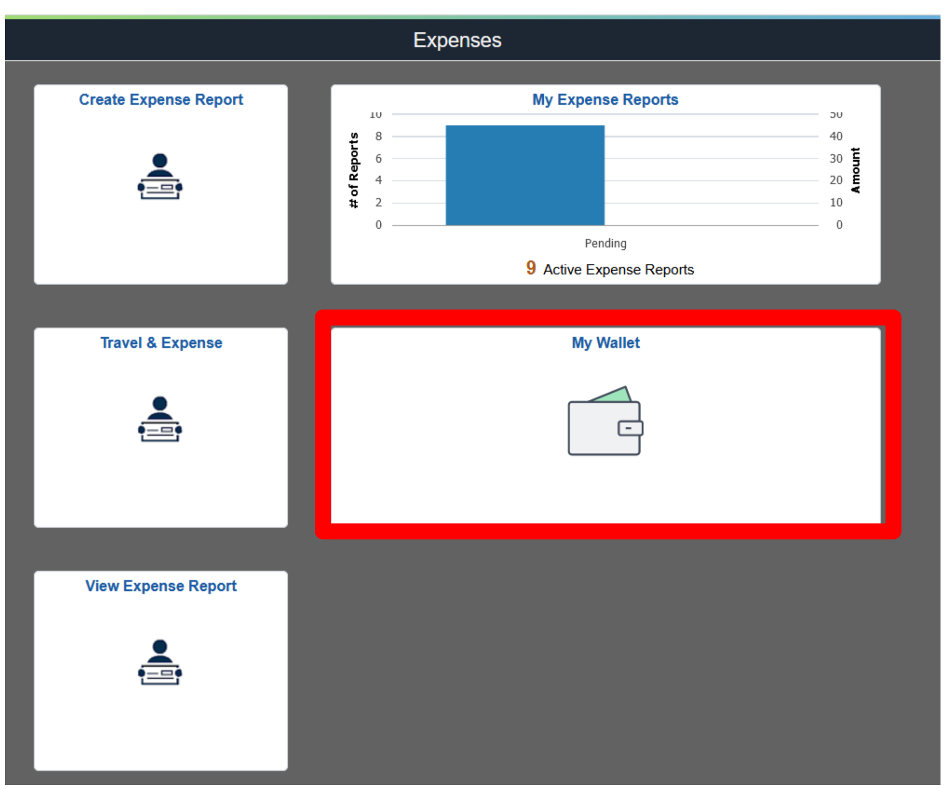
PeopleSoft – How to Modify a My Wallet Transaction

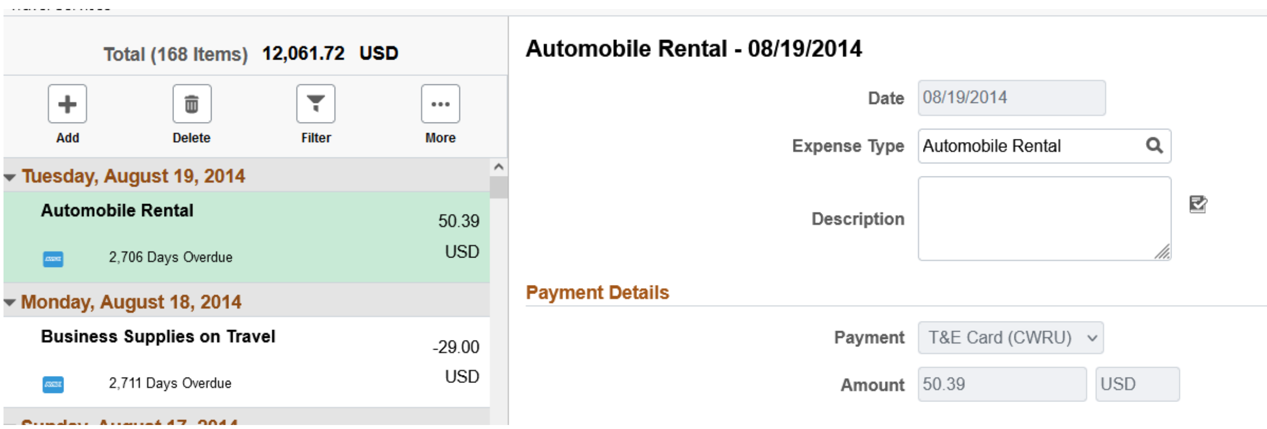
Concept

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.

