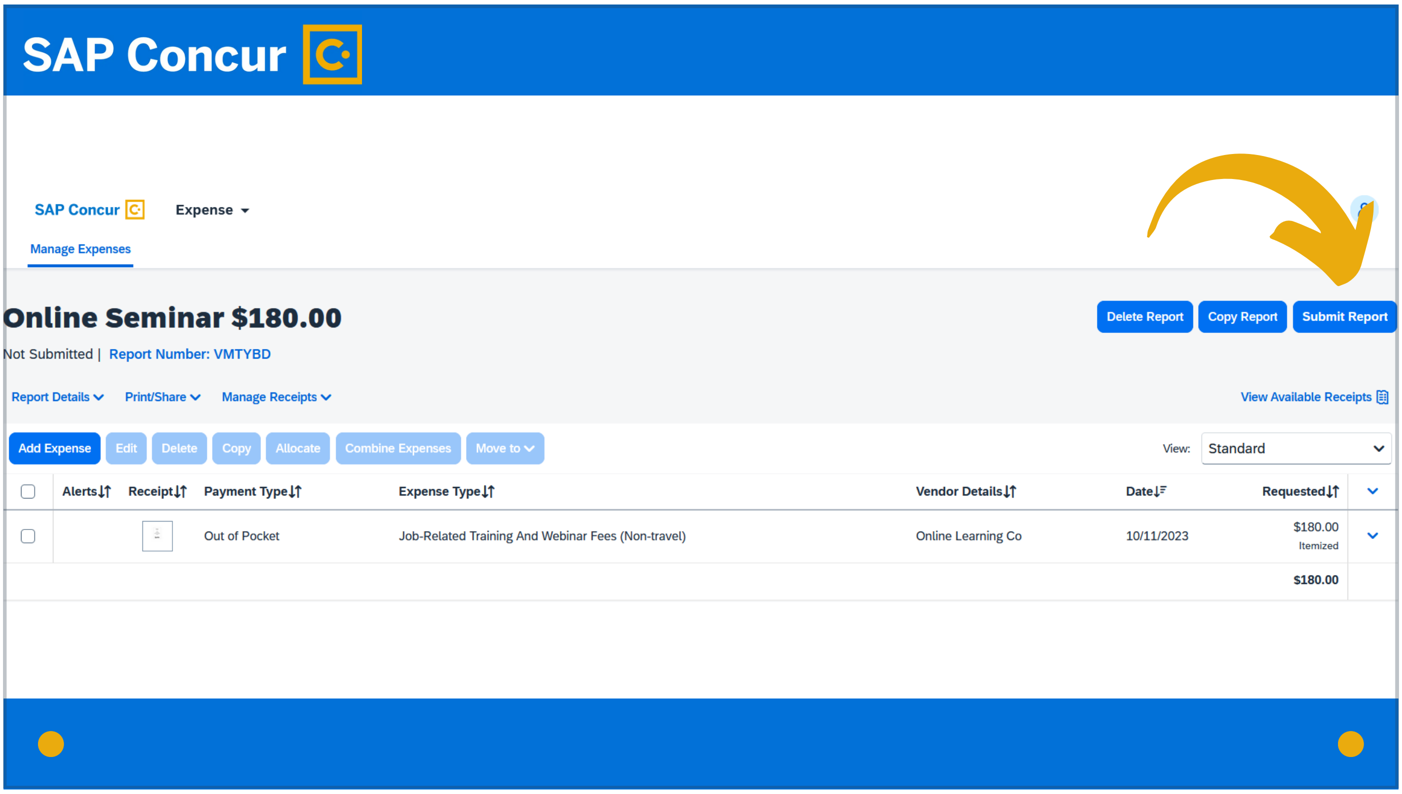
SAP Concur

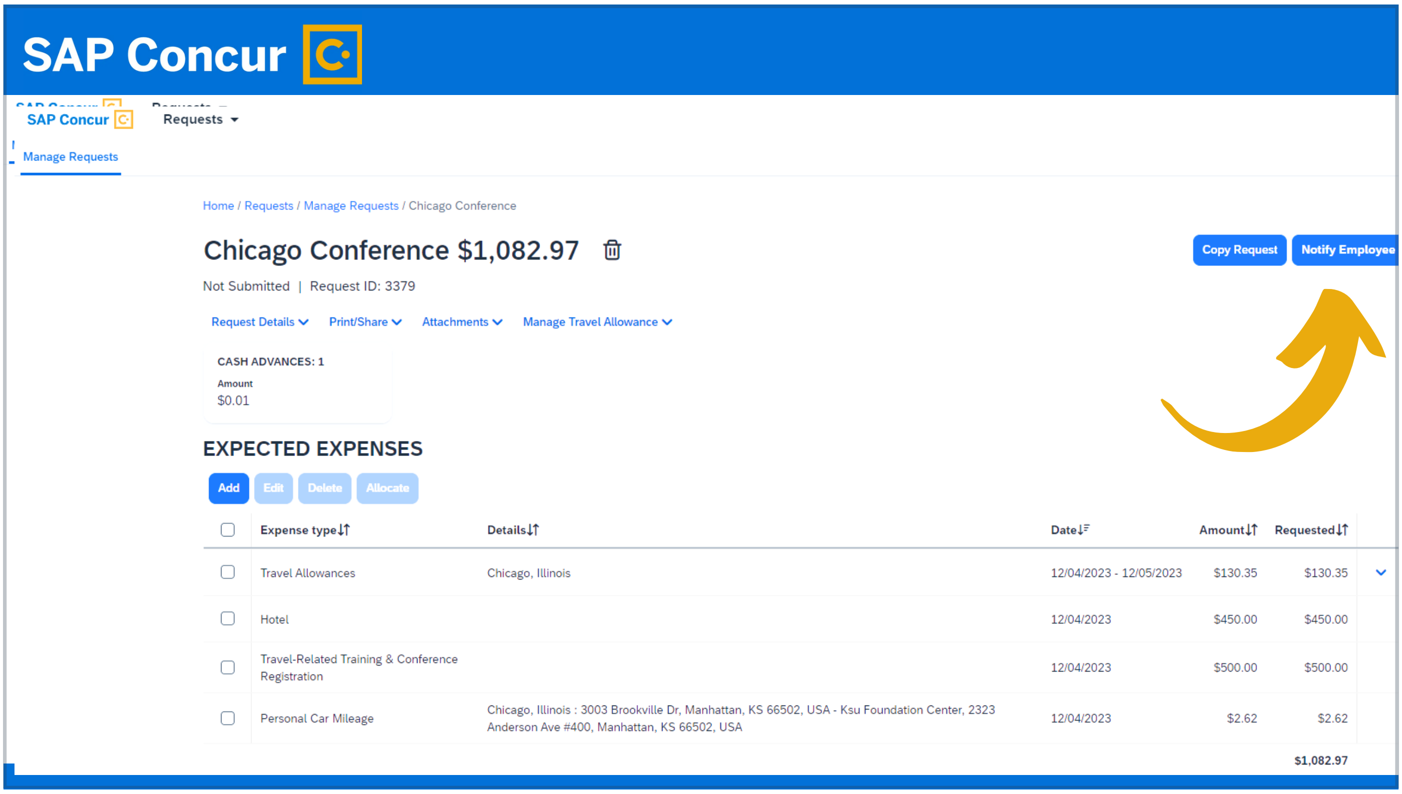
Requests and Expense Reports:

