Return Button

This training is an overview of how and when to use the Recall button for an expense report (ER) and pre-approval (PA). The Return button is available for all submitted ERs and PAs. It can be used for any approver in the assigned queue (individual or group). When a report is returned, it will be sent to the expense owner’s Returned tab.

Important Note: For expense reports specifically, a user will have to Recall the report (instead of Return) in order to do the following:

1. Edit information on the Header
2. Add expense line items
3. Edit information on the Hotel Header

Pre-Approval Return:

Important Note: When an approver returns a pre-approval, the entire report is returned to the expense owner. PA’s cannot be returned at the individual line item level.

1. Select the Pre-Approvals tab.
2. The approver can return the pre-approval without viewing the header or line items.
3. If the approver wants to view the PA header and line items, select the “Open” button.

4. If the approver wishes to return the report from this screen, select the “Return” button to return the entire report to the expense owner.
Expense Report Return:

Important Note: When an approver returns a expense report, the entire report or individual line items can be returned to the expense owner.

1. Select the Expense Report’s Approval tab
2. Select the expense report to review/approve

3. Select the “Return” button to return the entire expense report to the expense owner.
4. Select the “Open” button to view all of the line items and header for this report.
5. Select this button to return the entire expense report to the expense owner.
6. If the approver wants to return an individual line item, select the expense to view the details.

7. Select the “Return button”
Insert a note as to why this item is being returned.

8. The status has gone from a **green check** mark to a **red** return symbol.
9. In order to **approve** the rest of the line items and **return** that one line item, the approver must select the “Submit” button to process all line items.