

Workflow - Department Heads :

Approving Expense

Reports

1. Welcome to our training on approving expense reports in Concur.



2. This training is specific to department heads who will review expense reports to make sure the expenses are allowable within and appropriate to the department. Department head approval of the report indicates that it is correct and sanctioned at the department level.

Travel to Super Cool Conference [Text: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Airfare | 1Time Airline | | Manhattan, Ka... | Out of Pocket |
| 10/02/2023 | Travel-Related ... | Cool Conferen... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |

View Summary

Report Summary

| Report Totals | Amount Due Company |
|---------------|--------------------|
| | \$0.00 |

Requests (1)

| Request Name | Request ID | Amount Approved |
|---------------------------------|------------|-----------------|
| Travel to Super Cool Conference | 3369 | \$4,092.50 |

TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

3. On the screen that allows you to view details of the report,

Travel to Super Cool Conference

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Airfare | 1Time Airline | | Manhattan, Ka... | Out of Pocket |
| 10/02/2023 | Travel-Related ... | Cool Conferen... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |

Summary

Report Summary

Report Totals

Amount Due Company

\$0.00

Requests (1)

>

>

| Request Name | Request ID | Amount Approved |
|---------------------------------|------------|-----------------|
| Travel to Super Cool Conference | 3369 | \$4,000.00 |

TOTAL AMOUNT
\$4,092.50

TOTAL REQUESTED
\$4,092.50

The expense details will show on the left of the screen.

Travel to Super Cool Conference [Text: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Airfare | 1Time Airline | | Manhattan, Ka... | Out of Pocket |
| 10/02/2023 | Travel-Related ... | Cool Conferen... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |



Summary

Report Summary

| Report Totals | Amount Due Company |
|---------------|--------------------|
| | \$0.00 |

Requests (1)

| Request Name | Request ID | Amount Approved |
|---------------------------------|------------|-----------------|
| Travel to Super Cool Conference | 3369 | \$4,092.50 |

TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

You can scroll from the bottom of the screen to view the full range of details provided.

Travel to Super Cool Conference [Text: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Airfare | 1Time Airline | | Manhattan, Ka... | Out of Pocket |
| 10/02/2023 | Travel-Related ... | Cool Conferen... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |

View

Summary

Report Summary

Report Totals

| Amount Due Company |
|--------------------|
| \$0.00 |

Requests (1)

| Request Name | Request ID | Amount Approved |
|---------------------------------|------------|-----------------|
| Travel to Super Cool Conference | 3369 | \$4,000.00 |



TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

Or you can click on the line that divides the Expenses and Report Summary sides of the screen and drag the line to the right

Travel to Super Cool Conference [Test, Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... | City of Purcha... | Payment Type | Amount | Adjusted Clai... | View ▾ |
|------------------|---|------------------|-------------------|-------------------|---------------|------------|------------------|--------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/04/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 | |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/03/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 | |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket | \$500.00 | | |
| 10/02/2023 | Airfare | ITime Airline | Manhattan, Ka... | | Out of Pocket | \$750.00 | \$750.00 | |
| 10/02/2023 | Travel-Related Training & Conference Registration | Cool Conferen... | | Atlanta, Georgia | Out of Pocket | \$2,500.00 | \$2,500.00 | |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket | \$250.00 | \$250.00 | |
| 10/02/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of Pocket | \$1.25 | \$1.25 | |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | \$17.25 | \$17.25 | |

Summary

Report Summary

| Report Totals | Amount Due Company |
|---------------|--------------------|
| | \$0.00 |

Requests (1)

| Request Name | Request ID |
|---------------------------------|------------|
| Travel to Super Cool Conference | 3369 |



to extend the Expenses portion of the screen.


Travel to Super Cool Conference [Test: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type | View | Summary |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|------|--|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | | Report Summary Report Totals |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket | | Amount Due Company \$0.00 |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | | Amount Approved \$4,000.00 |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket | | |
| 10/02/2023 | Hotel | | | Holiday Inn | | | |
| 10/02/2023 | Airfare | | | 1Time Airline | | | |



TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

The paper/paperclip icon allows you to view documents attached to the expense, such as receipts. Hover over this icon to view the attached documents.

