

Requests and Expense Reports: **Recalling, Canceling, Closing Requests/Reports**

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

recall **cancel/delete** **close**



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

recall

cancel/delete

close



**reclaim to
correct/cancel**

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

recall

cancel/delete

close



delete entirely

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

recall

cancel/delete

close



**mark complete;
archive**

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.

SAP Concur Expense

Manage Expenses | Card Transactions | Cash Advances

September 2023 Mileage \$237.49

Pending Accounts Payable Manager Approval | Report Number: O6VDQS

Approved: \$32.75 | Remaining: \$(89.74)

Report Details | Print/Share | Manage Receipts

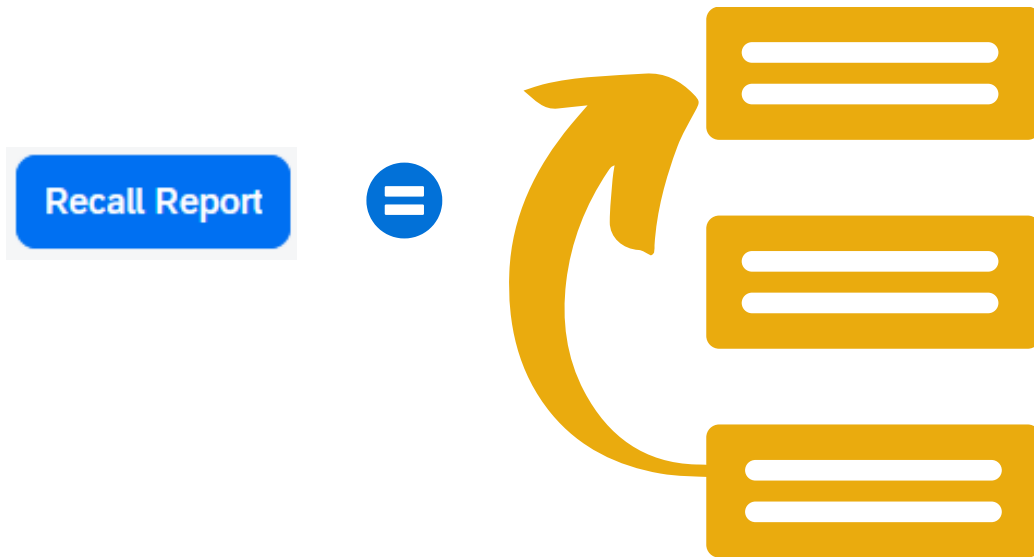
View: Standard

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested	
			Out of Pocket	Personal Car Mileage		09/04/2023	\$43.23	\$43.23	
			Out of Pocket	Hotel	Holiday Inn Hays, Kansas	09/02/2023	\$115.00	\$115.00 Itemized	▼
			Out of Pocket	Personal Car Mileage		09/01/2023	\$79.26	\$79.26	
							\$237.49	\$237.49	

