

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.

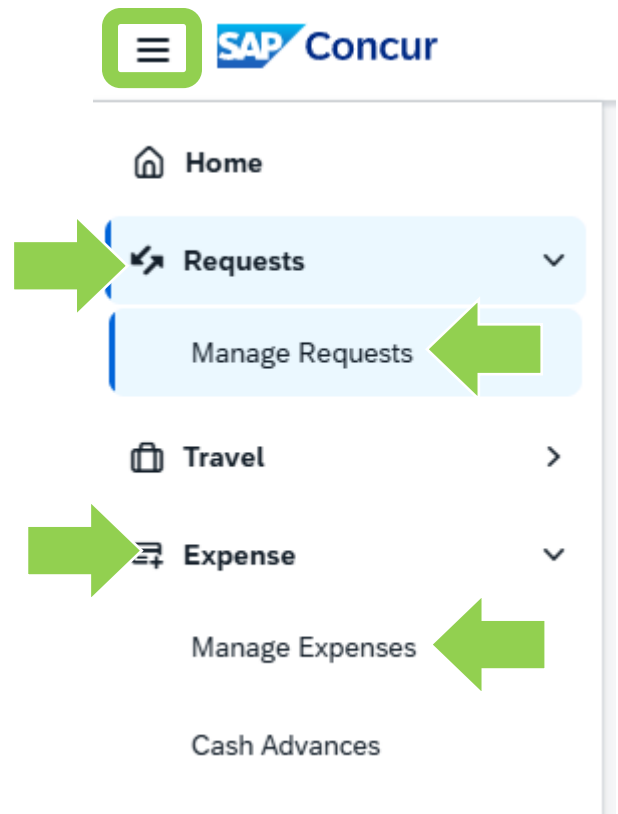
Last updated November 25, 2025.

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

1. In the menu on the lefthand side of your screen, click either **'Requests'** or **'Expense'**.

In the drop-down menu, click on either **'Manage Requests'** or **'Manage Expenses'**.

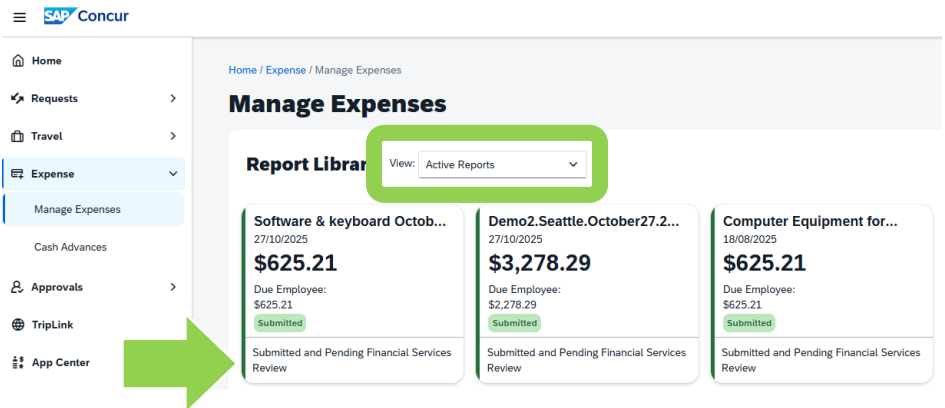
TIP: Click on the hamburger menu icon (i.e. three horizontal lines) to view the menu's text.



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

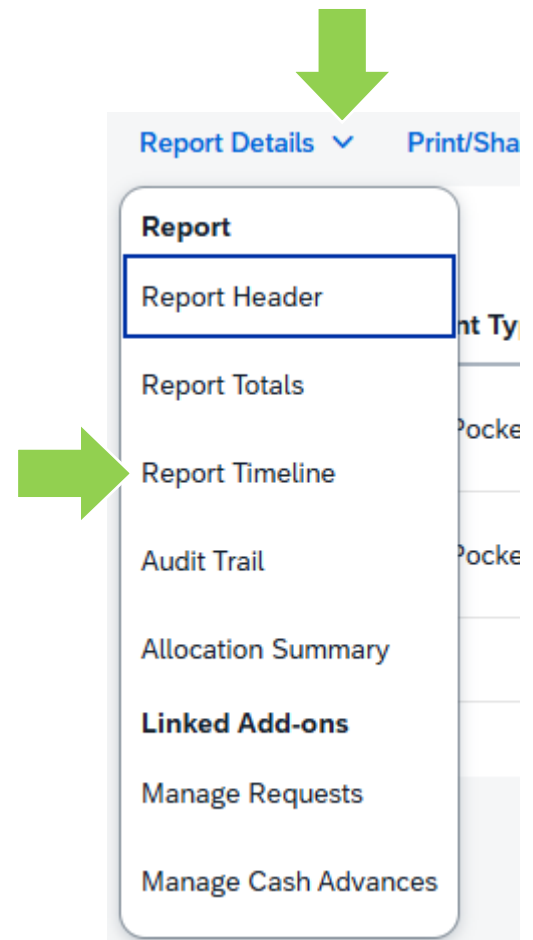
For additional detail, click on any **submitted** expense report or request tile.

TIP: On this screen, you can search for reports by time period (e.g. Last 90 Days).



3. In the screen that opens, click on the **drop-down arrow beside either 'Report Details' or 'Request Details'.**

From the drop-down menu, **click on either 'Report Timeline' or 'Request Timeline'.**



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:

- **'Financial Services Dept. Review' Step:** Your report will be with Accounts Payable and/ or Research Financial Services
- **'Supervisor Approval' Step:** The supervisor 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 (Accounts Payable)' Step:** This step is also with Accounts Payable. This is an administrative step that will generally skip.

The screenshot displays the SAP Concur Expense Report Timeline for a report titled "Seattle Conference" with a total amount of \$1,035.00. The interface is divided into two main sections: "Approval Flow" and "Report Summary".

Approval Flow: This section shows a vertical sequence of five steps, each with a circular indicator. The first step, "Financial Services Dept. Review", is marked with a green checkmark, indicating it is completed. The subsequent steps are "Supervisory Approval", "Cost Object Approval", "Wire Transfer Approval", and "Final Accounting Review (Accounts Payable)", all of which have grey indicators, suggesting they are pending approval. The "Supervisory Approval" step includes the text "Approver Approver" below it.

Report Summary: This section provides details about the report's status and history. It shows the current date as "Wednesday, 29 May, 2024". The status is "Submitted", with a note "Status Updated: Traveller Four May 29, 2024 2:05 PM". Below this, it shows a previous status "Submitted and Pending Financial Ser" with a note "Status Updated: Traveller Four May 29, 2024 2:05 PM". The date "Tuesday, 20 February, 2024" is also displayed. A "Report Comment - \$1,035.00" is shown, along with a timestamp "Traveller Four Feb 20, 2024 4:58 PM" and the comment text "Seattle SAP Conference to remain curre".

What next?

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