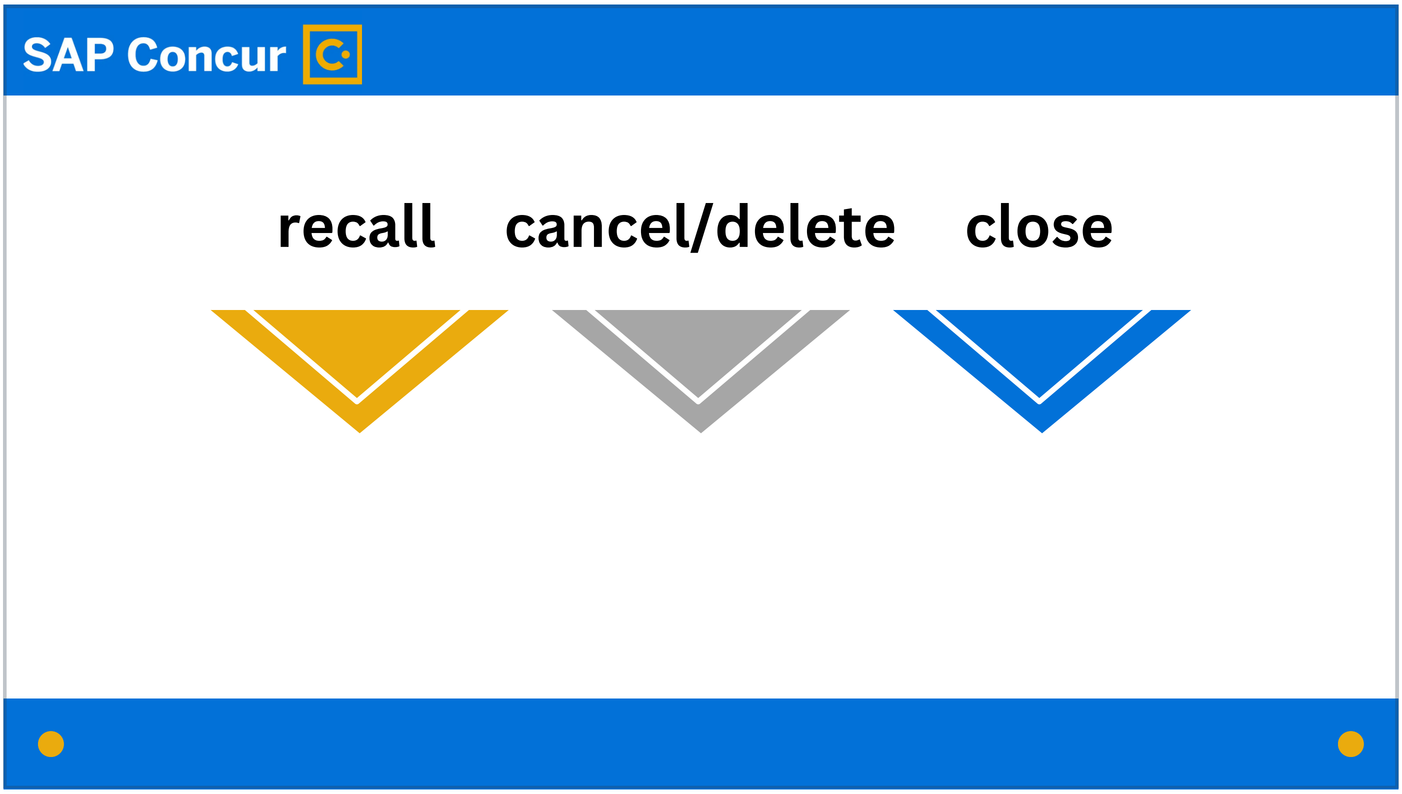
SAP Concur

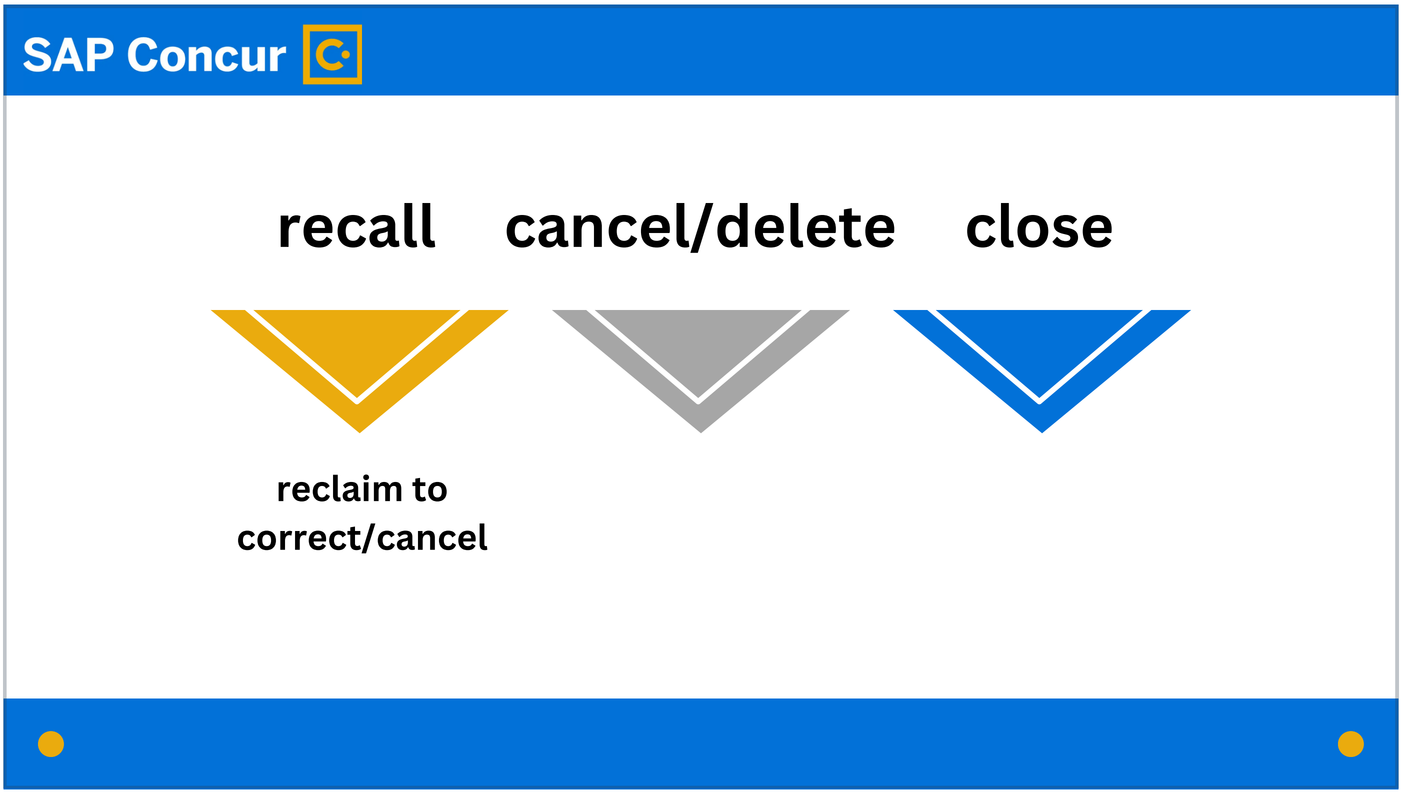
Requests and Expense Reports:

# Recalling, Canceling, Closing Requests/Reports

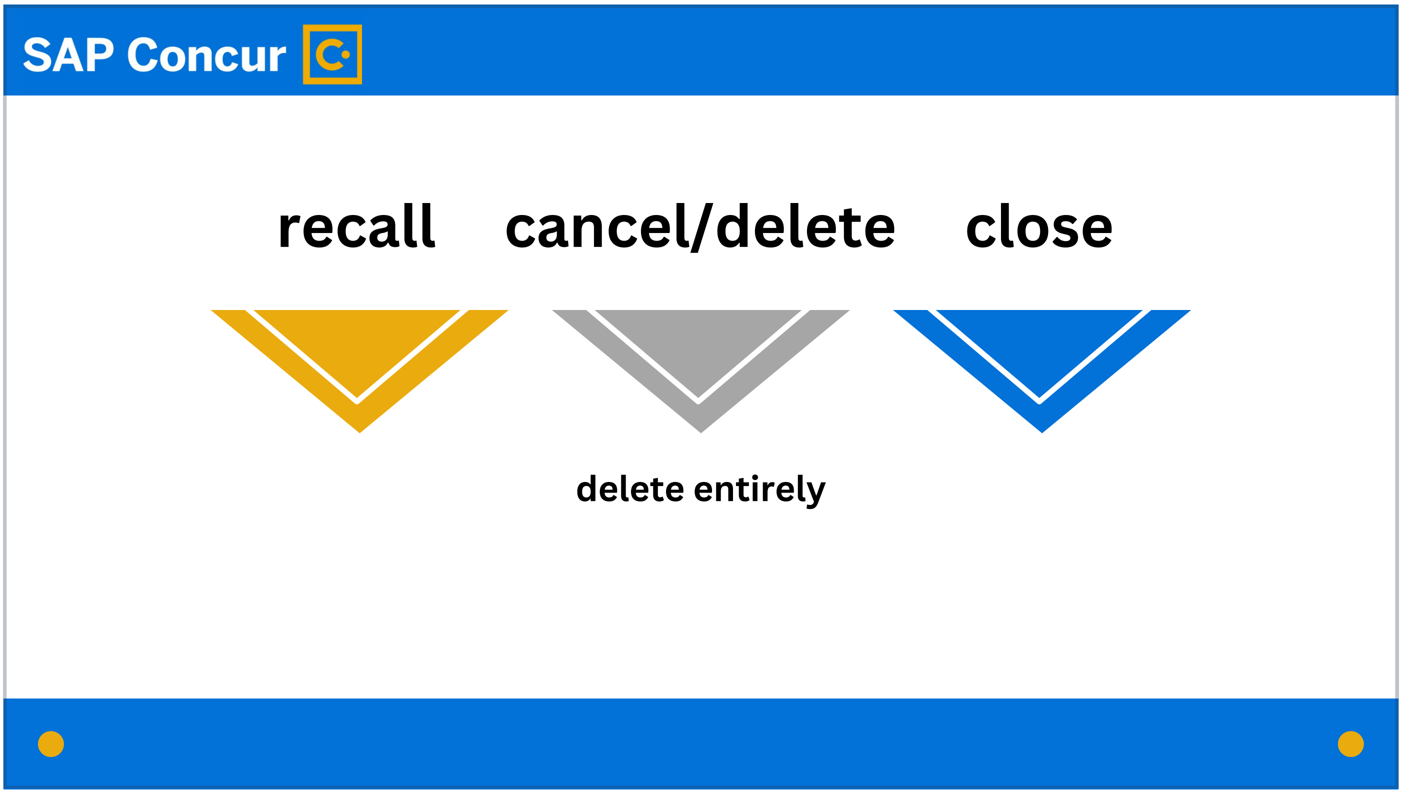
Welcome to our training on recalling, canceling, and closing requests or reports in Concur.



