



**New Mexico State University**

**Financial Systems Administration**  
**Travel Expense Report – Retrieve an Existing Report**

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**May 16, 2017**

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## Retrieving a Travel Expense Report

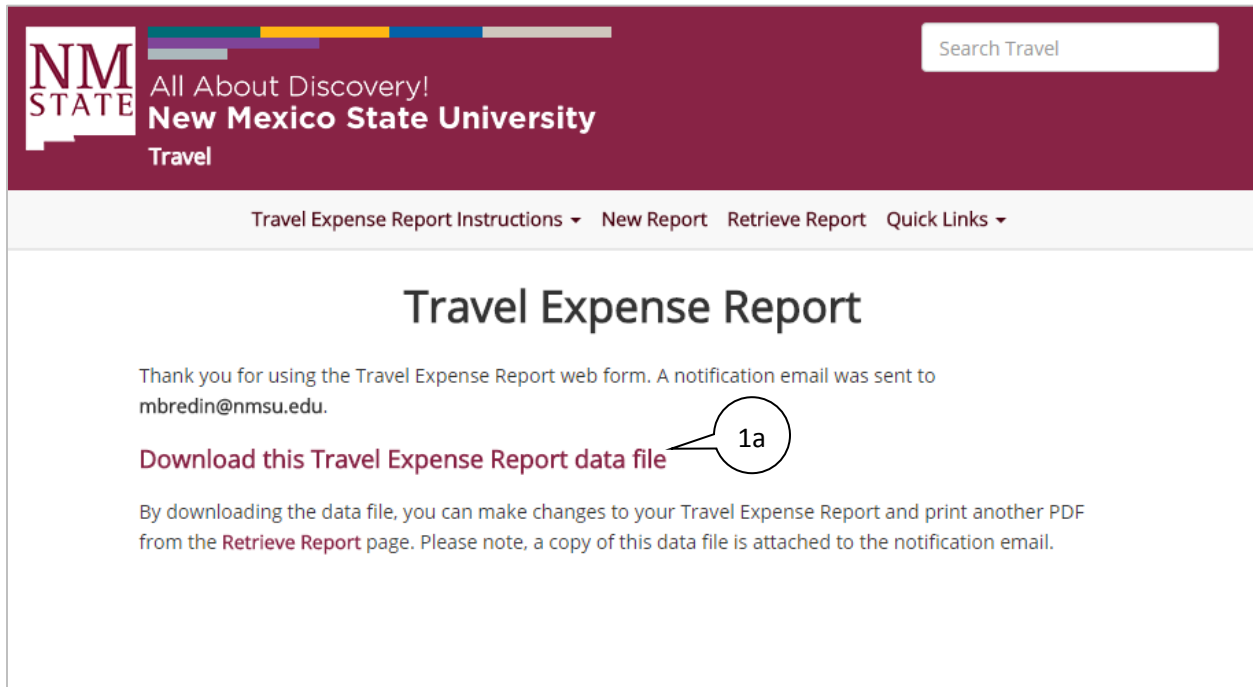
**Purpose:** To allow you to make changes to a Travel Expense Report that was already created without having to re-enter all of the travel information.

When the Travel Expense Report web form is completed, the travel information is automatically saved and put into a data file. You will need this data file to retrieve and repopulate the web form and create another PDF.

