

SAP Concur Expense Guide

SAP Concur 



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Signing In to SAP Concur

Click [SAP Concur](#) to access the site. It uses single sign on so you will be logged in under your university credentials. This link is also available on MyLETU and on the first tab of the [LeTourneau University Travel Portal](#).

Exploring the SAP Concur Home Page

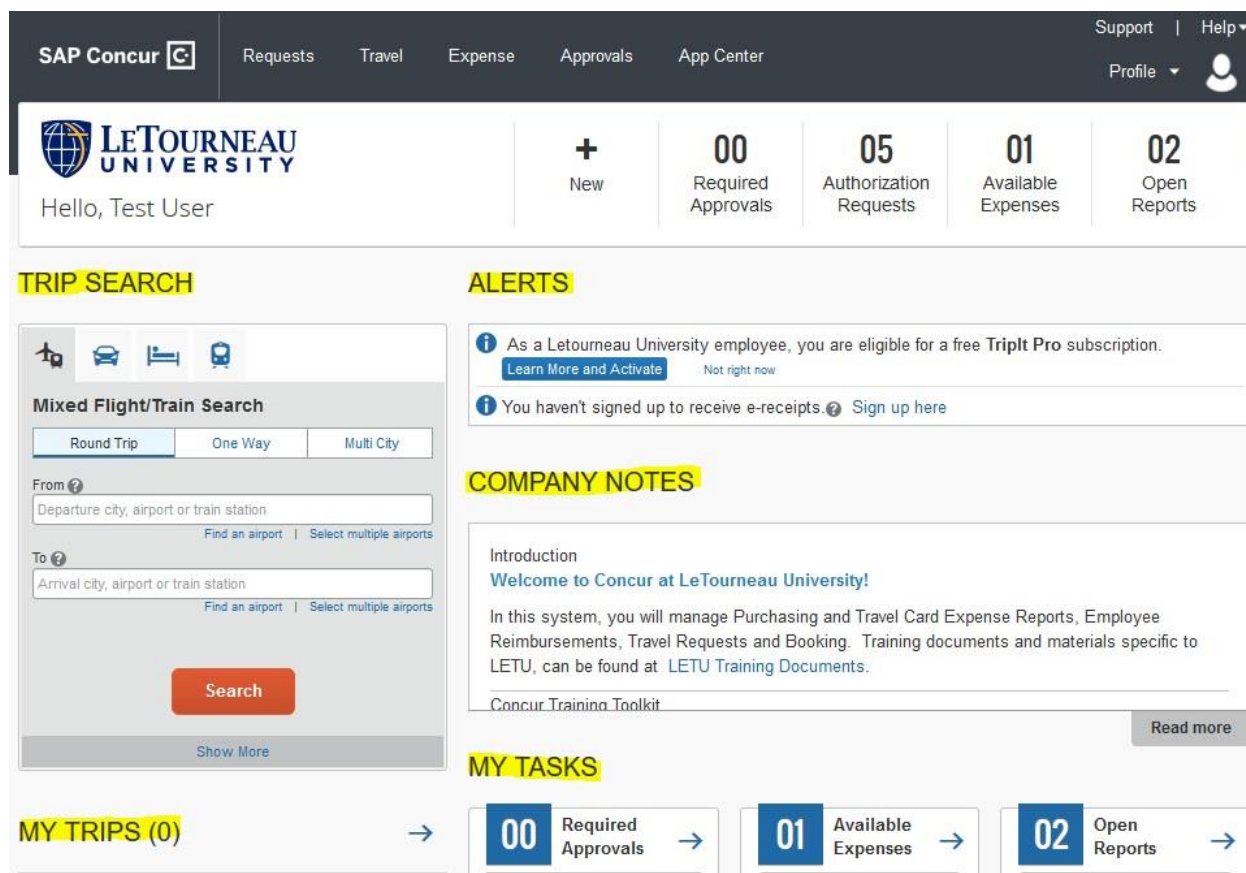
The SAP Concur home page contains the following sections.

Note: To return to the SAP Concur home page from any other page, click the **SAP Concur logo** on the top left of the screen.

Concur Expense and Concur Travel

You will see these sections.

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none"> • Start a new report or request • Open reports and requests • Manage available expenses
Trip Search	This section provides the tools you need to book a trip with any or all of the following: <p>Flight: Use to book a flight. You can also book hotel and reserve a car at the same time.</p> <p>Car, Hotel, Limo, or Rail: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (Flight tab).</p>
Alerts	This section displays informational alerts about Travel features.
Company Notes	Information regarding the Expense and Travel products will be displayed here. This includes links to training materials and reference documents.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists Required Approvals, Available Expenses, and Open Reports.



The screenshot shows the SAP Concur dashboard for a user named 'Test User' at Letourneau University. The top navigation bar includes links for Requests, Travel, Expense, Approvals, and App Center. The dashboard features a 'TRIP SEARCH' section with a 'Mixed Flight/Train Search' form, an 'ALERTS' section with a notification about a free Triplt Pro subscription, a 'COMPANY NOTES' section with a welcome message, and a 'MY TASKS' section with three task cards: '00 Required Approvals', '01 Available Expenses', and '02 Open Reports'. The 'MY TRIPS (0)' section is also visible.

Updating Your Expense Profile

You use the Profile Options page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information changes. Your profile options include:

- Approvers
- Attendees
- Bank Information
- E-Receipts
- Expense Delegates
- Expense Preferences:
 - Email notifications
 - Prompts

Note: Some of this information may be pre-populated. Review and make changes as necessary.

Refer to the [SAP Concur Getting Started Quick Start Guide](#) for more in depth instructions.

Acting as a Delegate

To be assigned as a delegate, the user (delegator) must add you in their employee profile to prepare reports on their behalf.

