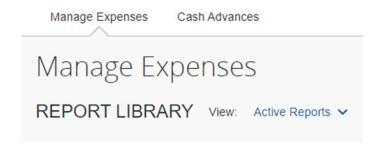
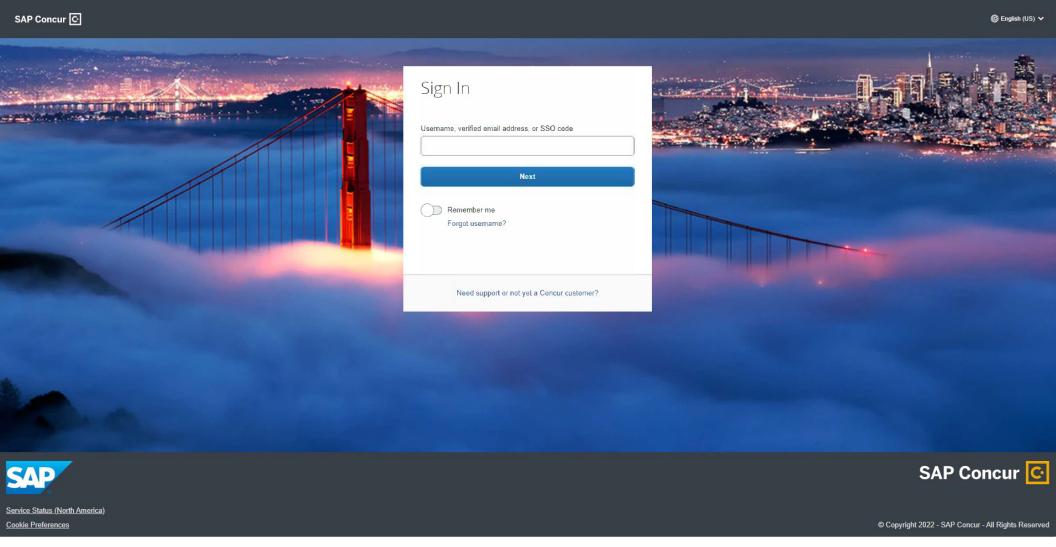
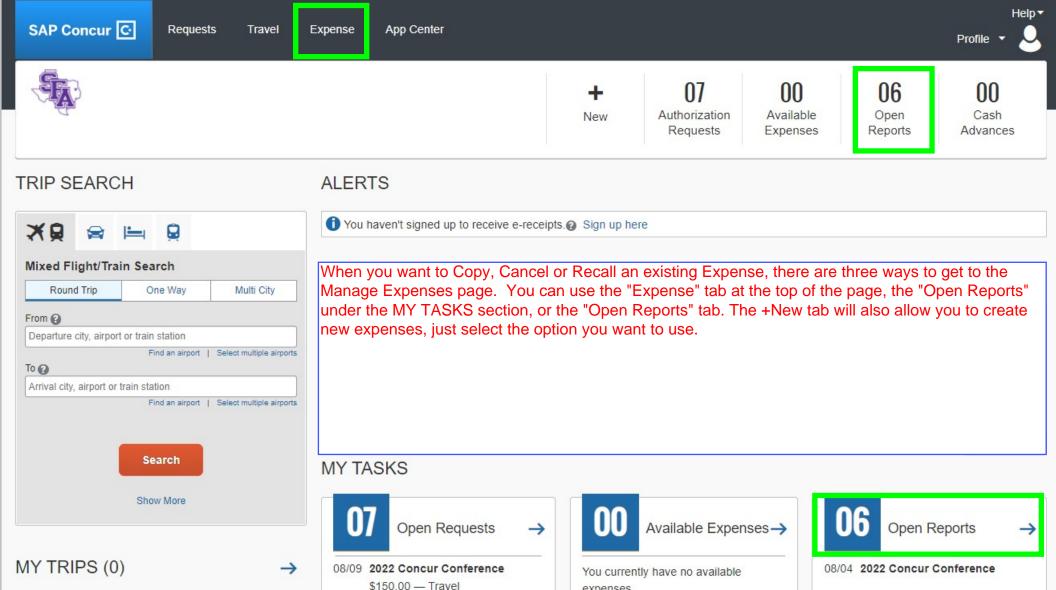
SAP Concur Next Gen UI: How to Copy, Cancel, or Recall an Expense





To first enter a request or expense, log into Concur. You can access Concur through mySFA.

