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 \rightarrow Expense Report Create/Modify \rightarrow enter in your SUID or ID of

<pre><employee home<="" pre=""></employee></pre>	
Expenses WorkCenter	
Main Reports/Queries	Expense Report
🗞 Links C 🗄	Find an Existing Value Add a New Value
 Travel and Safety Credit Card Processing - Expenses Expense Processing - Employee 	*Empl ID
Approve Transactions	Add
Expense Report Create/Modify	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			🔚 Save for Later 🔜 Sumr	mary and Submit
Matthew O'Keefe @ *Request Type *Report Description Reference Q Expenses @	Default Location	Quick	s Start An Existing Report Entries from My Wallet	GO
Expand All Collapse All Add: 🔚 My Wallet (0) 🗳 Quick-Fill			Total 0.00 USD	
*Date *Expense Type	Business Purpose	*Payment Type	*Amount *Currency 0.00 USD	+ -
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Then, you will see the original report that you created, and click the "Select" button next to it.

From Date 12/28/2020 x (ii) To 03/28/2022 (iii) Search cpense Reports Report ID Description Business Purpose Status Created Solect 0028002065 Pro Development Conf 2021 Reimbursement Submitted for 03/28/2022	Copy from Existing Expense Report								
Report ID Description Business Purpose Status Created Select 0088002065 Pro Development Conf 2021 Reimbursement Submitted for 03/28/2022	From Date 12/28/2020 × 🛐 7	o 03/28/2022	Search		Help				
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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:

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<u>Note:</u> 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.