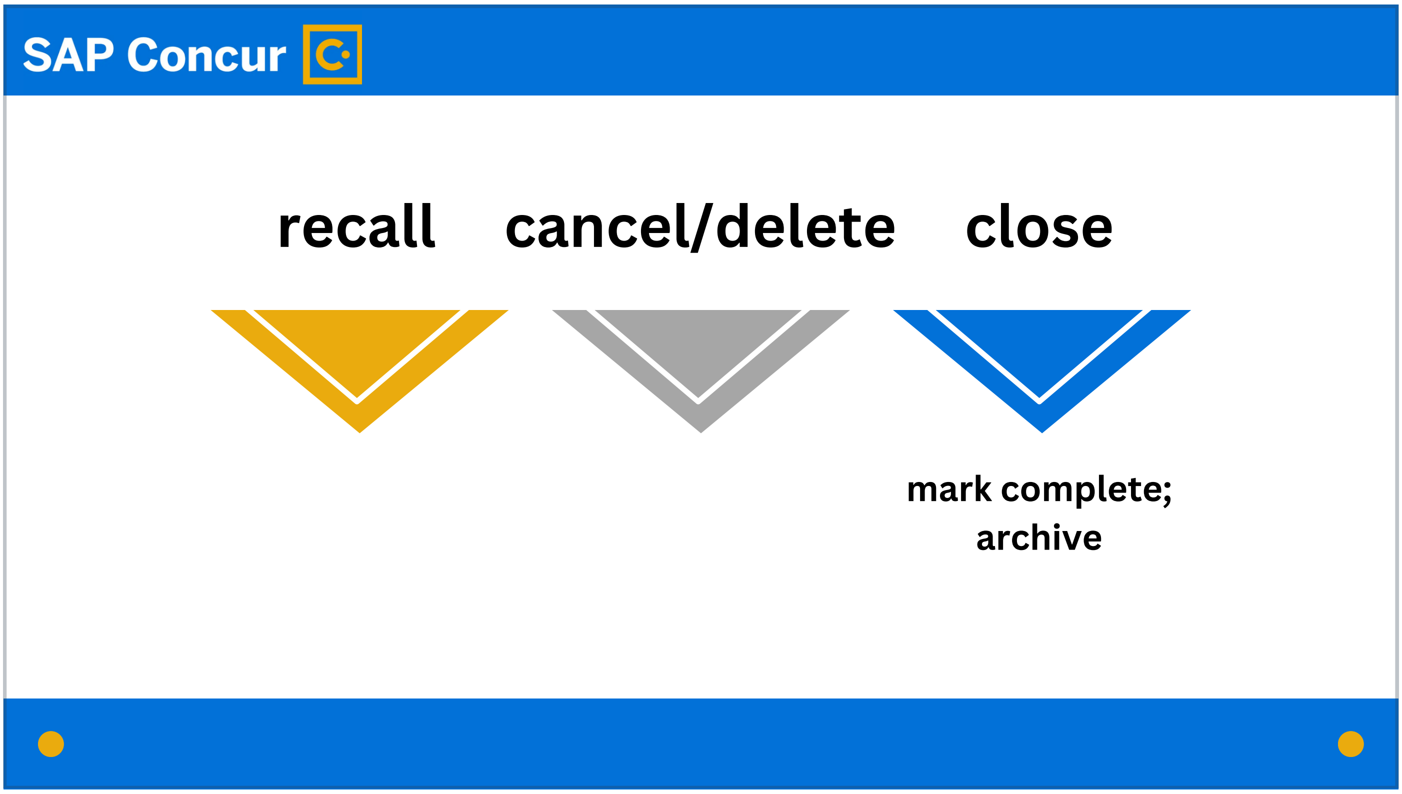

It is important first to understand the differences among these three functions:




Recalling a request or report pulls it out of the approval process either to correct or cancel it.

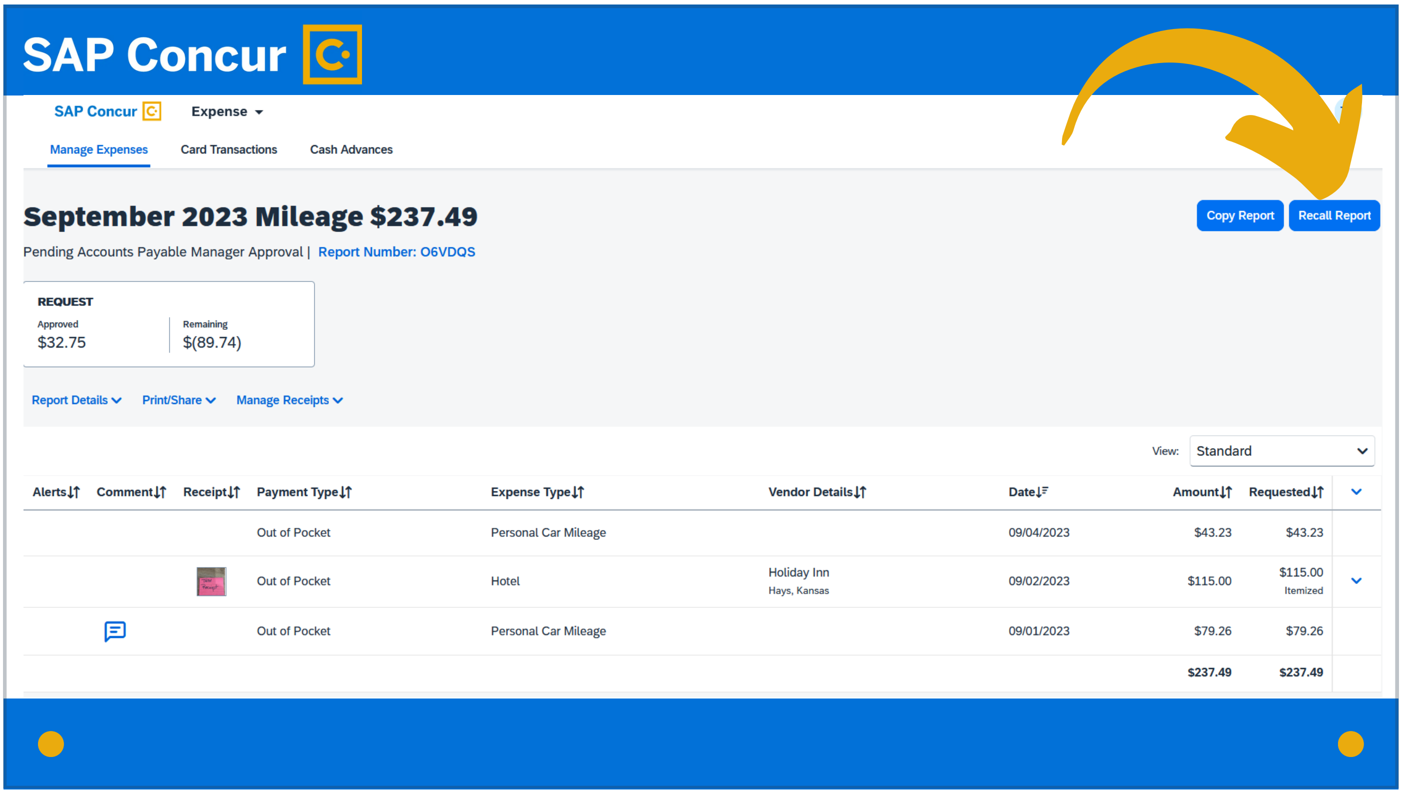



Canceling it deletes it entirely so that it no longer exists.

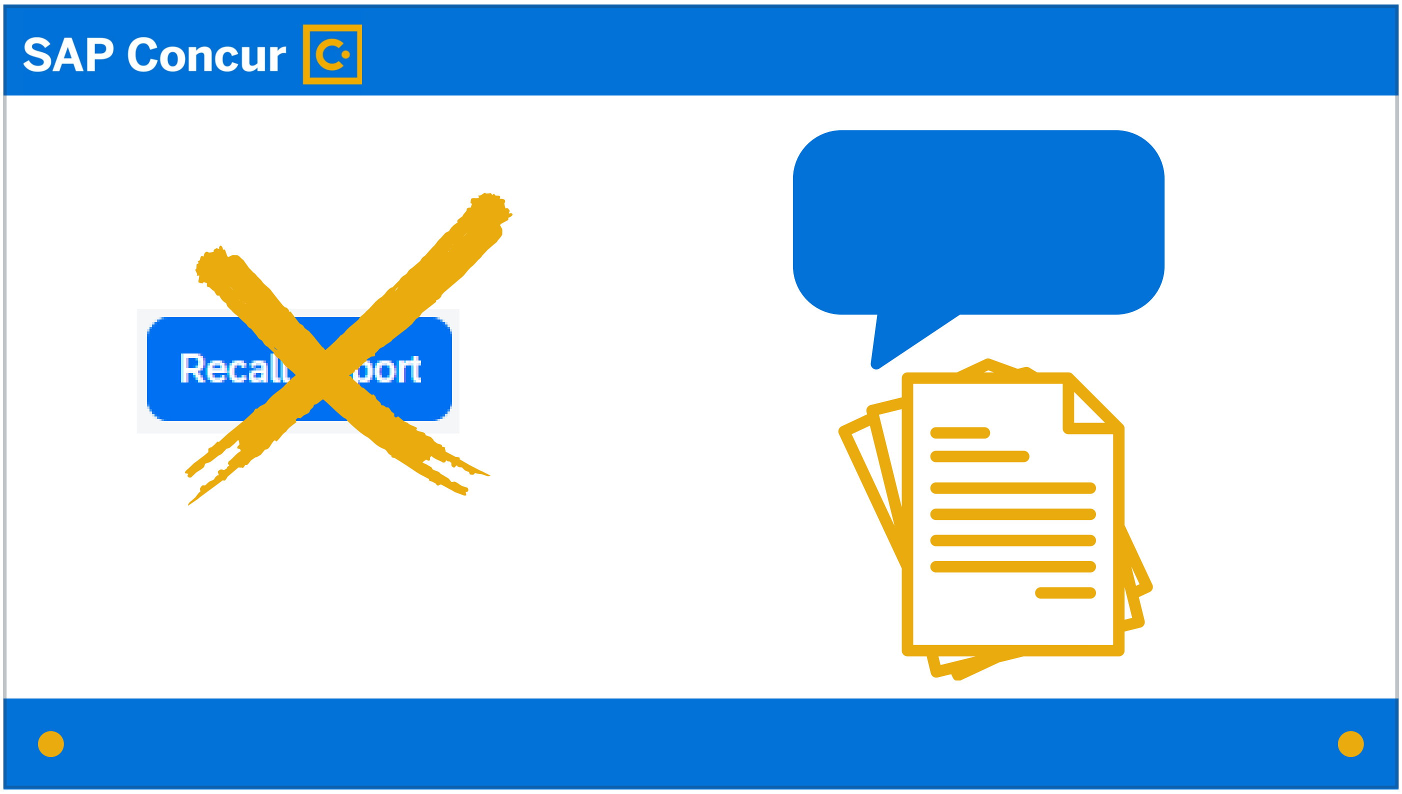



And closing it marks it as complete, which deactivates and archives it.