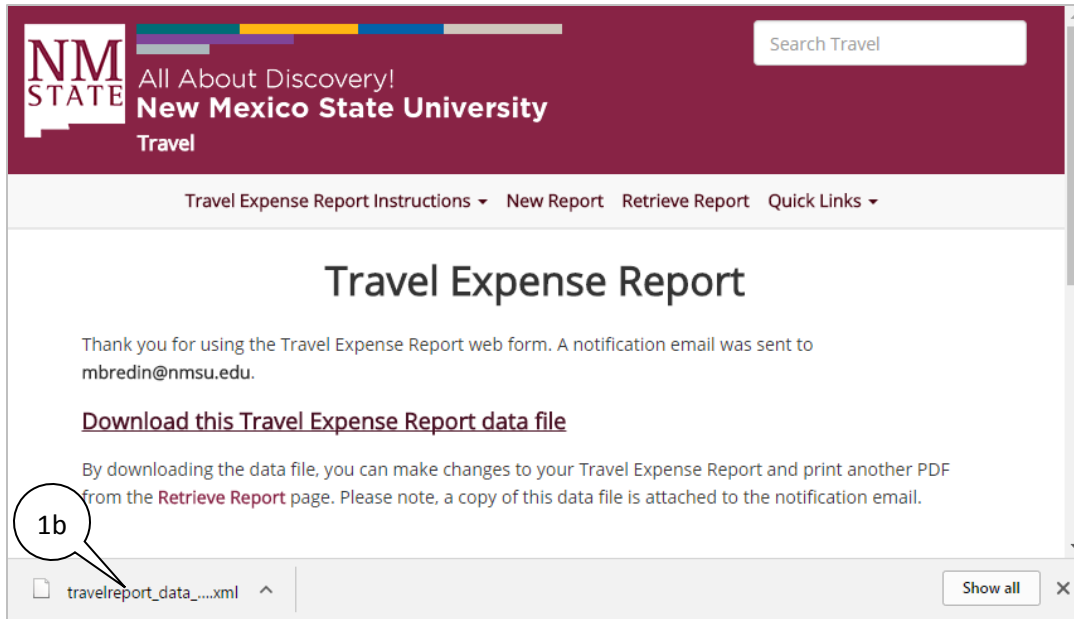
## How to Retrieve a Travel Expense Report and Make Changes

The system will display a link to download the data file on the screen after you select **Go** and will email a copy of the file to the preparer's email address.

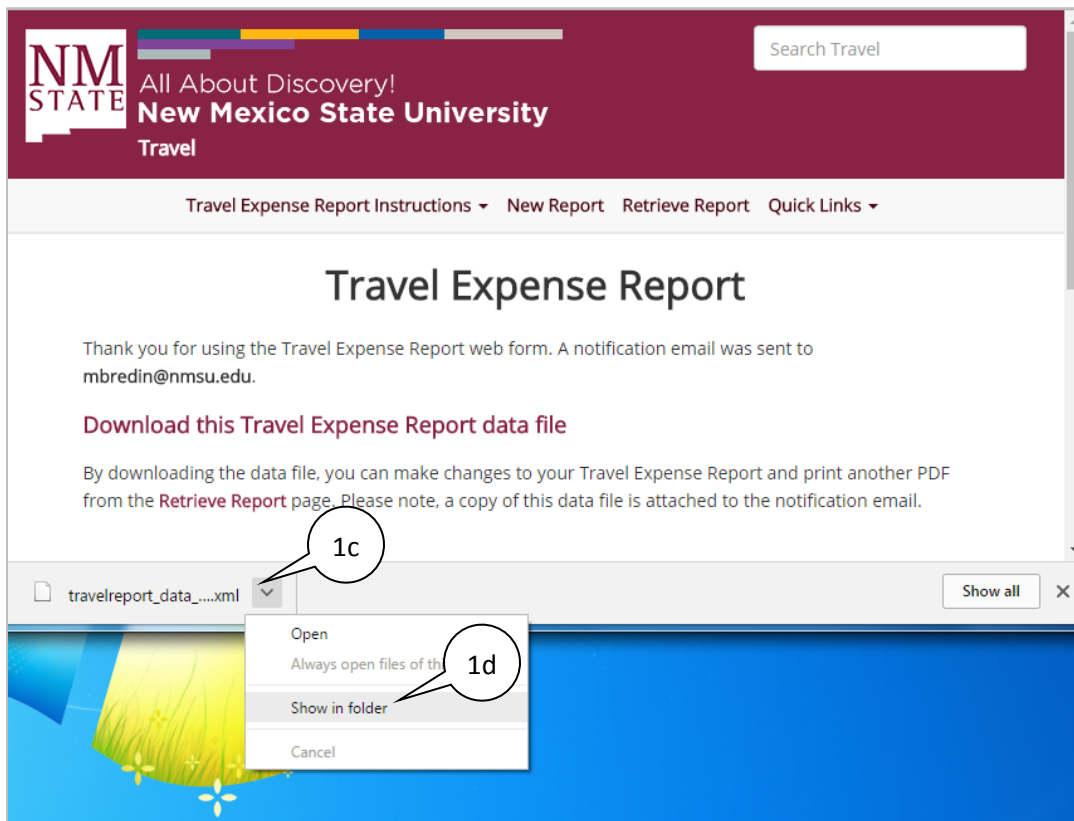
1. Download the **Travel Expense Report data file**.