Travel to Super Cool Conference [Test, Stacy]

Summary Details Receipts Print / Email

Expenses

| Transaction | Enter Vendor ... | Additional Inf... | City of Purcha... | Payment Type | Amount | Adjusted Clai... | View |
|-------------|------------------|-------------------|-------------------|---------------|------------|------------------|------|
| 10/04/2023 | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/04/2023 | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 | |
| 10/03/2023 | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/03/2023 | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 | |
| 10/02/2023 | Holiday Inn | | Atlanta, Georgia | Out of Pocket | \$500.00 | | |
| 10/02/2023 | 1Time Airline | | Manhattan, Ka... | Out of Pocket | \$750.00 | \$750.00 | |
| 10/02/2023 | Cool Conferen... | | Atlanta, Georgia | Out of Pocket | \$2,500.00 | \$2,500.00 | |
| 10/02/2023 | Enterprise | | Atlanta, Georgia | Out of Pocket | \$250.00 | \$250.00 | |
| 10/02/2023 | | | Atlanta, Georgia | Out of Pocket | \$1.25 | \$1.25 | |
| 10/02/2023 | | | Atlanta, Georgia | Out of Pocket | \$17.25 | \$17.25 | |

- Receipts Required
- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images

You have additional receipt viewing options available under the Receipts dropdown menu.

Travel to Super Cool Conference [Test: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details

Expenses

Expense Type Enter Vendor ... Account ... City of Purchase ... Payment Type

Report Summary

Report Totals

Amount Due Company

\$0.00

Amount Approved

\$4,092.50

| Date | Expense Type | Vendor | City of Purchase | Payment Type |
|------------|--------------------|---------------|------------------|---------------|
| 10/03/2023 | Meal Per Diem | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | |
| 10/02/2023 | Airfare | 1Time Airline | | |

TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

The pie chart icon indicates funding string allocations associated with the expense. Click on this icon to view the allocations.

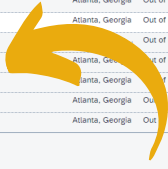
Travel to Super Cool Conference [Text: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details Receipts Print / Email

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Int... | City of Purcha... | Payment Type |
|------------------|--------------------|------------------|-------------------|-------------------|---------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/04/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |
| 10/03/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Airfare | 1Time Airline | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Travel-Related ... | Cool Conferen... | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Incidentals Per... | | | Atlanta, Georgia | Out of Pocket |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket |



View 

Report Summary

Report Totals

Amount Due Company

\$0.00

Requests (1)

> Request Name

Request ID

Amount Approved

> Travel to Super Cool Conference

3369

\$4,000.00

TOTAL AMOUNT \$4,092.50 TOTAL REQUESTED \$4,092.50

11. To view the details of any expense in the expense list, click on the line for that expense.

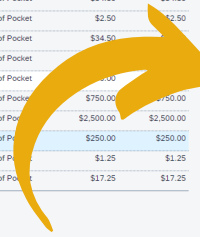
Travel to Super Cool Conference [Text: Stacy]

[Send Back to Employee](#) [Approve](#) [Approve & Forward](#)

Summary Details ▼ Receipts ▼ Print / Email ▼

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... | City of Purcha... | Payment Type | Amount | Adjusted Clat... | |
|---------------------|---|------------------|-------------------|-------------------|---------------|-------------------|------------------------|-------------------|
| 10/04/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/04/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 | |
| 10/03/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 | |
| 10/03/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of Pocket | \$1.25 | \$1.25 | |
| 10/02/2023 | Hotel | Holiday Inn | | Atlanta, Georgia | Out of Pocket | \$750.00 | \$750.00 | |
| 10/02/2023 | Airfare | 1Time Airline | | Manhattan, Ka... | Out of Pocket | \$2,500.00 | \$2,500.00 | |
| 10/02/2023 | Travel-Related Training & Conference Registration | Cool Conferen... | | Atlanta, Georgia | Out of Pocket | \$250.00 | \$250.00 | |
| 10/02/2023 | Car Rental | Enterprise | | Atlanta, Georgia | Out of P... | \$17.25 | \$17.25 | |
| 10/02/2023 | Incidentals Per Diem | | | Atlanta, Georgia | Out of P... | \$17.25 | \$17.25 | |
| 10/02/2023 | Meal Per Diem | | | Atlanta, Georgia | Out of P... | | | |
| TOTAL AMOUNT | | | | | | \$4,092.50 | TOTAL REQUESTED | \$4,092.50 |