Go to the Resources Tab --> Travel & P-Card Heading --> Concur Link



expenses.

Manage Expenses

Cash Advances

Manage Expenses

REPORT LIBRARY View: Active Reports >

+
Create New Report

NOT SUBMITTED 08/04/2022

2022 Concur Conference

\$0.00

• Dawn Test
• 0.00

NOT SUBMITTED 12/03/2021

① ATT conference

\$774.30

OT SUBMITTED 01/07/2021

 Basketball Champ Las Vegas, NV

\$321.38

• Dallas Comp

\$1,168.00

• Demo123 • 250.00 2022 Concur Conference

\$121.00

Submitted & Pending Supervisor
Approval
Supervisor ...

In order to copy an existing expense, click on the expense report that will be copied.

Recall Report

Copy Report

Manage Expenses

Cash Advances

Once the expense report has been opened, clicked on the Copy Report button.

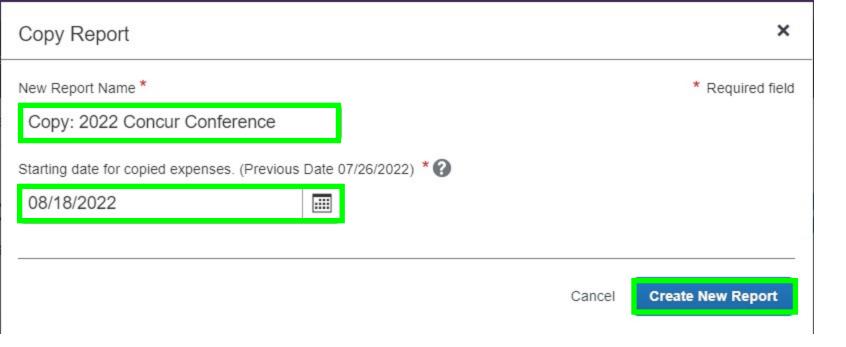
2022 Concur Conference \$121.00

Submitted & Pending Supervisor Approval

Report Details V Print/Share V Manage Receipts V Travel Allowance V

					View: Standard ✓
Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/29/2022	\$34.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/28/2022	\$34.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/27/2022	\$5.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/26/2022	\$48.00
					4

\$121.00



After clicking the Copy Report button, this popup will appear. This will allow for the copied report name and starting date to be changed. This is useful for Blanket Travel or travel that is repetitive.

Once all changes have been made, click the Create New Report button.



Travel

Expense

App Center



Manage Expenses

Cash Advances

Copy: 2022 Concur Conference \$0.00 🟛

Submit Report

Not Submitted



No Expenses

Add expenses to this report to submit for reimbursement.

Now that there is a copy of the original expense, it needs to be linked to a request. As previously mentioned, this is a good practice for those few that use a blanket travel request.

Before adding new expenses, or editing those that transferred over, the expense will need to be linked to an existing request.

Note: meals per diem do not transfer over, but hotel lodging, airfare, car rentals, and a few others will be copied and need to be edited.