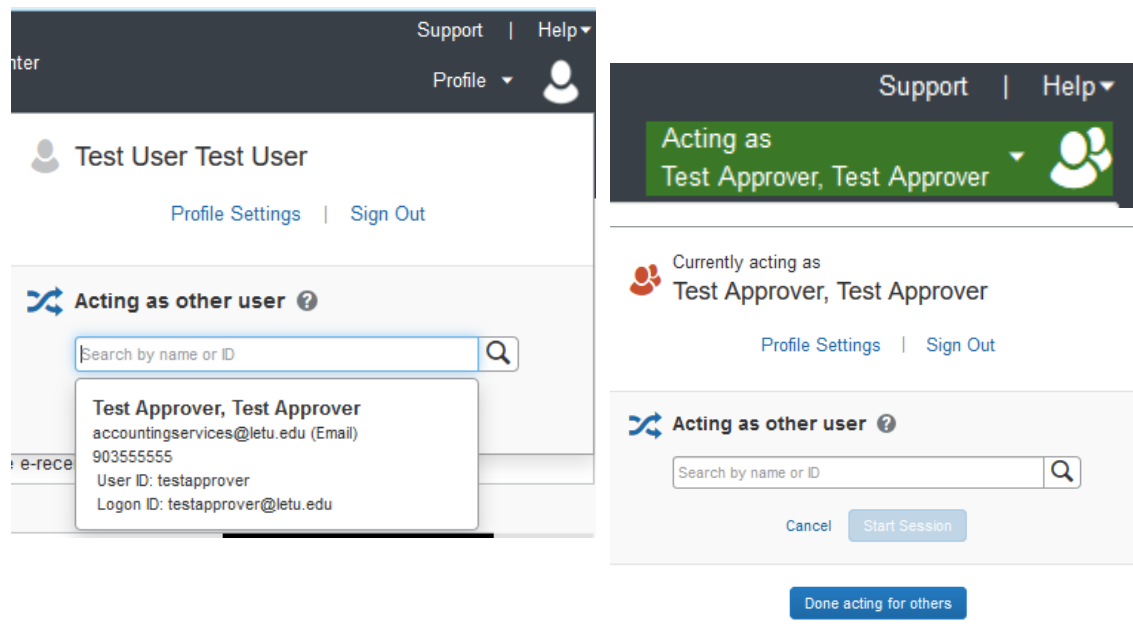
To work as a delegate

1. Click Profile > Act on behalf of another user.
2. Select the appropriate delegator's name.
3. Click Start Session.

NOTE: Notice that the Profile menu now displays Acting as and shows the name you just selected. You are now officially working on behalf of that person, and you can perform tasks such as creating and printing reports.

4. To select a different user, follow the same steps but click a different name.
5. To return to your own tasks, click Acting as, and then select Done acting for others.

NOTE: Notice that the Profile menu now appears.

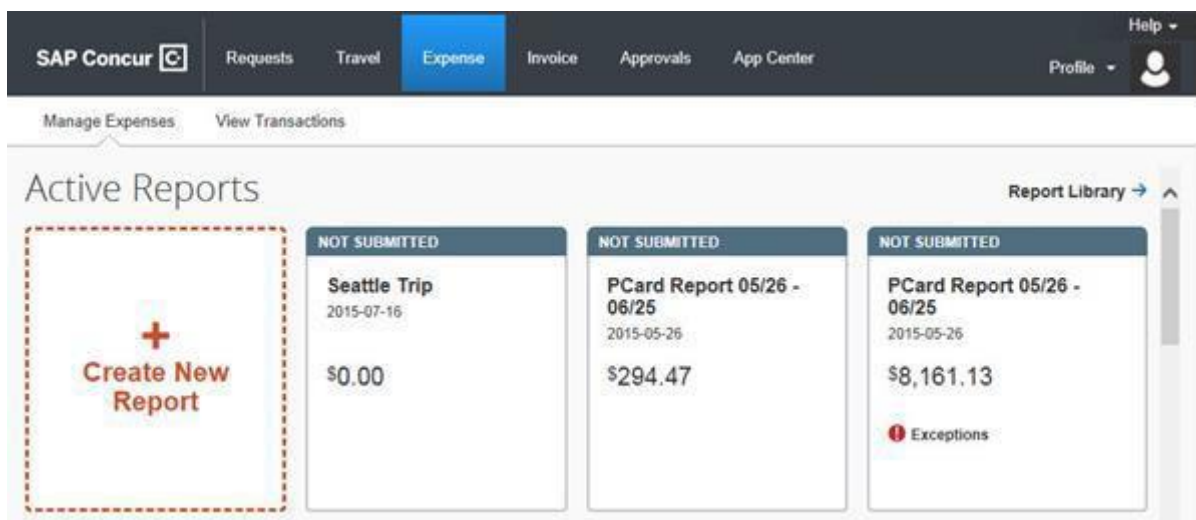


The image contains two screenshots of the SAP Concur user interface. The left screenshot shows the 'Test User Test User' profile page with a 'Profile' dropdown menu open, displaying 'Acting as' and a search bar. A search result for 'Test Approver, Test Approver' is shown, including email, user ID, and login ID. The right screenshot shows the 'Acting as' dropdown menu with 'Test Approver, Test Approver' selected. Below this, the 'Currently acting as' section shows the same user name. At the bottom, there is a 'Done acting for others' button.

Creating an Expense Report

To create an expense report

1. Either:
 - On the SAP Concur home page, on the Quick Task Bar, place your mouse pointer over New, and then click Start a Report.
 - or -
 - On the SAP Concur home page, from the Expense menu, on the Manage Expenses tab, click the Create New Report tile.








2. On the Create a New Expense Report page, complete all required fields (indicated with an asterisk) and the optional fields as desired, and then click Next.

NOTE: You can set up a default fund and function in your user profile under Expense Information. This fund and function will then be pre-populated in your report.