Submitting Requests & Reports

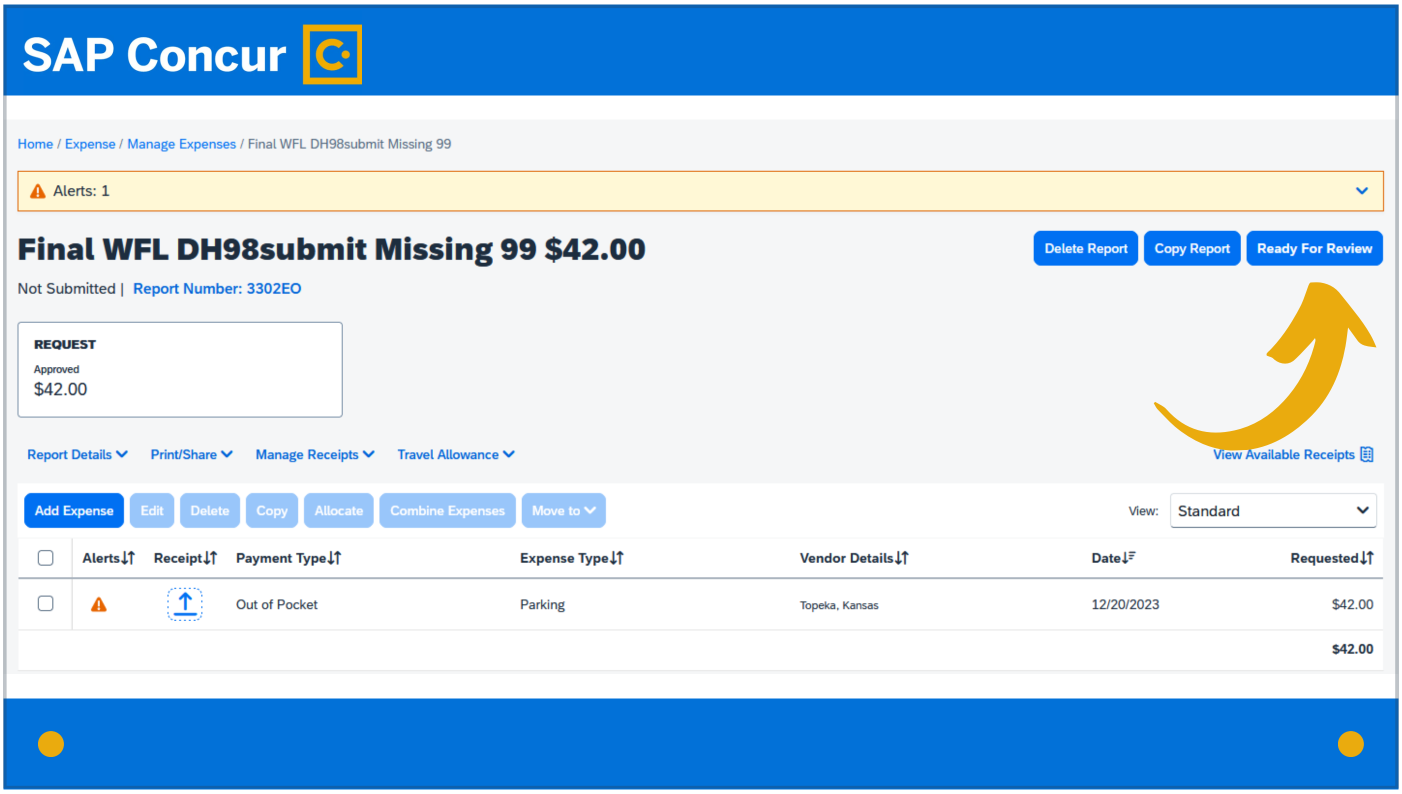
Welcome to our training on submitting requests or reports in Concur.



Once all details for a request or report are complete and you are ready to submit it for approval, click Submit Report at the top right of the screen, if you are the employee—

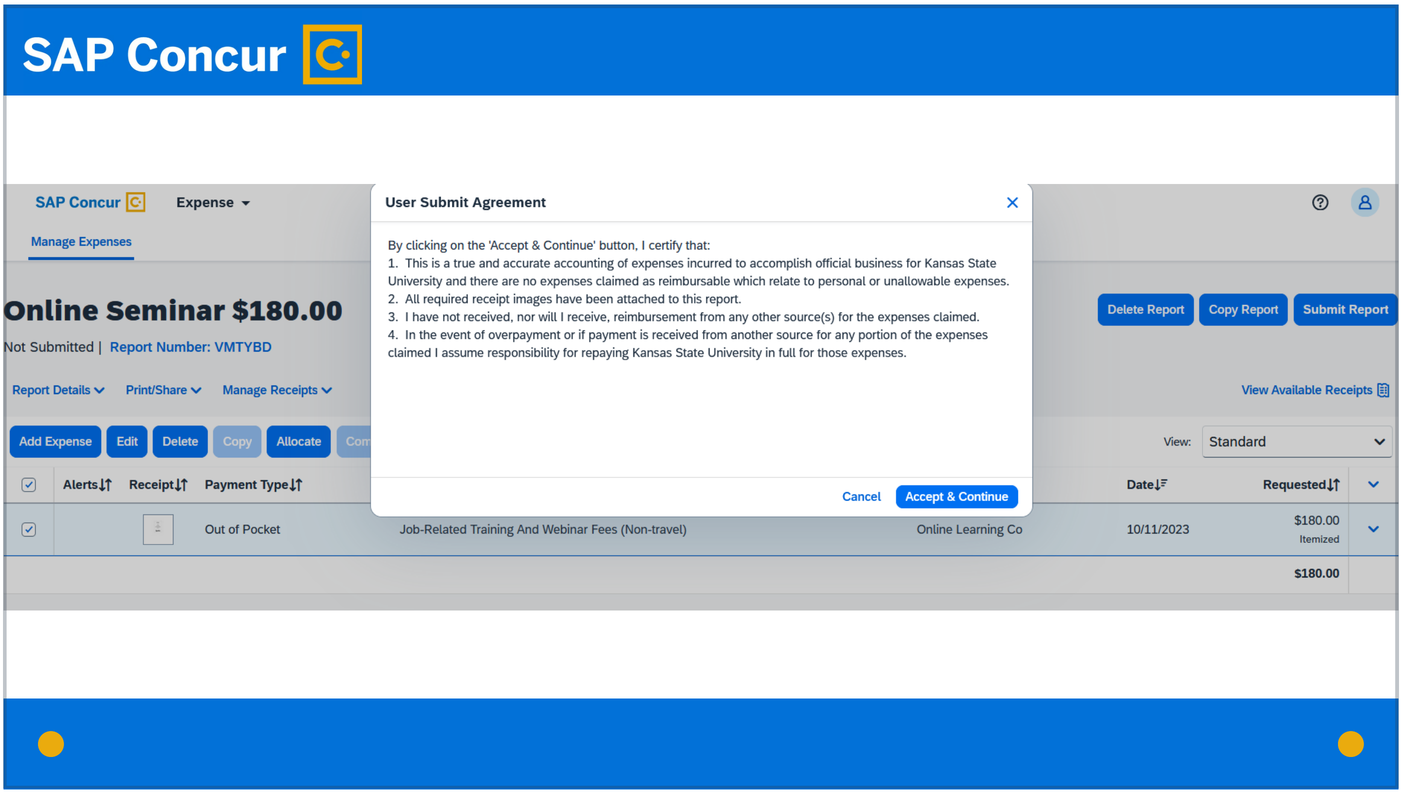


or, if you are the delegate for the employee, click the Notify Employee button (on requests)