Expense Receipt Image Summary

Expense Type: **Car Rental** Transaction Date: 10/02/2023

Report/Trip Purpose: 1) Conference Attendee

Vendor: Enterprise City of Purchase: Atlanta, Georgia

Payment Type: Out of Pocket Amount: 250.00 USD

Reviewed: No Approved Amount: 250.00

Comment: Request: 10/02/2023, \$250.00 - Travel t

[Save](#) [Allocate](#) [Attach Receipt](#)

12. The expense details window will open to the right.

The screenshot displays the SAP Concur 'Approvals' page for a report titled 'Red Stapler'. The interface includes navigation tabs for 'Approvals Home', 'Requests', and 'Reports'. A summary bar at the top right contains buttons for 'Send Back to Employee', 'Approve', and 'Approve & Forward'. Below this, there are tabs for 'Summary', 'Details', 'Receipts', and 'Print / Email'. The main content area is divided into two sections: 'Exceptions' and 'Expenses'. The 'Exceptions' table shows one entry: 'Office Supplies' on '10/09/2023' for '\$15.00' with the note 'Requires AES approval.'. The 'Expenses' table has columns for 'Transaction D...', 'Expense Type', 'Enter Vendor ...', 'Additional Inf...', and 'C'. It lists one expense: 'Hotel' on '10/26/2023' for 'Allstar Hotels' with a value of '50.00'. A red exclamation point icon is visible next to this expense. A yellow arrow points to this icon. At the bottom of the expenses table, there are summary fields: 'TOTAL AMOUNT \$15.00' and 'TOTAL REQUESTED \$15.00'. The 'Amount Due Employee' is listed as '\$15.00'.

13. If any expense shows a red exclamation point icon to the left, that indicates an alert or warning associated with the expense. You can click on that icon to view the alert or warning and determine if action is necessary to resolve it.

Travel to Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

- Report
 - Report Header
 - Totals
 - Audit Trail
 - Approval Flow
 - Comments
- Allocations
 - Allocations
- Travel Allowances
 - Expenses & Adjustments
 - Reimbursable Allowances Summary

| | Enter Vendor ... | Additional Inf... | City of Purcha... | Payment Type | Amount | Adjusted Clai... |
|-------------------------|----------------------|-------------------|-------------------|---------------|------------|------------------|
| | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 |
| | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 |
| | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 |
| | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 |
| | Holiday Inn | | Atlanta, Georgia | Out of Pocket | \$500.00 | |
| | 1Time Airline | | Manhattan, Ka... | Out of Pocket | \$750.00 | \$750.00 |
| Conference Registration | Cool Conferen... | | Atlanta, Georgia | Out of Pocket | \$2,500.00 | \$2,500.00 |
| | Enterprise | | Atlanta, Georgia | Out of Pocket | \$250.00 | \$250.00 |
| 10/02/2023 | Incidentals Per Diem | | Atlanta, Georgia | Out of Pocket | \$1.25 | \$1.25 |
| 10/02/2023 | Meal Per Diem | | Atlanta, Georgia | Out of Pocket | \$17.25 | \$17.25 |

To access report details such as the report header, audit trail, comments, travel allowances, etc., click the Details dropdown menu and select the appropriate option.

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▾ Receipts ▾ Print / Email ▾

Expenses

- Report
 - Report Header
 - Totals
 - Audit Trail
 - Approval Flow
 - Comments
- Allocations
 - Allocations
- Travel Allowances
 - Expenses & Adjustments
 - Reimbursable Allowances Summary

| | Enter Vendor ... | Additional Inf... | City of Purcha... | Payment Type | Amount | Adjusted Clai... |
|---------------------------------|-------------------------|-------------------|-------------------|---------------|------------|------------------|
| Totals | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 |
| Approval Flow | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 |
| Comments | | | Atlanta, Georgia | Out of Pocket | \$34.50 | \$34.50 |
| Allocations | | | Atlanta, Georgia | Out of Pocket | \$2.50 | \$2.50 |
| Allocations | Holiday Inn | | Atlanta, Georgia | Out of Pocket | \$500.00 | |
| Travel Allowances | 1Time Airline | | Manhattan, Ka... | Out of Pocket | \$750.00 | \$750.00 |
| Expenses & Adjustments | Conference Registration | Cool Conferen... | Atlanta, Georgia | Out of Pocket | \$2,500.00 | \$2,500.00 |
| Reimbursable Allowances Summary | Enterprise | | Atlanta, Georgia | Out of Pocket | \$250.00 | \$250.00 |
| 10/02/2023 | Incidentals Per Diem | | Atlanta, Georgia | Out of Pocket | \$1.25 | \$1.25 |
| 10/02/2023 | Meal Per Diem | | Atlanta, Georgia | Out of Pocket | \$17.25 | \$17.25 |

