

5/4/2022

Creating A Report from A Request

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Use approved requests to create an expense report

1. Click Authorization Requests

The screenshot shows the SAP Concur dashboard for a user named Kayla at Clemson University. The top navigation bar includes 'Requests', 'Expense', 'Approvals', and 'App Center'. The main dashboard area displays several key metrics: 'New' (00), 'Required Approvals' (00), 'Authorization Requests' (02, highlighted with a red box), 'Available Expenses' (29), and 'Open Reports' (00). Below the metrics, there is a 'COMPANY NOTES' section with a link to 'Concur Training Toolkit'. The 'MY TASKS' section contains three cards: 'Required Approvals' (00), 'Available Expenses' (29), and 'Open Reports' (00). The 'Available Expenses' card lists several transactions with dates and amounts.

Category	Value
New	00
Required Approvals	00
Authorization Requests	02
Available Expenses	29
Open Reports	00

MY TASKS

Task	Value
Required Approvals	00
Available Expenses	29
Open Reports	00

Available Expenses List:

Date	Item	Amount
08/28	LADBROKE HOTELS	\$22.38
08/28	WINDWARD ISLAND	\$658.05
08/28	SOL HOTELS	\$613.80
08/28	Lumber and Building Materials St	\$531.36
08/28	COMPANIA FAUCETT	\$13.76

2. On the Manage Requests screen, select the appropriate approved request from the Request Library

The screenshot shows the 'Manage Requests' screen in SAP Concur. The top navigation bar includes 'Requests', 'Expense', 'Approvals', and 'App Center'. The main content area is titled 'Manage Requests' and features a 'REQUEST LIBRARY' section. There are three cards in the library: a 'Create New Request' button (highlighted with a red box), and two approved requests: 'Teaching Conference' (approved 12/12/2021, amount \$1,095.60) and 'Trip to Seattle' (approved 11/22/2021, amount \$2,200.00).

Request Name	Amount	Approval Date
Teaching Conference	\$1,095.60	12/12/2021
Trip to Seattle	\$2,200.00	11/22/2021

- Once you have selected the appropriate approved request, click Create Expense Report in the upper right-hand corner

The screenshot shows the SAP Concur interface for managing a request. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's profile is visible in the top right. The main content area is titled 'Manage Requests' and displays 'Trip to Seattle \$2,200.00' with 'Approved | Request ID: 346X'. A 'More Actions' dropdown menu is open, highlighting the 'Create Expense Report' button. Below this, there are options for 'Request Details', 'Print/Share', and 'Attachments'. A summary box shows 'REPORTS: 1' with an 'Amount' of '\$1,200.00'. The 'EXPECTED EXPENSES' section contains a table with columns for 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'.

Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
Airfare	Greenville (GSP) - Seattle (BFI) : Round Trip	11/22/2021	\$500.00	\$500.00
Lodging/Hotel	Seattle, Washington	11/22/2021	\$1,000.00	\$1,000.00
Business Meals	Seattle, Washington	11/22/2021	\$0.00	\$0.00
02. Incidental Travel Expenses		11/22/2021	\$100.00	\$100.00
Registration/Conference Fees		11/22/2021	\$600.00	\$600.00

Estimated Total: \$2,200.00

- If there are no expenses that need to be added to the report, click Submit Report

The screenshot shows the SAP Concur interface for managing expenses. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's profile is visible in the top right. The main content area is titled 'Manage Expenses' and displays 'Trip to Seattle \$0.00' with 'Not Submitted'. A 'Submit Report' button is highlighted in a red box. Below this, there are options for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A summary box shows 'REQUEST' with 'Approved' amount of '\$2,200.00' and 'Remaining' amount of '\$1,700.00'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main content area displays 'No Expenses' and the instruction 'Add expenses to this report to submit for reimbursement.'