Create New Report ✕

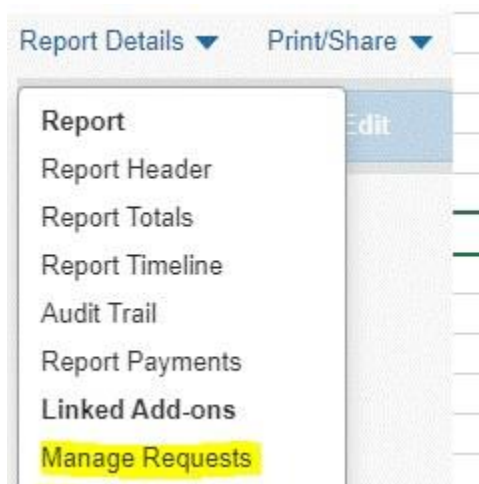
* Required field

<p>Report Name *</p> <input type="text" value="Business Trip"/>	<p>Report Start Date *</p> <input type="text" value="07/01/2020"/> 
<p>Report End Date *</p> <input type="text" value="07/31/2020"/> 	<p>Activity Type *</p> <input type="text" value="None Selected"/> 

<p>Fund *</p> <div style="display: flex; align-items: center;">  <input type="text" value="(10) COF - Traditional"/> 1 </div>	<p>Function *</p> <div style="display: flex; align-items: center;">  <input type="text" value="(0000000) No Function"/> 2 </div>
--	---

Comments To/From Approvers/Processors

3. If a Request has been submitted and approved for any expenses on the report, select Report Details and Manage Requests. This will take you to a screen to add the Request(s) to the report. If you want to add more than one Request, you will need to select Add again and select another Request from the list.



4. At this point, you will likely either:
 - Add an out-of-pocket expense to your expense report
 - Add company card transactions to your expense report

Adding Card Transactions to an Expense Report

On the SAP Concur home page, you can view a list of any unassigned credit card transactions in the Available Expenses section.

You can add card transactions to an expense report in the following ways:

- From the open expense report
- From the Credit Card Charges page (Expense > View Transactions on the sub-menu).

- From the Available Expenses section (you might need to scroll down) (Expense > Manage Expenses on the sub-menu)


From the open expense report

To add card transactions within the open report

- Select the open report.
- Select Add Expense.
- From the Available Expense section, select the check box(es) for the appropriate expenses.
- Select the transaction that you want to assign to the current expense report.
- Select Add to Report.

Add Expense

1
Available Expenses



Create New Expense

<input checked="" type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>	Test JPMC P-Card Mastercard	Hotel	Howard Johnsons	06/17/2020	\$975.92

Displayed expenses: 1, Total: 1

Close
 Add To Report

The expense appears in the list of expenses, with any applicable icons, such as company card or exceptions.

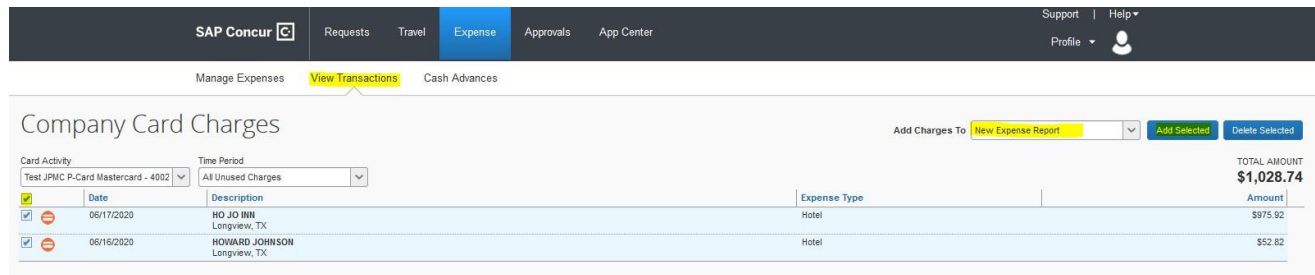
Report Details ▾ Print/Share ▾ Manage Receipts ▾								
<div> Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾ </div>								
<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Out of Pocket	Car Rental	Alamo Longview, Texas	07/14/2020	\$80.00	\$80.00
<input type="checkbox"/>			Out of Pocket	Airfare	United Washington DC, District of Columbia	07/08/2020	\$400.00	\$400.00
<input type="checkbox"/>			Test JPMC P-Card Mastercard	Hotel	Howard Johnsons Washington DC, District of Columbia	06/17/2020	\$975.92	\$975.92

From the Credit Card Charges page

To assign one or more transactions to an expense report

1. Click the Expense tab, and then select View Transactions from the sub-menu.

2. Select the appropriate check box(es) next to the transaction.
TIP: Select the uppermost check box to select all transactions.
1. Select an expense report from the Add Charges To dropdown list.
2. Click Add Selected.



Company Card Charges

Card Activity: Test JPMC P-Card Mastercard - 4002 Time Period: All Unused Charges

Check Box	Date	Description	Expense Type	Amount
<input checked="" type="checkbox"/>	06/17/2020	HO JO INN Longview, TX	Hotel	\$975.92
<input checked="" type="checkbox"/>	06/16/2020	HOWARD JOHNSON Longview, TX	Hotel	\$52.82

TOTAL AMOUNT: \$1,028.74

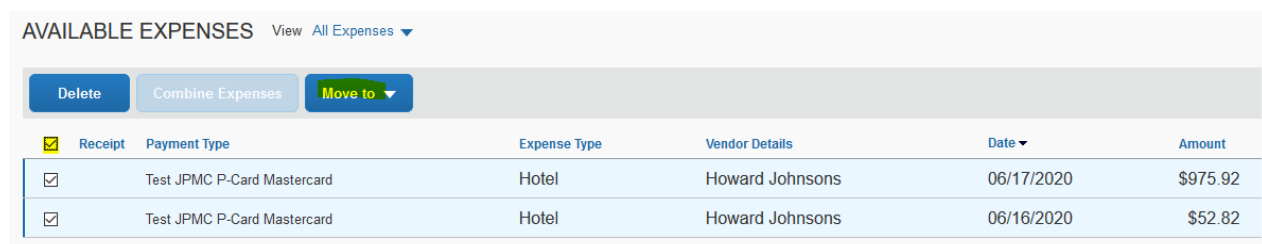
From the Available Expenses section

To assign transactions to a report from the Available Expenses section

You can access the Available Expense section in the following ways:

- From the SAP Concur home page, on the Quick Task bar, click the Available Expenses task.
- From the SAP Concur home page, in the My Tasks section, click the Available Expenses task.
- From the SAP Concur home page, from the menu, click Expenses, and then select Manage Expenses from the sub-menu.