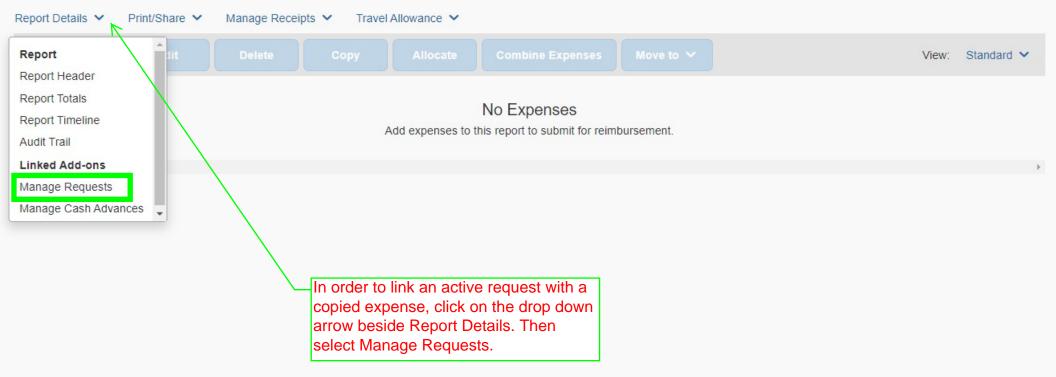
Submit Report

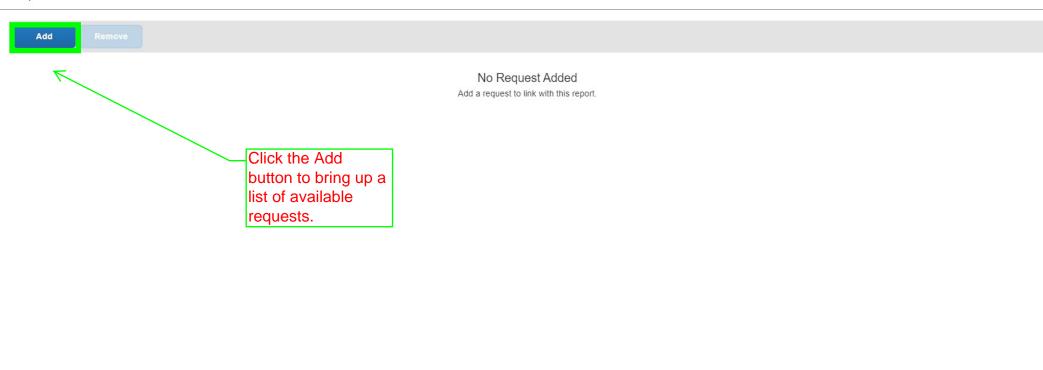
Manage Expenses

Cash Advances

Copy: 2022 Concur Conference \$0.00 🟛

Not Submitted





Close

Available Requests



		Request Name ↑↓	Request ID ↑↓	Start Date =	End Date ↑↓	Cancelled ↑↓	Request Total ↑↓	Approved $\uparrow\downarrow$	Remaining 1
	0	2022 Concur Conference	3ARM	08/09/2022	08/12/2022	No	\$150.00	\$150.00	\$150.00
Ō	0	Dawn Test	3334			Yes	\$0.00	\$0.00	\$0.00

Cancel

Add To Report

Select the request that will be linked to the expense report. Once a request is selected, click on the Add To Report button.