- a. If your browser is still open on the confirmation page, click on the **Download this Travel Expense Report data file** link.

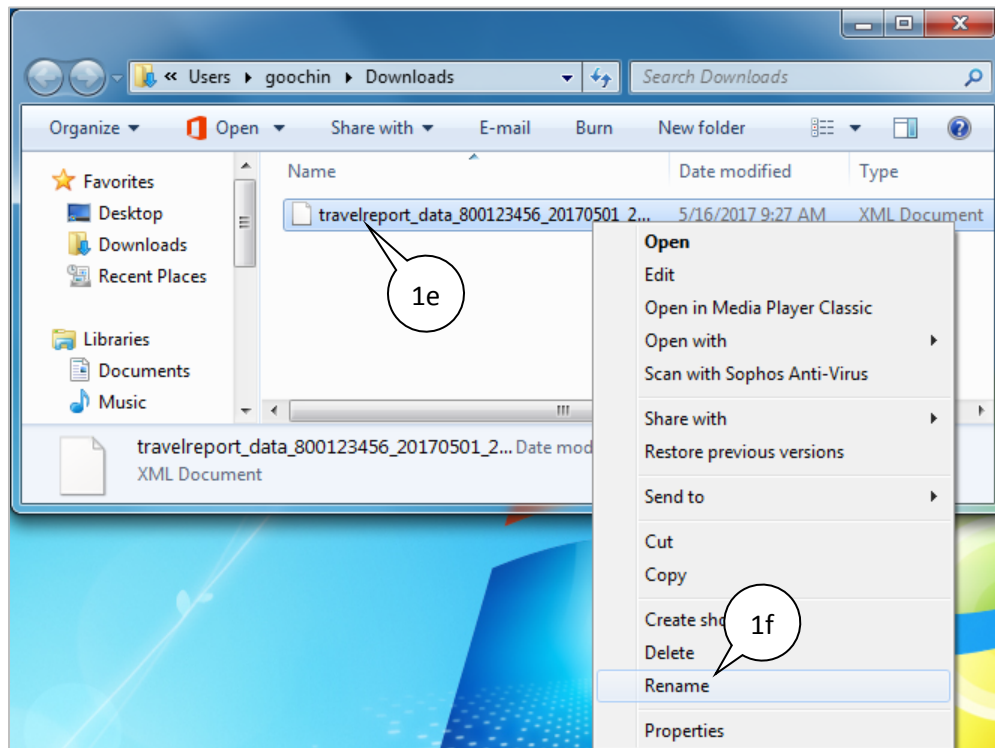


- b. A download notification for the file will appear in the lower left corner of the browser.

