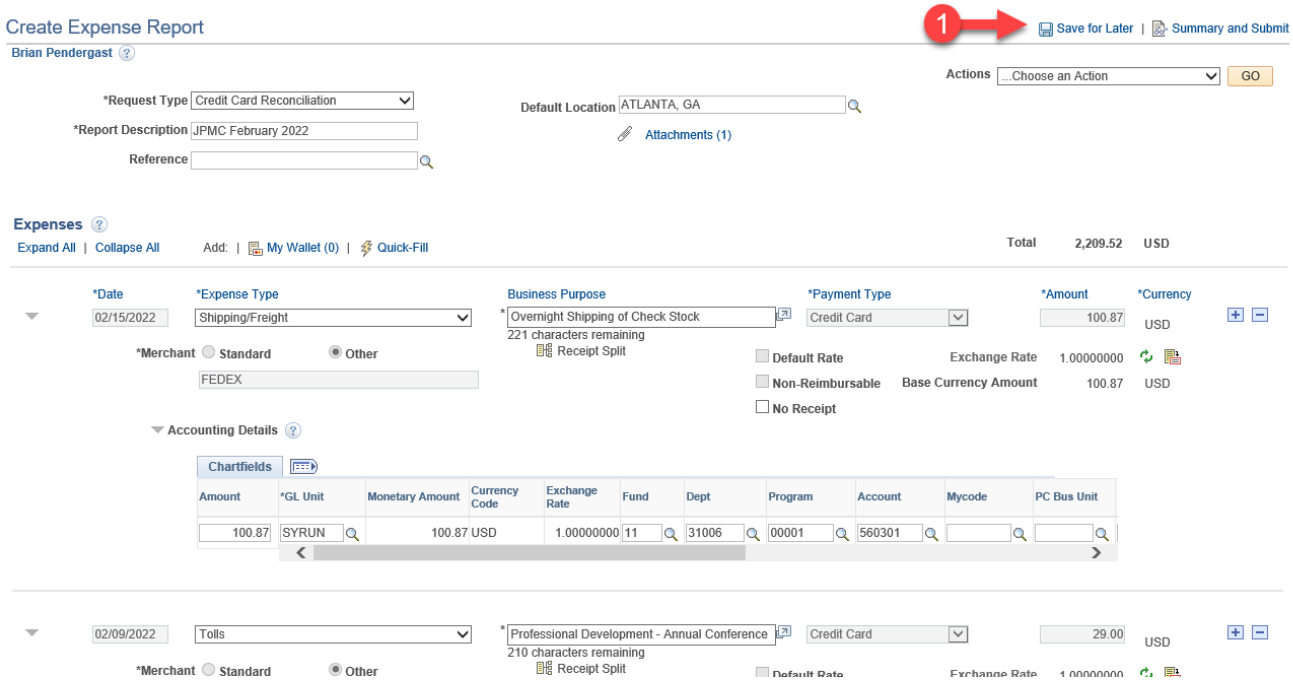
Saving an Expense Report for Later & Printing for Approval