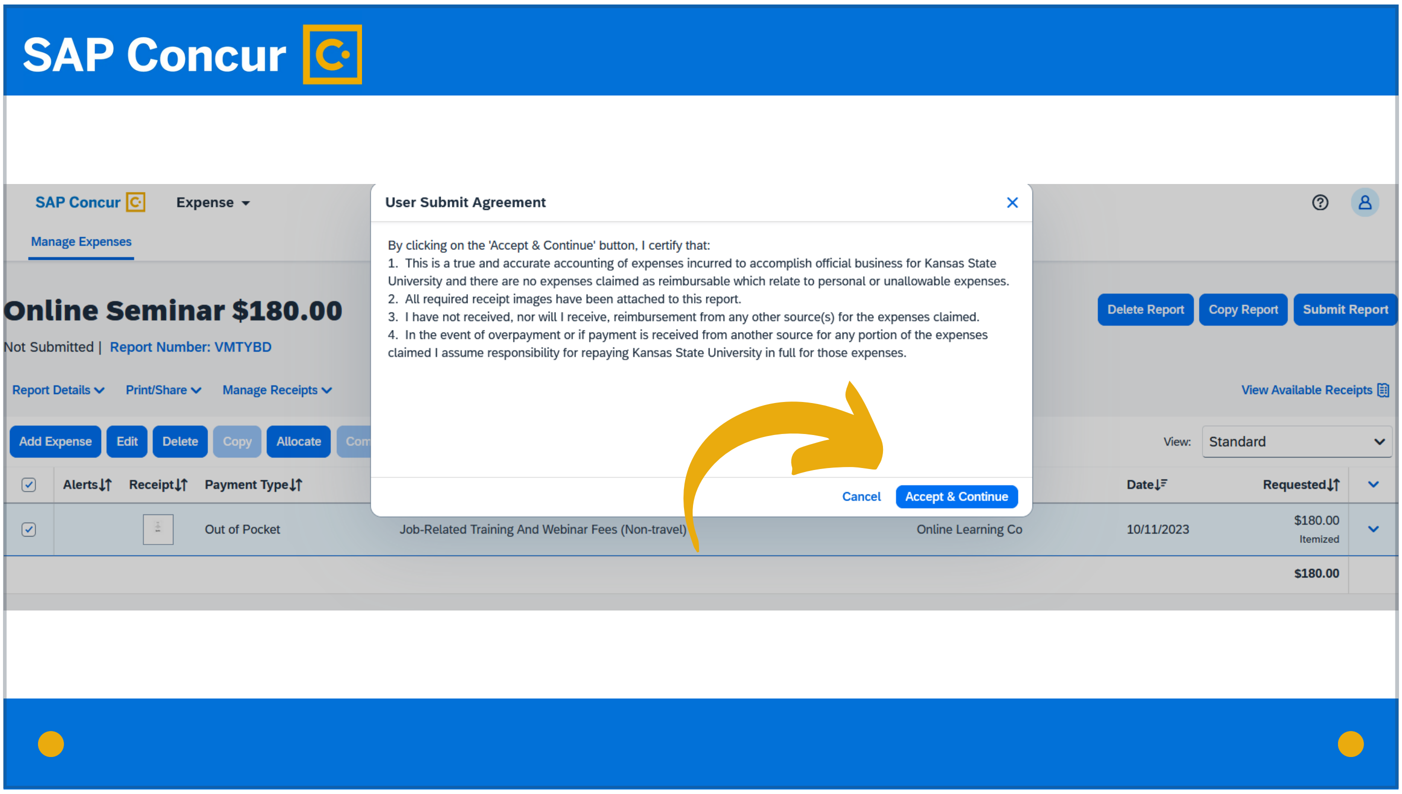


or the Ready for Review button (on reports).

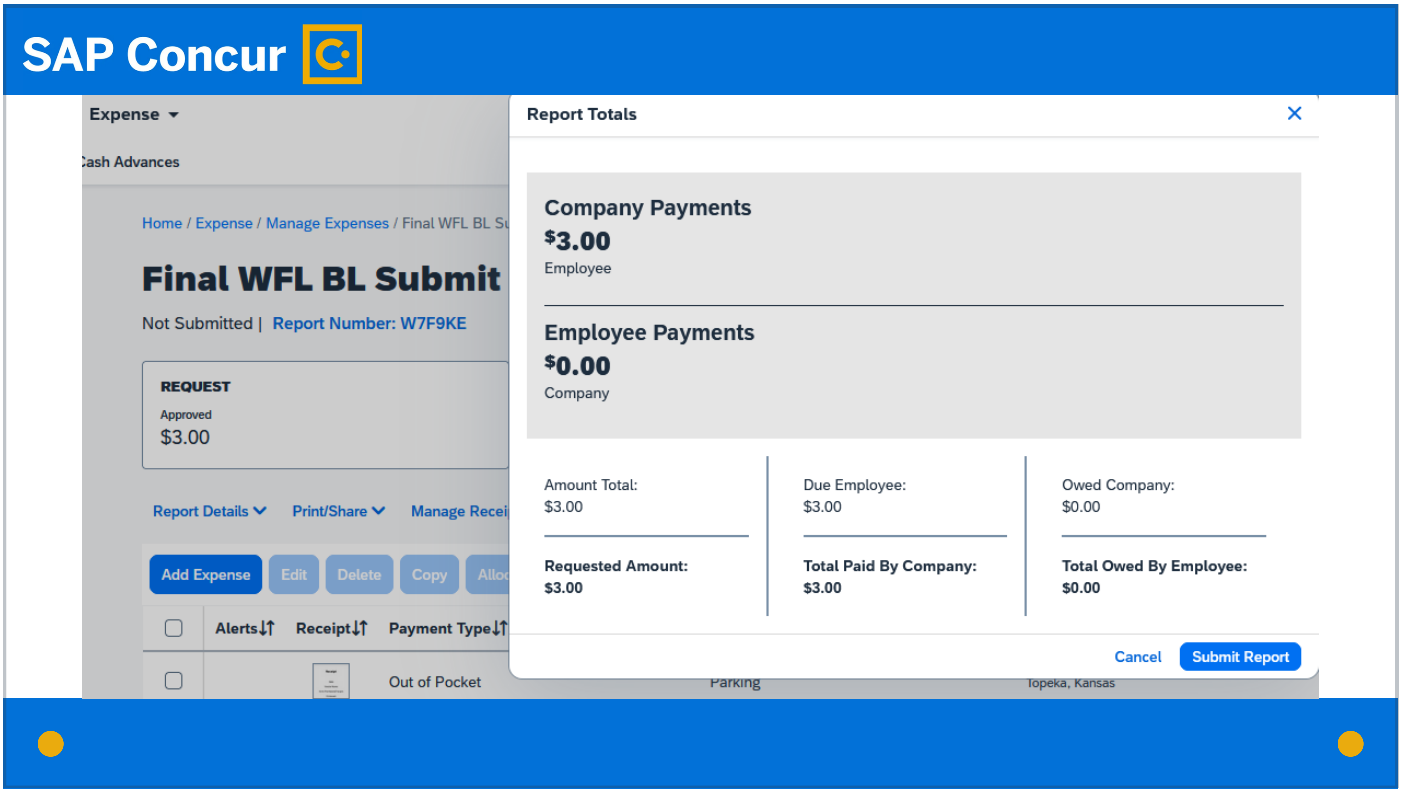
This will send an email to the employee that the request or report is ready to be submitted.



