

How to Add a Request to an Expense Report

This problem begins when you fail to click the blue expense link beside the request to begin your expense report. Sometimes, the failure to do this is because there is no blue expense link on that page. This happens as a result of your answer to the “How will you be booking your travel?” question on the request. Please see the information in the document “How will you be booking your travel” for tips on how to avoid this problem.

If you have just begun the process to create an expense report when you realize you need to add your travel request to it, it is easier to delete the expense report and start again using the blue expense link. This will avoid doing a lot of duplicate entry on the header screens.

If you are further into the process before you realize the expense report is not linked to a request, do the following:

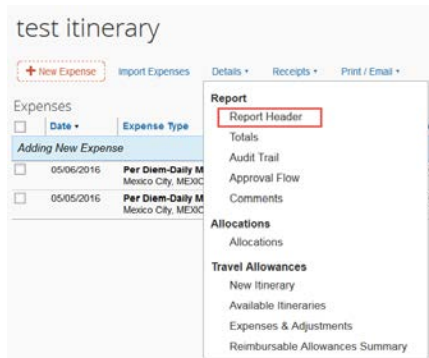
- If you do not have an approved travel request, create one and have it approved.
- If your approved travel request does not have a blue expense link beside it, open the document called “How Will You be Booking Your Travel” and follow the instructions in the troubleshooting section to fix your request.
- Once you have an approved request with the blue expense link:

View

Request Name Begins With Go

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved ...	Remainin...	Action
<input type="checkbox"/>	test dates test	3KTY	Approved	07/10/2016	07/18/2016	\$200.00	\$200.00	\$200.00	
<input type="checkbox"/>	test itinerary test	3KUP	Approved	07/12/2016 07/03/2016	07/19/2016	\$200.00	\$200.00	\$200.00	Expense
				07/05/2016					

- Open your [expense report](#).
- Go to Details>Report Header.



- In report header, scroll to the bottom to the requests tab. Click Add. Your available requests appear.

Available Requests ✕

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Appro...	Amount Remai...
<input type="checkbox"/>	test	3CYU	Yes	\$24.00	\$24.00	\$24.00
<input type="checkbox"/>	test hotel overage	39MF	Yes	\$250.00	\$250.00	\$250.00
<input type="checkbox"/>	test itinerary	3KUR	No	\$200.00	\$200.00	\$200.00

- Select the request you want to attach. Click Add.
- You will then see the request has been attached to the header. Be sure to click Save.

Report header for: test itinerary ✕

05/06/2015

Meeting

test

In State Travel

Traveler Type
Non-grant - OU employee

Is car gov owned?
No

City, State of official employment site
Norman, OK

Department
(137512600) FINANCIAL SUPPO

Does this trip contain personal travel?
No

Comment

Assign payment for this expense report/claim to

Amount to be assigned

Report Currency
US, Dollar

Approval Status
Sent Back to User

Report Total
236.00

Personal Expenses
0.00

Amount Not Approved
0.00

Amount Approved
236.00

Amount University Paid
0.00

Amount Due University
0.00

Amount Due User
76.50

Amount Due University Card
0.00

Total Amount Claimed
236.00

Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/>	test itinerary	3KUR	No	\$200.00	\$200.00	\$200.00