You can also select Approval Flow from this menu

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▼ Receipts ▼ Print / Email ▼

Expenses

| | Transaction D... | Expense Type | Enter Vendor ... | Add |
|--|------------------|---|------------------|-----|
| | 10/04/2023 | Meal Per Diem | | |
| | 10/04/2023 | Incidentals Per Diem | | |
| | 10/03/2023 | Meal Per Diem | | |
| | 10/03/2023 | Incidentals Per Diem | | |
| | 10/02/2023 | Hotel | Holiday Inn | |
| | 10/02/2023 | Airfare | 1Time Airline | |
| | 10/02/2023 | Travel-Related Training & Conference Registration | Cool Conferen... | |
| | 10/02/2023 | Car Rental | Enterprise | |
| | 10/02/2023 | Incidentals Per Diem | | |
| | 10/02/2023 | Meal Per Diem | | |

Approval Flow for Report: Travel to Super Cool Conference ✕

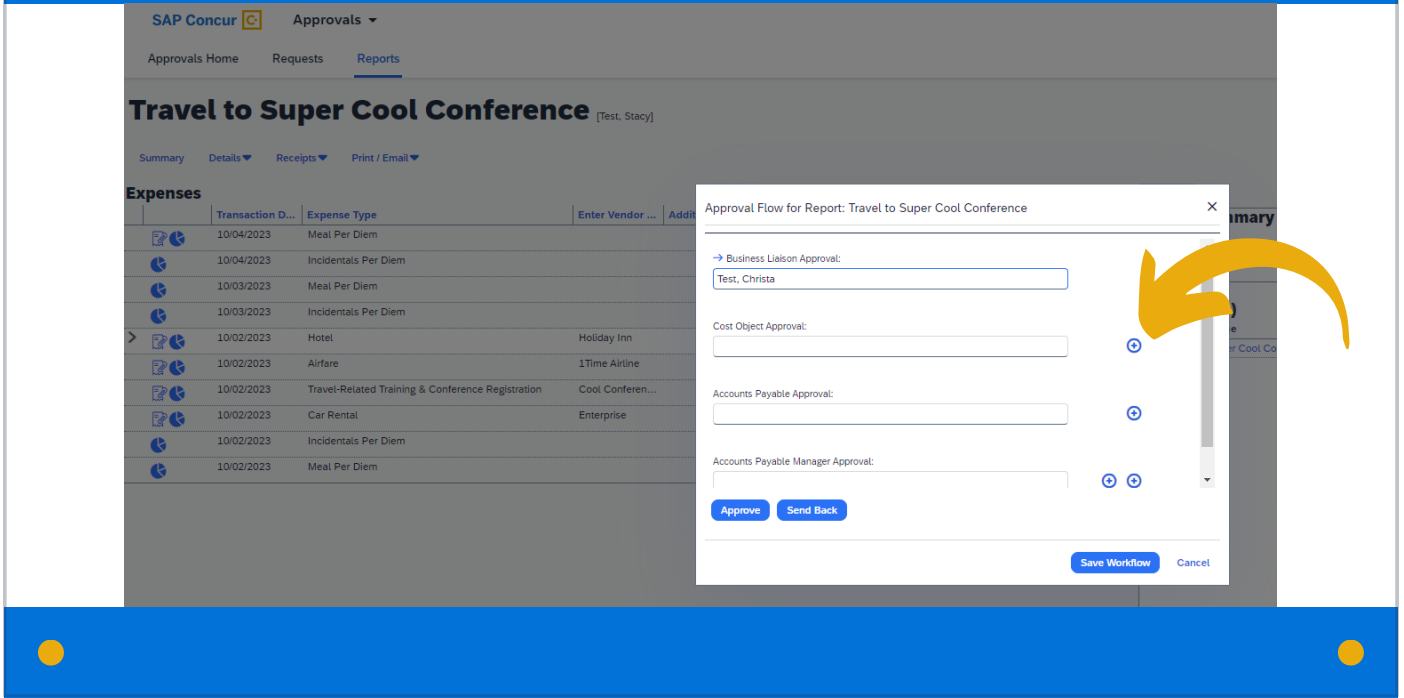
→ Business Liaison Approval:

