

SAP CONCUR How-To Sheets

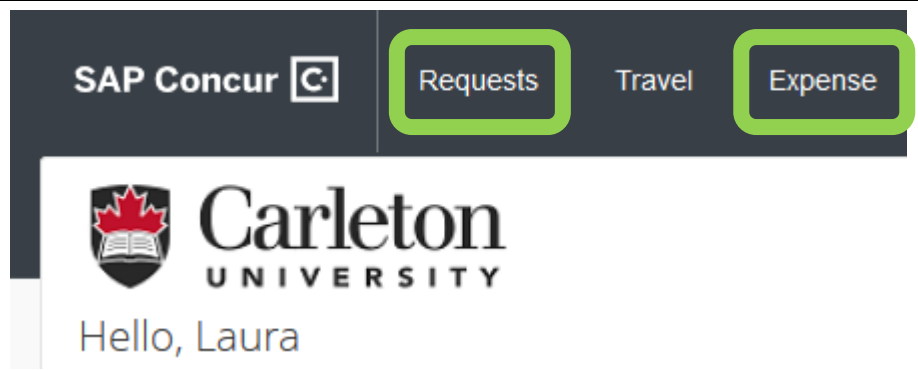
Checking the Status of your Expense or Request Report

This how-to sheet outlines the steps required to:

- Determine where your expense report or request is sitting in the approval flow.

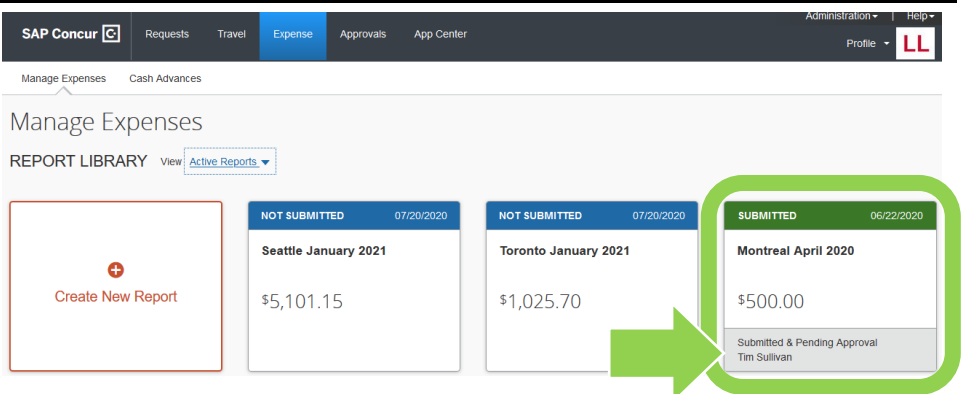
THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

- From the landing page, click on either 'Requests' or 'Expense'.

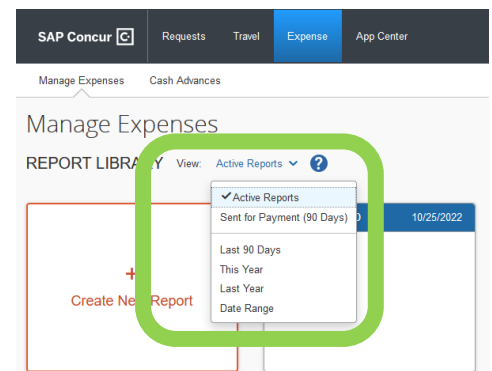


- The bottom of the tile (see green arrow) will tell you where the report/ request is sitting in the approval flow.

For additional detail, click on any **submitted** expense report or request.

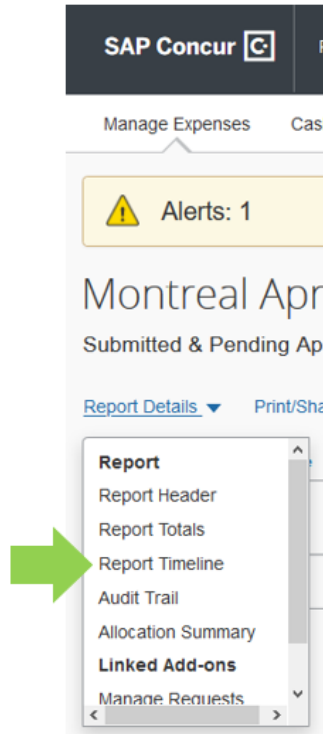


Tip: If you don't see the report you are looking for, you can choose another date range (e.g. 'Last 90 Days').

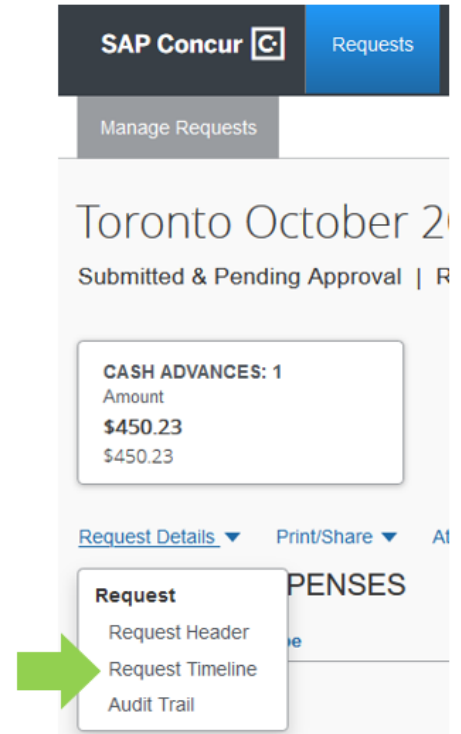


3. In the screen that opens, click on either the blue 'Report Details' or 'Request Details' text. Choose either 'Report Timeline' or 'Request Timeline' from the drop down menu.

Expense Report



Request

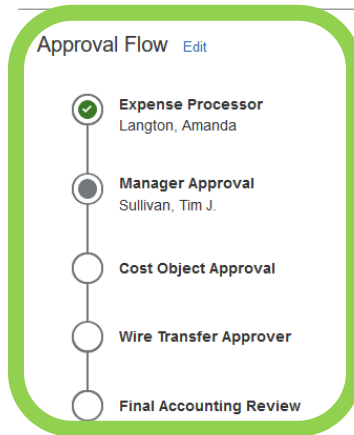


4. The 'Approval Flow' will tell you:
- which steps have already been approved (i.e. circle with a green check mark)
 - where the report/ request is currently sitting for approval (i.e. a grey circle)

The steps in the approval flow:

- **'Expense Processor' Step:** Your report will be with Accounts Payable and/ or Research Financial Services
- **'Manager Approval' Step:** The manager approval must be an individual in a one-up role from the claimant or higher.
- **'Cost Object Approval' Step:** The financial approval authority/ies for the Index/es you have charged a given report to.
- **'Wire Transfer' Step:** This step is Accounts Payable and it will only be triggered if a wire transfer has been requested. Otherwise this step will skip.
- **'Final Accounting Review' Step:** This step is also with Accounts Payable. This is an administrative step that will generally skip.

Report Timeline
Montreal April 2020 | \$500.00



Report Summary

SUBMITTED
Landriault, Laura 06/22/2020

SUBMITTED AND PENDING PROCESSOR APPROVAL
Landriault, Laura 06/22/2020

APPROVED
Langton, Amanda 07/27/2020

What next?

- Visit carleton.ca/facts/travel to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.