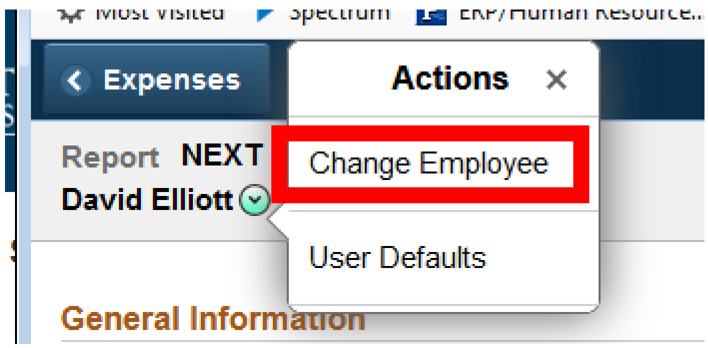
Procedure

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

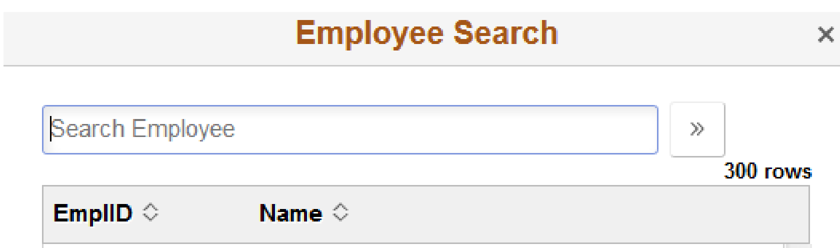




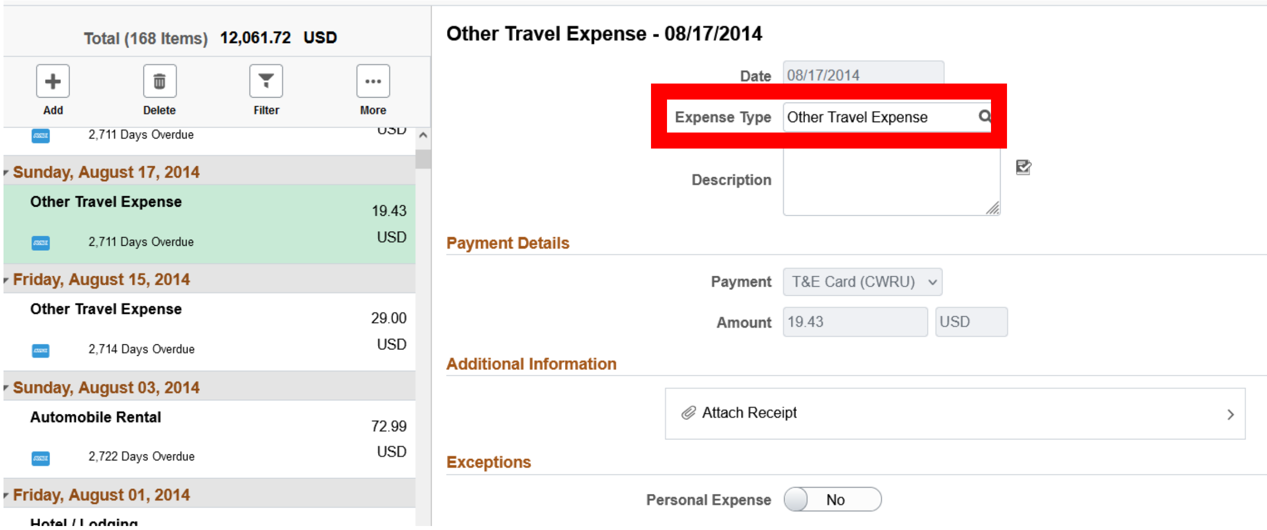
1. A list of imported expenses for the user logged in will be displayed.
2. To modify the expenses for another individual: Select the Green Arrow Next to the name.



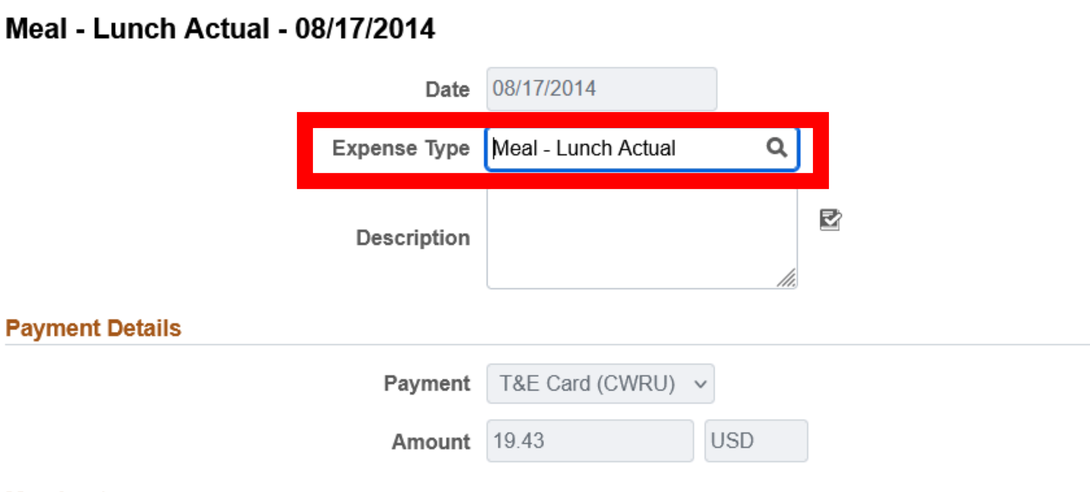
3. Select the new individual by name or EMPLID



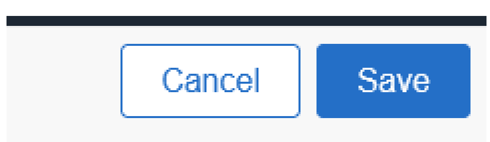
4. Select the expense you would like to modify from the left side menu.
5. The only option that can be modified is the Expense Type.



6. Update the Expense Type to the correct type:



7. Once updates are complete select the 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.