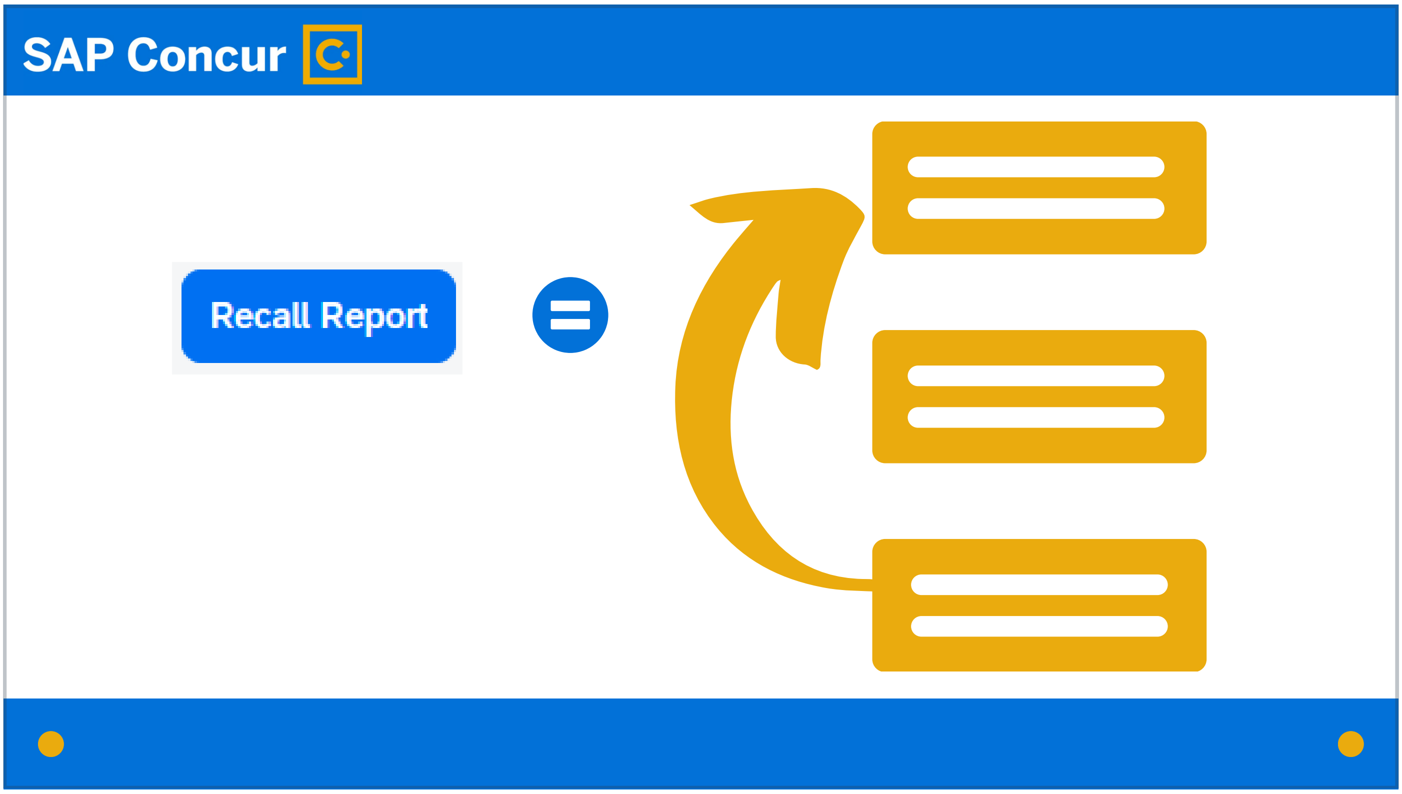

We’ll look next at how to do each of these three things.



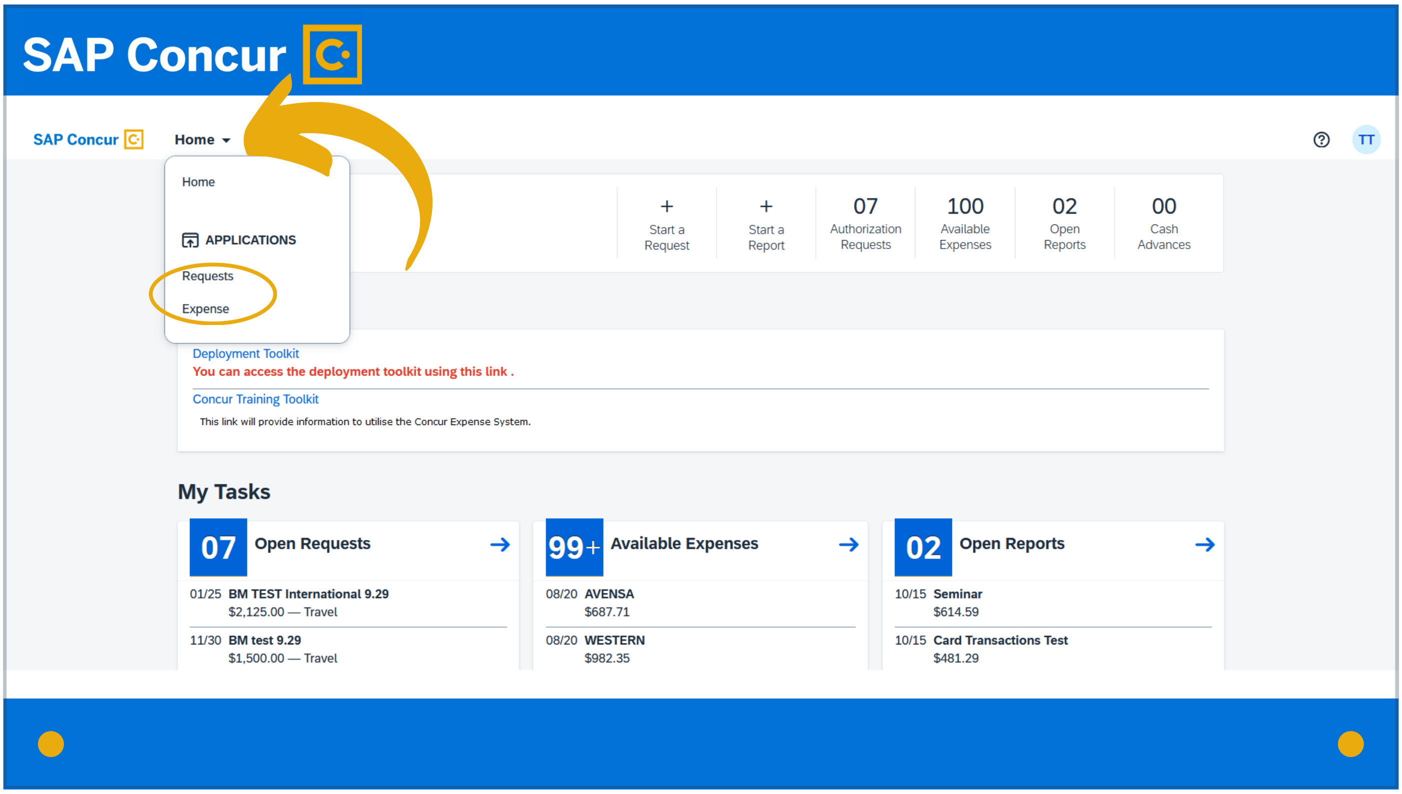

After a request or report has been submitted, at any point in the approval process until the request or report is finally approved, it is possible to recall it. A request or report should only be recalled if its details are in error or change in such a way to be no longer accurate.



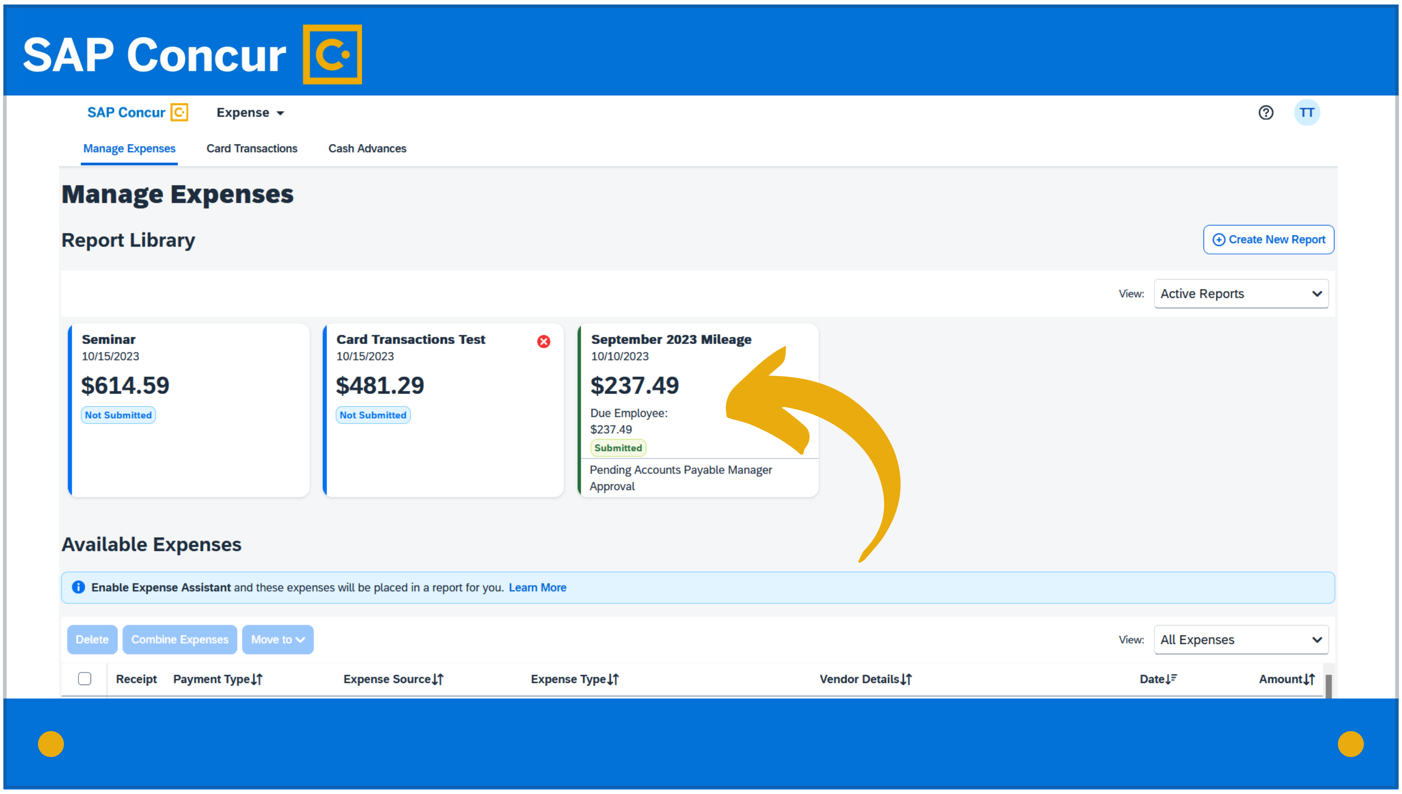

A request or report does not have to be recalled to correct things such as missing documentation or details that can be added as comments. Documentation and comments can be added at any time without having to recall the request or report. This is always preferable to recalling the request or report because, if it is recalled, it then has to be resubmitted,



