Edit travel folder

General information

This chapter describes how to add settlements to a **travel folder** that has already been created.This can be done in two ways.

1) Directly after creating a travel folder

As already shown at the end of the chapter New travel folder[1] , after saving the travel folder the user gets to the view shown in the screenshot. If the user now clicks on **Add accounting**, he will be forwarded to the business travel accounting assistant.

Add Business Trip Expenses

A detailed description of the accounting assistant can be found in the chapter Business trip expense accounting[2].

After completion of the accounting, by clicking on **Save & Close**, it is automatically added to the travel folder:

2) Subsequently via the menu item *Workflow - open tasks*

Saved travel folders can be accessed later via Workflow - Open Tasks.

From here, the user can return to the **Business Trip Accounting Assistant** by selecting

Edit 🖊   **in the Action(s)** column. From there it continues as described under point 1).

Further he has the following possibilities here:

- Open the **details** for the request, where the travel folder also appears again.
- **Forward** the request to the supervisor for approval.
- **Cancel** the request and delete the trip folder.
- Call the Travel Accounting Assistant again to further **edit** the travel folder.
- Add **comments** / descriptions to the folder or **print** the folder.

In the **Activity** column, the user can always follow the status of his or her travel folder.

As long as the travel folder has not yet been forwarded for approval, the *Fill Travel Expenses* column contains the **activity**.

If the travel folder was forwarded by clicking on **Forward**, approval is displayed until it has been approved or rejected by the superior.

> **N O T I Z**
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> Notice this : If *one* travel expense report does not find approval in the travel folder, the superior must reject the *entire travel folder*. In this case, the entire folder is returned to the employee, where appropriate corrections are made, or where the entire folder can be canceled.

1. /daisy/personalwolke-default/7147-dsy.html?language=4

2. /daisy/personalwolke-default/7065-dsy.html?language=4