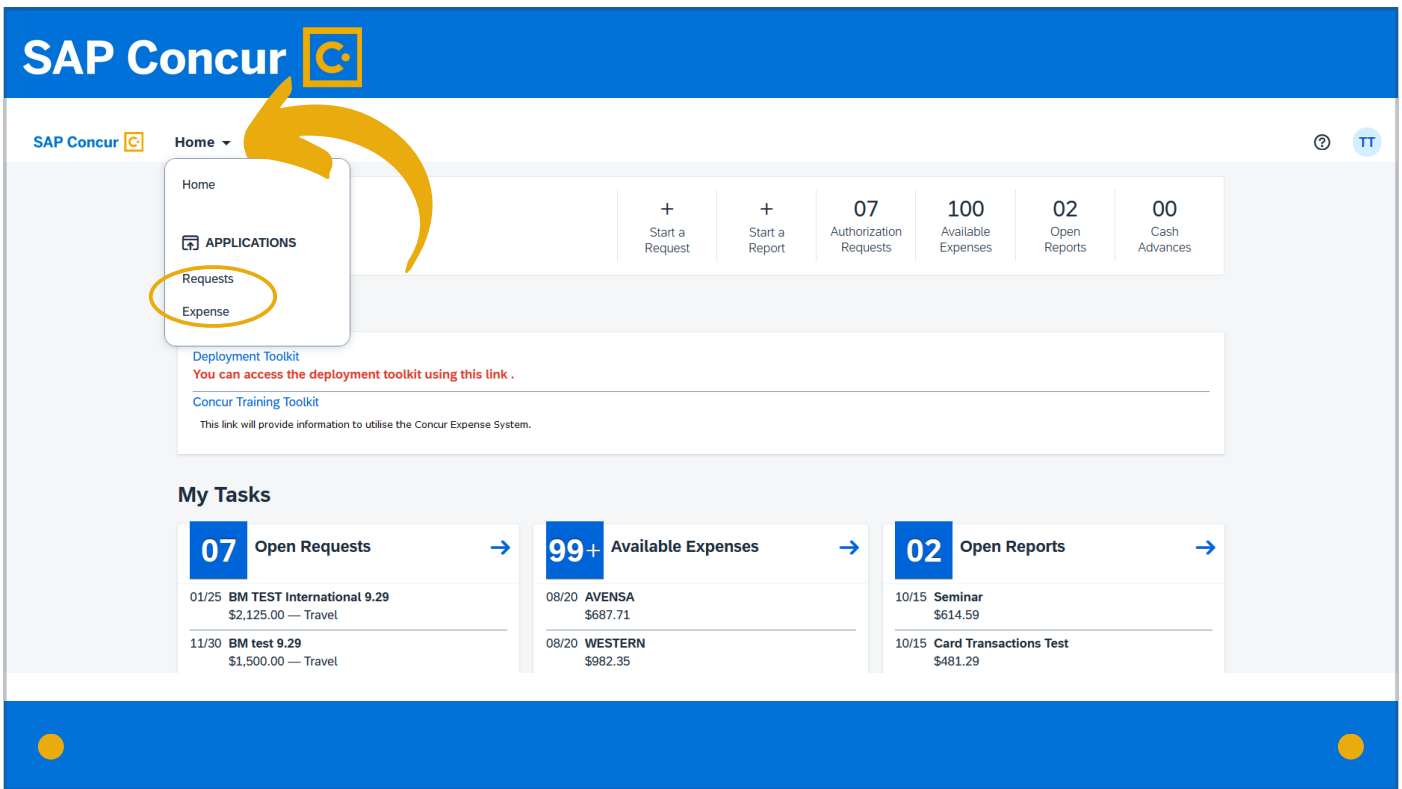
After a request or report has been submitted, at any point in the approval process until the request or report is finally approved, it is possible to recall it. A request or report should only be recalled if its details are in error or change in such a way to be no longer accurate.



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—

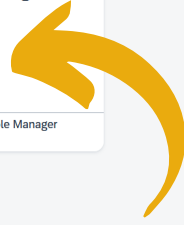
Manage Expenses

Report Library

[Create New Report](#)

View: Active Reports

Seminar 10/15/2023 \$614.59 Not Submitted	Card Transactions Test  10/15/2023 \$481.29 Not Submitted	September 2023 Mileage 10/10/2023 \$237.49 Due Employee: \$237.49 Submitted Pending Accounts Payable Manager Approval
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Available Expenses

Enable Expense Assistant and these expenses will be placed in a report for you. [Learn More](#)

[Delete](#) [Combine Expenses](#) [Move to](#)

View: All Expenses

<input type="checkbox"/>	Receipt	Payment Type	Expense Source	Expense Type	Vendor Details	Date	Amount
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And click on the appropriate request or report box.