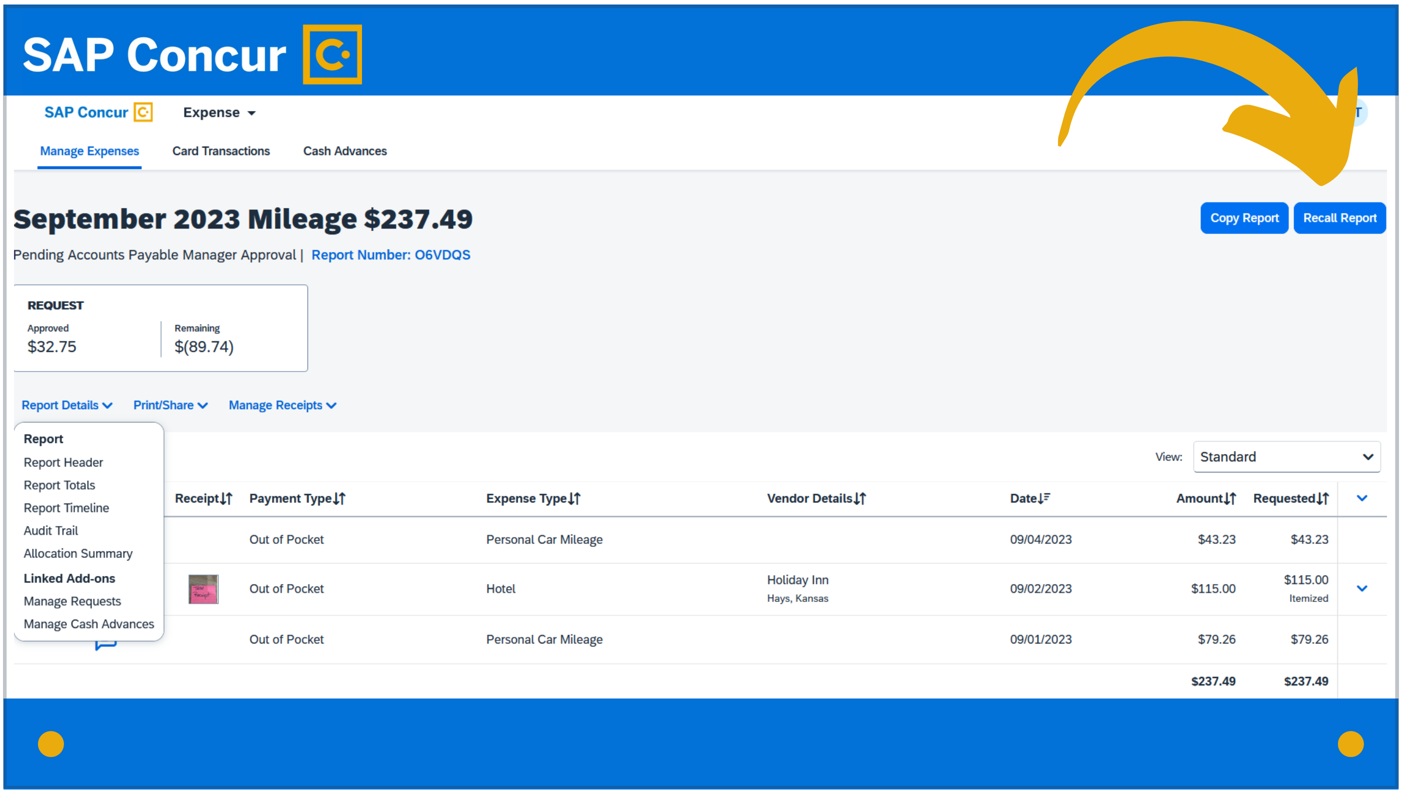

and the entire workflow process has to start over.



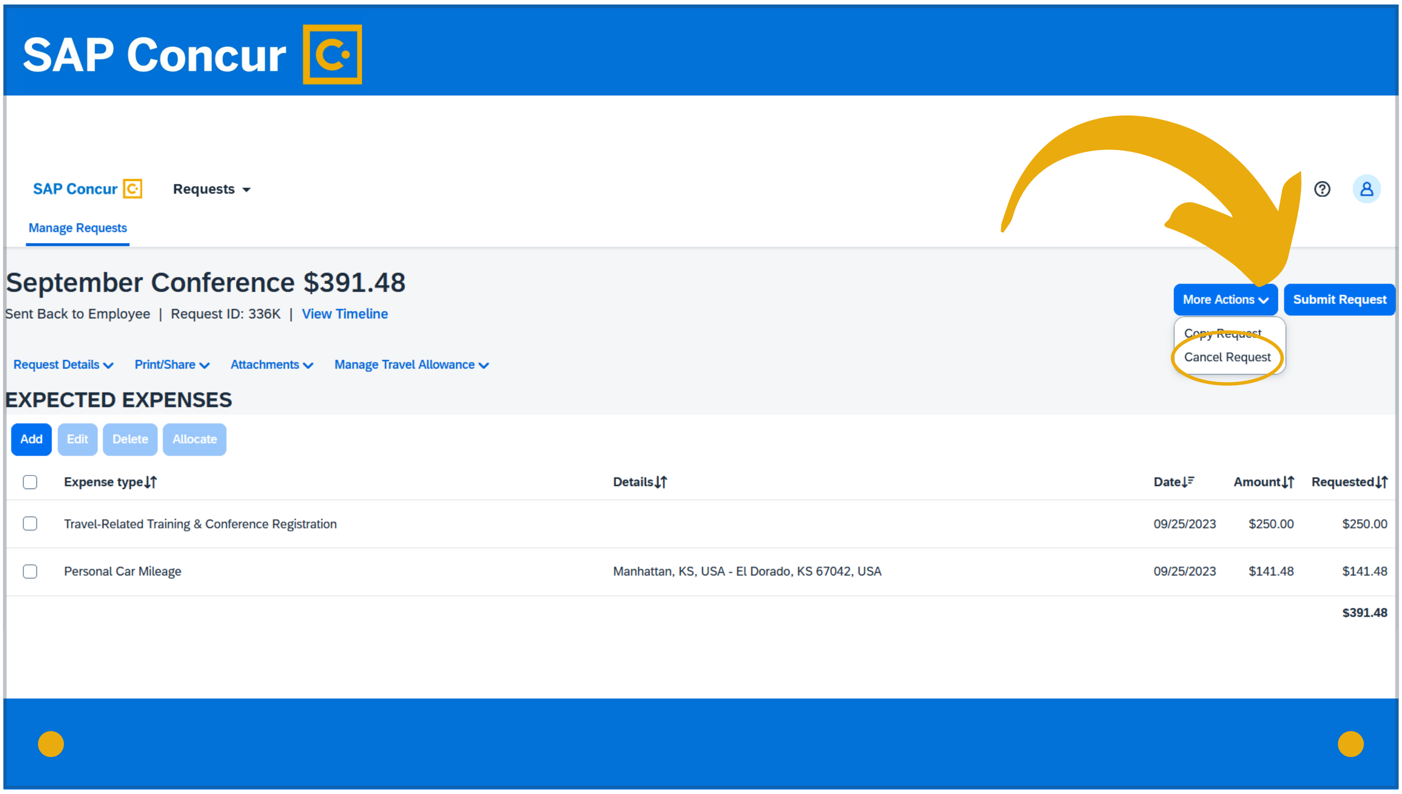

To recall the submitted request or report, go back to the applicable Request or Expense page—which you can get to by clicking on the page identifier dropdown menu and selecting either Request or Expense—




And click on the appropriate request or report box.