Cost Object Approval:

Accounts Payable Approval:

Accounts Payable Manager Approval:

to view the report workflow information



The screenshot displays the SAP Concur 'Approvals' section for a report titled 'Travel to Super Cool Conference'. The main area shows a table of expenses with columns for Transaction Date, Expense Type, and Vendor. An 'Approval Flow for Report: Travel to Super Cool Conference' modal is open, showing a sequence of approval steps: Business Liaison Approval (with 'Test, Christa' entered), Cost Object Approval, Accounts Payable Approval, and Accounts Payable Manager Approval. A yellow arrow points to the 'Business Liaison Approval' field. At the bottom of the modal are buttons for 'Approve', 'Send Back', 'Save Workflow', and 'Cancel'.

| Transaction D... | Expense Type | Enter Vendor ... | Add |
|------------------|---|------------------|-----|
| 10/04/2023 | Meal Per Diem | | |
| 10/04/2023 | Incidentals Per Diem | | |
| 10/03/2023 | Meal Per Diem | | |
| 10/03/2023 | Incidentals Per Diem | | |
| 10/02/2023 | Hotel | Holiday Inn | |
| 10/02/2023 | Airfare | 1Time Airline | |
| 10/02/2023 | Travel-Related Training & Conference Registration | Cool Conferen... | |
| 10/02/2023 | Car Rental | Enterprise | |
| 10/02/2023 | Incidentals Per Diem | | |
| 10/02/2023 | Meal Per Diem | | |

17. It is possible from this screen to add an approver to the workflow if necessary. For details on this process, please refer to our training video on adding approvers to the workflow.

SAP Concur Approvals

Approvals Home Requests **Reports**

Red Stapler [Test, Stacy] Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

| Expense Type | Date | Amount | Exception |
|-----------------|------------|---------|------------------------|
| Office Supplies | 10/09/2023 | \$15.00 | Requires AES approval. |

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... |
|------------------|-----------------|------------------|-------------------|
| 10/09/2023 | Office Supplies | Staples | |

Report Summary

| Report Totals | Amount Due Company | Amount Due Employee |
|---------------|--------------------|---------------------|
| | \$0.00 | \$15.00 |

TOTAL AMOUNT: \$15.00 TOTAL REQUESTED: \$15.00


Once you have reviewed all aspects of the report, you have the options to approve it or send it back to the employee.




19. Important!



20. If the reason you cannot approve the report is that required documentation or a clarifying comment is needed, it is better to email the employee to ask them to attach that documentation or add that comment. Documentation and comments can be added to a report at any time, but sending the report back to the employee causes the entire approval process to start over.

SAP Concur 

SAP Concur  Approvals ▾

Approvals Home Requests Reports

Expense Report with Request [Test, Nick]

Summary Details ▾ Receipts ▾ **Print / Email ▾**

*KSU-Report Details

Exceptions

| Expense Type | Date | Amount | Exception |
|--------------|------------|----------|--|
| Hotel | 10/26/2023 | \$600.00 | ⚠️ WARN-This report contains expense(s) outside of the trip dates, please review for accuracy. |