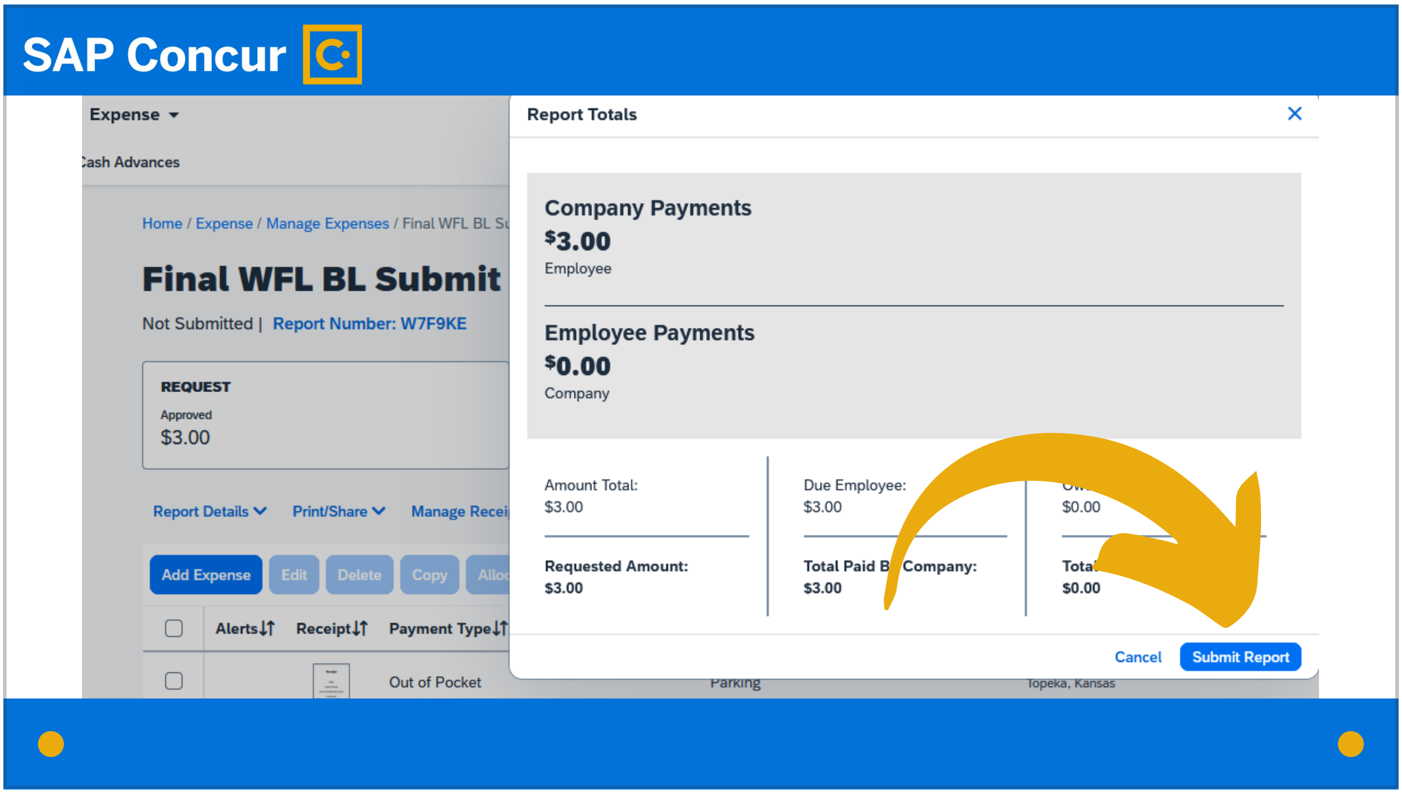
The employee has to be the person to submit the request or report; delegates can create requests or reports on behalf of the employee but are not able to submit them because the employee has to be the person to agree to the User Submit Agreement. This User Submit Agreement will appear once the employee clicks the Submit button.



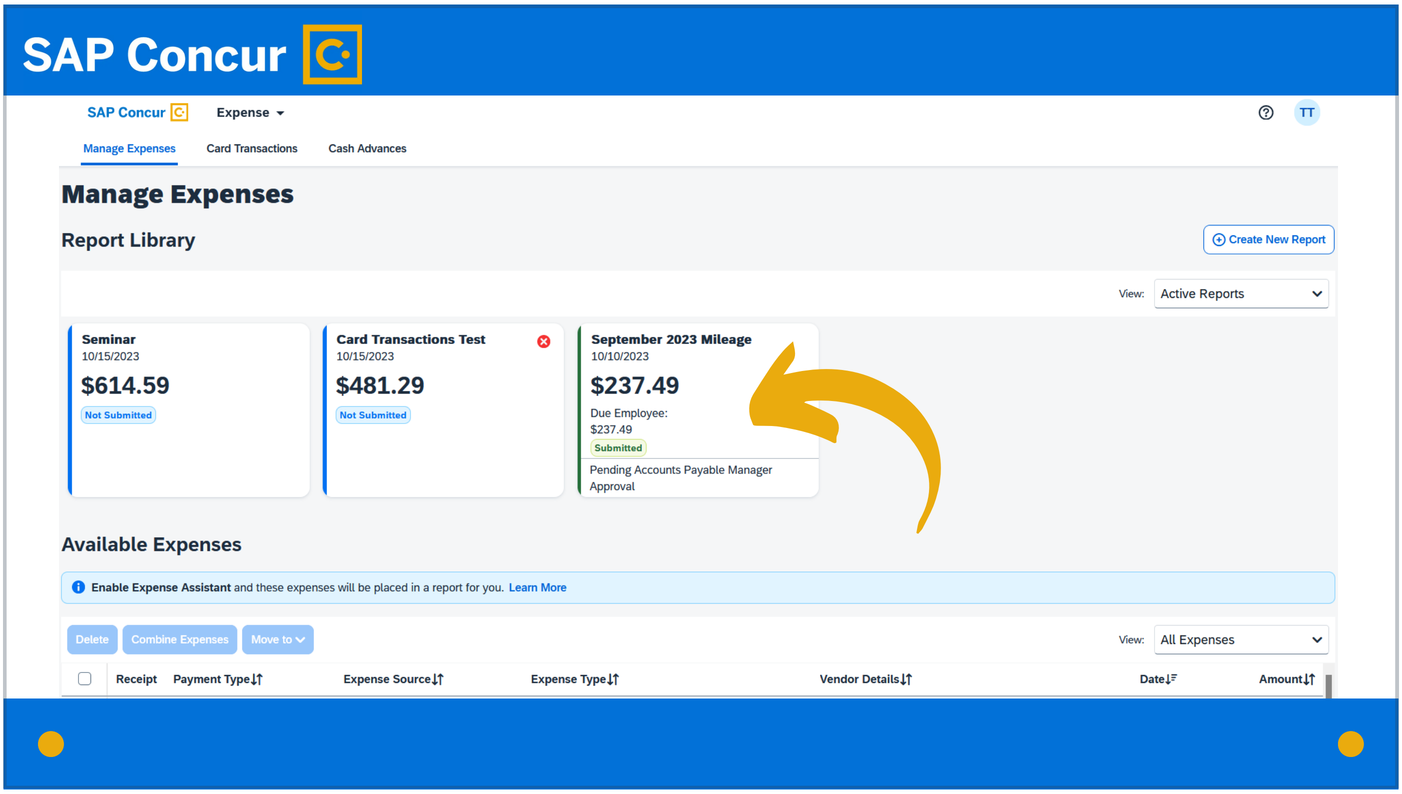
If you are the employee submitting the request or report, read the submit agreement to make sure you agree with and are aware of all points it refers to. If for any reason you do not agree and do not wish to continue, click Cancel to prevent the request or report from being submitted. Otherwise, click the Accept and Continue button.



