Edit Travel Folder

General Information

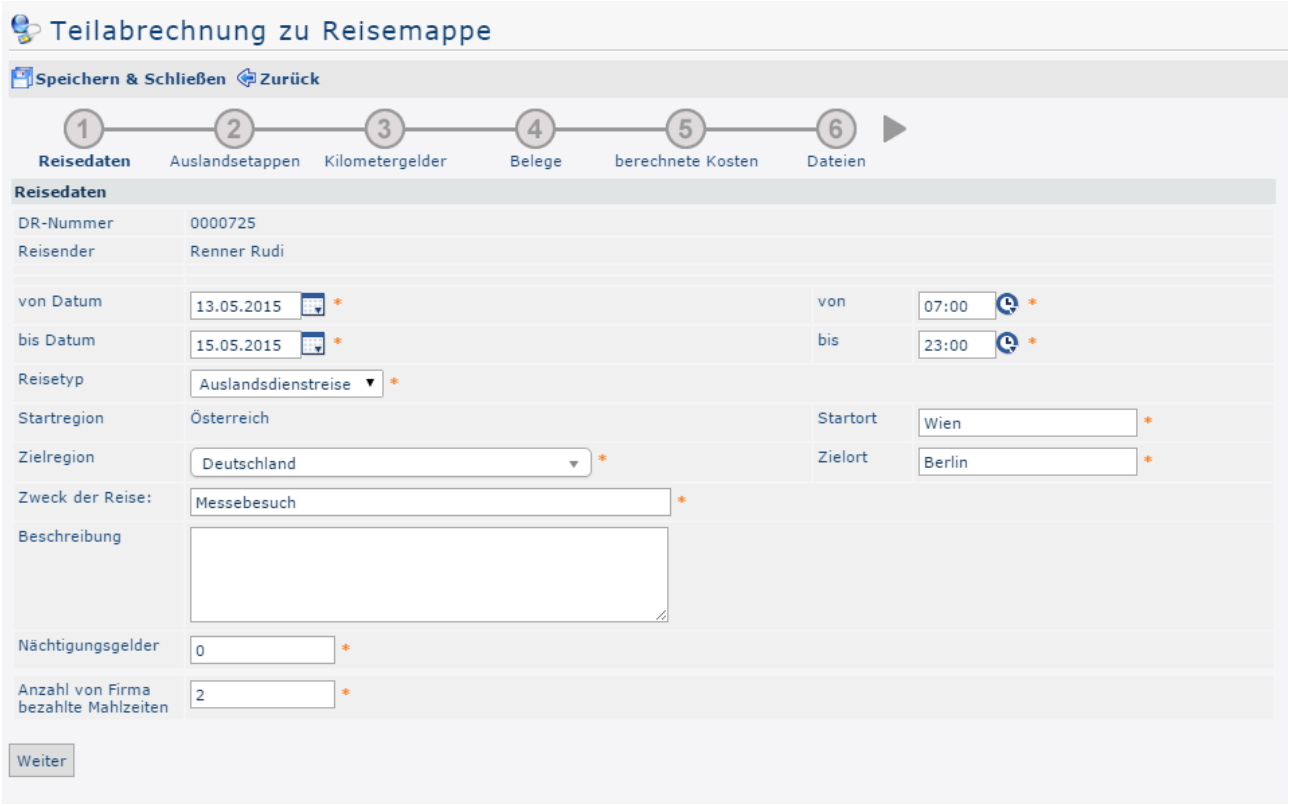
This chapter describes how to add expense reports to a **travel folder** that has already been created.
This can be done in two ways.

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 arrives at the view shown in the screenshot. If the user now clicks **Add expense report**, he or she is taken to the business trip expense report wizard.

Add Business Trip Expense Report



A detailed description of the expense report wizard can be found in the chapter Business Trip Expense Report[2].

After the expense report is complete, clicking **Save & Close** automatically adds it to the travel folder:



2) Afterward via the menu item *Workflow - Open Tasks*

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



From here, the user returns to the **business trip expense report wizard** by selecting **Edit**



in the **Action(s)** column. From there, continue as described under point 1).

The user also has the following options here:

- Open the **details** of the request, where the travel folder also appears again
- **Forward** the request to the supervisor for approval
- **Cancel** the request, thereby deleting the travel folder
- Open the business trip expense report wizard again to continue **editing** the travel folder
- Add **comments** / descriptions to the folder, or **print** the folder

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

As long as the travel folder has not yet been forwarded for approval, the **Activity** column shows *Fill in expense report.*

Once the travel folder has been forwarded by clicking **Forward**, the column shows *Approval* until the supervisor has approved or rejected it.

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> Please note: If *one* expense report in the travel folder is not approved, the supervisor must reject the *entire travel folder*. In this case, the entire folder goes back to the employee, who can make the necessary corrections or cancel the entire folder.

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