If there are expenses that need to be added to the report, click Add Expense

The screenshot shows the SAP Concur Expense report interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Expense' (highlighted), 'Approvals', and 'App Center'. On the right, there are 'Help', 'Profile', and a user icon. Below the navigation bar, there are tabs for 'Manage Expenses' and 'View Transactions'. The main content area displays the report title 'Trip to Seattle \$0.00' with a trash icon and a 'Submit Report' button. Below the title, it says 'Not Submitted'. There are several dropdown menus: 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' summary box shows 'Approved \$2,200.00' and 'Remaining \$1,700.00'. A toolbar contains buttons for 'Add Expense' (highlighted with a red box), 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. Below the toolbar, it says 'No Expenses' and 'Add expenses to this report to submit for reimbursement.'

From here, you can select an Available Expense or Create New Expense

The screenshot shows the 'Add Expense' dialog box overlaid on the expense report. The dialog has a title bar with 'Add Expense' and a close button. It features two tabs: '29 Available Expenses' (selected) and '+ Create New Expense'. A blue arrow points to the '29 Available Expenses' tab. Below the tabs is a table of available expenses with columns for 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Amount'. The table contains five rows of expense data. At the bottom of the dialog, there are 'Close' and 'Add To Report' buttons.

<input type="checkbox"/>	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Amount ↑↓
<input type="checkbox"/>	CU PCard	Lodging/Hotel	LADBROKE HOTELS	08/28/2021	\$22.38
<input type="checkbox"/>	CU PCard	Lodging/Hotel	SOL HOTELS	08/28/2021	\$613.80
<input type="checkbox"/>	CU PCard	Airfare	COMPANIA FAUCETT	08/28/2021	\$13.76
<input type="checkbox"/>	CU PCard	Airfare	WINDWARD ISLAND	08/28/2021	\$658.05
<input type="checkbox"/>	CU PCard	Car Rental Fuel	THRIFTY RENT-A-CAR	08/28/2021	\$620.79

For an Available Expense select the box that is needed from the list of charges then select Add To Report. Then click Submit Report explained in step #4

29
Available Expenses

+
Create New Expense

<input type="checkbox"/>	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Amount ↑↓
<input checked="" type="checkbox"/>	CU PCard	Lodging/Hotel	LADBROKE HOTELS	08/28/2021	\$22.38
<input type="checkbox"/>	CU PCard	Lodging/Hotel	SOL HOTELS	08/28/2021	\$613.80
<input type="checkbox"/>	CU PCard	Airfare	COMPANIA FAUCETT	08/28/2021	\$13.76
<input type="checkbox"/>	CU PCard	Airfare	WINDWARD ISLAND	08/28/2021	\$658.05
<input type="checkbox"/>	CU PCard	Car Rental Fuel	THRIFTY RENT A-CAR	08/28/2021	\$620.79

Close **Add To Report**

To create a new expense click Create New Expense then select an expense type(s) that needs to be added to the report

29
Available Expenses




+
Create New Expense

Search for an expense type

- Recently Used
 - Car Rental
 - Car Rental Fuel
 - Lodging/Hotel
 - Internet/Online Fees
 - Airfare
- 01. Travel & Transportation
 - Airfare

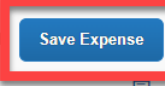

Add expenses to this report to submit for reimbursement.

Complete the required Details for the new expense and click Save Expense. Then click Submit Report explained in step #4. **If a new expense requires Itemizations, this can be completed once you click Save Expense.**


SAP Concur  Requests Expense Approvals App Center Help  Profile 


Manage Expenses View Transactions



New Expense




Cancel  Save Expense 


Details Itemizations


 Allocate * Required field

Expense Type *
Car Rental Fuel 

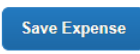

Transaction Date * MM/DD/YYYY  Trip Purpose *
Conference/Seminar 


Trip Type * 3. Out of State  City of Purchase
 

Payment Type *
Pending Card Transaction 

Amount * Currency *
US, Dollar 

Comment

  Cancel


Upload Receipt Image