SAP Concur Expense

Manage Expenses | Card Transactions | Cash Advances

September 2023 Mileage \$237.49

Pending Accounts Payable Manager Approval | Report Number: O6VDQS

Copy Report | Recall Report

REQUEST
 Approved: \$32.75 | Remaining: \$(89.74)

Report Details | Print/Share | Manage Receipts

View: Standard

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
	Out of Pocket	Personal Car Mileage		09/04/2023	\$43.23	\$43.23
	Out of Pocket	Hotel	Holiday Inn Hays, Kansas	09/02/2023	\$115.00	\$115.00 Itemized
	Out of Pocket	Personal Car Mileage		09/01/2023	\$79.26	\$79.26
					\$237.49	\$237.49

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--



September Conference \$391.48

Sent Back to Employee | Request ID: 336K | [View Timeline](#)

[Request Details](#) ▾ [Print/Share](#) ▾ [Attachments](#) ▾ [Manage Travel Allowance](#) ▾

[More Actions](#) ▾ [Submit Request](#)

- [Copy Request](#)
- [Cancel Request](#)

EXPECTED EXPENSES

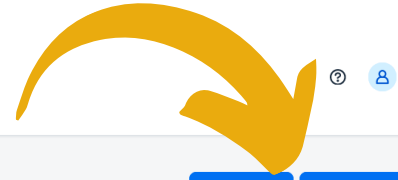
[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type ^{↓↑}	Details ^{↓↑}	Date ^{↓↑}	Amount ^{↓↑}	Requested ^{↓↑}
<input type="checkbox"/>	Travel-Related Training & Conference Registration		09/25/2023	\$250.00	\$250.00
<input type="checkbox"/>	Personal Car Mileage	Manhattan, KS, USA - El Dorado, KS 67042, USA	09/25/2023	\$141.48	\$141.48
					\$391.48

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.



September Conference \$391.48

Sent Back to Employee | Request ID: 336K | [View Timeline](#)

[Request Details](#) ▾ [Print/Share](#) ▾ [Attachments](#) ▾ [Manage Travel Allowance](#) ▾

[More Actions](#) ▾ [Submit Request](#)

- [Copy Request](#)
- [Cancel Request](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Travel-Related Training & Conference Registration		09/25/2023	\$250.00	\$250.00
<input type="checkbox"/>	Personal Car Mileage	Manhattan, KS, USA - El Dorado, KS 67042, USA	09/25/2023	\$141.48	\$141.48
					\$391.48

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



[Home](#) / [Requests](#) / [Manage Requests](#) / [Delegate Notification Request](#)

Delegate Notification Request \$38.00

[Copy Request](#)


[Submit Request](#)

Not Submitted | Request ID: 3309

[Request Details](#) ▾ [Print/Share](#) ▾ [Attachments](#)  ▾ [Manage Travel Allowance](#) ▾

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>		Parking	Arkansas City, Kansas	12/21/2023	\$38.00	\$38.00


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

Allocation 0129 \$196.57

[Delete Report](#) [Copy Report](#) [Submit Report](#)


Not Submitted | Report Number: DIFGP0

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾ [Travel Allowance](#) ▾

[View Available Receipts](#) 

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#) ▾

View: [Standard](#) ▾

<input type="checkbox"/>	Receipt↑	Payment Type↑	Expense Type↓	Vendor Details↑	Date↓	Requested↓
<input type="checkbox"/>		Out of Pocket	Personal Car Mileage		01/29/2024	\$181.57 <small>Allocated</small>
<input type="checkbox"/>		Out of Pocket	Parking		01/29/2024	\$15.00 <small>Allocated</small>

or click the Delete Report button, on reports.

Airfare Mlg in Lieu Test 3 \$2,100.00

[More Actions ▾](#) [Close Request](#)

Approved | Request ID: 33LT

[Request Details ▾](#) [Print/Share ▾](#) [Attachments ▾](#)

REPORTS: 1

Amount	Remaining
\$2,100.00	\$2,100.00

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Airfare	Milwaukee, Wisconsin	11/30/2023	\$750.00	\$750.00



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

Home / Expense / Manage Expenses

Manage Expenses

Report Library



Expense reports automatically close after they are paid in processing.

