

# SAP CONCUR How-To Sheets

## Checking the Status of your Expense or Request Report

This how-to sheet outlines the steps required to:

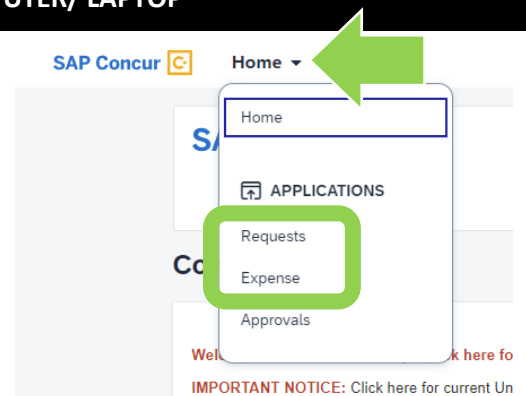
- Determine where your expense report or request is sitting in the approval flow.

Last updated December 11, 2023.

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

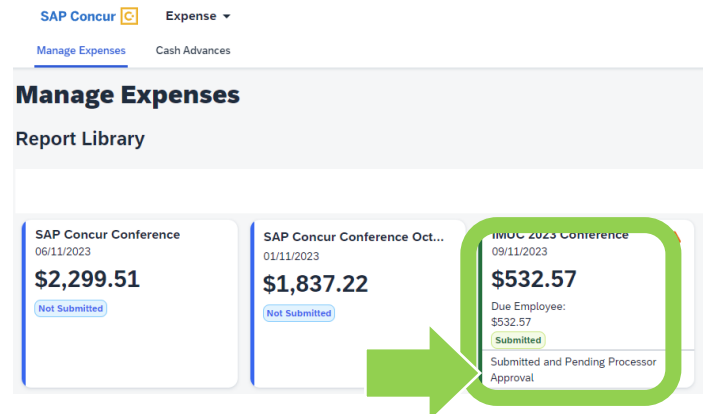
- From the landing page, click on the **drop-down arrow beside the black 'Home' text**.

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

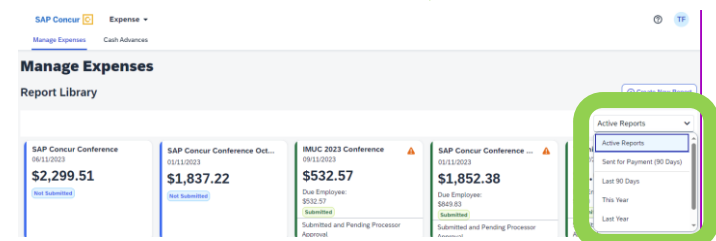


- The bottom of the tile (see green arrow) will tell you where the report/ request is sitting in the approval flow.

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

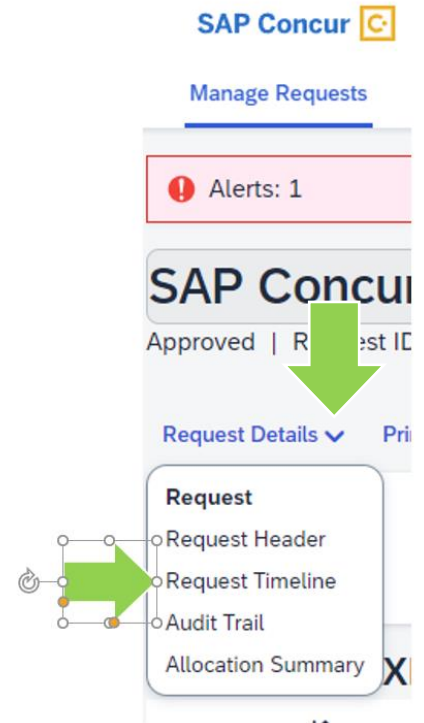
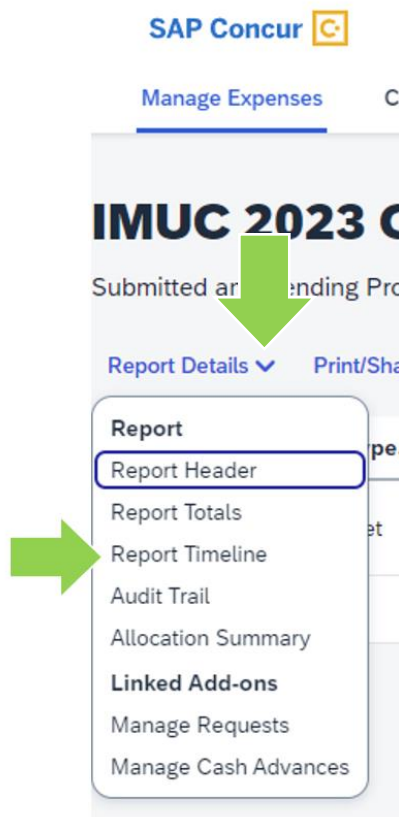


**TIP:** On this screen, you can search for reports by time period (e.g. Last 90 Days).



3. In the screen that opens, click on the **drop-down arrow beside '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:

- **'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

IMUC 2023 Conference | \$532.57

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#### Approval Flow

```
graph TD; A((Expense Processor)) --- B((Manager Approval)); B --- C((Cost Object Approval)); C --- D((Wire Transfer Approver)); D --- E((Final Accounting Review));
```

The diagram shows a vertical flow of five steps. The first step, 'Expense Processor', is marked with a green circle and a checkmark, indicating it is complete. The other steps are marked with grey circles, indicating they are pending approval.

#### Report Summary

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**REPORT COMMENT**

Four, Traveller 09/11/2023  
Attending IMUC Conference to remain current on the system

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**SUBMITTED**

Four, Traveller 09/11/2023

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**SUBMITTED AND PENDING PROCESSOR APPROVAL**

Four, Traveller 09/11/2023

#### What next?

- Visit [carleton.ca/facts/travel](http://carleton.ca/facts/travel) to find more how-to sheets.
- Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).