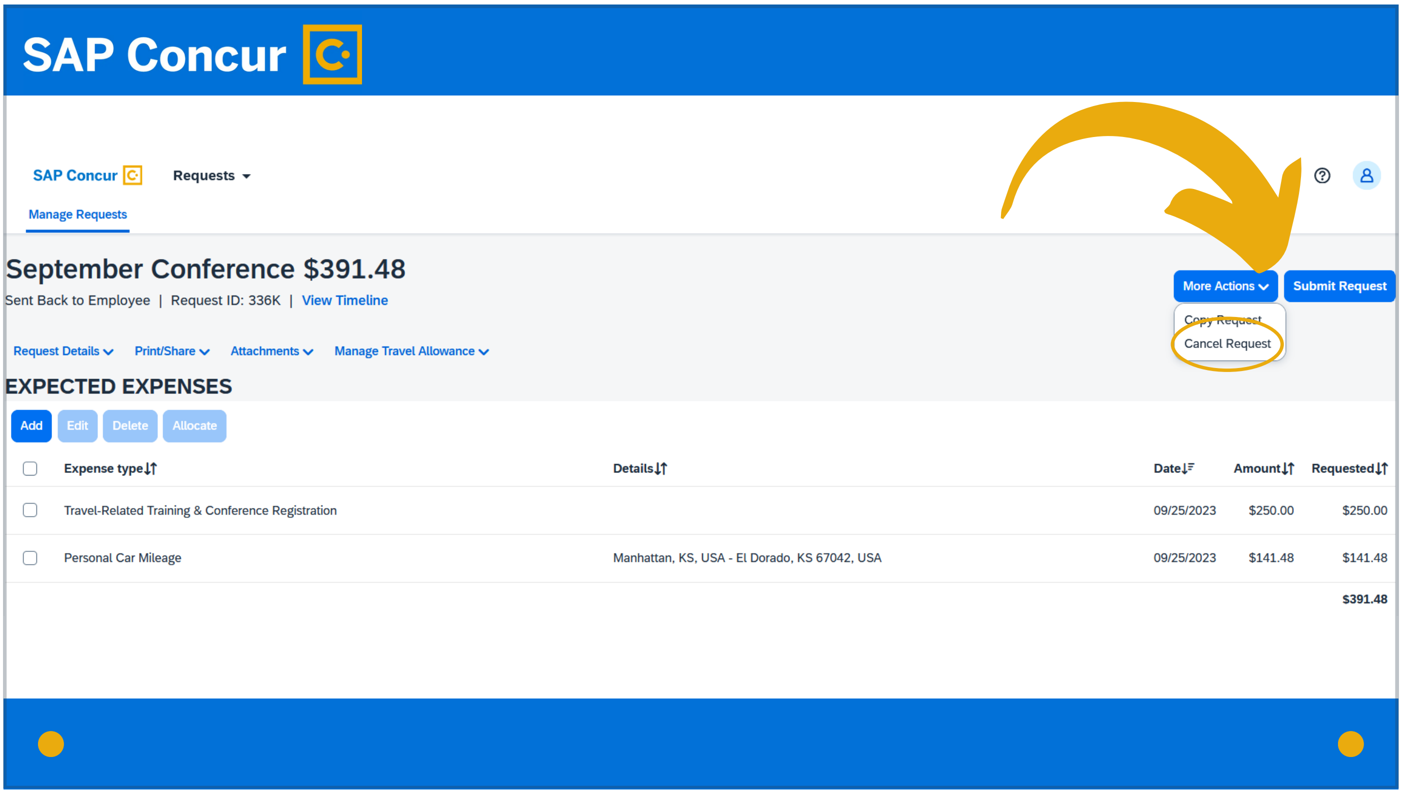



On the next screen, click on the Recall button near the top right of the screen. Correct the request or report as needed and resubmit it--

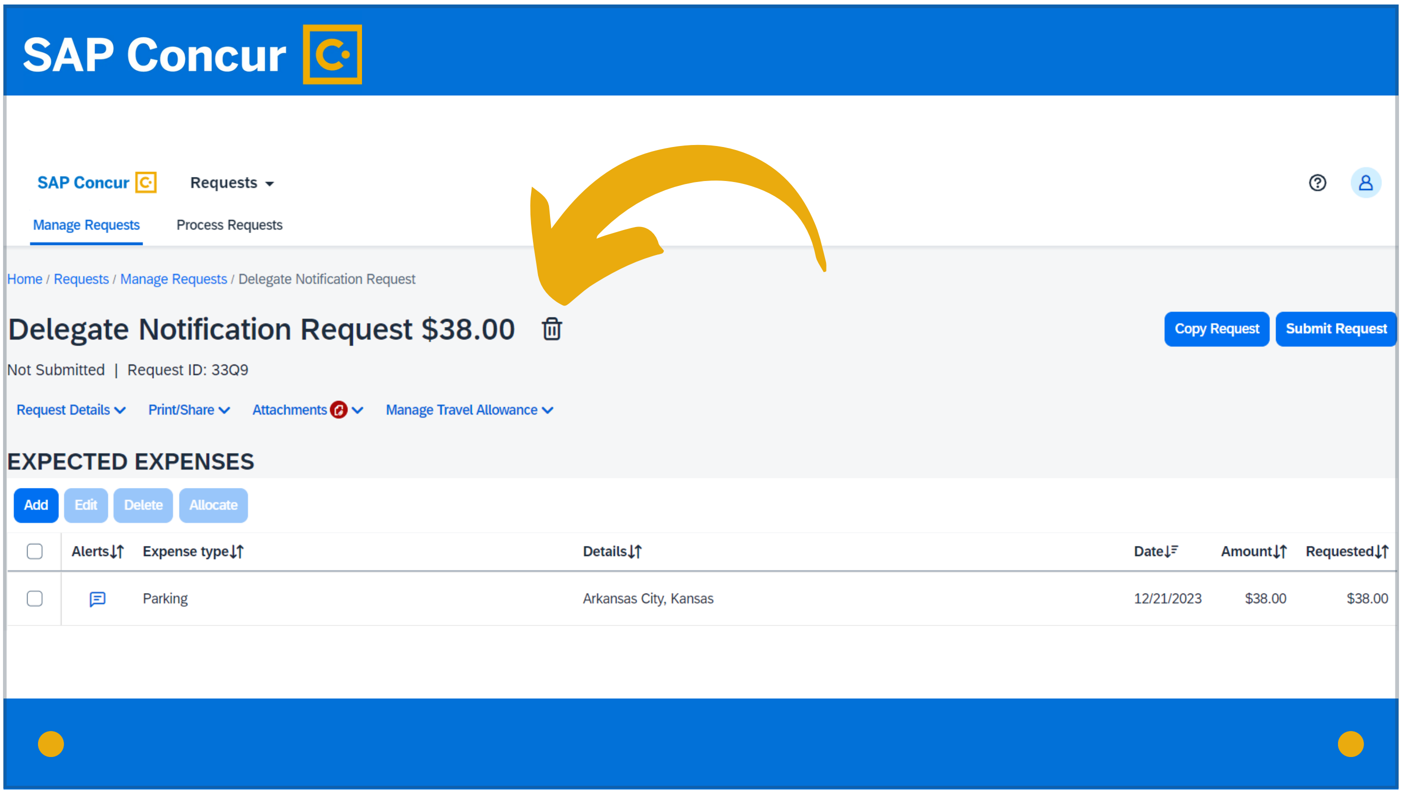



or, if you are wanting to cancel it completely, cancel it.

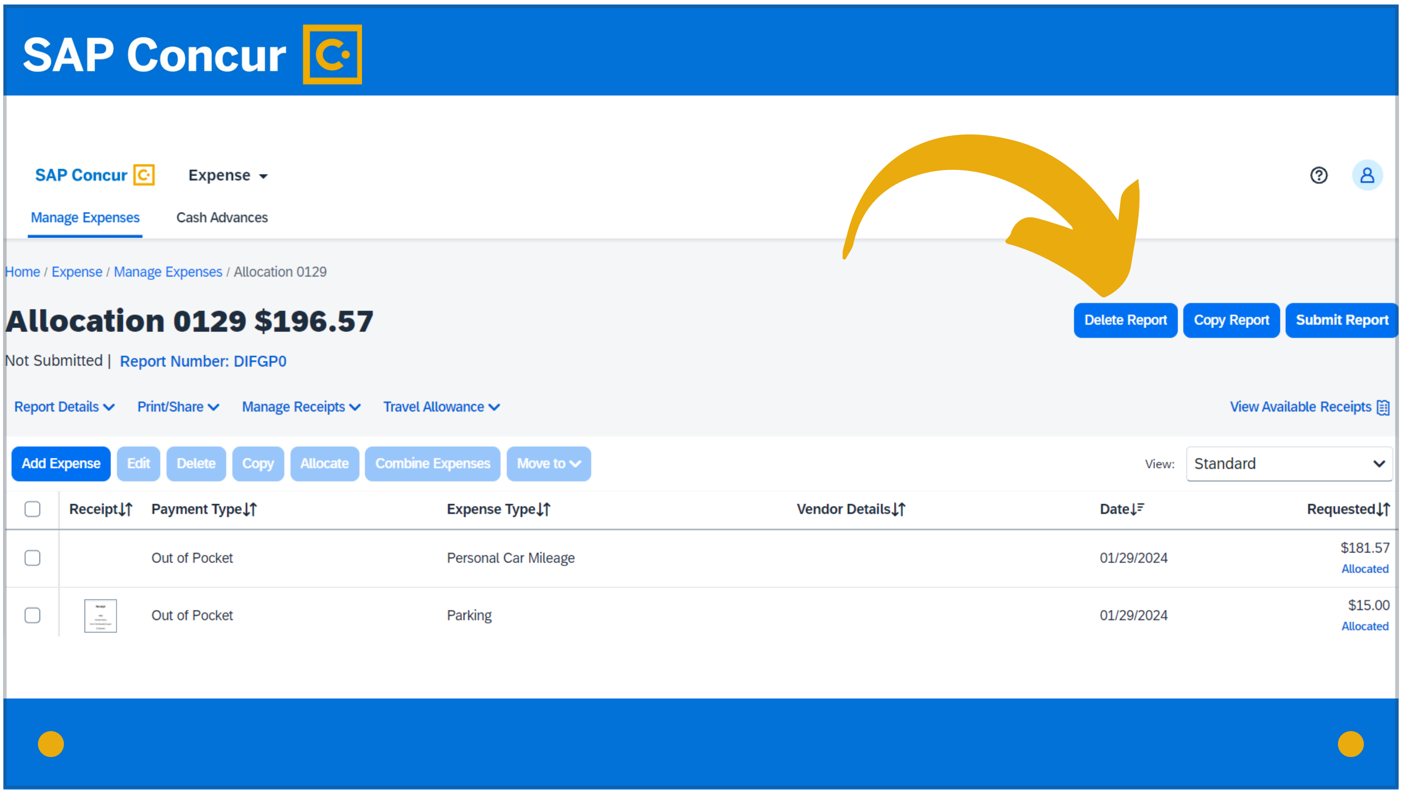

A cancelled request or report cannot be resubmitted. It is no longer active or usable. For this reason, cancelled requests or reports should be rare, occurring only, for example, when the travel associated with the request or report did not take place, eliminating the need for the request or report.