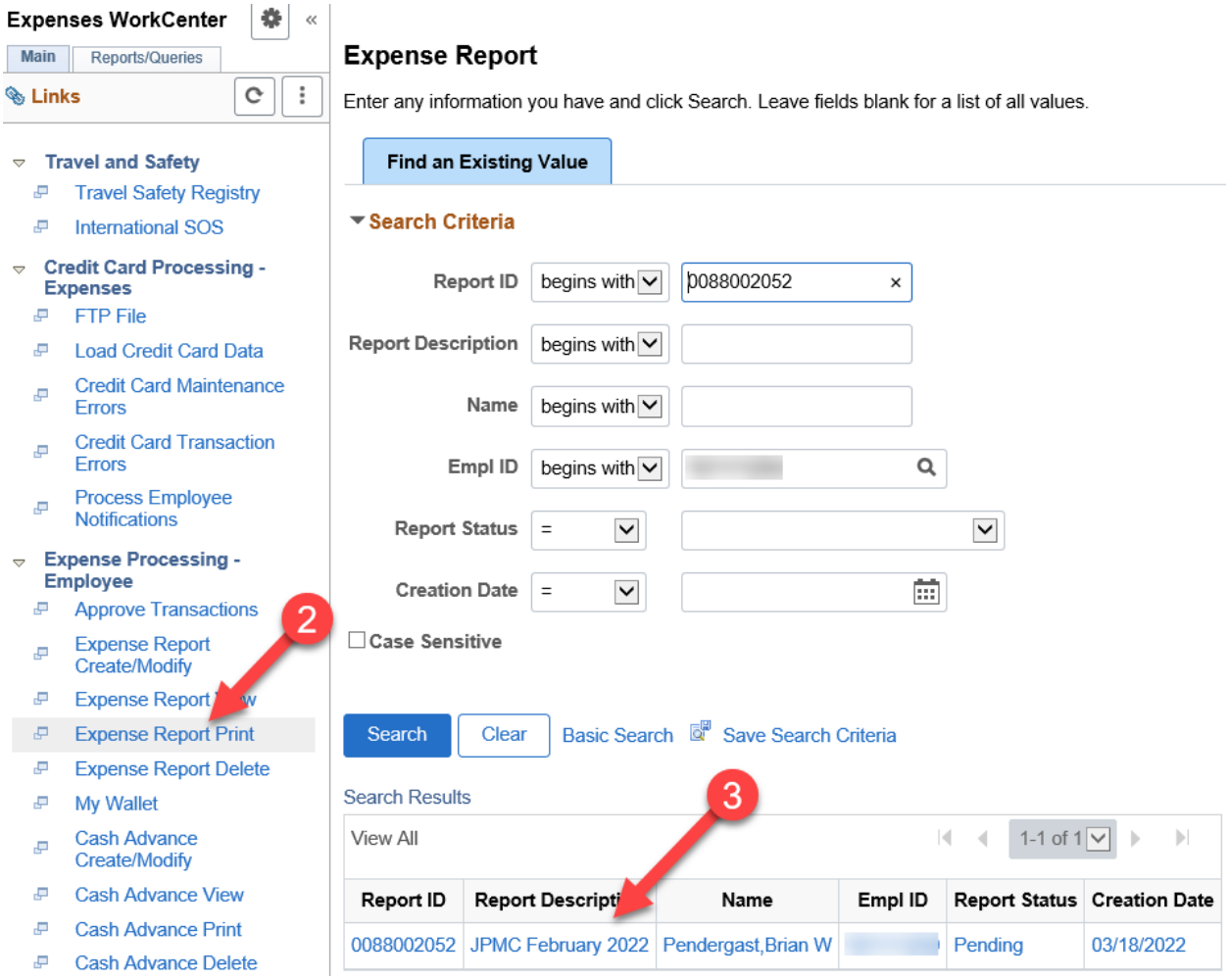
During the JPMC credit card reconciliation process, many times employees will need to save their report to be able to access it later, or to be able to print their report to email it to a supervisor that is not in the system's approval workflow.

After creating your expense report by filling in the necessary information and attaching receipts via the "Attachments" link - Click on the "Save of Later" link (1).