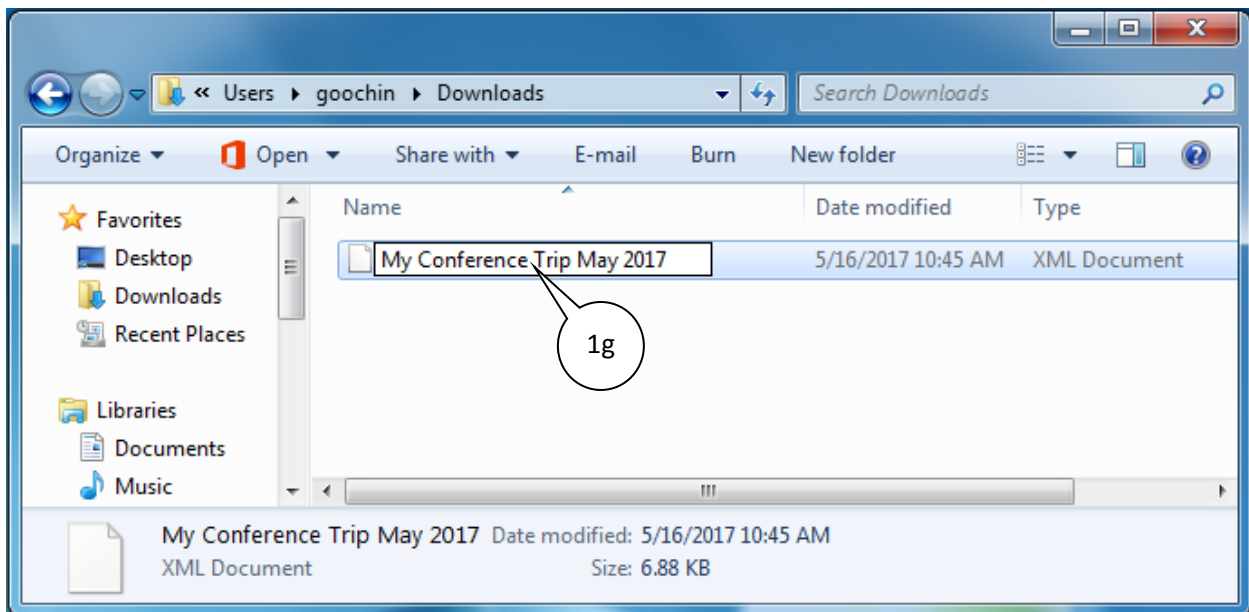


- c. Click on the arrow  icon to the right of the file name.
- d. Select **Show in folder** from the context menu.

The **Downloads** folder will be displayed and the file highlighted:



- e. Right-click on the file name.
- f. Select **Rename** from the context menu.

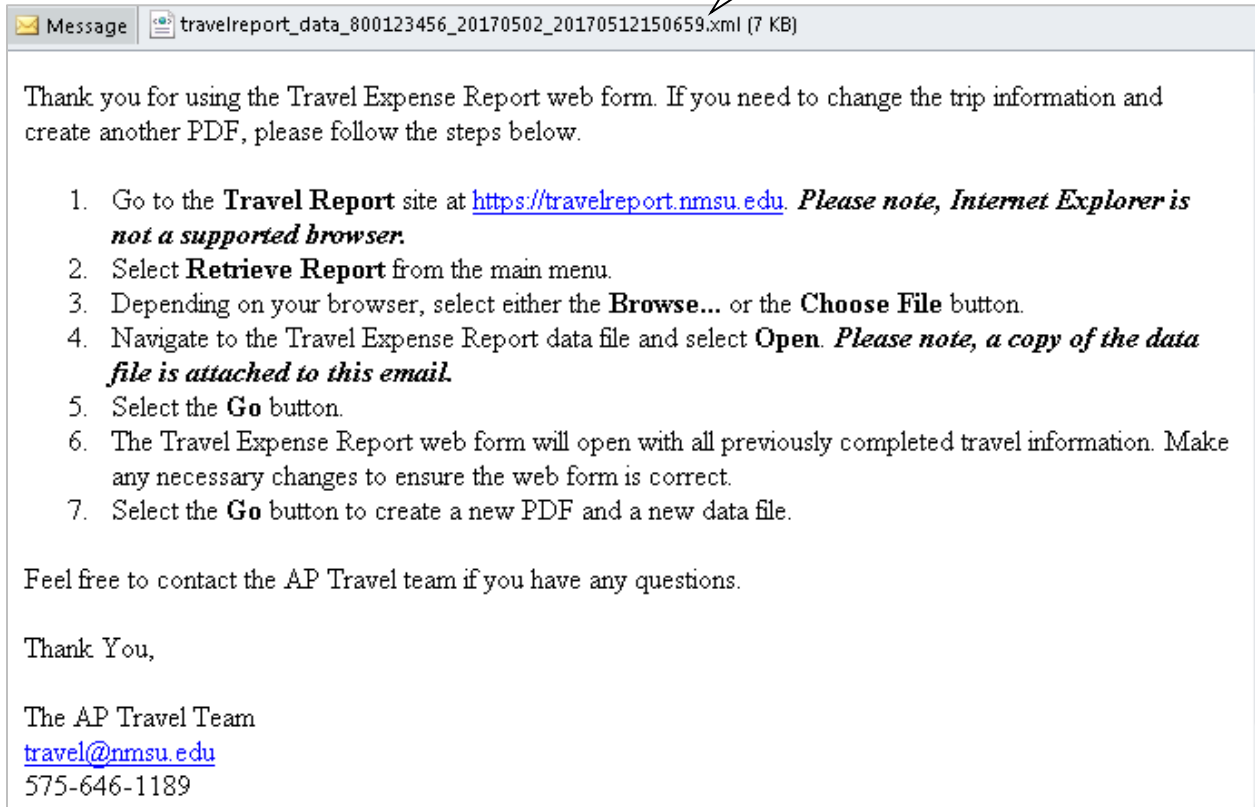


- g. Change the file name to something that will make it easier to identify.