Airfare Mlg in Lieu Test 3 \$2,100.00

[More Actions ▾](#) [Close Request](#)

Approved | Request ID: 33LT

[Request Details ▾](#) [Print/Share ▾](#) [Attachments ▾](#)

REPORTS: 1

Amount	Remaining
\$2,100.00	\$2,100.00

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Airfare	Milwaukee, Wisconsin	11/30/2023	\$750.00	\$750.00



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

Manage Requests

Reque

Delegat
12/21/20

\$38.

Not Subn

Final WFL BL Submit 1219

12/19/2023 | 33P6

\$25.00

Approved

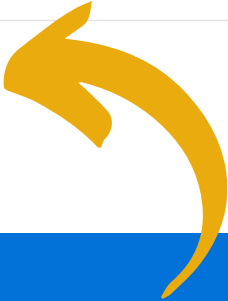


Submit 1219

3

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

No: A4WC9D / ID: 6CA03AE90DA94901B74D		
WFL Limit Test AES No: VJWBWV / ID: 33A9883ED6BE48BBB00B	Sent for Payment	12/01/2023
WFL Limit Test Travel Request No: MH8EWS / ID: 09249912ACFD4194A542	Payment Confirmed	12/01/2023



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

The screenshot shows the SAP Concur interface. At the top, there is a blue header with the SAP Concur logo. Below the header, there is a navigation bar with 'SAP Concur' and 'Requests' dropdown. Under 'Requests', there are two options: 'Manage Requests' (which is underlined) and 'Process Requests'. The main content area shows a breadcrumb trail: 'Home / Requests / Manage Requests / Final WFL BL Submit 0104'. Below this, the title is 'Final WFL BL Submit 0104 \$3.00'. Underneath the title, it says 'Approved | Request ID: 33QM'. There are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. Below these is a section titled 'REPORTS: 1' with a table:

Amount	Remaining
\$3.00	\$3.00

A yellow arrow points from the 'Close' button in the 'Request Details' dropdown to a warning dialog box. The dialog box has a question mark icon and the following text: 'You are about to permanently close this request. This will release any amounts associated with the request that are not linked to a submitted report and remove it from the list of available requests to assign to an expense report.' At the bottom of the dialog box, there are two buttons: 'Cancel' and 'OK'.

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.

SAP Concur  Expense ▾


Manage Expenses Card Transactions Cash Advances

Home / Expense / Manage Expenses / Example 0211

Alerts: 8

All  2  6

Report

 A travel request must be submitted and approved prior to completing a travel report. Please contact your business liaison or concur@k-state.edu with any questions.



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.

The screenshot displays the SAP Concur 'Manage Requests' interface. At the top, the SAP Concur logo is visible. Below it, there are navigation tabs for 'Manage Requests' and 'Process Requests'. The main heading is 'Manage Requests', followed by a breadcrumb trail 'Home / Requests / Manage Requests'. A 'Request Library' section contains several request cards. A yellow arrow points to a dropdown menu in the top right corner of the request library, which is currently open and showing a list of status options: Active, Requests, Not Submitted, Pending Approval, Approved, Cancelled, Closed, and All Requests. The 'Closed' option is circled in yellow. The request cards show details such as request title, date, amount, and status. For example, one card shows 'Delegate Notification Request' for \$38.00 with a 'Not Submitted' status, while others show 'Approved' or 'Submitted' statuses.

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

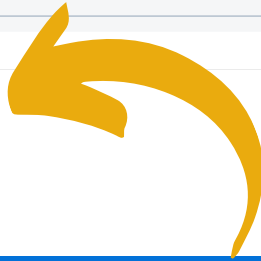
Manage Requests

Request Library

View [Closed](#) ▾

[Create New Request](#)

Request Name↓↑	Status↓↑	Request Dates↓↑	Requested↓↑	Approved↓↑
Final WFL BL Submit 0104 ID: 33QM	Approved 01/04/2024	01/04/2024	\$3.00	\$3.00



and selecting the request from the list of closed requests.