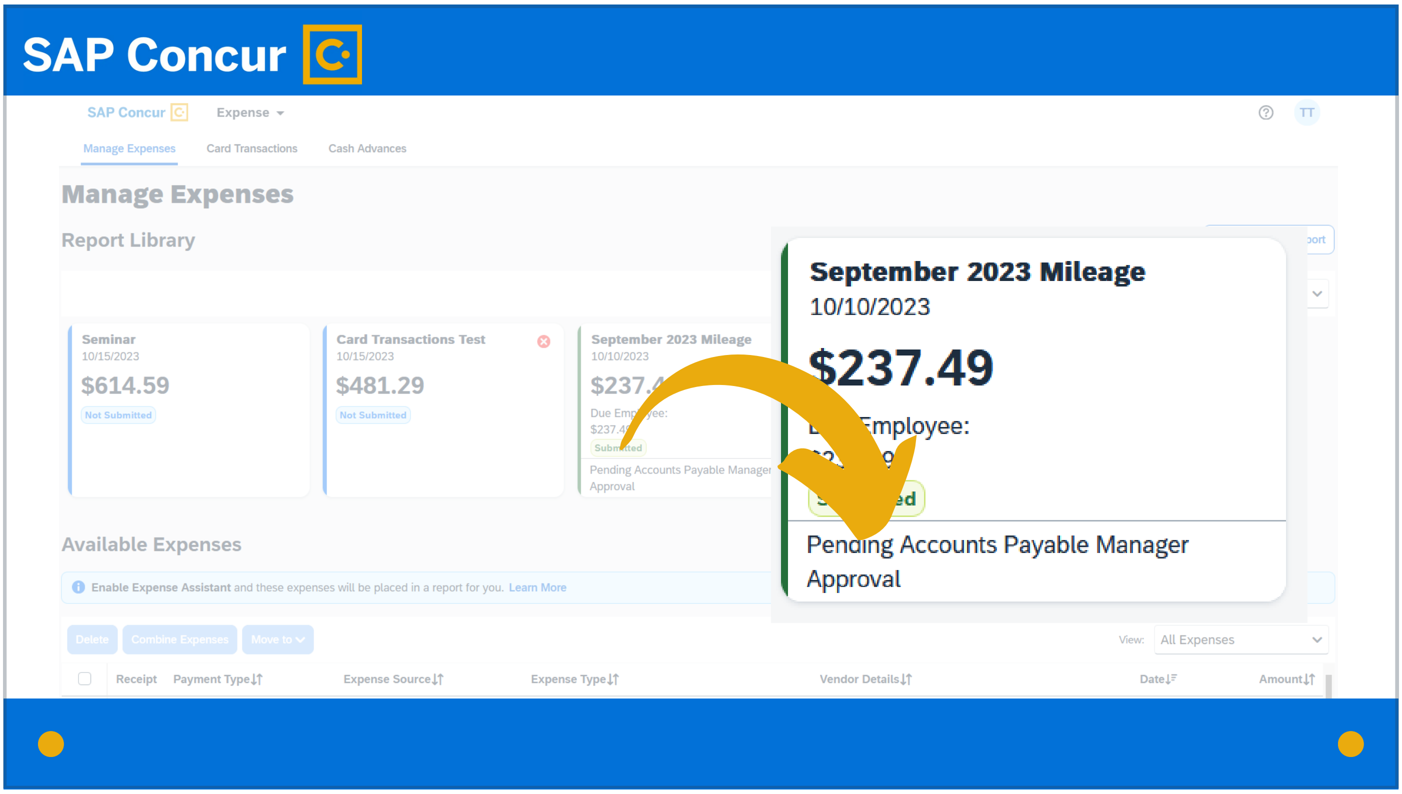
On expense reports, the Report Totals screen will appear.



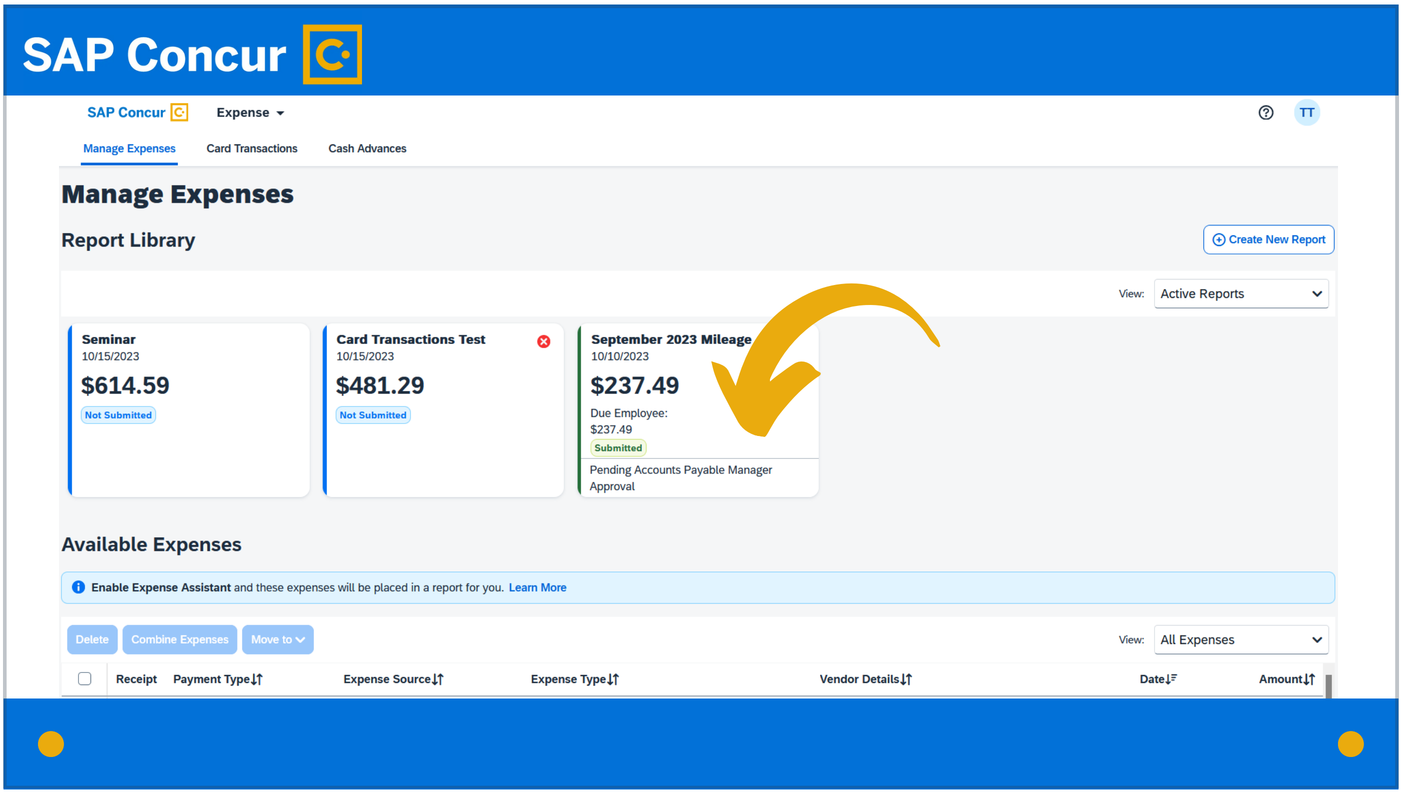
If the totaled information is correct, click Submit Report at the bottom right.



