Recall Button

This training is an overview of how and when to use the Recall button for an expense report (ER) and pre-approval (PA). A Recall button is available for all submitted ERs and PAs. It can be used at any time before the report has reached the final stage or approval. When a report is recalled, it will be sent to the expense owner’s Drafts.

For expense reports specifically, a user will have to Recall the report 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 Recall:

Use the Recall button for pre-approvals (PAs) when the routing needs to be reset or changes need to be made. When the PA is recalled, the user can adjust the header and all expense line item information.

1. Select the “Submitted Last 90 Days” tab to view all reports that may be available for “Recall”
2. Select the desired PA to recall. Note: the report shows that it is in “Pending” status, so it is available for recall.

3. Select the “Recall” button in the top right-hand corner and then select “Yes” that this report should be moved to your draft list.
4. The PA has now been moved to the “Draft” tab. Select this tab to view the PA.

The user can see that it is now in their PA Draft list and available to edit.
Expense Report Recall:

The “Recall” button for the expense report (ER) behaves the exact same way as it does on the PA. When an ER is recalled, it restarts the approval process and can be done at any time before the report is fully approved.

Here are the reasons specific to the expense report as to why it would be recalled (as previously stated above):

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

![Image of expense report recall feature]

1. Select the “Submitted Last 90 Days” tab under expense reports to view all reports that may be available for “Recall”
2. Select the desired PA to recall. Note: the report shows that it is in “Pending” status, so it is available for recall.

3. Select the “Recall” button in the top right-hand corner and then select “Yes” that this report should be moved to your draft list
4. The ER has now been moved to the “Draft” tab. Select this tab to view the ER.

The user can see that it is now in their ER Draft list and available to edit.