

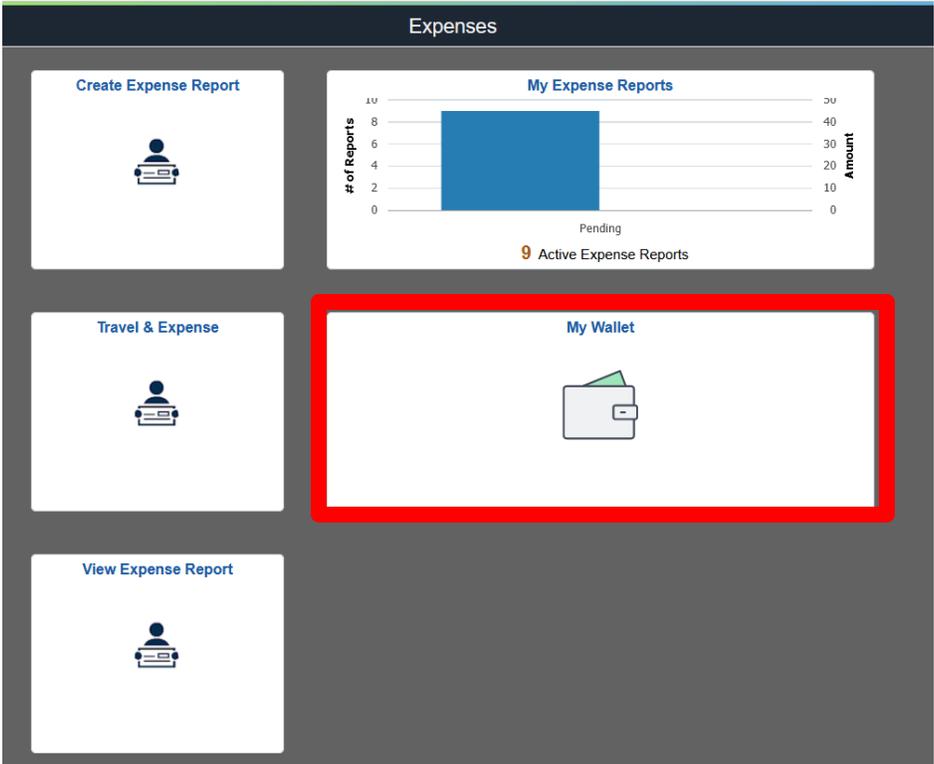
# PeopleSoft – How to Modify a My Wallet Transaction

## Concept

This business process explains how to modify a My Wallet transactions. The American Express import of T&E Card transactions sometimes needs to have the Expense Type modified from the default. That Expense Type needs to be updated in My Wallet before it is added to the expense report. A delegated entry person has the ability to update My Wallet as well as a create expense report.

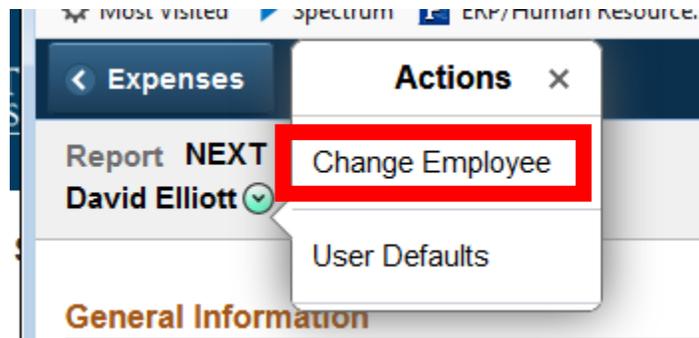
## Procedure

Navigate to the Expenses tile and then the My Expense Reports tile



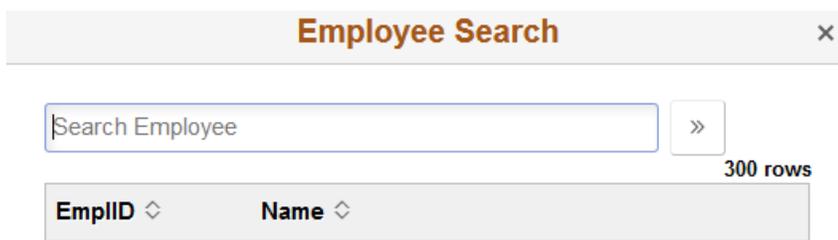
Total (168 Items) 12,061.72 USD		Automobile Rental - 08/19/2014	
<b>+</b> Add	<b>-</b> Delete	<b>Filter</b>	<b>More</b>
<b>Tuesday, August 19, 2014</b>		Date	08/19/2014
<b>Automobile Rental</b>	50.39	Expense Type	Automobile Rental
 2,706 Days Overdue	USD	Description	<input type="text"/>
<b>Monday, August 18, 2014</b>		<b>Payment Details</b>	
<b>Business Supplies on Travel</b>	-29.00	Payment	T&E Card (CWRU)
 2,711 Days Overdue	USD	Amount	50.39 USD

1. A list of imported expenses for the user logged in will be displayed.
2. To modify the expenses for another individual: Select the Green Arrow Next to the name.



The screenshot shows a mobile application interface. At the top, there's a navigation bar with a back arrow and the text 'Expenses'. Below this, there's a user profile section for 'David Elliott' with a green checkmark icon. An 'Actions' dropdown menu is open, showing two options: 'Change Employee' (which is highlighted with a red rectangular box) and 'User Defaults'. Below the actions menu, there's a section titled 'General Information'.

3. Select the new individual by name or EMPLID



The screenshot shows a dialog box titled 'Employee Search'. At the top right of the dialog is a close button (an 'x'). Below the title bar is a search input field with the placeholder text 'Search Employee' and a search button with a double arrow '»'. Below the search field, it indicates '300 rows'. At the bottom, there is a table with two columns: 'EmplID' and 'Name', both with small diamond-shaped sort icons next to their headers.

4. Select the expense you would like to modify from the left side menu.
5. The only option that can be modified is the Expense Type.

The screenshot shows an expense management interface. On the left, a list of expenses is displayed with a total of 168 items and a value of 12,061.72 USD. The list includes items like 'Other Travel Expense' and 'Automobile Rental'. On the right, the details for an 'Other Travel Expense' dated 08/17/2014 are shown. The 'Expense Type' dropdown is highlighted with a red box and currently shows 'Other Travel Expense'. Other fields include 'Description', 'Payment' (T&E Card (CWRU)), 'Amount' (19.43 USD), and 'Personal Expense' (No).

6. Update the Expense Type to the correct type:

#### Meal - Lunch Actual - 08/17/2014

This screenshot shows the same expense management interface, but the 'Expense Type' dropdown is now set to 'Meal - Lunch Actual' and is highlighted with a red box. The date remains 08/17/2014. The 'Description' field is empty. The 'Payment' is still 'T&E Card (CWRU)' and the 'Amount' is '19.43 USD'. The 'Merchant' field is partially visible at the bottom.

7. Once updates are complete select the Save button.

A close-up of the bottom of the form showing two buttons: a light blue 'Cancel' button and a dark blue 'Save' button.

8. Once all of the transactions are updated, the user can go to the normal Expense entry screen and add those transaction(s) to a report.