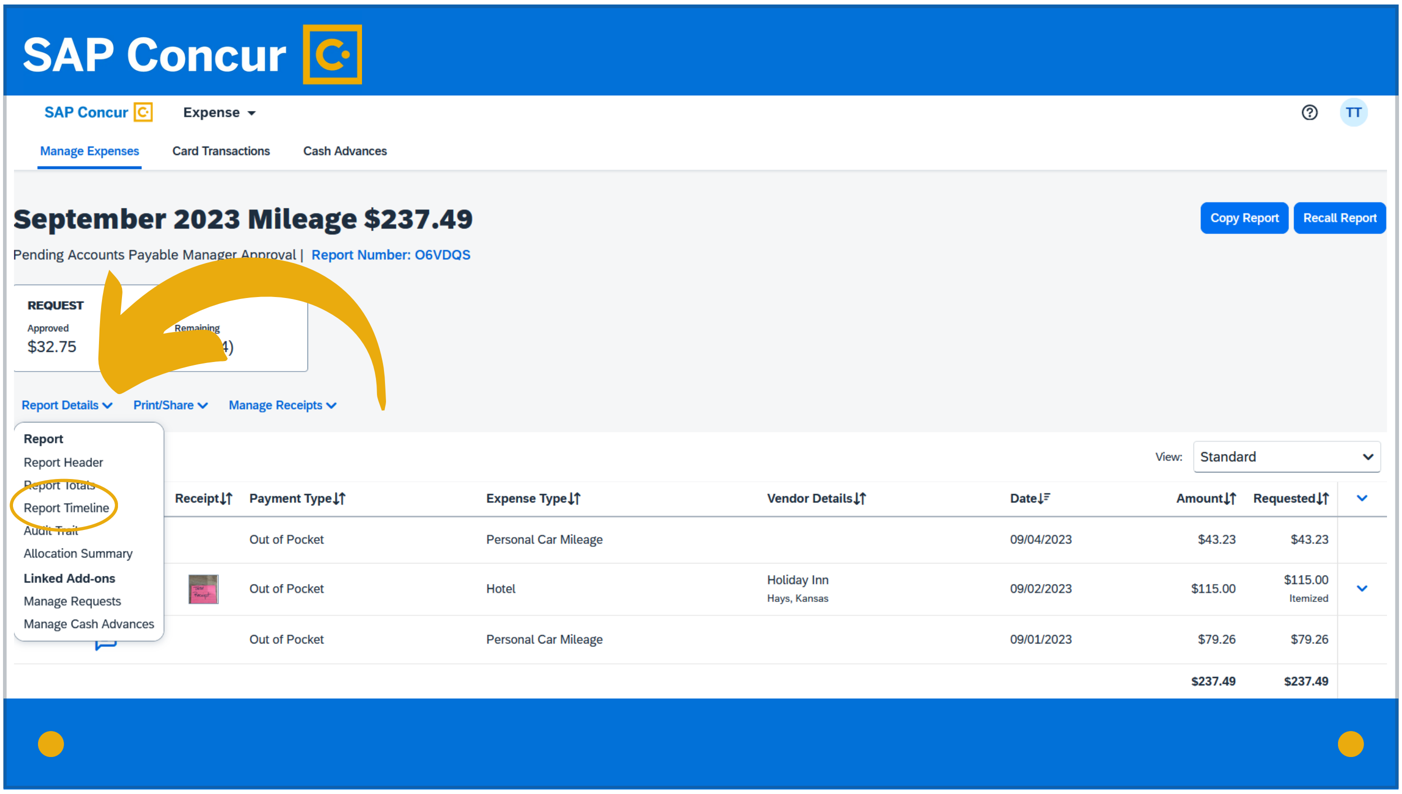
The request or report is now submitted and will show in your Request or Report Library.



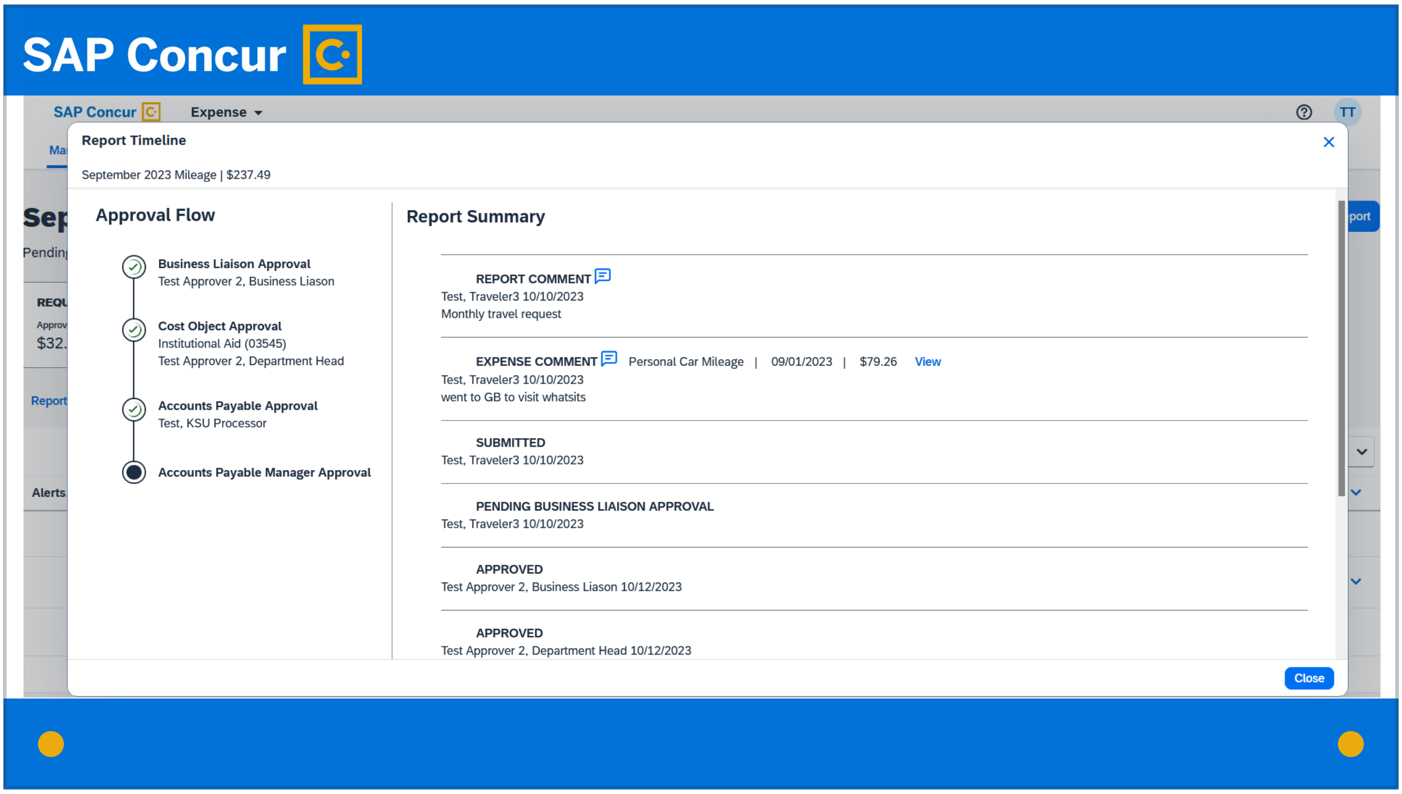
You can see at the bottom of the request or report box the current status. This status will update as the request or report moves through the approval process.