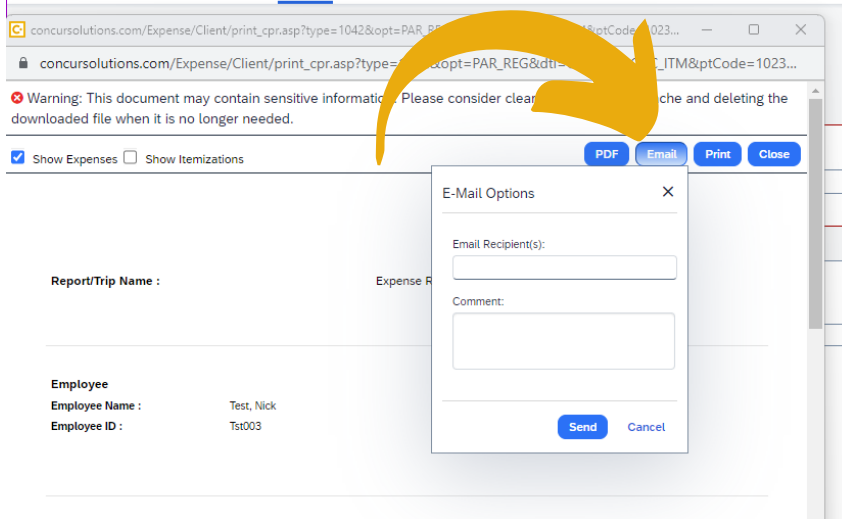
Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... | View ▾ << |
|------------------|--------------|------------------|-------------------|-----------|
| 10/26/2023 | Hotel | Allstar Hotels | | Summary |

Report Summary

| Report Totals | Amount Due Company |
|---------------|--------------------|
| | \$0.00 |

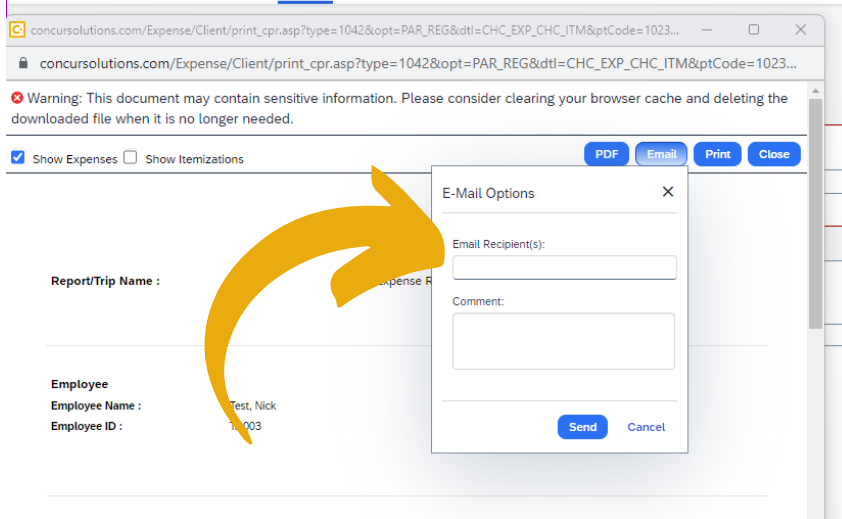
21. To email the employee to request the documentation or comment, click on the Print/Email link dropdown menu and select KSU Report Details.



The screenshot shows a web browser window displaying an SAP Concur report. The browser's address bar shows the URL: `concurolutions.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dti=...&ITM&ptCode=1023...`. A warning message is visible: "Warning: This document may contain sensitive information. Please consider clearing your cache and deleting the downloaded file when it is no longer needed." Below the warning, there are checkboxes for "Show Expenses" (checked) and "Show Itemizations". In the top right corner of the report window, there are buttons for "PDF", "Email", "Print", and "Close". A yellow arrow points to the "Email" button. An "E-Mail Options" dialog box is open in the foreground, containing fields for "Email Recipient(s)", "Comment", and "Send" and "Cancel" buttons. The background report content includes a "Report/Trip Name" field and an "Employee" section with the following details:

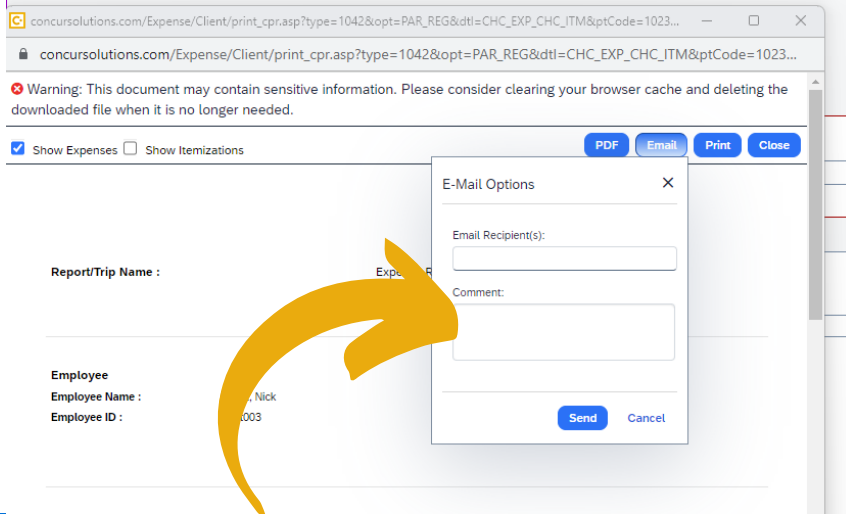
| | |
|-----------------|------------|
| Employee Name : | Test, Nick |
| Employee ID : | Tst003 |