1. Select the appropriate check box(es) next to the transaction.
TIP: Select the uppermost check box to select all transactions.
2. Click Move.
3. Select the name of the appropriate report or To New Report.
 - If you select an existing report, the report opens, and the selected transactions are attached to the report.
 - If you select To New Report, the Create a New Expense Report page appears. Enter the report information as usual.



AVAILABLE EXPENSES View All Expenses

Buttons: Delete, Combine Expenses, Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>	Test JPMC P-Card Mastercard	Hotel	Howard Johnsons	06/17/2020	\$975.92
<input checked="" type="checkbox"/>	Test JPMC P-Card Mastercard	Hotel	Howard Johnsons	06/16/2020	\$52.82

Adding an Out-of-Pocket Expense to an Expense Report

To add an out-of-pocket expense to a report

1. From the open report, click Add Expense.
2. In the Add Expense window, search for and select the appropriate expense type from the list.

The page refreshes, displaying the required and optional fields for the selected expense type.

3. Complete the required and optional fields as directed by your company.
4. Click the Payment Type dropdown arrow, and then select Out of Pocket.
5. Click any of the following:
 - Attach Receipts- To upload and attach receipt images
 - Itemizations - To itemize the expense
 - Allocate -To allocate the expense
 - Save– To save the out-of-pocket expense
 - Cancel - To exit without saving this expense

Add Expense

2
Available Expenses

+
Create New Expense

^ Recently Used

- Airfare
- Non Reimbursable/Personal Expense
- Car Rental
- Individual Meals - Overnight Travel
- Consulting Services


^ 01. Travel Expenses

- Airfare
- Airline Fees
- Car Rental

New Expense

Details


Itemizations

 Allocate
* Required field

Expense Type *

Airfare
▼

Transaction Date *

MM/DD/YYYY


Business Purpose *

Ticket Number


Vendor *

Search for Vendor
▼

Airline Travel Service Code

None Selected
▼

Destination City *


▼

Payment Type *

Out of Pocket
▼

Amount *

Currency *

US, Dollar
▼

Comment

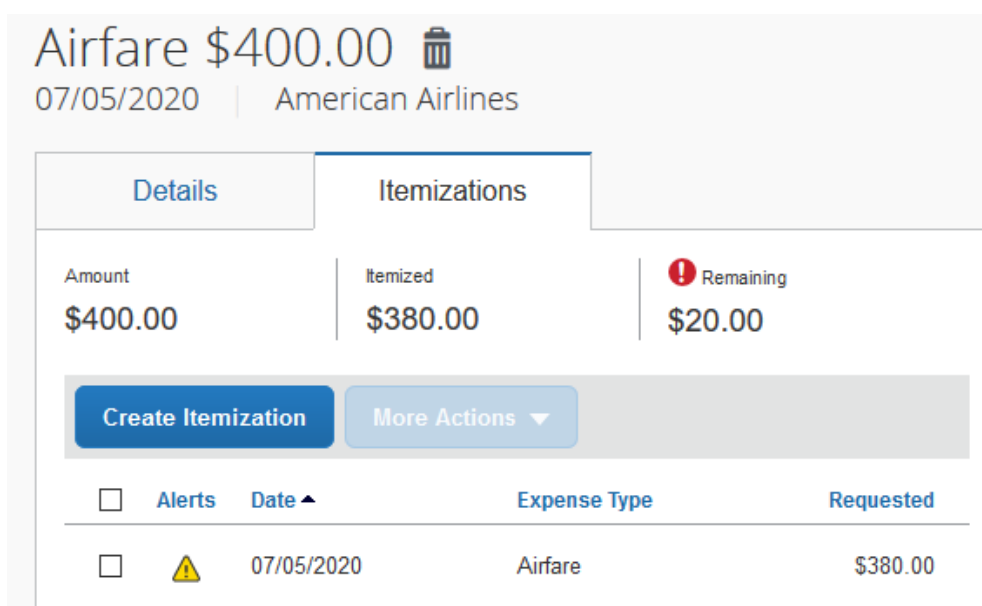
Itemizing Expenses

Use the Itemizations tab to account for receipts that include both business and personal expenses or to ensure that each of your expenses is accounted for correctly.

To itemize an expense


1. Create the expense as usual, and then click the Itemizations tab.
2. On the New Itemization tab, select Create Itemization. Then select the expense type that applies to the first itemization.

The Total Amount, the Itemized amount, and the Remaining amount appear at the top of the page. Continue itemizing the expense until the remaining amount is \$0.00.



The screenshot shows the SAP Concur interface for itemizing an expense. At the top, it displays 'Airfare \$400.00' with a trash icon, the date '07/05/2020', and the airline 'American Airlines'. Below this, there are two tabs: 'Details' and 'Itemizations'. The 'Itemizations' tab is active, showing a summary table with three columns: 'Amount', 'Itemized', and 'Remaining'. The values are \$400.00, \$380.00, and \$20.00 respectively. Below the summary table, there are two buttons: 'Create Itemization' and 'More Actions'. At the bottom, there is a table with columns: 'Alerts', 'Date', 'Expense Type', and 'Requested'. The table contains one row with a warning icon, the date '07/05/2020', the expense type 'Airfare', and the requested amount '\$380.00'.

Amount	Itemized	Remaining
\$400.00	\$380.00	\$20.00

Alerts	Date	Expense Type	Requested
<input type="checkbox"/> 	07/05/2020	Airfare	\$380.00

3. For each additional itemization, on the New Itemization tab, select the appropriate expense type and complete the appropriate fields.

NOTE: You can also Copy itemizations to save time with similar entries.

