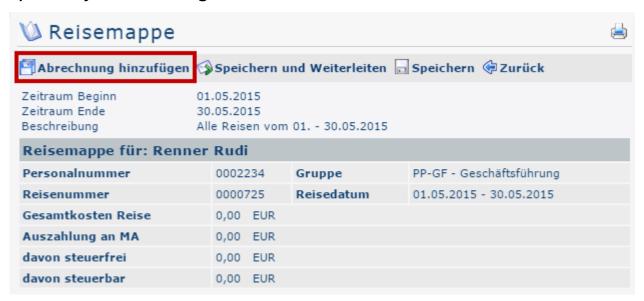
### Edit travel folder

#### **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.

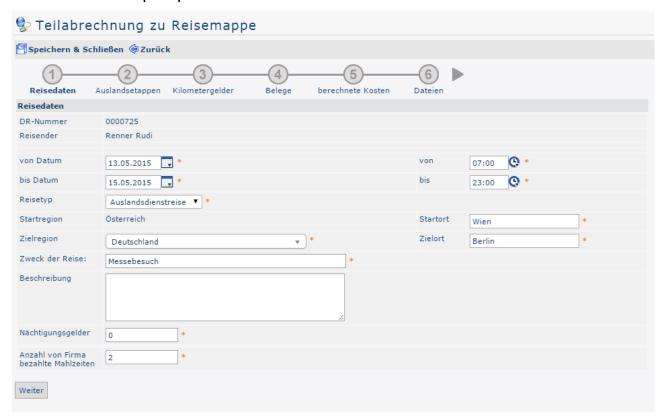
# 1) Directly after creating a travel folder



As already shown at the end of the chapter New travel folder<sup>1</sup>, 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.

Edit travel folder

### Add Business Trip Expenses



A detailed description of the accounting assistant can be found in the chapter Business trip expense accounting<sup>2</sup>.

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



Edit travel folder 2

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

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



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



**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.

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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/webdesk-manual-admin/7147-dsy.html?language=4
- 2. /daisy/webdesk-manual-admin/7065-dsy.html?language=4

Edit travel folder 3

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