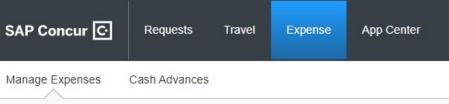


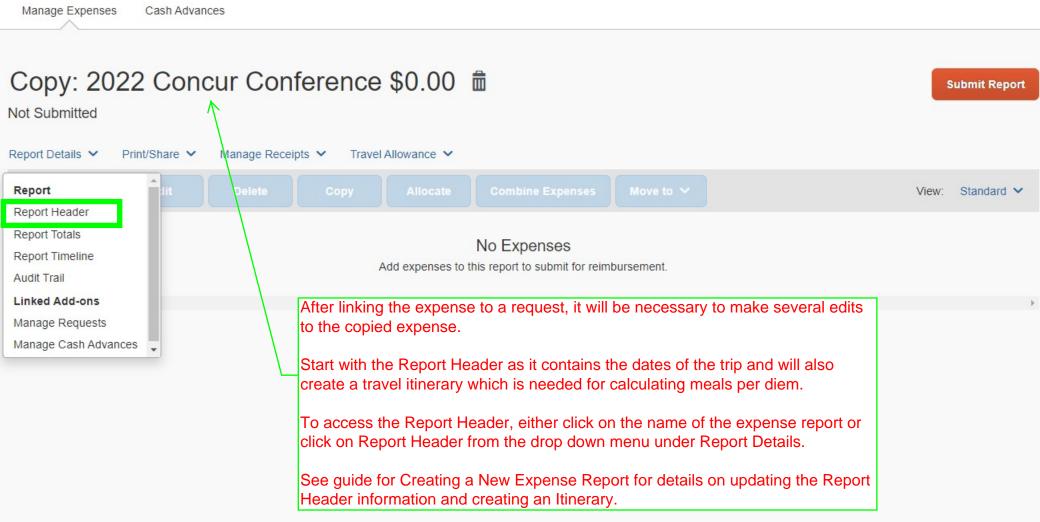
The request will now appear linked to the current expense.

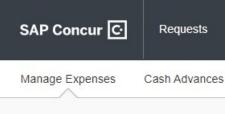
Click on the Close button.

Close

×









Submit Report



Travel

Not Submitted





Add expenses to this report to submit for reimbursement.

After updating the Report Header and creating an Itinerary (if needed), either click on the Add Expense button to upload expenses or select any expenses that copied over and edit them.

Note: Further details about adding and editing expenses is on the guide for Creating a New Expense Report.

Manage Expenses

Cash Advances

Manage Expenses

REPORT LIBRARY View: Active Reports >

The copied expense report will appear on the Manage Expenses page. If it has not been submitted, it will have a blue header like this one. If it has been submitted (whether approved or pending approval), it will have a green header.

Create New Report

Copy: 2022 Concur Conference \$0.00 2022 Concur Conference
\$0.00

NOT SUBMITTED 07/20/2022

Dawn Test

\$0.00

• ATT conference \$774.30

NOT SUBMITTED 01/07/2021

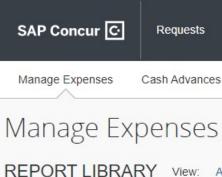
① Basketball Champ Las Vegas, NV

\$321.38

• Dallas Comp

\$1,168.00

NOT SUBMITTED 01/04/2021 **9 Demo123**\$250.00



Requests Travel Expense

App Center



REPORT LIBRARY View: Active Reports >

In order to Recall an expense report that has already been submitted, click on the expense report that needs to be recalled.

Create New Report

NOT SUBMITTED 08/04/2022 2022 Concur Conference \$0.00

NOT SUBMITTED 07/20/2022 Dawn Test \$0.00

NOT SUBMITTED 12/03/2021 ATT conference \$774.30

01/07/2021 NOT SUBMITTED Basketball Champ Las Vegas, NV \$321.38

NOT SUBMITTED 01/05/2021 Dallas Comp \$1,168.00

NOT SUBMITTED 01/04/2021 Demo123 \$250.00

SUBMITTED 08/03/2022 2022 Concur Conference \$121.00 Submitted & Pending Supervisor Approval Supervisor ...



View: Standard >

Manage Expenses

Cash Advances

2022 Concur Conference \$121.00

Copy Report Recall Report

Submitted & Pending Supervisor Approval

Report Details V Print/Share V Manage Receipts V Travel Allowance V

Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/29/2022	\$34.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/28/2022	\$34.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/27/2022	\$5.00
	Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/26/2022	\$48.00

\$121.00

Recalling an expense report can be useful if adjustments need to be made, either edits to expenses already listed, or adding expenses that were left off in error.

Click the Recall Report button to be able to make necessary changes to an expense.

Note: If an expense has already been submitted, approved, and posted, the expense cannot be Recalled. It is important to very the information being submitted before sending it to be approved.

After clicking the Recall Report button, this message window will appear. Click the Yes button.

Note: Once an expense is recalled, it will need to go through the chain of approvals once more to verify the information. This could extend the time that the expense is verified by the Travel Office.