On the report window that opens, click the Email button near the top right of the window



The screenshot shows the SAP Concur interface for viewing reports. The browser address bar shows the URL: `concurolutions.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&ptCode=1023...`. A warning message is displayed: "Warning: This document may contain sensitive information. Please consider clearing your browser cache and deleting the downloaded file when it is no longer needed." Below the warning, there are checkboxes for "Show Expenses" (checked) and "Show Itemizations". A modal dialog box titled "E-Mail Options" is open, containing fields for "Email Recipient(s)", "Comment", and buttons for "Send" and "Cancel". A yellow arrow points from the "Employee Name" field in the background report to the "Email Recipient(s)" field in the dialog.

enter the employee's email



concur solutions.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&ptCode=1023...
concur solutions.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&ptCode=1023...

Warning: This document may contain sensitive information. Please consider clearing your browser cache and deleting the downloaded file when it is no longer needed.

Show Expenses Show Itemizations PDF Email Print Close

Report/Trip Name : _____ Expense Report

Employee
Employee Name : _____, Nick
Employee ID : _____ 003

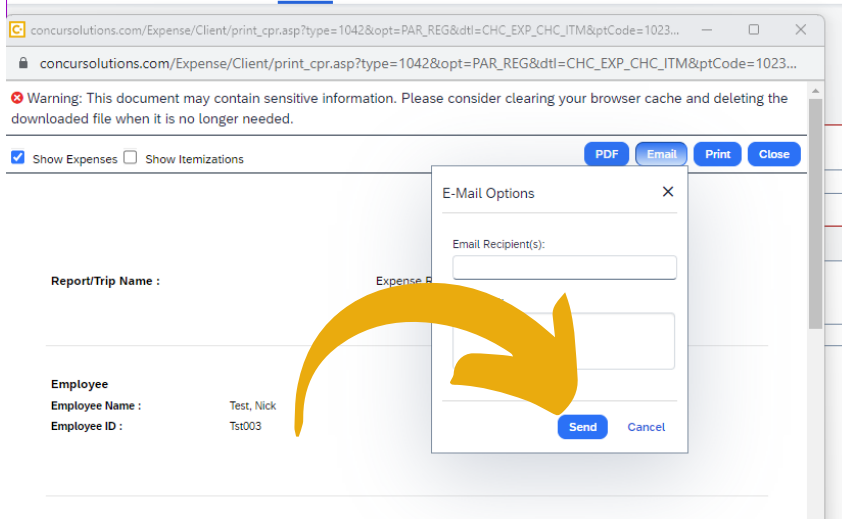
E-Mail Options X

Email Recipient(s):

Comment:

Send Cancel

and add a comment to explain what needs to be appended.



concurrency.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&ptCode=1023...
concurrency.com/Expense/Client/print_cpr.asp?type=1042&opt=PAR_REG&dtl=CHC_EXP_CHC_ITM&ptCode=1023...

Warning: This document may contain sensitive information. Please consider clearing your browser cache and deleting the downloaded file when it is no longer needed.

Show Expenses Show Itemizations PDF Email Print Close

Report/Trip Name :
Expense R

Employee
Employee Name : Test, Nick
Employee ID : Tst003

E-Mail Options
Email Recipient(s):
Send Cancel

25. Then click send.

The screenshot displays the SAP Concur interface for an approval report titled "Red Stapler" by user [Test, Stacy]. The report is currently in the "Reports" tab. At the top right, there are three buttons: "Send Back to Employee", "Approve", and "Approve & Forward". A large yellow arrow points to the "Send Back to Employee" button. Below the report title, there are tabs for "Summary", "Details", "Receipts", and "Print / Email".