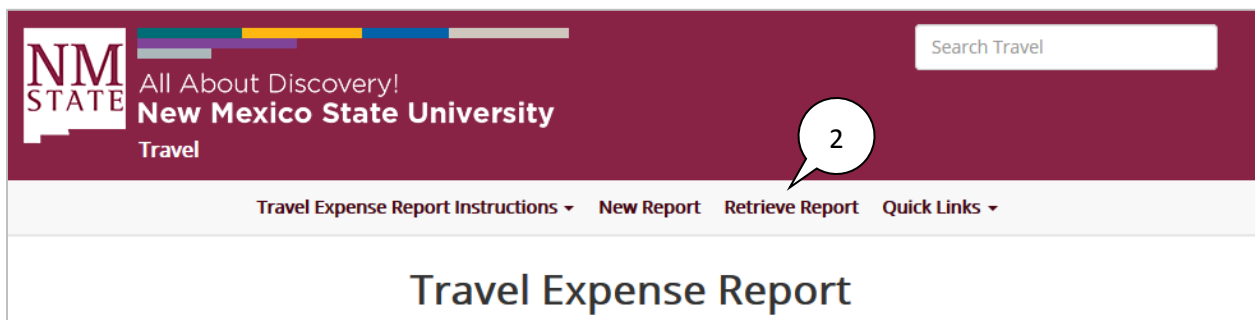
**Alternatively:**

The data file can also be downloaded from the *Travel Expense Report Notification* email sent to the preparer:

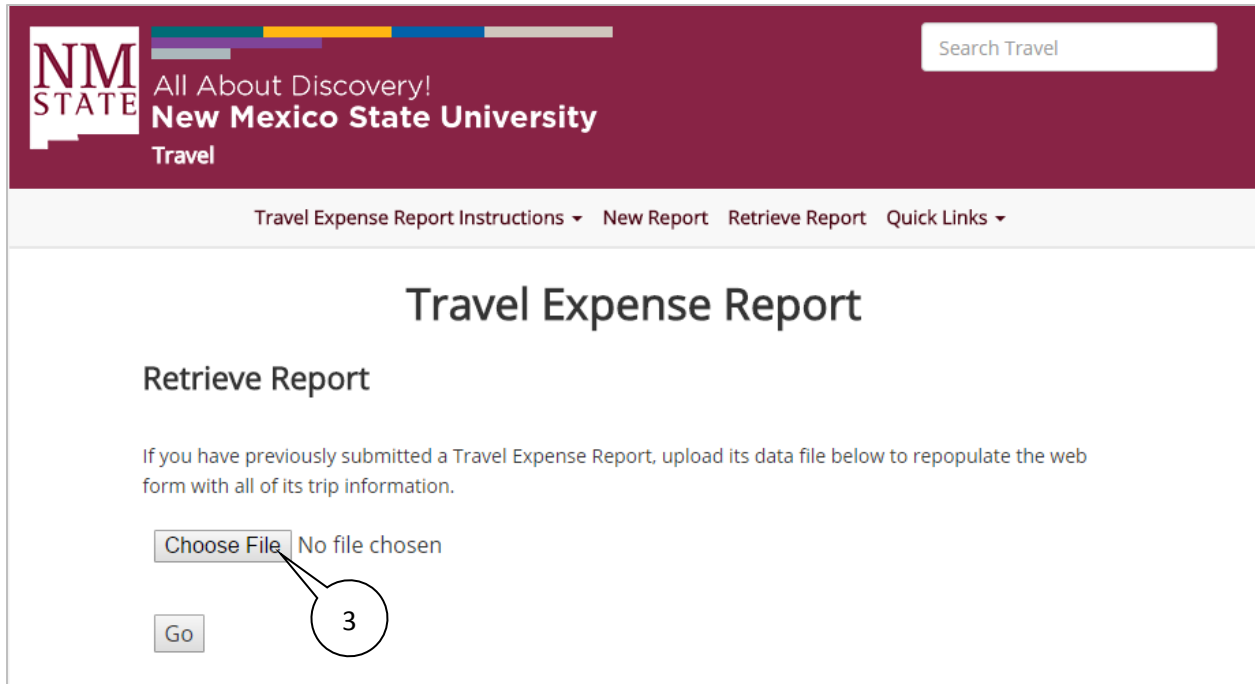
1f



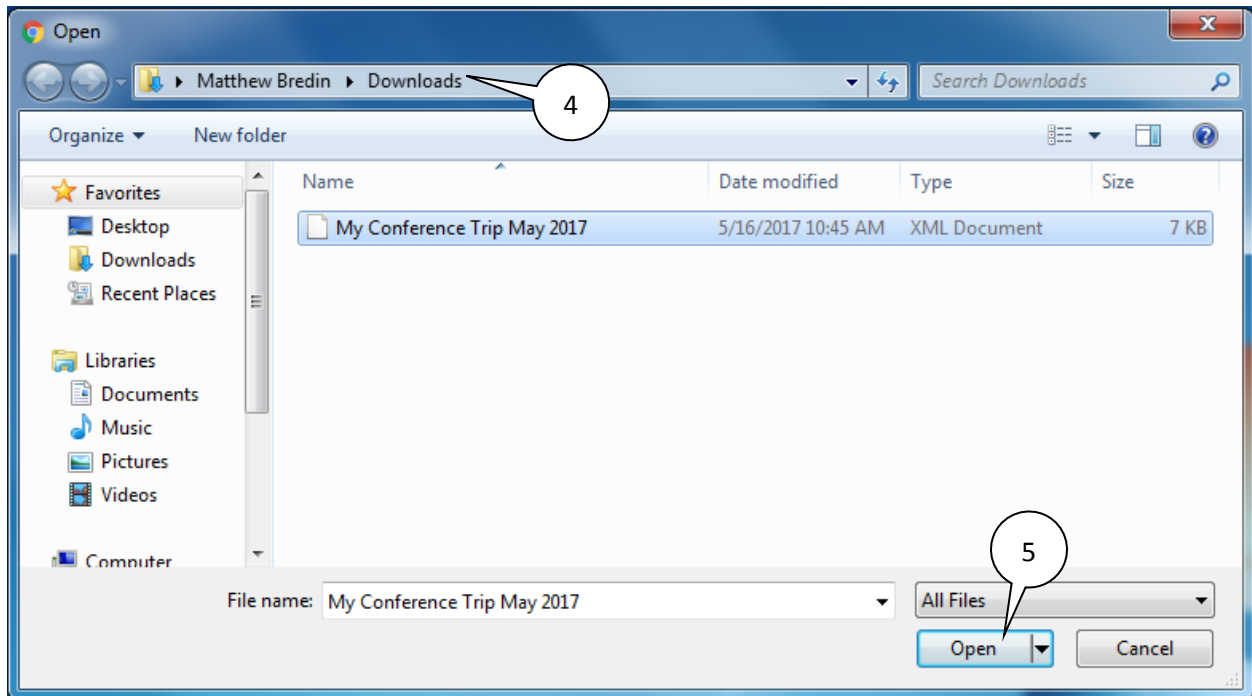
- h. Right-click the attachment to download the file and save it to a folder of your choice. Then, follow Steps e-g to rename the file accordingly.



2. Click on **Retrieve Report**.



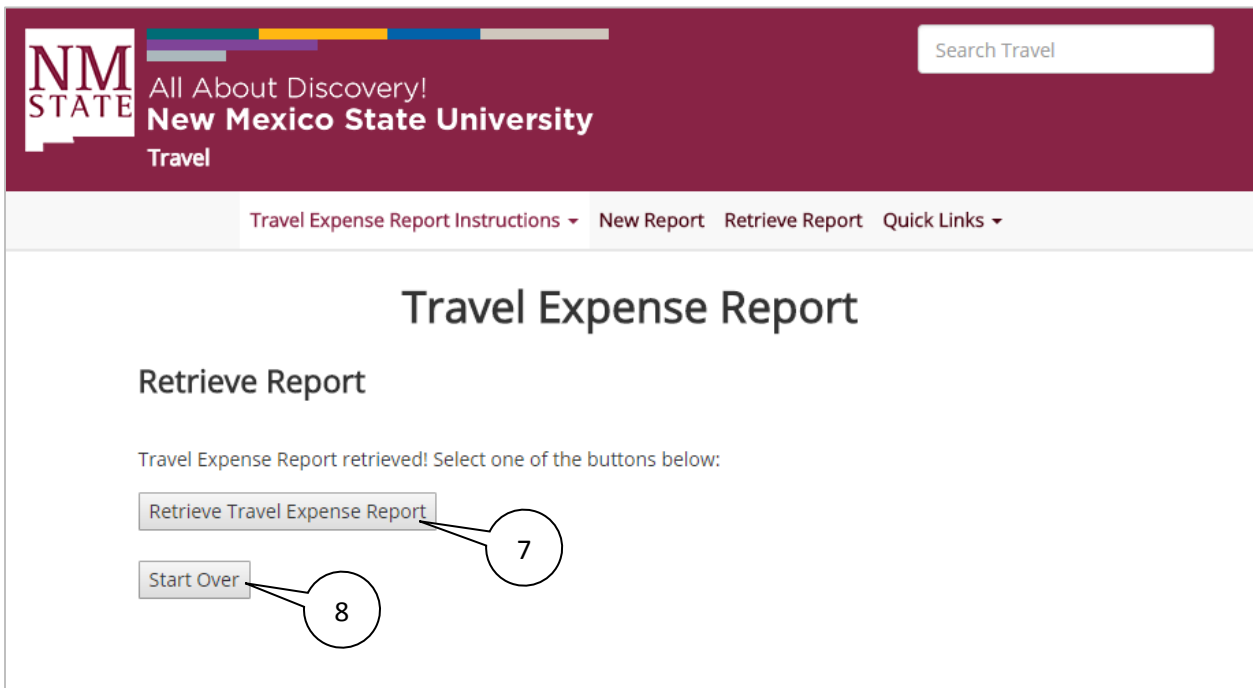
3. Click on the **Choose File** button.