4. Once you have completed the details for each itemization, click Save Expense.

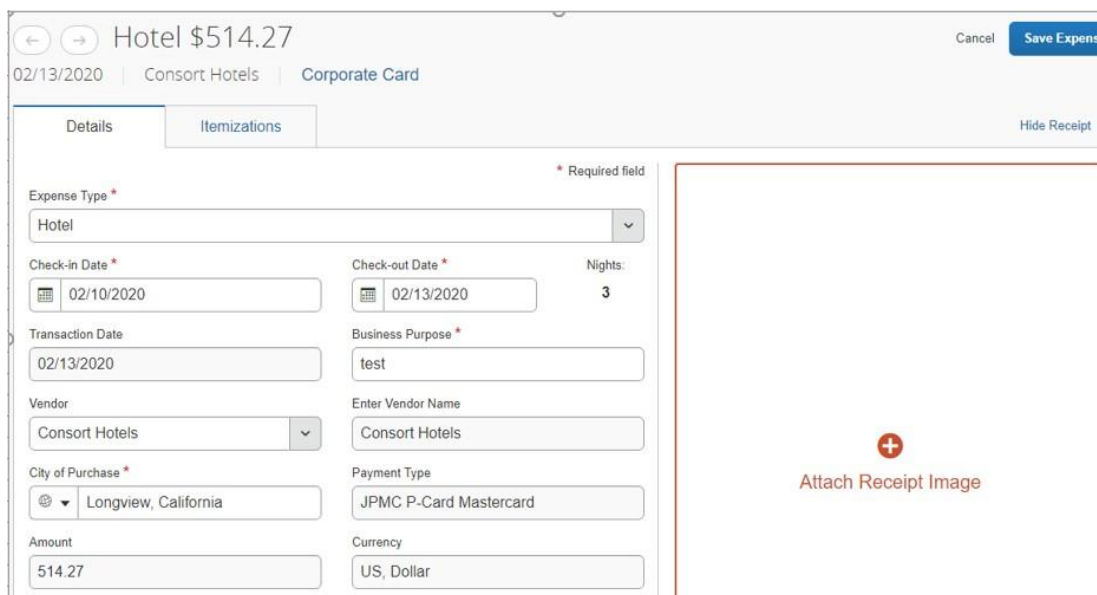
Itemizing Nightly Hotel Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Hotel Itemizations allow you to quickly itemize recurring room rates and taxes. You can then itemize the remaining charges on your hotel bill, and adjust for any rate changes during your stay

To create a hotel expense

1. With the expense report open, click Add Expense, and then select the Hotel expense type.

The page refreshes, displaying the required and optional fields for the selected expense type.



Hotel \$514.27

02/13/2020 | Consort Hotels | Corporate Card

Details | Itemizations

Cancel Save Expense

Hide Receipt

* Required field

Expense Type *
Hotel

Check-in Date *
02/10/2020

Check-out Date *
02/13/2020

Nights:
3

Transaction Date
02/13/2020

Business Purpose *
test

Vendor
Consort Hotels

Enter Vendor Name
Consort Hotels

City of Purchase *
Longview, California

Payment Type
JPMC P-Card Mastercard

Amount
514.27

Currency
US, Dollar

Attach Receipt Image

2. Complete the fields.
3. Click the Itemizations tab

Concur Expense populates the Check-out Date and the Number of Nights based on the transaction date and the Check-in Date.

4. Select whether your hotel room rate was The Same Every Night, or Not the Same.
5. Enter the Room Rate (per night) and Room Tax (per night), as applicable.

← →
Hotel \$514.27

02/13/2020
Consort Hotels
Corporate Card

Details

Itemizations

Amount \$514.27	Itemized \$0.00	! Remaining \$514.27
--------------------	--------------------	--

New Itemization

Expense Type *

Hotel
▼

Entry Type: Recurring Itemization ▼ 02/10/2020 - 02/13/2020 (Nights: 3)

Your hotel room rate was:

The Same Every Night
Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
150.00	10.00	5.00	

(Amounts in USD)

6. Click Save Itemization.
 7. If there is a remaining amount that needs to be itemized (other charges, for example, for incidentals or room service), the remaining amount is displayed in the Remaining field. Continue to itemize the amounts until the balance is \$0.00.
 8. Click the Expense Type dropdown arrow, and then select the appropriate type of expense.
 9. Enter the required fields and optional fields if directed.
- If this is a foreign currency transaction, once you enter the Amount, the total will be shown in your default currency along with the calculated exchange rate.
10. After you have entered all of the appropriate information, click Save Itemization.
 11. Continue itemizing until the remaining amount is \$0.00.
 12. Select the Personal Expense check box for any expense that should not be reimbursed by your company.
 13. Click Save Expense.

Adding Attendees to an Expense

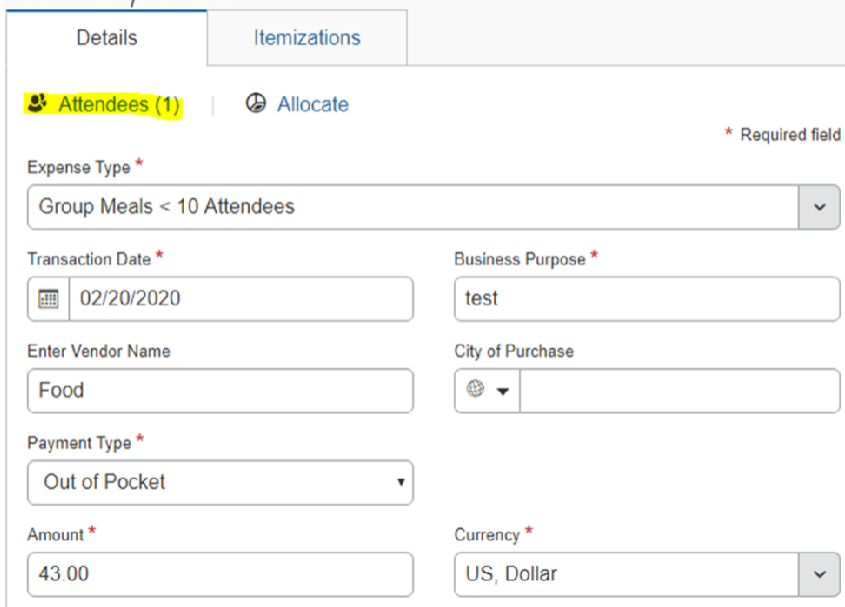
Some expenses, such as group meals and non-travel group meals, require you to add attendees to the expense. You will see the Attendees selection for these types of expenses. For meals < than 10 attendees, you will need to list each individual. For meals with 10+ attendees, you will need to add a group name.