The "Exceptions" section shows a table with one entry:

| Expense Type | Date | Amount | Exception |
|-----------------|------------|---------|------------------------|
| Office Supplies | 10/09/2023 | \$15.00 | Requires AES approval. |

The "Expenses" section shows a table with one entry:

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... |
|------------------|-----------------|------------------|-------------------|
| 10/09/2023 | Office Supplies | Staples | |


The "Report Summary" section shows a table with two columns: "Amount Due Company" and "Amount Due Employee".

| Report Totals | Amount Due Company | Amount Due Employee |
|---------------|--------------------|---------------------|
| | \$0.00 | \$15.00 |

At the bottom of the expenses table, there are two summary rows:

| TOTAL AMOUNT | TOTAL REQUESTED |
|--------------|-----------------|
| \$15.00 | \$15.00 |

26. If something other than missing documentation or comment clarification is the reason the report cannot be approved and it is necessary for the report to be sent back to the employee, click the Send Back button.

SAP Concur  Approvals ▼

Approvals Home Requests Reports

Travel to Super Cool Conference [Test, Stacy]

Summary Details ▼ Receipts ▼ Print / Email ▼

Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... |
|------------------|--|------------------|-------------------|
| 10/04/2023 | Meal Per Diem | | |
| 10/04/2023 | Incidentals Per Diem | | |
| 10/03/2023 | Meal Per Diem | | |
| 10/03/2023 | Incidentals Per Diem | | |
| 10/02/2023 | Hotel | Holiday Inn | |
| 10/02/2023 | Airfare | 1Time Airline | |
| 10/02/2023 | Travel-Related Training & Conference Re... | Cool Conferen... | |
| 10/02/2023 | Car Rental | Enterprise | |
| 10/02/2023 | Incidentals Per Diem | | |
| 10/02/2023 | Meal Per Diem | | |

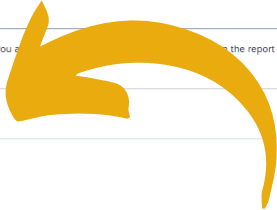
Send Back Report

Comment History


| Date | Entered By | Comment Text |
|------------|-------------|------------------------|
| 10/10/2023 | Test, Stacy | Gonna learn cool stuff |


Add a comment to explain why you are sending the report to the employee.

Comment



27. In the comment box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.

SAP Concur 

SAP Concur  Approvals CT

Approvals Home Requests Reports

Red Stapler [Test, Stacy]

Summary Details Receipts Print / Email Hide Exceptions

Send Back to Employee **Approve** **Approve & Forward**

Exceptions

| Expense Type | Date | Amount | Exception |
|-----------------|------------|---------|------------------------|
| Office Supplies | 10/09/2023 | \$15.00 | Requires AES approval. |


Expenses

| Transaction D... | Expense Type | Enter Vendor ... | Additional Inf... |
|------------------|-----------------|------------------|-------------------|
| 10/09/2023 | Office Supplies | Staples | |

Report Summary

| Report Totals | Amount Due Company | Amount Due Employee |
|---------------|--------------------|---------------------|
| | \$0.00 | \$15.00 |

TOTAL AMOUNT: \$15.00 TOTAL REQUESTED: \$15.00



If the report is good to be approved, click the Approve button.

The screenshot displays the SAP Concur 'Approvals' interface for a 'Delegate Report Training' request. A 'Final Confirmation' dialog box is open, featuring the following text:

Final Confirmation

Approver Agreement

By clicking 'Accept' I certify the expense report and its accompanying receipts have been reviewed and comply with Kansas State University policy.

Buttons: **Accept** (highlighted with a yellow arrow), **Decline**

The background interface includes a navigation bar with 'SAP Concur' and 'Approvals', a breadcrumb trail 'Approvals Home > Requests > Reports', and a summary section for the report. The 'Expenses' table shows a single entry for '10/16/2023' with a 'Job-Related Tr...' expense type and an 'Online Learnin...' vendor. Summary statistics at the bottom indicate a 'TOTAL AMOUNT' and 'TOTAL REQUESTED' of \$175.00.

Read the Approver Agreement that comes up to make certain you agree to it. As long as you do agree, click the Accept button. Your part in the approval process is now complete.