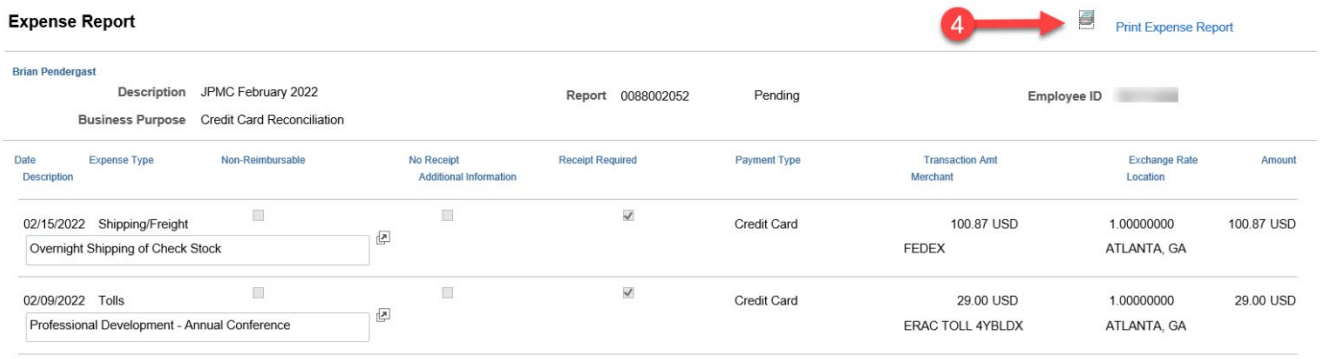
You will notice right away that a report ID number has been created and has been placed into a pending status.

Next, click on “Expense Report Print” link (2) under the “Expenses WorkCenter”.

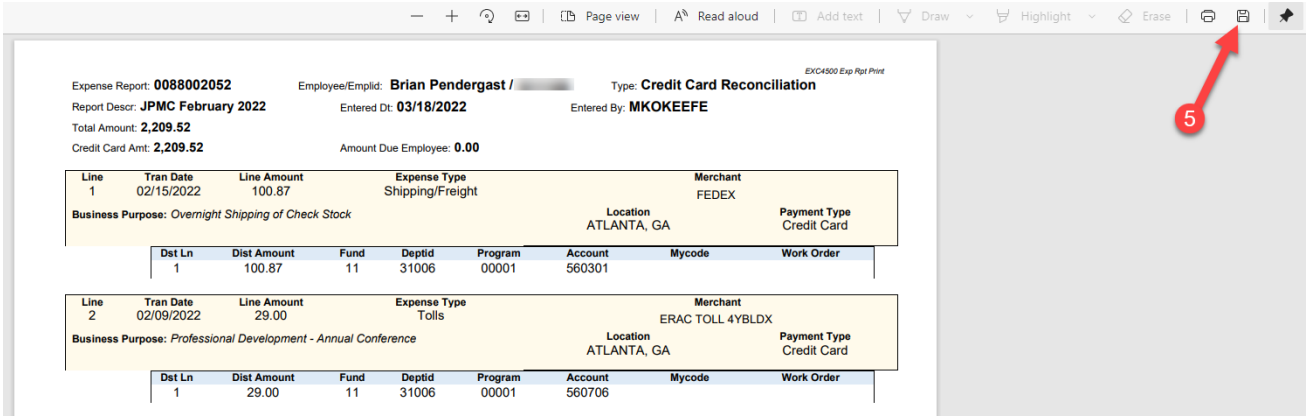


This should auto populate the Report ID and the SUID of the employee populating the search results automatically. Please click on any of the links (3) in the search results to reopen the selected expense report.

Now click on the “Print Expense Report” link (4) at the top right corner of the screen.

