SAP CONCUR How-To Sheets

Checking the Status of your Expense or Request Report

This how-to sheet outlines the steps required to:

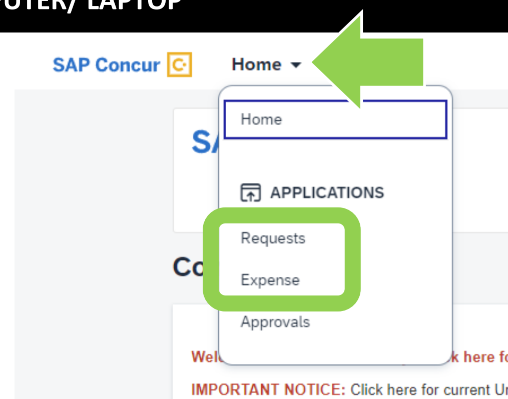
- Determine where your expense report or request is sitting in the approval flow.

Last updated December 11, 2023.

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

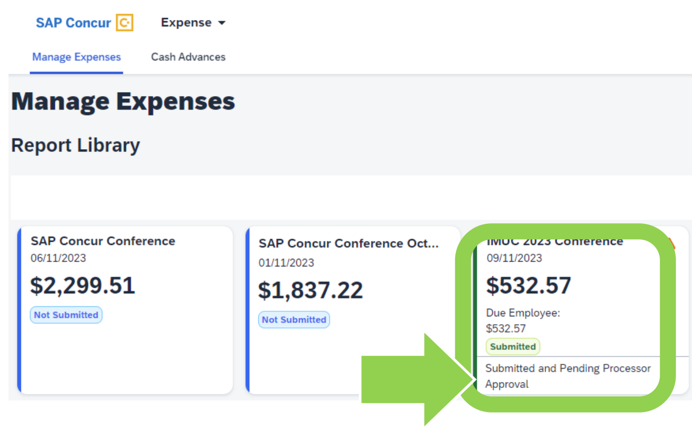
1. From the landing page, click on the **drop-down arrow beside the black 'Home' text**.

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

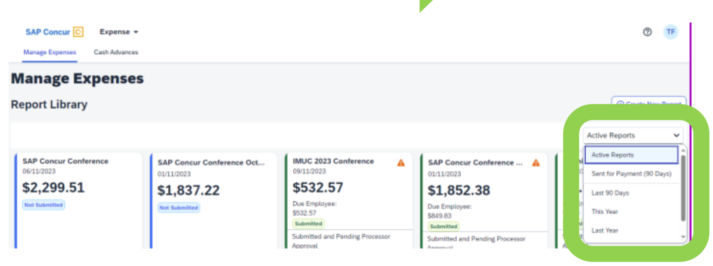


2. The bottom of the tile (see green arrow) will tell you where the report/ request is sitting in the approval flow.

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

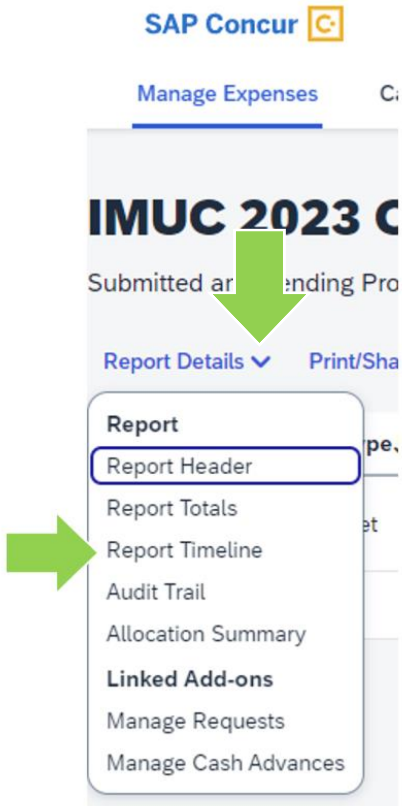


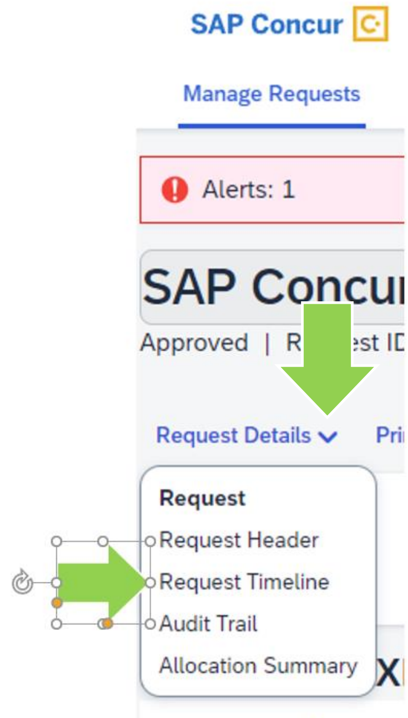
   TIP: On this screen, you can search for reports by time period (e.g. Last 90 Days).



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

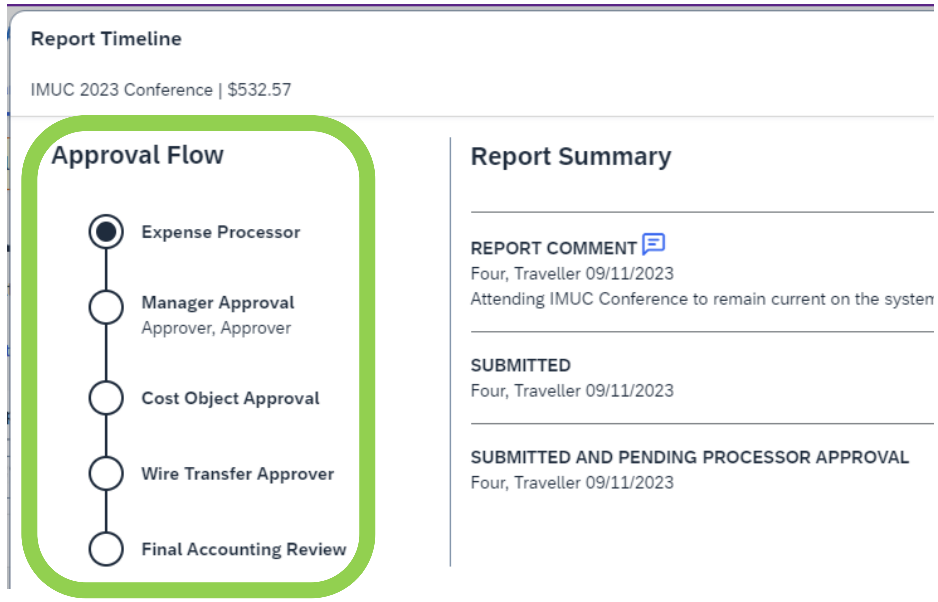
   From the drop-down menu, **click on either 'Report Timeline' or 'Request Timeline'.**





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.



What next?

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