

# Withdrawing a Submitted Expense Report

**NOTE:** Withdrawing a submitted expense report is required **BEFORE** an expense report can be edited or modified. This is a necessary step when a submitted report has been returned to the claimant by the approver.

1. Highlight the row by clicking anywhere on the expense report except for the blue EXP-000xxxxxxx.
2. Click the **Actions** button
3. Select **Withdraw** from the *List of Actions*

The screenshot shows the 'Travel and Expenses' dashboard. At the top, there are three summary cards: 'Expense Items' with a value of 0, 'Expense Reports' with a value of 1 and the status 'In Approval', and 'Approvals' with a value of 0. Below these cards is a table of expense reports. The first row is highlighted in blue and contains the following information: 'Conference Nov 8-10/17', '2 items', and '550.00 CAD' with a date of '24-Nov-2017'. An 'Actions' dropdown menu is open over this row, with the 'Withdraw' option highlighted by a red box. Other options in the menu include 'Duplicate', 'Print Preview', and 'Print Preview with Attachments'.

4. Click **Yes** when the warning message appears

The screenshot shows the same 'Travel and Expenses' dashboard as the previous image, but with a warning dialog box overlaid. The dialog box has a yellow warning icon and the text: 'Warning: Withdrawing the expense report cancels existing approvals. It becomes an in progress expense report that you can edit and submit. Do you want to continue?'. At the bottom right of the dialog box are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box. In the background, the table row for the expense report is visible, showing 'EXP-0003351741 - Toronto COFO Conference Nov 8-10/17', '2 items', and '550.00 CAD' with a date of '24-Nov-2017'. Below the table, there is additional information: 'Pending manager approval', '1 policy violation', and 'Imaged receipts received on 24-Nov-2017'.



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5. The expense report moves from “In Approval” to “In Progress.” At this point the expense report can be adjusted or deleted.
- To adjust and resubmit, follow steps for creating an expense report (<http://www.uwindsor.ca/finance/381/1-uwinsite-finance-creating-expense-report>)
  - To delete, click the **x** on the far right side of the expense report.

The screenshot displays the 'Travel and Expenses' dashboard. At the top, there are three summary cards: 'Expense Items' with a count of 0, 'Expense Reports' with a count of 1 and the status 'In Progress', and 'Approvals' with a count of 0. Below these cards is a table of expense reports. The table has columns for report ID, description, item count, amount, and date. A red box highlights the 'x' icon in the 'Actions' column of the first row, which corresponds to the 'In Progress' report.

Expense Report ID	Description	Items	Amount	Date	Actions
EXP-0003351741	Toronto COFO Conference Nov 8-10/17	2 items	550.00 CAD	24-Nov-2017	[x]