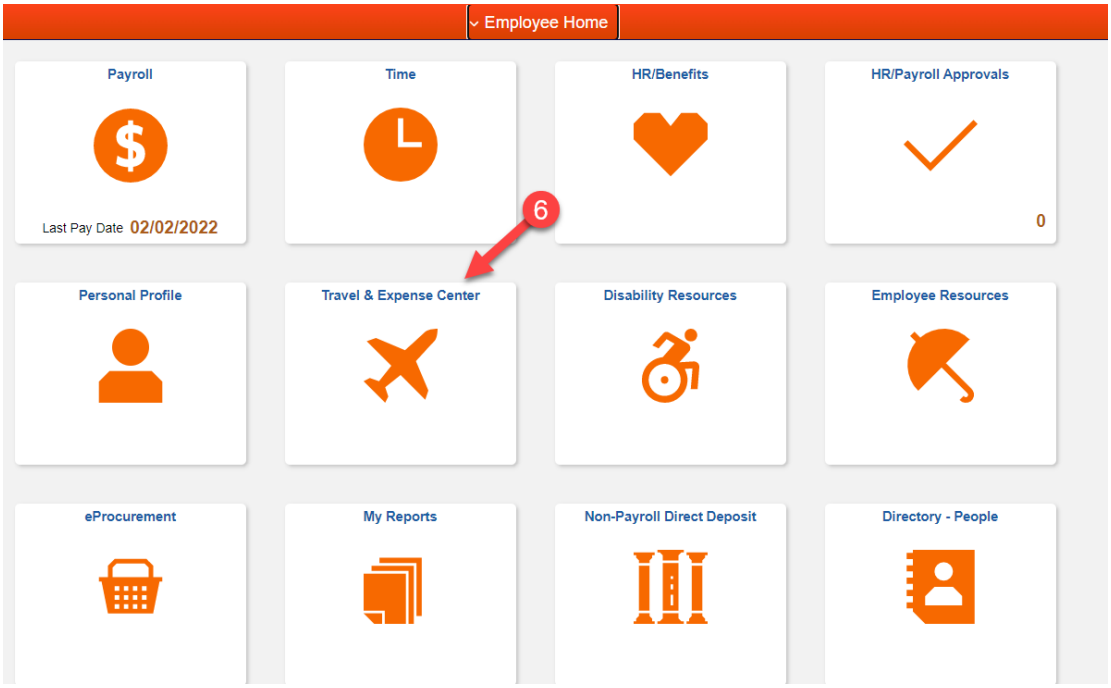


The internet browser you use should have an option to save the file as a PDF (5). Then you can email it to your supervisor or whoever needs to provide additonal approval.

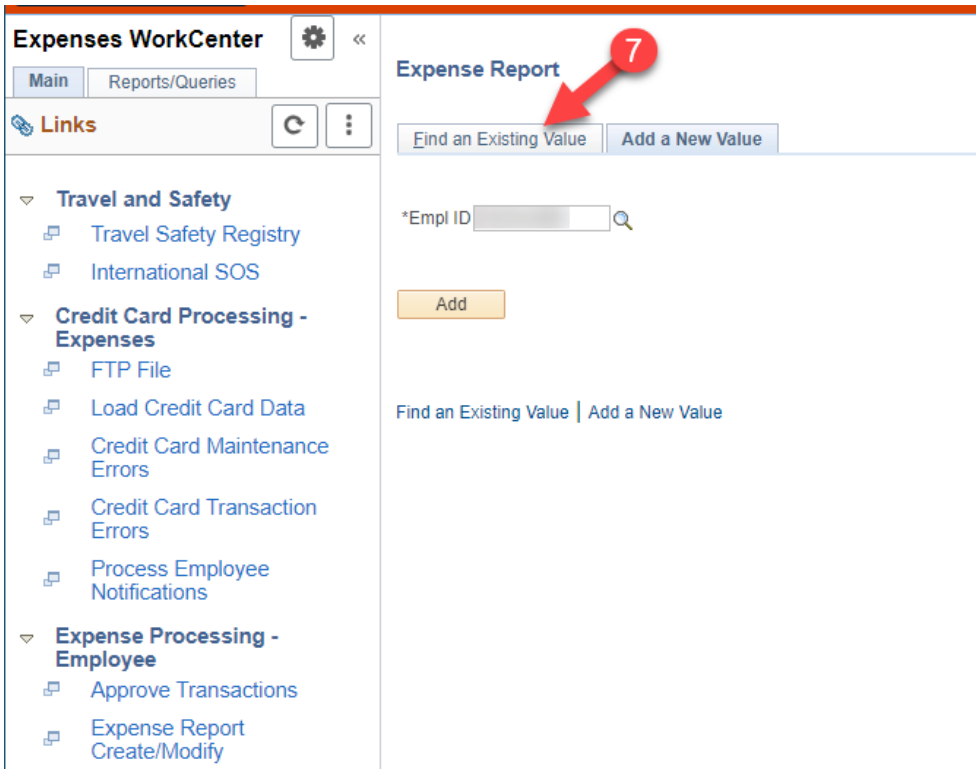


Once the approval(s) have been received, you will need to re-open the expense report and attach the approval email. (See below)