Travel E

Expense

App Center



Manage Expenses

Cash Advances

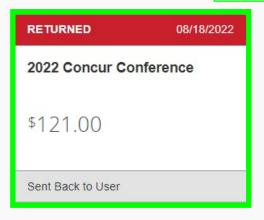
Manage Expenses

REPORT LIBRARY View: Active Reports >

After an expense has been recalled, it will appear in the Manage Expenses page with a red header.

Note: Expenses that are returned from a supervisor will also say Returned with a red header.

+
Create New Report







NOT SUBMITTED 12/03/2021

① ATT conference

\$774.30





NOT SUBMITTED	01/04/2021
• Demo123	
\$250.00	

Travel

Office for final review and eventual approval.

Expense App Center



Manage Expenses

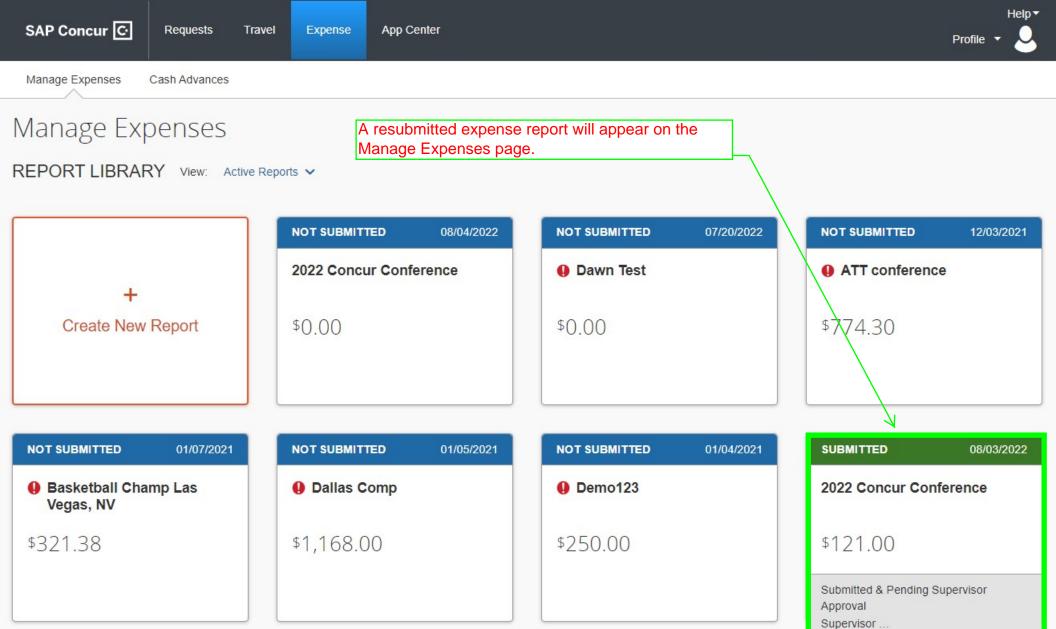
Cash Advances

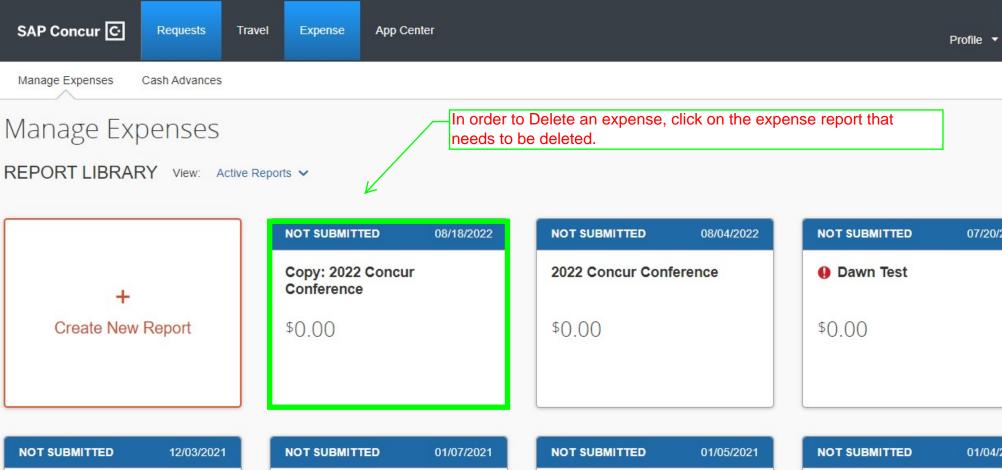
2022 Concur Conference \$121.00 🟛

Copy Report Submit Report

● Returned | View Report Timeline

		nt/Share ✓ Manage Receipts				
Paid by Traveler _Meal Per Diem San Antonio, Texas 07/29/2022 \$34.00 Paid by Traveler _Meal Per Diem San Antonio, Texas 07/28/2022 \$34.00	Add Expense	Edit Delete	Copy Allocate Con	Move to V		View: Standard V
Paid by Traveler _Meal Per Diem San Antonio, Texas 07/28/2022 \$34.00	☐ Receipt ↑↓ F	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
		Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/29/2022	\$34.00