To add attendees to a group meal or a non-travel group meal

In the open expense report, notice that you are automatically added as an attendee.

1. If you have used an attendee before, you can quickly add them to this expense by entering their first or last name, and then select the previously used attendee.
2. To enter new attendees for the expense, click the Attendee button.

New Expense



3. In the Add Attendee window, enter the new attendee's information (required fields are indicated with an asterisk).

Attendees

Group Meals < 10 Attendees

Attendees: 1

Add **Remove**

☒ Attendee Name ▲

☒ Traveler, Traveler

Add Attendees

Recent Attendees

Attendees

Attendee Groups

<input type="checkbox"/>	Attendee Name ▲	Attendee Title	Institution/Company	Attendee Type	Attendee Count
<input type="checkbox"/>	Brown, Bubba	donor		Guest	0
<input type="checkbox"/>	Jones, Jim	Alumni		Guest	0
<input type="checkbox"/>	Silseth, Anne	Concur		Guest	0
<input type="checkbox"/>	Smith, Joe	Alumni		Guest	0
<input type="checkbox"/>	Stables, Michelle	Concur		Guest	0

[Search All Attendee History](#)

Add to List

- Click Save to save the new attendee and add them to the expense.

Note that all of your new attendees are listed for this meal and the expense amount is distributed equally among all attendees.

- Click Save.









The Attendees icon now appears next to the expense.

Allocating Expenses

You can allocate expenses to fund-functions and activity types, which will be charged for those expenses. You can allocate a single expense or multiple expenses.

There are two options for allocating your expenses.

- Allocate several expense lines at the same time. To do this, check the boxes by the expense to be allocated and select Allocate.

<div> Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▼ </div>					
<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details
<input checked="" type="checkbox"/>			Out of Pocket	Car Rental	Alamo Longview, Texas
<input checked="" type="checkbox"/>			Out of Pocket	Airfare	United Washington DC, District of Columbia
<input checked="" type="checkbox"/>			Out of Pocket	Hotel	Hyatt Hotels Washington DC, District of Columbia
<input type="checkbox"/>			Out of Pocket	Airfare	American Airlines Washington DC, District of Columbia

- or -

Allocate one line at a time. To do this, select the expense line and then select the Allocate icon at the top of the expense Details tab.

Details
Itemizations

Attendees (4)
Allocate


* Required field


The Allocations for

Report window appears. The total expense Amount, the amount Allocated, and the amount Remaining are listed.


- From the Allocate by dropdown list, select Percent or Amount.
- Select Add to choose the fund-function and/or activity type.
- The Add Allocation window appears. Select the appropriate items and then select Add to List.

Add Allocation ✕


New Allocation



Favorite Allocations

Fund ^{*} 1



(10) COF - Traditional


Function ^{*} 2



(0000000) No Function

Activity Type ^{*}

2. Recruiting



Cancel

Add to List

5. Add as many allocations as necessary.

You can adjust the amounts and percentages. The total amount must be allocated 100%, otherwise an audit rule is flagged, and you will not be able to submit the report.

6. Click Save.

The word Allocated now shows up under the expense amount. From here you can view the allocation or modify it if necessary.

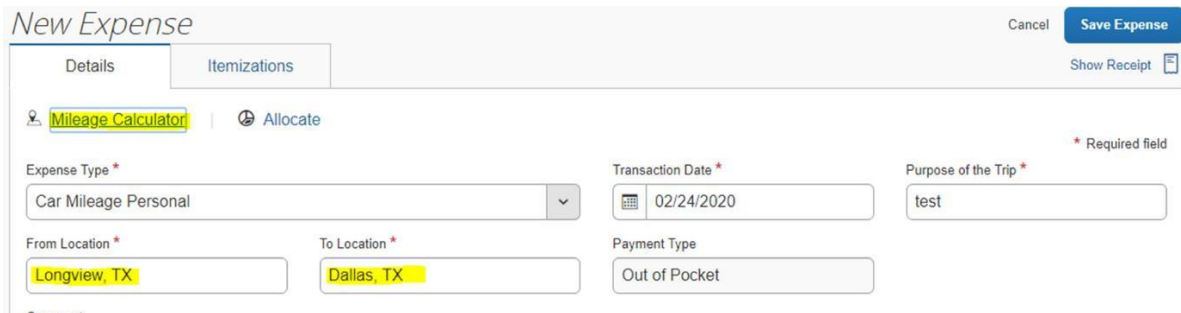
<div><div>Add Expense</div><div>Edit</div><div>Delete</div><div>Copy</div><div>Allocate</div><div>Combine Expenses</div><div>Move to ▼</div></div>							
<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date ▼	Requested
<input type="checkbox"/>			Out of Pocket	Car Rental	Alamo Longview, Texas	07/14/2020	\$80.00 Allocated
<input type="checkbox"/>			Out of Pocket	Airfare	United Washington DC, District of Columbia	07/08/2020	\$400.00 Allocated
<input type="checkbox"/>			Out of Pocket	Hotel	Hyatt Hotels Washington DC, District of Columbia	07/07/2020	\$300.00 Allocated Itemized

