

Copying an Existing Report

If entering the same report for reimbursement monthly or yearly for example, copying a previous expense report can populate all the information to accelerate the submission process.

Travel & Expense Center → Expense Report Create/Modify → enter in your SUID or ID of

< Employee Home

Expenses WorkCenter

Main Reports/Queries

Expense Report

Find an Existing Value Add a New Value

*Empl ID

Add

Find an Existing Value | Add a New Value

Next, you will see a blank expense report like you were creating a new one.

As shown below, do not fill anything out, and go to the Quick Start drop down menu, select “An Existing Report” and click the ‘GO’ button:

Create Expense Report

Matthew O'Keefe

Save for Later | Summary and Submit

Quick Start

Populate From
An Existing Report
Entries from My Wallet

GO

*Request Type

*Report Description

Reference

Default Location

Attachments

Expenses

Expand All | Collapse All

Add: | My Wallet (0) | Quick-Fill

Total 0.00 USD

*Date *Expense Type Business Purpose *Payment Type *Amount *Currency

254 characters remaining

Expand All | Collapse All

Total 0.00 USD

Then, you will see the original report that you created, and click the “Select” button next to it.

Copy from Existing Expense Report ×

[Help](#)

From Date To

Expense Reports

	Report ID	Description	Business Purpose	Status	Created
<input type="button" value="Select"/>	0088002065	Pro Development Conf 2021	Reimbursement	Submitted for Approval	03/28/2022

Note: If the report you want is not listed, expand your search using the date fields.

Finally, all the information should be copied into a new report from the old one except the receipt, so a new one will need to be attached under the “Attachments” link before submitting:

Create Expense Report [Save for Later](#) | [Summary and Submit](#)

Matthew O'Keefe ?

Actions

*Request Type

*Report Description Default Location

[Attachments](#)

Reference

Expenses ?

Expand All | Collapse All Add: Total 1.00 USD

*Date	*Expense Type	Business Purpose	*Payment Type	*Amount	*Currency
<input type="text" value="03/01/2022"/>	<input type="text" value="Conference/Meeting"/>	<input type="text" value="Pro Development Conf 2021"/>	<input type="text" value="Personal Funds"/>	<input type="text" value="1.00"/>	USD

*Location

Default Rate Exchange Rate 1.00000000
 Non-Reimbursable Base Currency Amount 1.00 USD
 No Receipt

▼ Accounting Details ?

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Fund	Dept	Program	Account	Mycode	PC Bus Unit
1.00	SYRUN	1.00 USD	USD	1.00000000	11	31006	00001	560729		

Note: Be sure to update the report description, business purpose, as well as anything else that may be needed. In the example above, I would want to change the date from “2021” to “2022” if I have the same conference in Syracuse, NY every year.