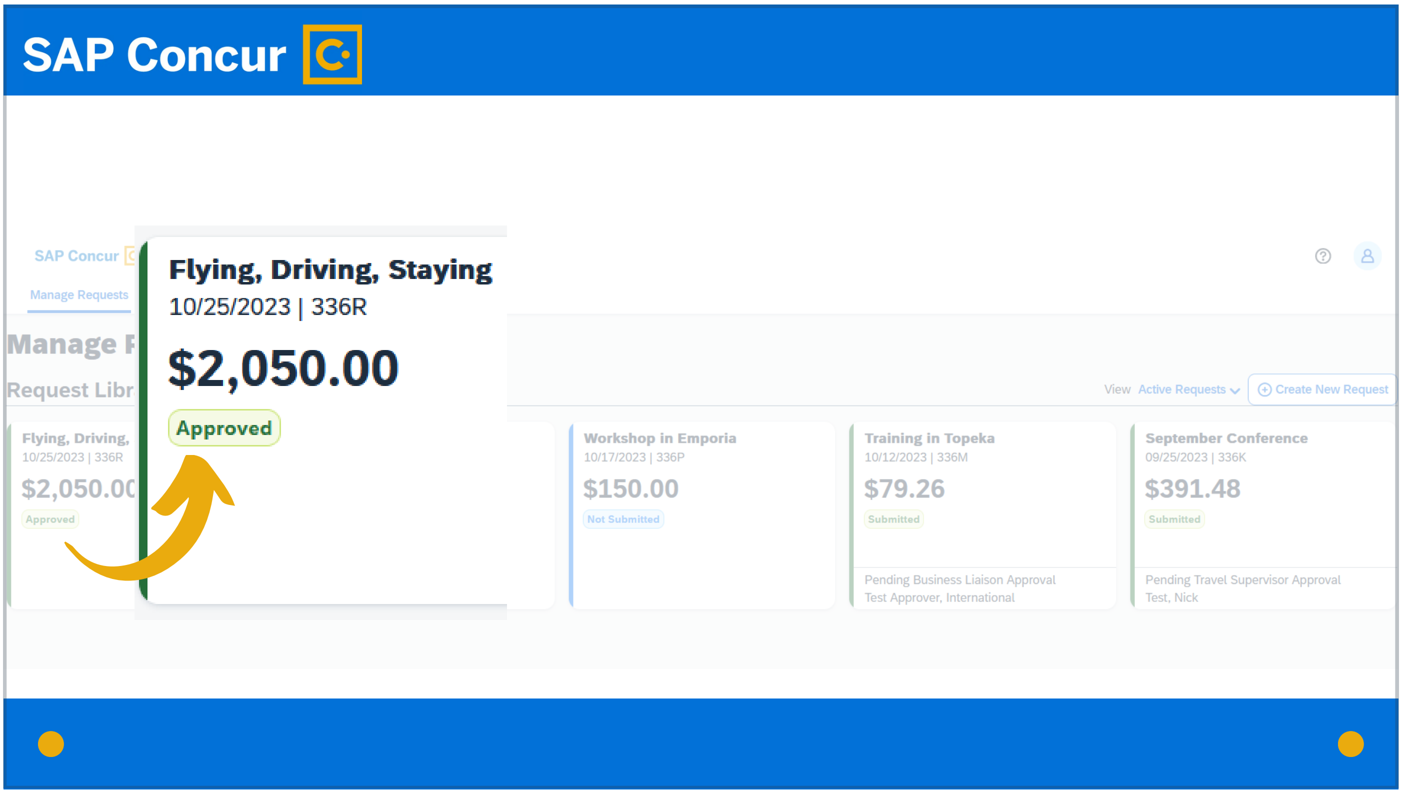
Additionally, if you click on the request or report box



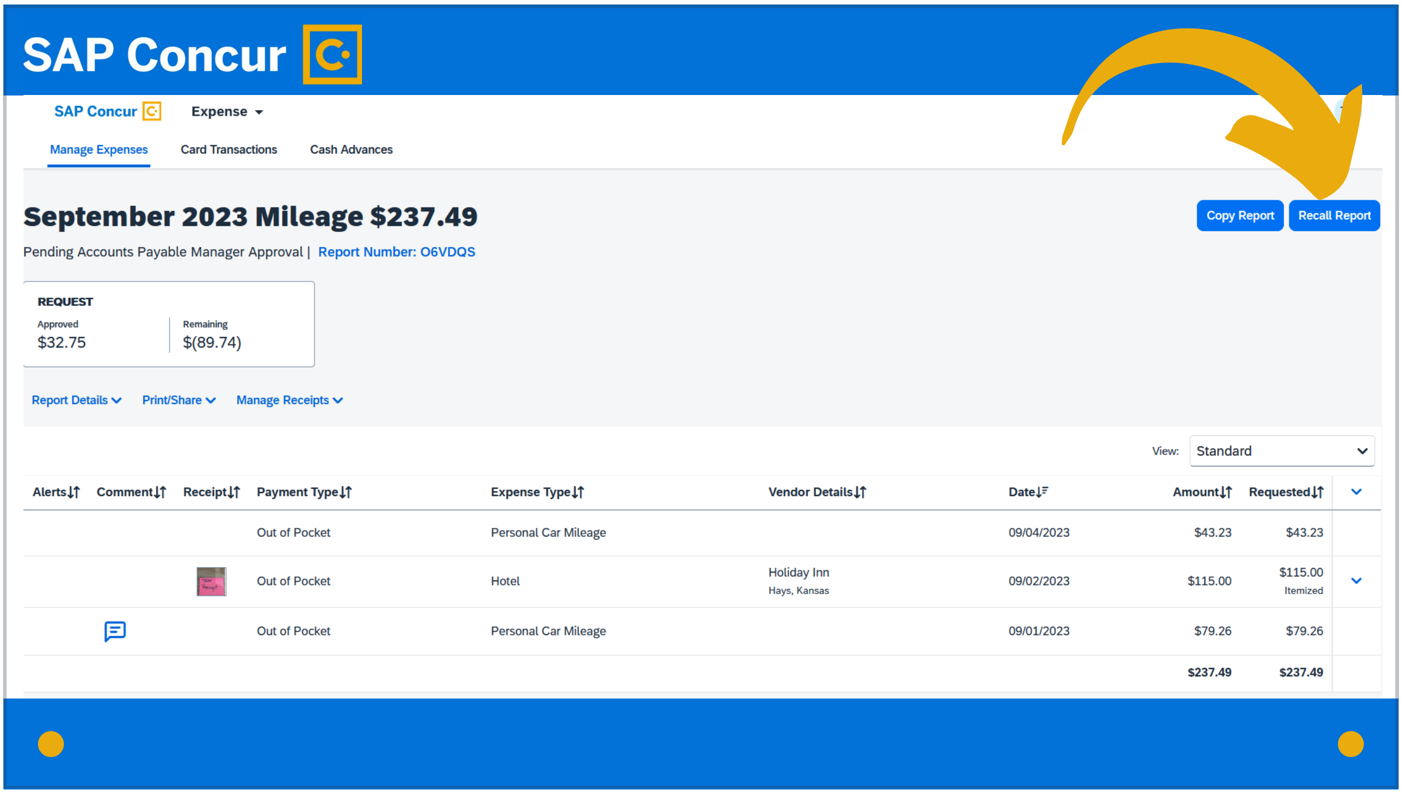
and, on the next screen, click on Request/Report Details -> Request/Report Timeline,



the workflow of the request or report will provide details on where it currently is in the approval process and what steps of that process remain to be completed.