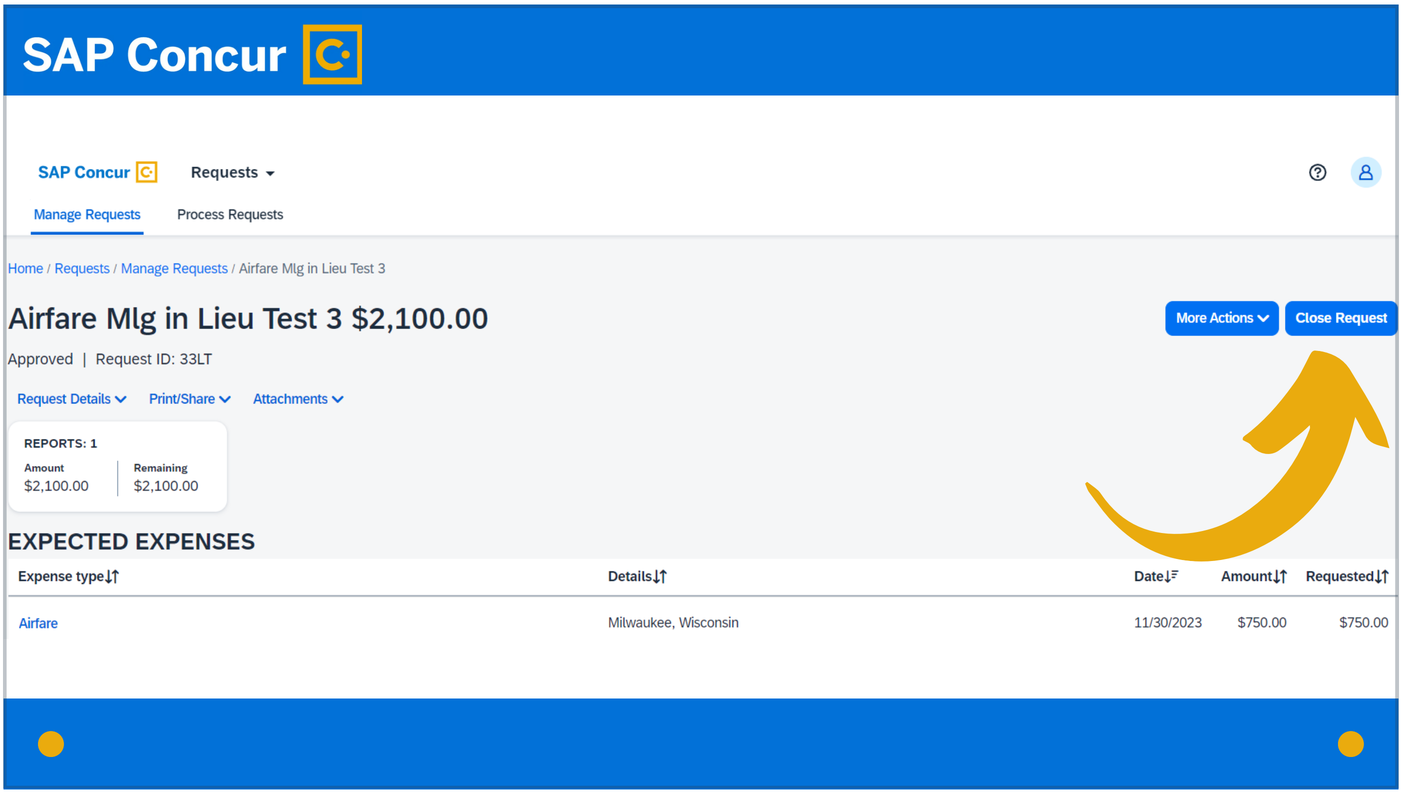

For submitted requests and reports, the cancel option is under the More Actions button on the right of the screen.



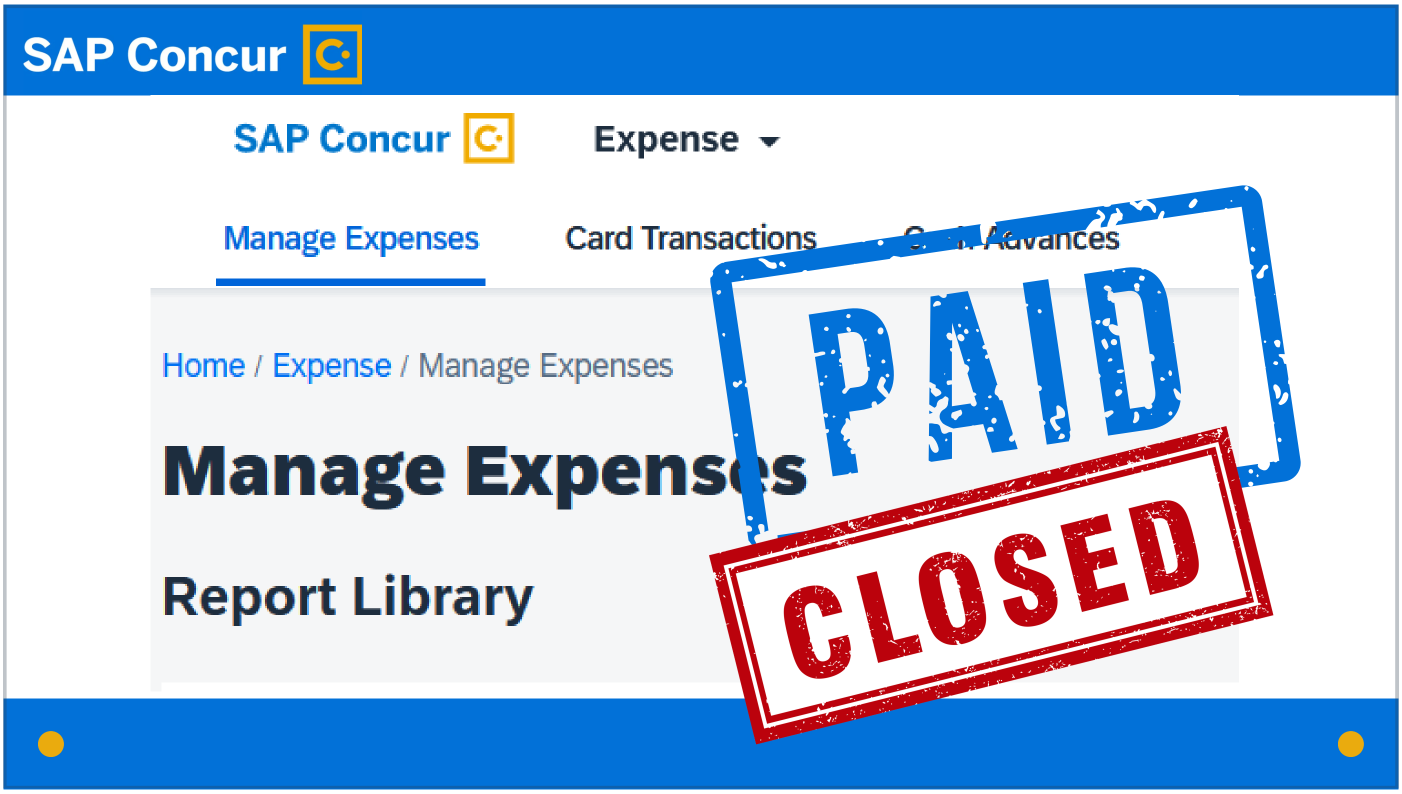

To delete a request or report before it has ever been submitted, click the trash can icon, on requests, at the right of the request name



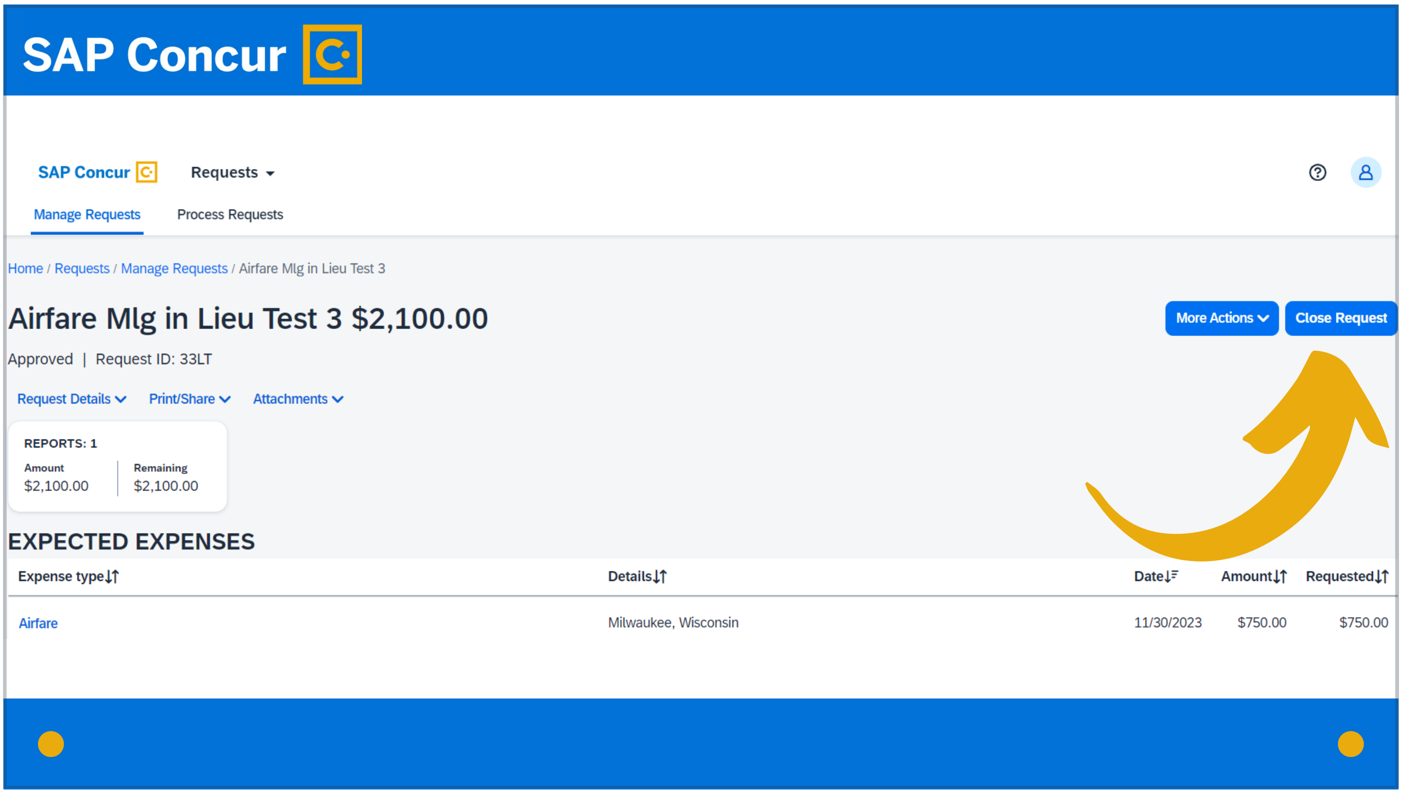

or click the Delete Report button, on reports.