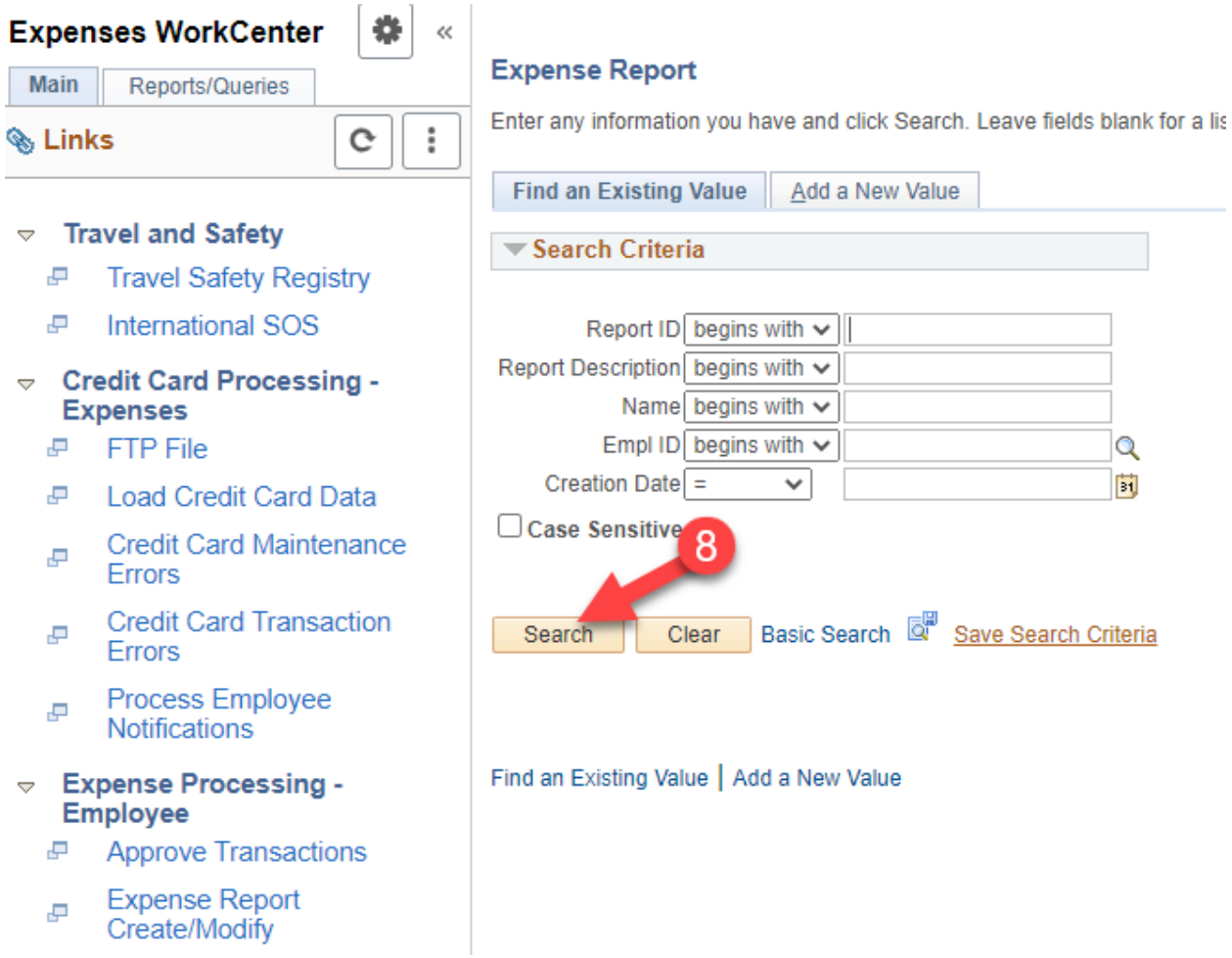
Start by going back into the “Travel & Expense Center” (6).



