Modifying an Expense Report

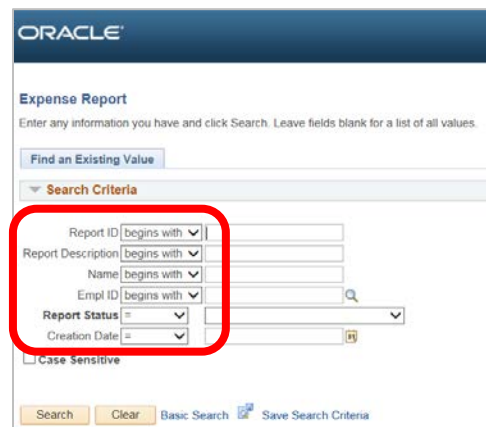### How to Withdraw, Modify, View, Print, and Delete an Expense Report

Users often need to withdraw, modify, view, print or delete an expense report that has already been submitted. This job aid shows users how to perform all of these functions. If you need to submit an expense report, please see the Submitting an Expense Report job aid: http://www.usg.edu/gafirst-fin/documentation/job_aids/category/travel_and_expenses.

Withdraw an Expense Report

Access PSFIN Self-Service: https://selfservice.fprod.gafirst.usg.edu and follow the navigation: **Employee Self-Service > Expense Report > View/Print.**

1. Enter one of the criteria listed under Search Criteria and click **Search.**

2. The Expense Report is displayed.
3. If an expense report has been submitted and no approval action has been taken, it can be withdrawn and edited. To do so, click the **Withdraw Expense Report** button. This will return the report to pending status so that it can be modified (see below).

Modify an Expense Report

Access PSFIN Self-Service: https://selfservice.fprod.gafirst.usg.edu and follow the navigation: **Employee Self-Service > Expense Report > Create/Modify.**

1. Enter one of the criteria listed under Search Criteria and click **Search.**
2. Select the **Expense Report ID** link to modify it.
3. Modify the expense report in the same fashion that you created it.

View an Expense Report

Access PSFIN Self-Service: https://selfservice.fprod.gafirst.usg.edu and follow the navigation: **Employee Self-Service > Expense Report > View/Print.**

1. Enter one of the criteria listed under Search Criteria and click **Search.**

2. The Expense Report is displayed in a read-only format.
3. To view specific expense lines, select the **Expense Details** link located in the top right corner.

4. Select the **Expand Section** arrow on the appropriate line. You can also select the **Expand All** link to expand all lines.
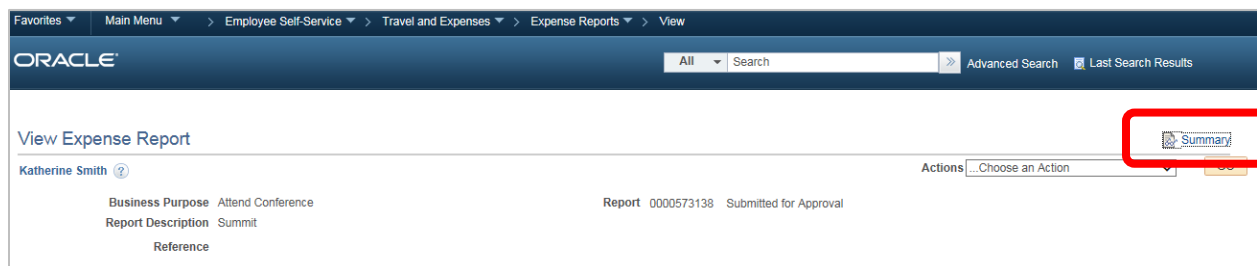
5. Click the **Summary** link to see the **Summary** page.
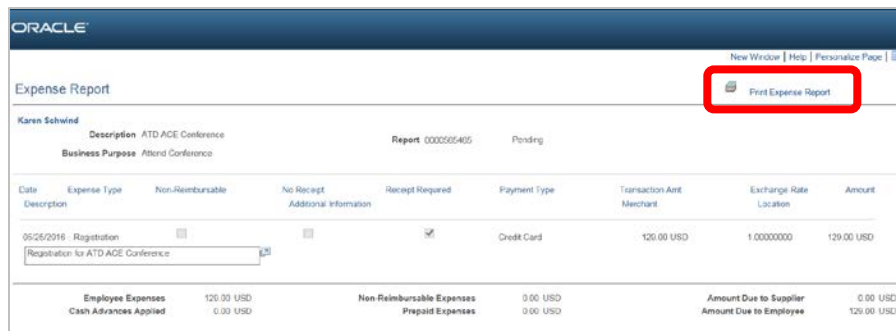
6. The **Approval History** section displays the approval levels and names of the approvers (if not pooled) for the transaction.
7. The **Action History** section displays any actions that have been taken on the transaction.

Print an Expense Report

Access PSFIN Self-Service: https://selfservice.fprod.gafirst.usg.edu and follow the navigation:
Employee Self-Service > Expense Report > View/Print.

1. Enter one of the criteria listed under **Search Criteria** and click **Search.**
2. A read-only view of the Expense Report is displayed.
3. Select the **View Printable Version** link.
4. A new window/tab will automatically open which will display the printed expense report. If no window/tab opens, check the pop-up blocker in your browser. You may have to turn pop-up blocking off.
5. Select **Print Expense Report**.

6. When you have finished viewing and/or printing the report, close the report window to return to the Expense Report view page.

Delete an Expense Report

Access PSFIN Self-Service: https://selfservice.fprod.gafirst.usg.edu and follow the navigation:
Employee Self-Service > Expense Report > Delete.

1. Enter the **Expense Report ID** or click **Search** and locate the expense report you want to delete. Only expense reports in Pending status can be deleted.
2. Put a checkmark in the appropriate box to select the expense report you wish to delete.
3. Select the **Delete Selected Report(s)** button.
4. The **Delete Confirmation** message is displayed.