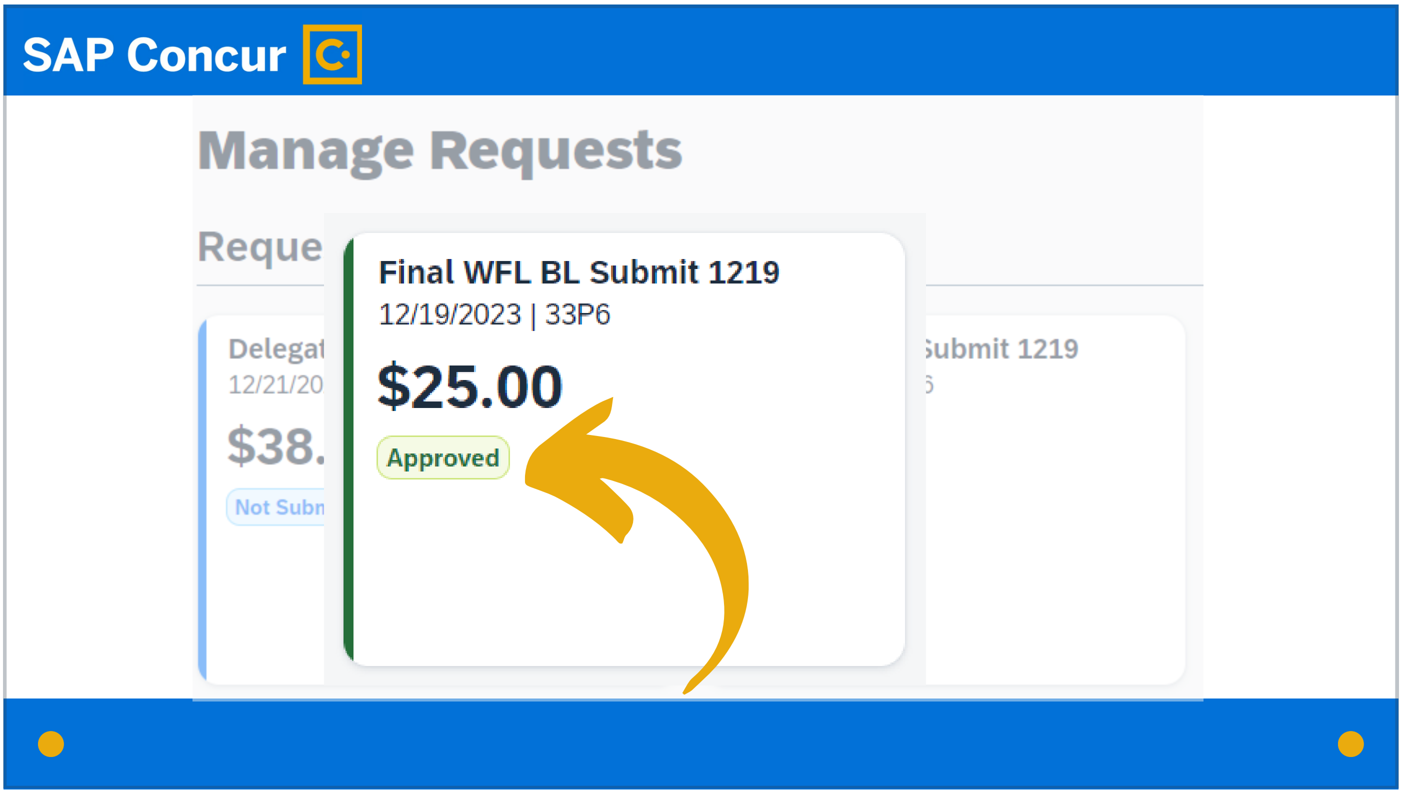

The final process we want to look at is closing a request.



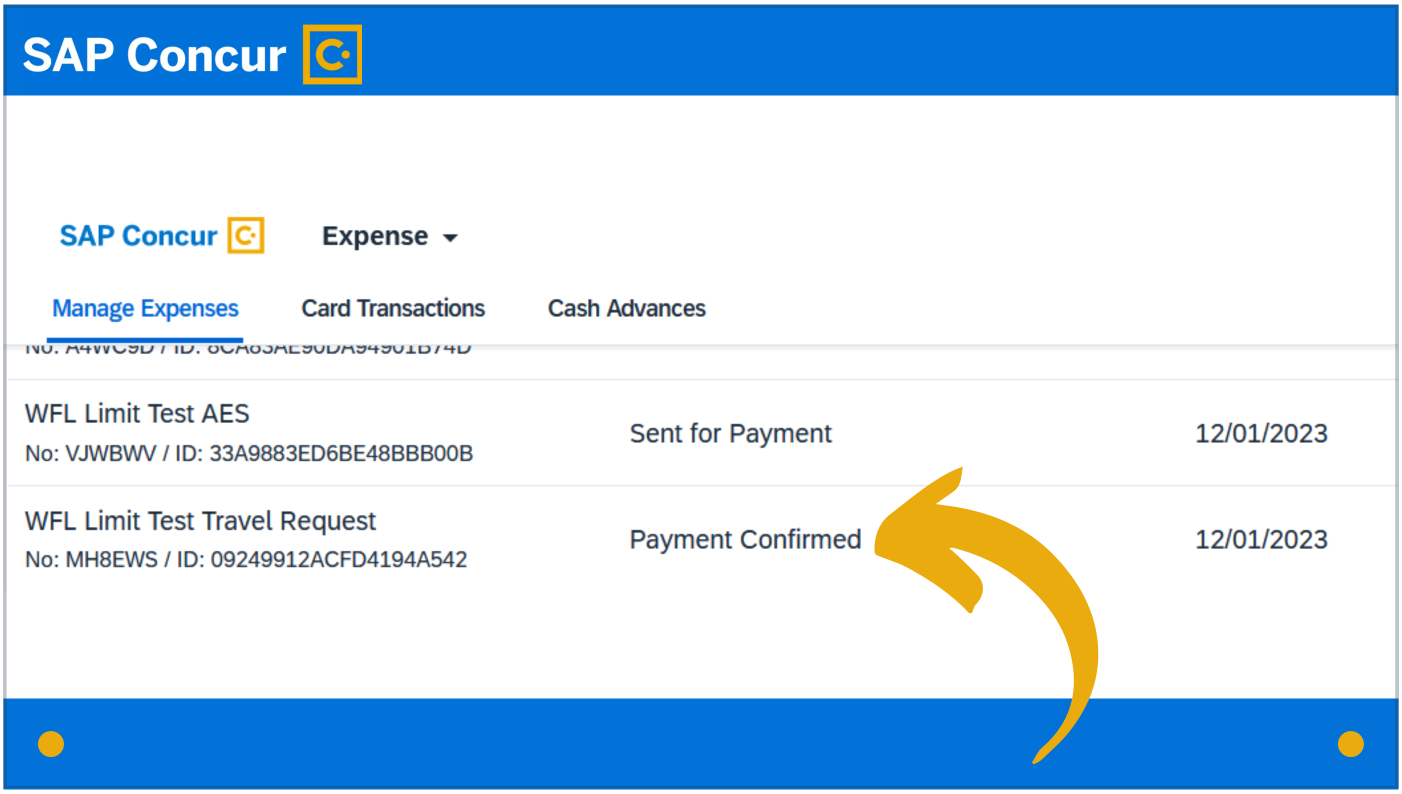

Expense reports automatically close after they are paid in processing.



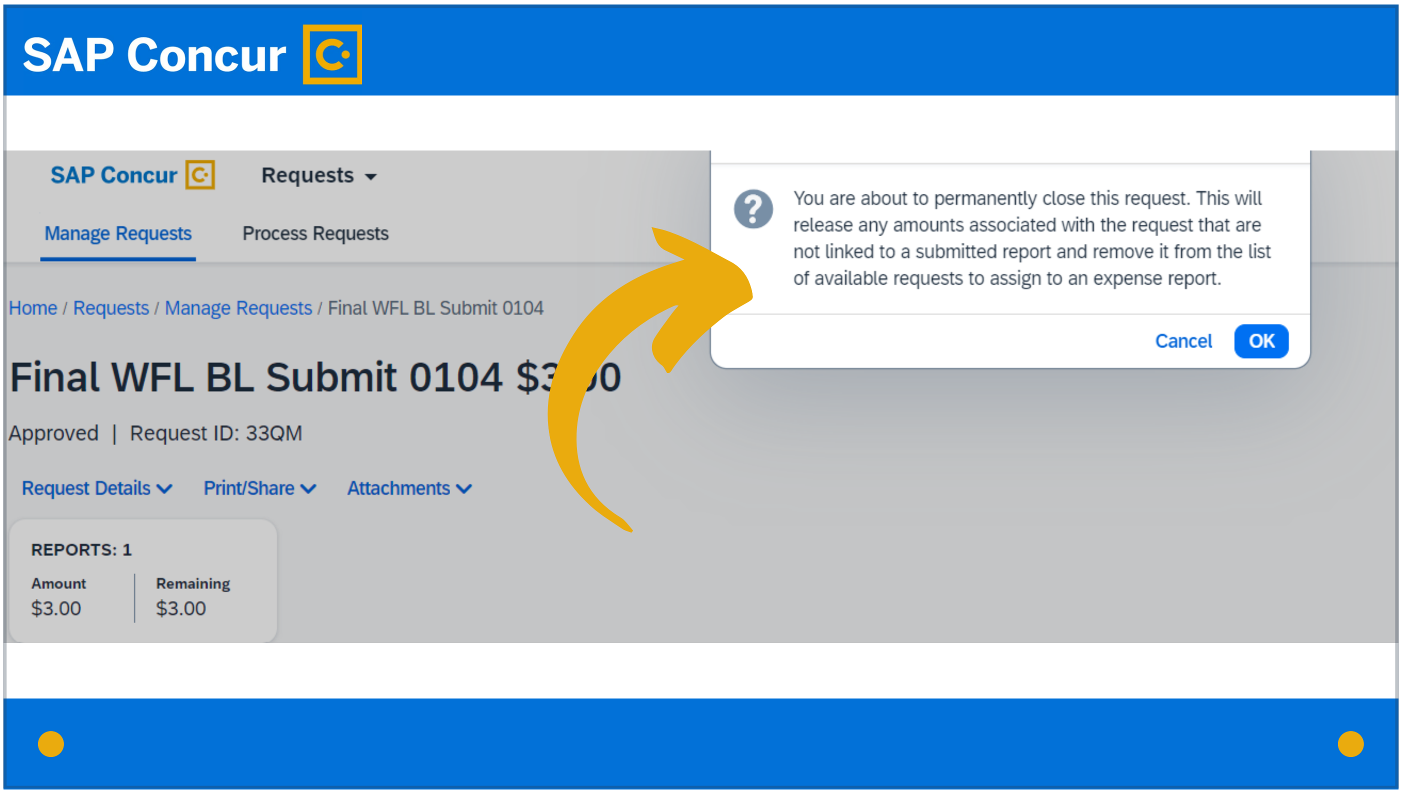

However, requests must be closed manually by clicking the Close button that appears on approved requests at the right of the screen.