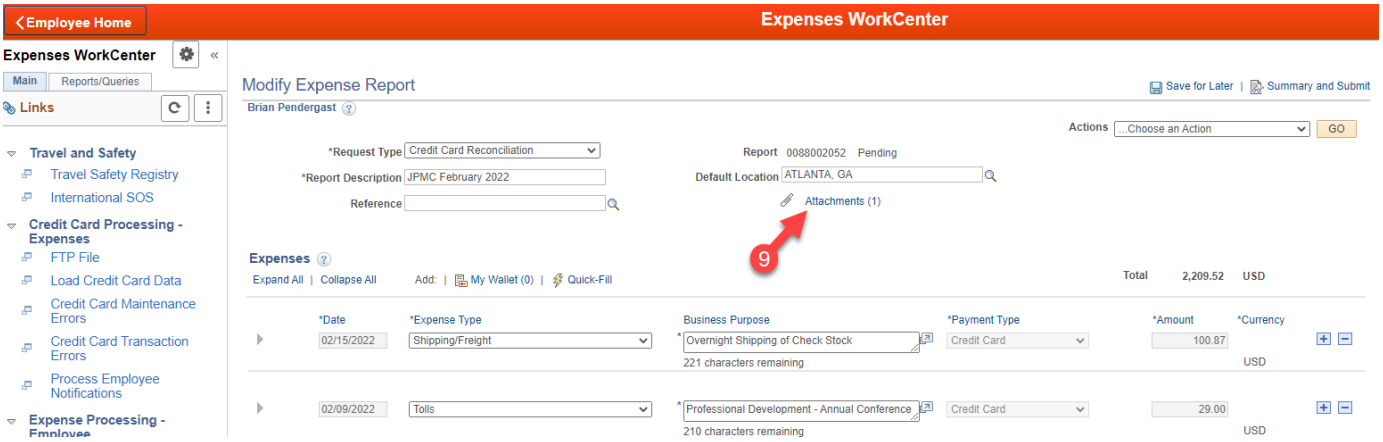
You are now back at the “Expense Report – Create/Modify” screen with your SUID filled in. Click on the “Find an Existing Value” tab (7) to locate the expense report.



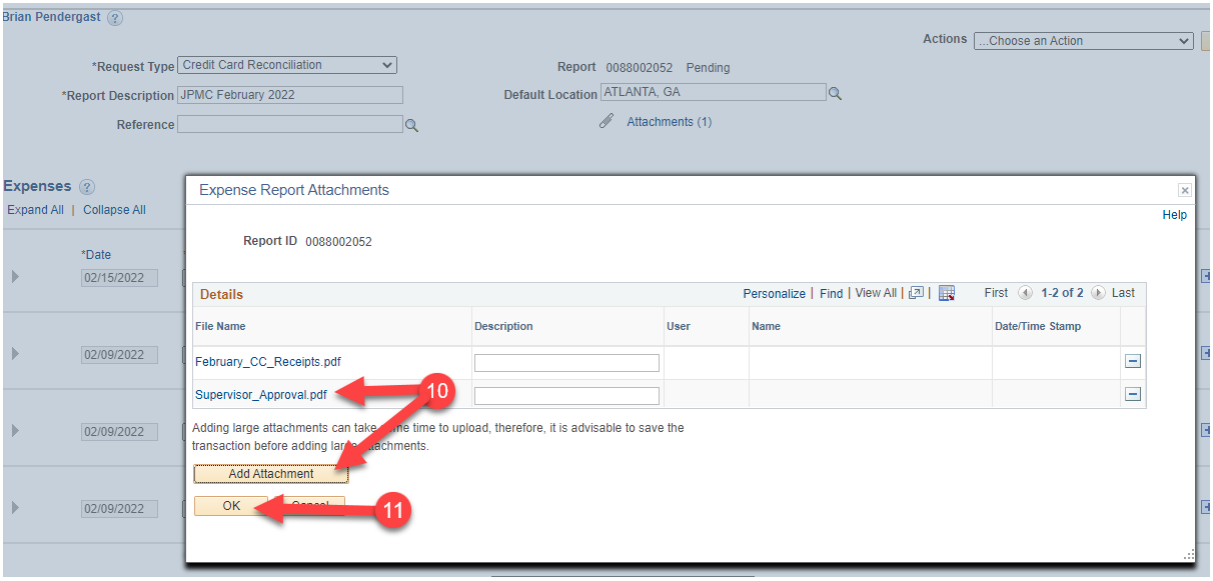
Then, click the search button (8), or can use the search fields to pull up the report.