Entering Personal Car Mileage

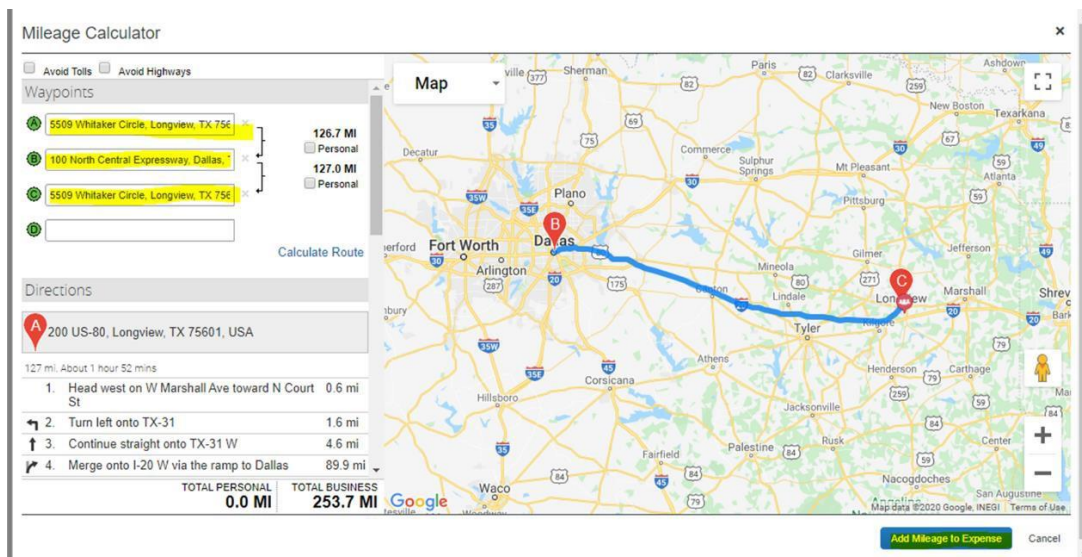
To create a car mileage expense

1. With the expense report open, click Add Expense, and then select the CarMileage Personal expense type.

The page refreshes with the required and optional fields displayed, including the Mileage Calculator link.



2. Select the Mileage Calculator window and you enter your point-to-point routes.



3. Select Add Mileage to Expense at bottom right.

When done, Expense calculates the reimbursement amount based on the miles and the reimbursement rate set by your company.

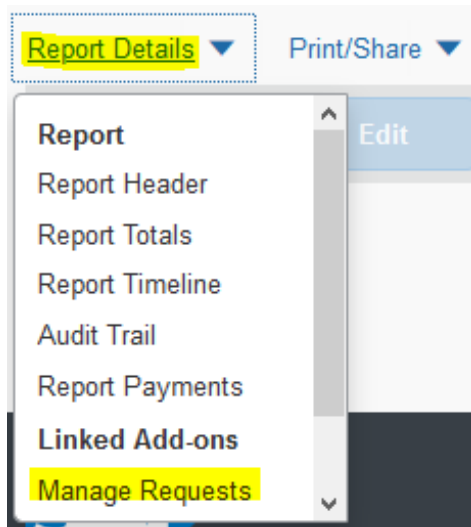
4. Complete all required and optional fields as needed.
5. Click Save.



Adding a Travel Request to an Expense Report

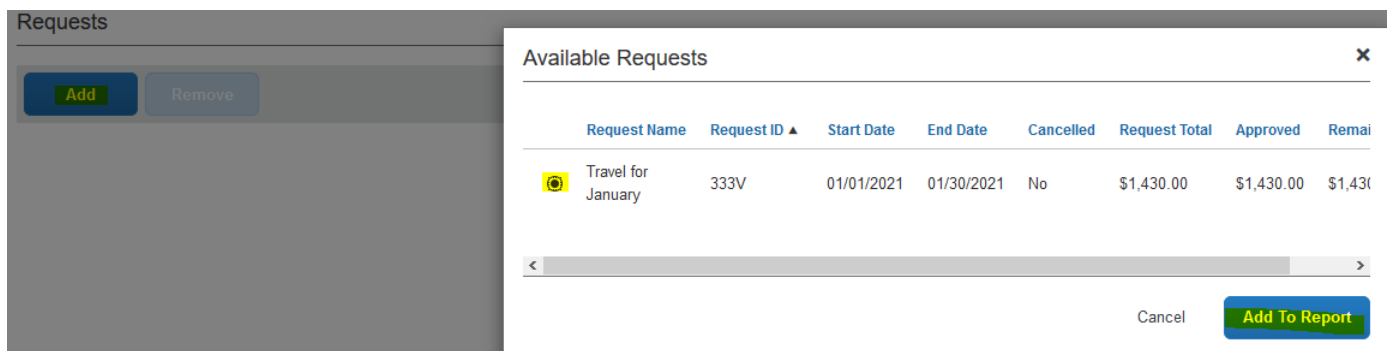
A Travel Request is required for Air Travel, Car Rental, and Hotel and other identifiable expenses. Once the Request is approved and the travel completed, the Request will need to be added to the Expense Report using the steps below.

1. Select Report Details>Manage Requests.



The Available Requests window appears.

2. Select Add>the desired Request(s)>Add To Report>Close



A Request appears in this list if:

- a. The Request is approved
 - b. The Request is not yet associated with another report.
3. The total Request amount will appear at the top of the Expense Report home page and will be available to attach to the applicable expense transaction.

REQUEST

Approved

\$1,430.00

Expense Type *

Airfare

Transaction Date *

MM/DD/YYYY



Business Purpose *

Ticket Number

Vendor *

Search for Vendor

Airline Travel Service Code

None Selected

Destination City *



Payment Type *

Out of Pocket

Amount *

Currency *

US, Dollar

Request *

01/11/2021, \$150.00 - Travel for Januar

Activating E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to SAP Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

You must opt-in from your Profile before e-receipts activate in Expense. A message will appear on the SAP Concur home page, prompting you to sign up. You can also active e-receipts from your Profile Options page.

To activate e-receipts

1. Click Profile, and then click Profile Settings.
2. On the Profile Options page, click E-Receipt Activation.

The E-Receipt Activation and User Agreement appears.

3. On the E-Receipt Activation page, click the [here link](#).
4. Read through the E-Receipt Activation agreement, and then click I Agree.

Receipts are successfully enabled.

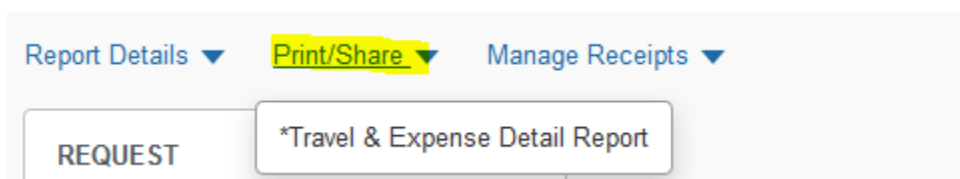
5. If you want to disable the E-Receipt Activation setting, on the E-Receipt Activation page, click the [here link](#).