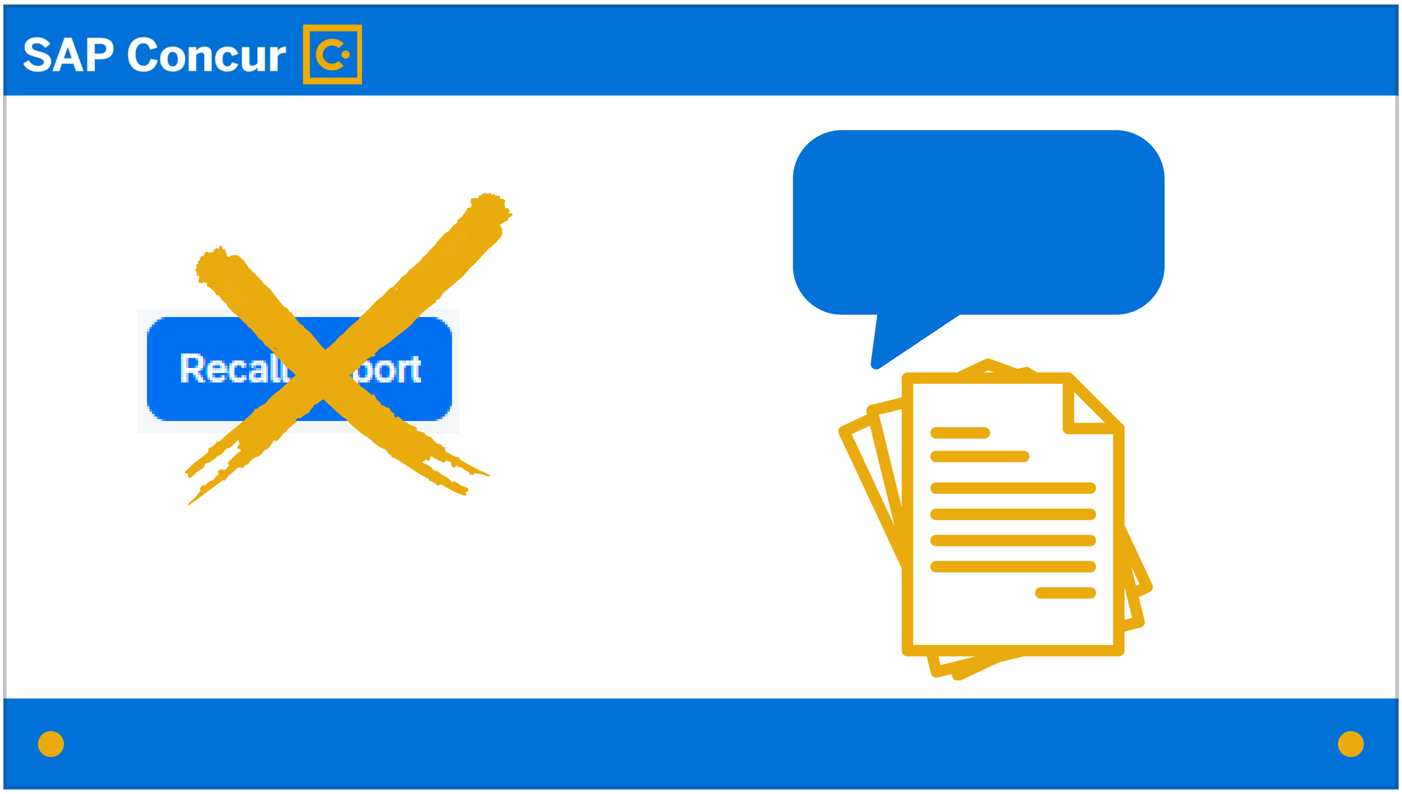


When the final approver approves the request or report, the status will change to Approved, and the process of submitting the request or report will be complete.

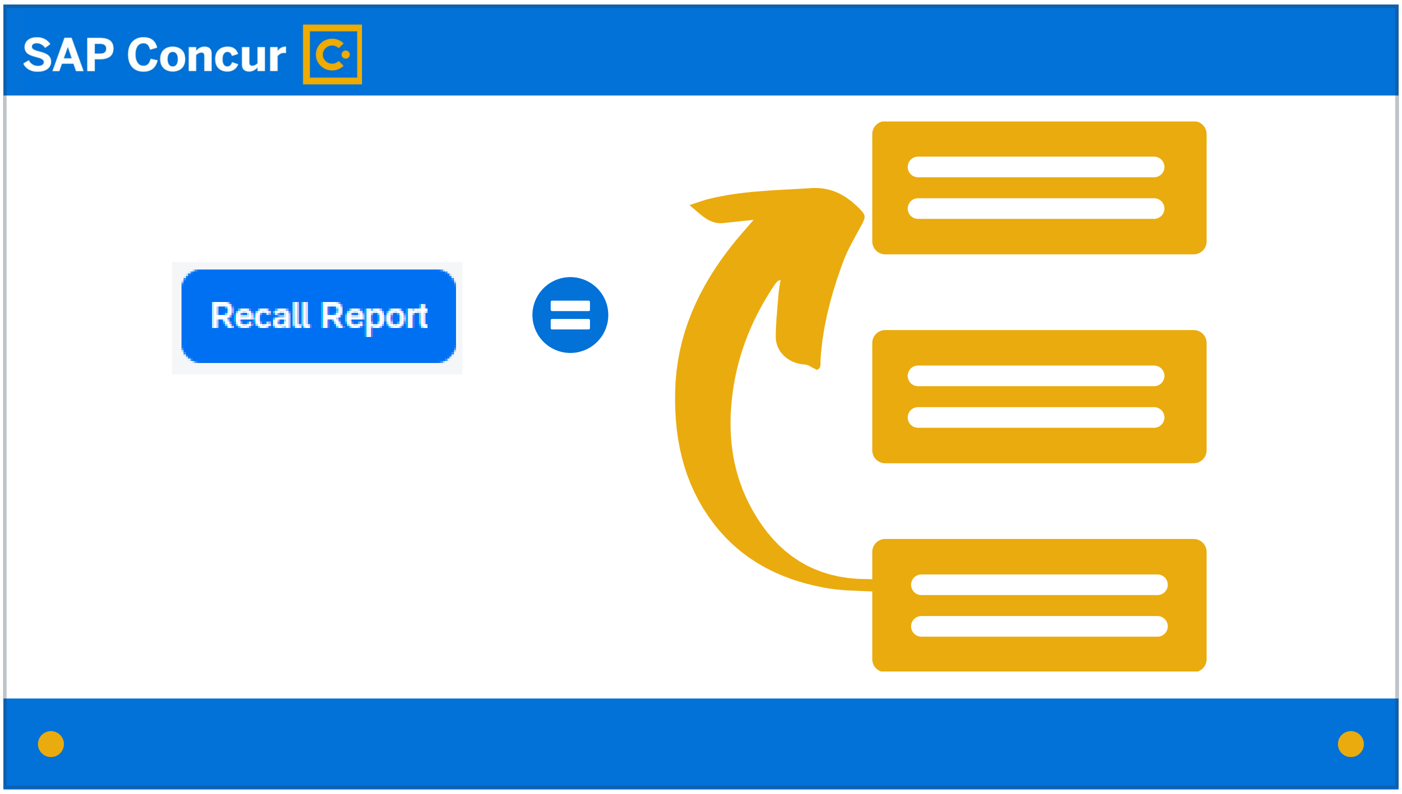


At any point in the approval process until the request or report is finally approved, it is possible to recall the submitted request or report.

Important! 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 information 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.