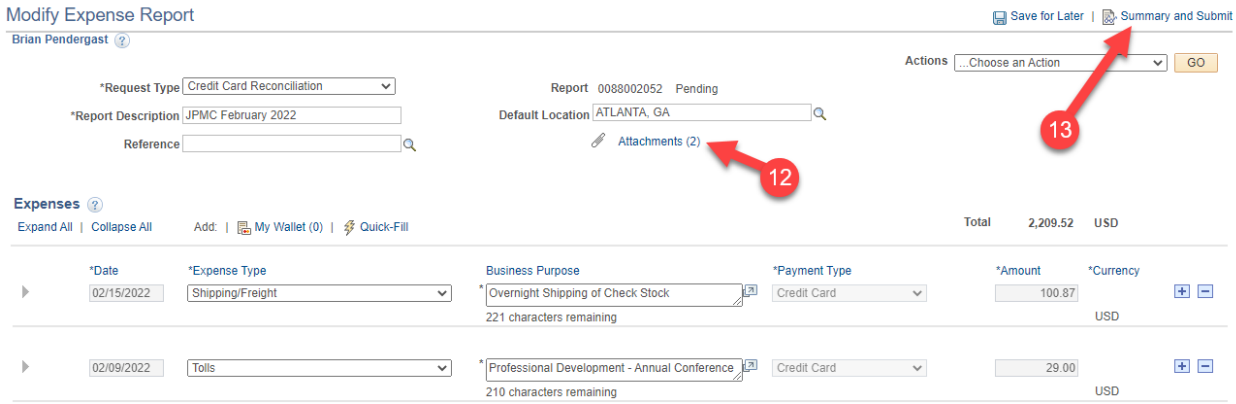
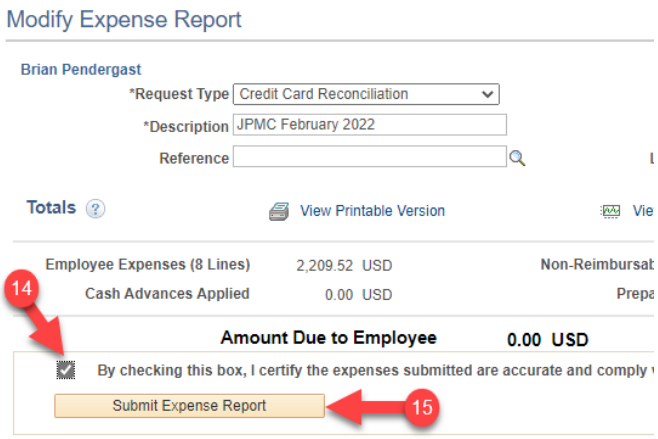
The report will reopen on your screen. Click on the “Attachments” link (9).



Attach the approval email (10), and then click “OK” (11) to get back to the expense report.



You will see the “Attachments” link (12) is now showing that two files are attached.



Once the report is ready to be submitted, click on the “Summary and Submit” (13), check the box (14) and click submit (15).