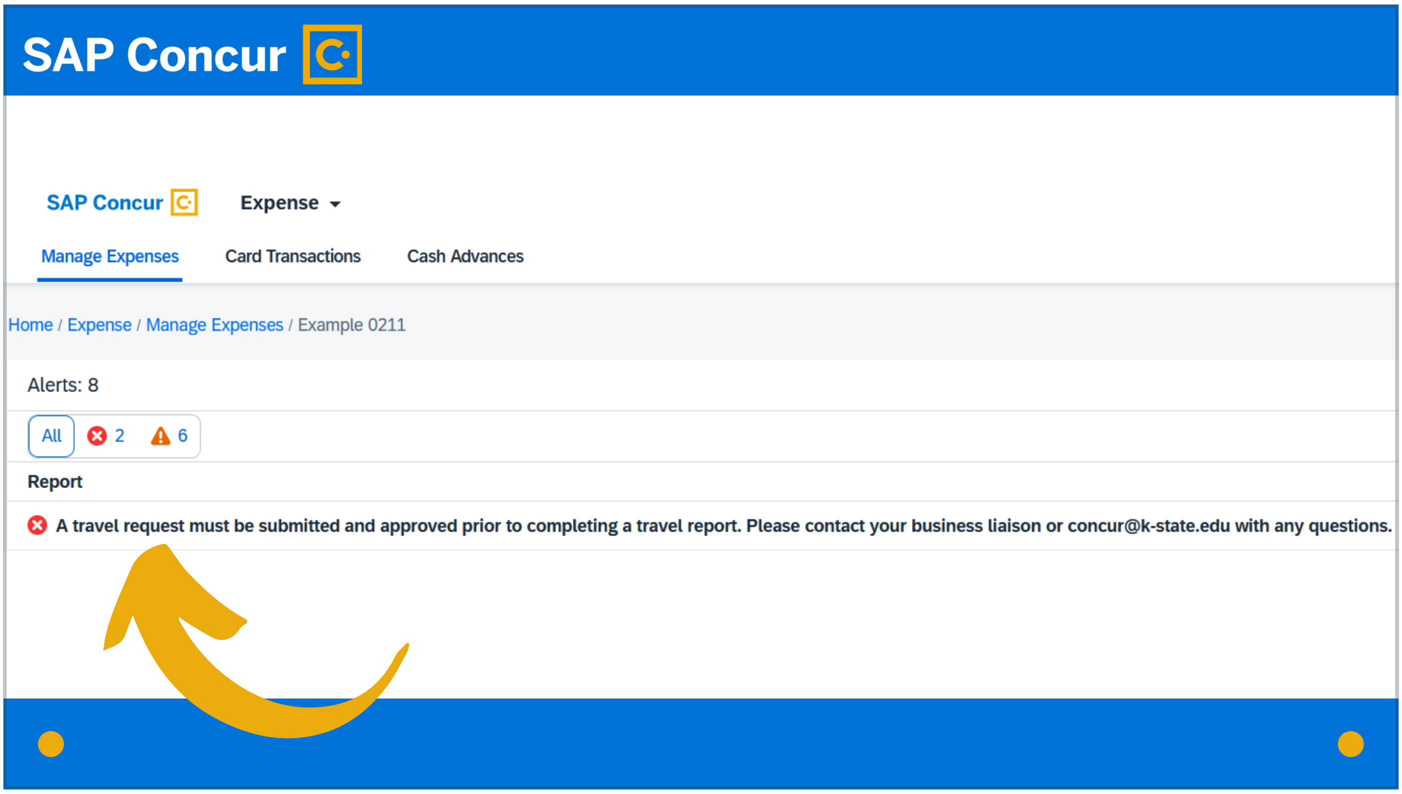

This button is only available on requests with a status of approved,



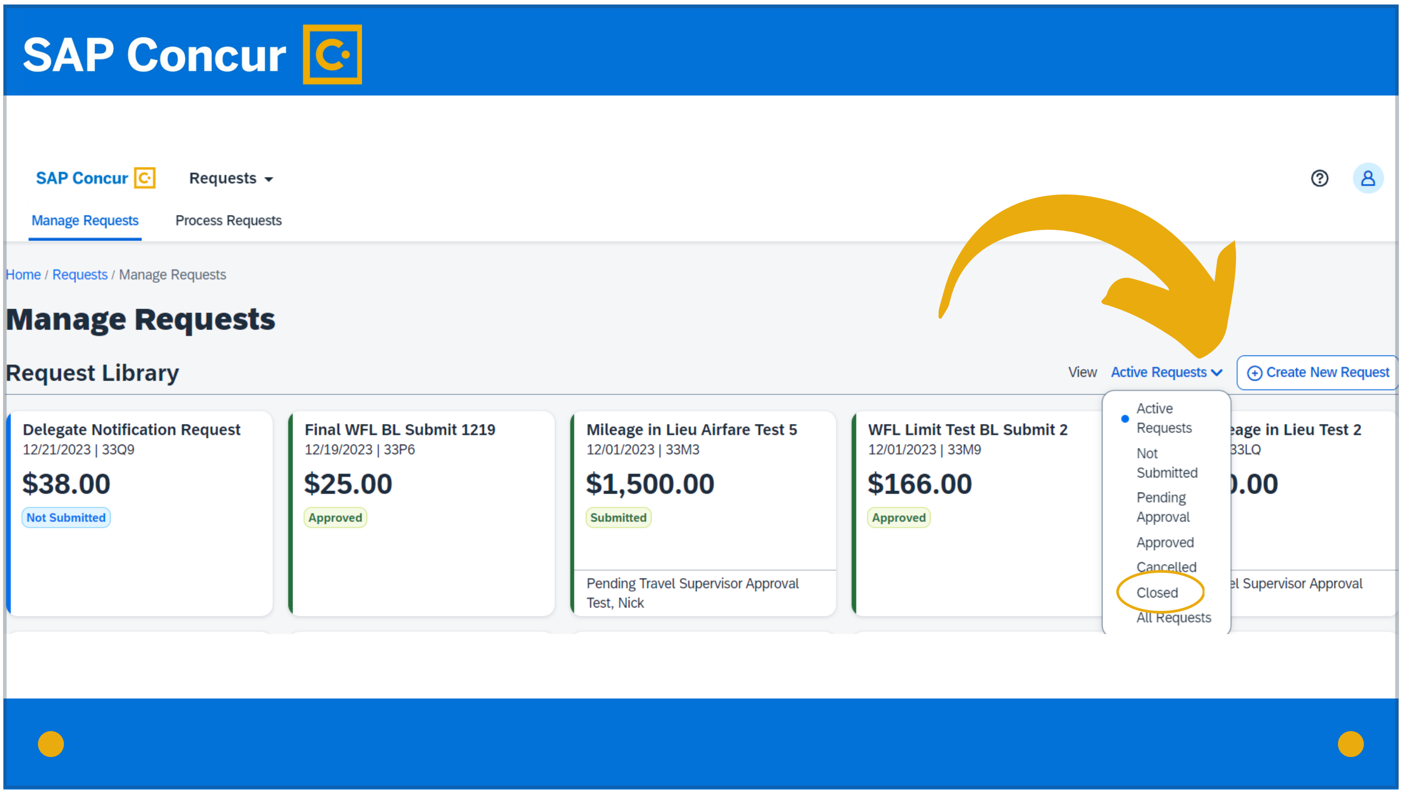

and the request should only be closed after the expense report it is linked to is fully processed and paid.



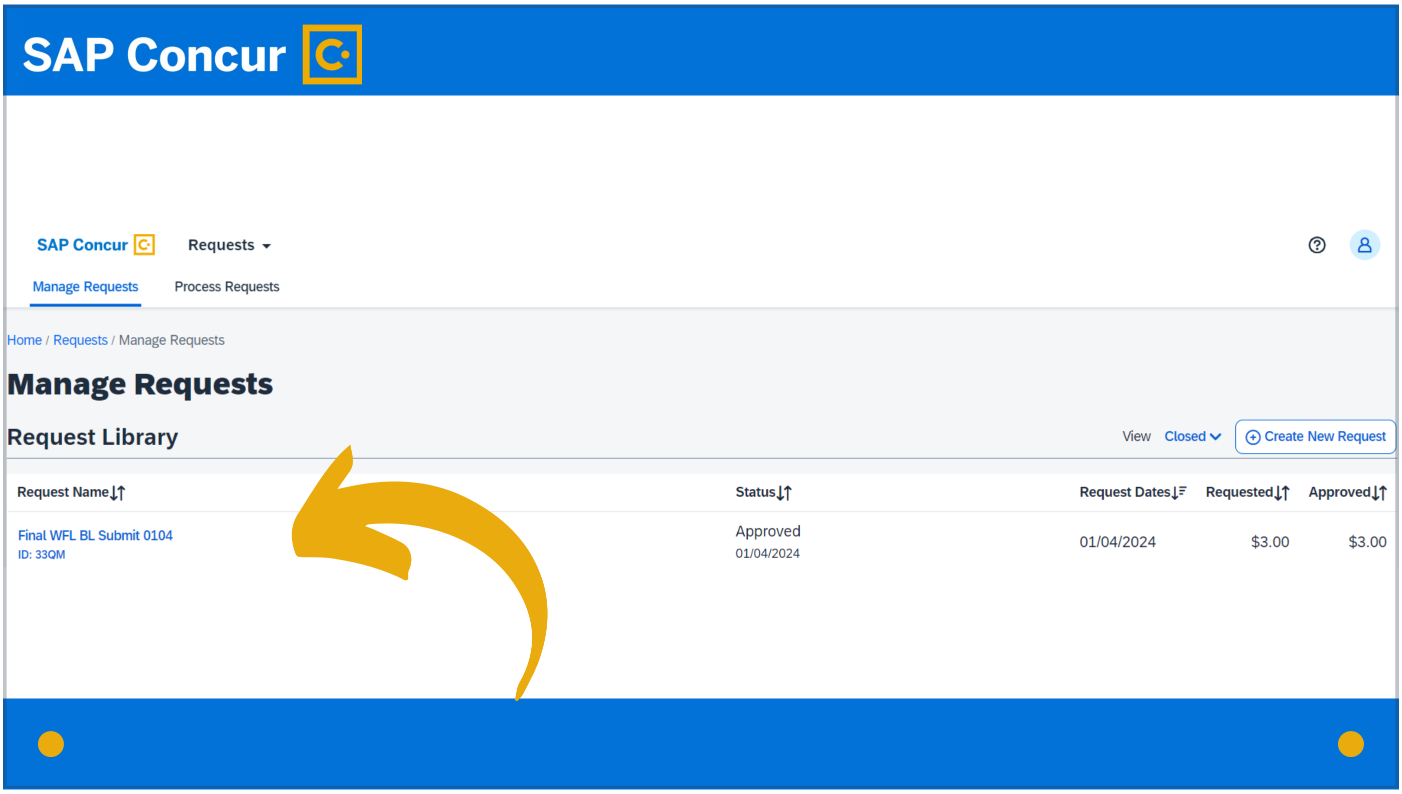

For this reason, if you click the Close button on a travel request, it provides a warning that closing the request removes it from the list of available requests to assign to an expense report.




If you close it prior to linking it to the expense report, the expense report will error out and not be able to be submitted.




Once you close a request, it will no longer show in your request library and it can no longer be changed in any way, but you are able to view it or copy it by changing the View search option to Closed




and selecting the request from the list of closed requests.