- 4. Navigate to the folder where the file was saved.
- 5. Select the file and then click on the **Open** button.



6. Click on the **Go** button.



7. Click on the **Retrieve Travel Expense Report** button to retrieve the web form.

8. Click on the **Start Over** button to upload a different file.



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Travel Expense Report Instructions
New Report
Retrieve Report
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* Aggie ID: <input type="text" value="888888888"/>	* Preparer Name: <input type="text" value="Test Person"/>
* Name: <input type="text" value="Test Person"/>	* Preparer Email: <input type="text" value="cstamm@nmsu.edu"/>
* Department: <input type="text" value="TESTDEPT"/>	* Preparer Phone: <input type="text" value="846-6727"/>
* Business Purpose and Benefit: <input style="width: 100%; height: 20px;" type="text" value="TESTING"/>	

**Trip Info** ⓘ

* Departure Date <span style="color: red;">➔</span>	* Departure Time <span style="color: red;">➔</span>	* Search Destination By <span style="color: red;">➔</span>	* Search Term <span style="color: red;">➔</span>	* Destination Per Diem <span style="color: red;">➔</span>	# of
<input type="text" value="4/10/2017"/>	<input type="text" value="12"/> <input type="text" value="00"/> <small>AM PM</small>	<input checked="" type="radio"/> Domestic Zip Code <input type="radio"/> Domestic City <input type="radio"/> Foreign Country	<input type="text" value="79902"/> <input type="button" value="Go"/>	<input type="text" value="El Paso, TX (Oct - Sep)"/>	1
* Return Date	* Return Time	Total Trip Duration			
<input type="text" value="4/11/2017"/>	<input type="text" value="1"/> <input type="text" value="00"/> <small>AM PM</small>	<input type="text" value="2"/>			

\* Advance ⓘ

Yes  No

**Travel Expenses** ⓘ

Meals

Meal Per Diem ⓘ

Destination	Meal Per Diem	Calculated Allowance	Less: Meals Provided			Total
El Paso, TX - First Day	\$59.00	\$44.25	Breakfast# <input type="text"/> × Rate \$8.85 Amount <input type="text"/>	Lunch# <input type="text"/> × Rate \$13.27 Amount <input type="text"/>	Dinner# <input type="text"/> × Rate \$22.13 Amount <input type="text"/>	\$44.25
El Paso, TX - Last Day	\$59.00	\$44.25	Breakfast# <input type="text"/> × Rate \$8.85 Amount <input type="text"/>	Lunch# <input type="text"/> × Rate \$13.27 Amount <input type="text"/>	Dinner# <input type="text"/> × Rate \$22.13 Amount <input type="text"/>	\$44.25
Meal Per Diem Total						\$88.50

Meal Reimbursement (if less than Meal Per Diem)  
 Reset Meals

9. Make any necessary changes to the repopulated web form.

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10. Click on the **Go** button when finished.

R:\Projects\BA\Web Travel Expense Report\Training\TravelFormRetrieveReport\_Chrome.pdf

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