Paid by Traveler _Meal Per Diem San Antonio, Texas 07/27/2022 \$5.00		Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/28/2022	\$34.00
		Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/27/2022	\$5.00
Paid by Traveler _Meal Per Diem San Antonio, Texas 07/26/2022 \$48.00		Paid by Traveler	_Meal Per Diem	San Antonio, Texas	07/26/2022	\$48.00
\$121.00						\$121.00







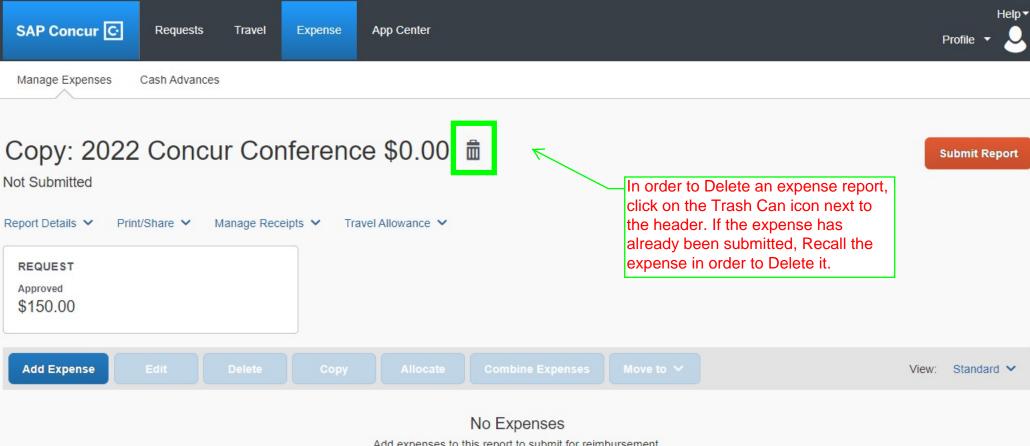






Help▼

07/20/2022



Add expenses to this report to submit for reimbursement.





This report will be permanently deleted.

Do Not Delete

Delete

After clicking the Delete (trash can) icon, this image will pop up asking for confirmation. If deleting the expense is what is intended, then click on the Delete button.

Manage Expenses

Cash Advances

Manage Expenses

REPORT LIBRARY View: Active Reports >

The expense will no longer be visible on the Active Reports view of the Manage Expenses.

+
Create New Report

Copy: 2022 Concur Conference \$0.00 2022 Concur Conference
\$0.00

NOT SUBMITTED 07/20/2022

Dawn Test

\$0.00

• ATT conference \$774.30

O1/07/2021

 Basketball Champ Las Vegas, NV

\$321.38

• 1,168.00

• 1/04/2021

• Demo123

• 250.00