Printing and Submitting an Expense Report

When you complete your expense report, you can print it to save a hard copy for your records or to review required receipts.

To preview and print the expense report

1. On the expense report page, click Print/Share, and then *Travel & Expense Detail Report. This prints a report that includes all report-level information as well as a summary of the report.
2. On the Detailed Report screen, review the details, and then click Print.




To submit your expense report

1. On the expense report page, click Submit Report.
2. The User Electronic Agreement appears. Select Accept & Continue.

Note: If there are any unresolved red flags, an Alert message will appear, stating that “This expense report cannot be submitted until all exceptions with red flags are resolved.” Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

3. The Report Totals window appears.

Report Totals
✕

 Alerts: 1 ▼

Company Pays <div style="font-size: 1.2em; font-weight: bold;">\$400.00</div> <div style="font-size: 0.8em;">Employee</div>	Employee Pays <div style="font-size: 1.2em; font-weight: bold;">\$0.00</div> <div style="font-size: 0.8em;">Company</div>
---	---

Amount Total:
 \$400.00

 Requested Amount:
 \$400.00

Due Employee:
 \$400.00

 Total Paid By Company:
 \$400.00

Owed Company:
 \$0.00

 Total Owed By Employee:
 \$0.00

Cancel
Submit Report

4. Review the information for accuracy, and then click Submit Report.

The Report Status window appears.

Note: A report can be submitted with yellow flags. These items are usually informational or allows a chance to review for accuracy.

5. Click Close.

Reviewing and Approving an Expense Report

As an approver, you will need to review submitted expense reports and approve them for reimbursement. On the SAP Concur home page, in the My Tasks section, you can view a list of any report waiting your approval.

Note: Reports go to the direct supervisor for approval first. It then goes to the Cost Object Approver which is the budget manager assigned to the fund-function being charged in the report. The report will only go to this approver if they have not already approved as the supervisor.

To review and approve an expense report

1. On the SAP Concur home page, click Required Approvals listed under My Tasks. Then click Expense Reports.

The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.

MY TASKS

01

Required Approvals →

Test User T. | Business Conference
\$450.00 — Expense

00

Available Expenses →

You currently have no available expenses.

01

Open Reports →

06/26 test
\$20.00

Approvals

00
Trips

00
Requests

01
Expense Reports

Expense Reports

Report Name	Employee	Report Date
Business Conference	Test User, Test User	07/27/2020

2. Review the report for accuracy.
 - The best way to see the full report including fund and functions is to view the print version of the report. Refer to *Printing and Submitting an Expense Report* in the previous section to see how to do this.
 - To view detail at the expense level, you can hover over the icon by the expense to see the receipt, allocations, warnings, comments, etc.

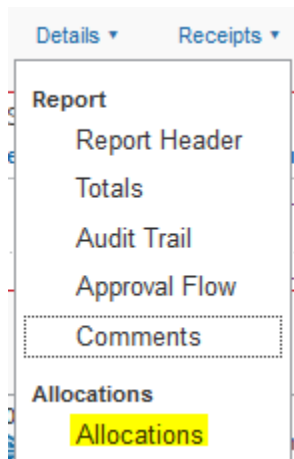
Expenses				View ▾	«
Date ▾	Expense Type	Amount	Requested		
07/06/2020	Airfare American Eagle, Washington DC, Distric	\$400.00	\$400.00		
07/06/2020	Car Rental Alamo, Washington DC, District of Colur	\$50.00	\$50.00		

- You can also click on the expense line and the details of the expense will show on the right side of the screen.
3. Click Approve when satisfied that the report is correct.

Approver Changing the Allocation

The approver can update a fund-function or activity type in a report.

1. To change the fund-function or activity type, click Details > Allocations.



2. The allocation screen will appear. Select the lines that you want to update and then select Allocate Selected Expenses.
3. Select Allocate By to change from percentage to amount if desired or select Add New Allocation to add a new fund-function.
4. Ensure that the amount is fully allocated and then select Save.

Allocations for Report: Business Conference □ ×

Expense List

Allocate Selected Expenses Clear Selections Summary

Select Group ▼

<input type="checkbox"/> Date ▼	Expense T...	Group	Amount
<input type="checkbox"/> 07/06/2020	Airfare	1	\$400.00
<input checked="" type="checkbox"/> 07/06/2020	Car Rental		\$50.00

AllocationsTotal:\$50.00 Allocated:\$50.00 (100%) Remaining:\$0.0

Allocate By: ▼ | Add New Allocation

<input type="checkbox"/>	Percentage	* Fund	* Function	* Activity Ty
<input type="checkbox"/>	50	(10) COF - Tra...	(5016301) Bus...	1. Purchasir
<input type="checkbox"/>	50	(10) COF - Tra...	(5016301) Bus...	1. Purchasir

The document will route to the appropriate approver based on the fund-function used.

Sending Back an Expense Report

As an approver, you will review submitted expense reports and approve them for reimbursement or send them back for corrections. All of the report's expenses appear in the Expenses list. If the report contains any exceptions, they will display in the Exceptions section of the report.

To return the entire expense report to the employee for correction

1. On the SAP Concur home page, in the Required Approvals section of My Tasks, click Expense Reports.

The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.

2. Click Send Back to Employee.

The Send Back Report window appears.

3. Enter a Comment for the employee, explaining why you are returning the report, and then click OK.

When you return a report to an employee for correction, it will no longer appear in your list of Reports Pending your Approval.

Correcting and Resubmitting an Expense Report

Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

To correct and resubmit an expense report

1. To open the report, on the SAP Concur home page, on the Quick Task bar, click the Open Reports task.

In the Active Reports section of the page, the report appears with Returned on the report tile. The approver's comment appears below the amount.

2. Click the returned report tile to open the report.
3. Make the requested changes, and then click Submit Report.