VIEWING ATTACHMENTS FOR CONCUR TRAVEL REQUESTS AND EXPENSE REPORTS

This job aid to provide step-by-step instructions for Travel Approvers to view attachments for Concur Travel Requests and Expense Reports.

LAUSD
UNIFIED

BASE
Business Applications
Supporting Education

1

Log into ESS with your SSO and click on the Travel Approvals tile to view travel requests or expense reports pending your approval.

Approval Inbox ▼

All Tasks (8)

Search 🔍 ⟳

Approve/Reject Travel
Request:34RJ for
Workflow System   Medium

Approve/Reject Travel
Request:34RC for Natalie...
Workflow System   Medium

Approve/Reject Travel
Request:34QQ for Violet...
Workflow System   Medium

Approve/Reject Travel
Request:34QN for Violet...
Workflow System   Medium

Approve/Reject Travel

Approve/Reject

Approve/Reject Travel Request:34RJ for   4500000053

Workflow System

Created on Aug 3, 2023, 11:24 AM

Status: Ready
Priority: Medium
Approval Preview

Review Attachments

ℹ   📋⁰   📎⁰   🔗¹

2 To view attachments for a travel request, select a travel request from your list pending work items.

Travel Details

This is to inform you that the following Travel Request has been submitted for your review and approval.

Trip Number	34RJ
Employee Name	
Employee Number	
Cost Center	0001870101INTERNATIO
Trip Name	Out-of-state seminar
Trip Purpose	staff training
Trip Start Date	08/03/2023
Trip End Date	08/04/2023
Travel Destination	Out of State

Approve   Reject   ⬆

3

Approve/Reject Travel Request: **34RJ** for C_____ z 4500000053

Workflow System

Status: Ready

Priority: Medium

Approval Preview

Created on Aug 3, 2023, 11:24 AM

Review Attachments

3 To view supporting documents for the travel request, highlight the Travel Request ID # and hold Ctrl + C on your keyboard to copy the ID# (you can also right-click on your mouse and select "Copy"). Then click on "Review Attachments."

(i)   📋 0   📎 0   🔗 1

Travel Details

This is to inform you that the following Travel Request has been submitted for your review and approval.

Trip Number	34RJ
Employee Name	C
Employee Number	0_____
Cost Center	0001870101INTERNATIO
Trip Name	Out-of-state seminar
Trip Purpose	staff training
Trip Start Date	08/03/2023
Trip End Date	08/04/2023
Travel Destination	Out of State

Approve   Reject   ⤴

4

4 After you sign in with your LAUSD SSO, you will be taken to Concur.

5 Click on the "Requests" tab.

6 Click on "Process Requests."

SAP Concur ⓒ   Requests   Expense   Approvals   App Center

Manage Requests   Process Requests

Requests Ready for Processing

Group: All Groups I Can Access

[Run Query ▾] [Starting Group ▾] [Group] [List Settings] [Create/Manage Queries ▾]

Find every request where

			AND

Name
Request ID
Employee ID
Employee First Name
Employee Last Name
Purpose
Approval Time Limit
Start Date
End Date
Creation Date
Submit Date
Approval Status
Total Posted Amount
Total Approved Amount
Total Remaining Amount
Request Policy

Request ID	Submit Date	Employee Name	Approval Status	Total Approved ...	Start Date	Purpose
36T	03/06/2023	Kompalli, Sankar	Pending Extern...	$100.00	03/06/2023	Test

7

Under "Find every request where" select "Request ID for the 1st search criteria.

7

10

Click on the arrow next to "Attachments" then select "View Documents."

11

You should be able to view the attachments.
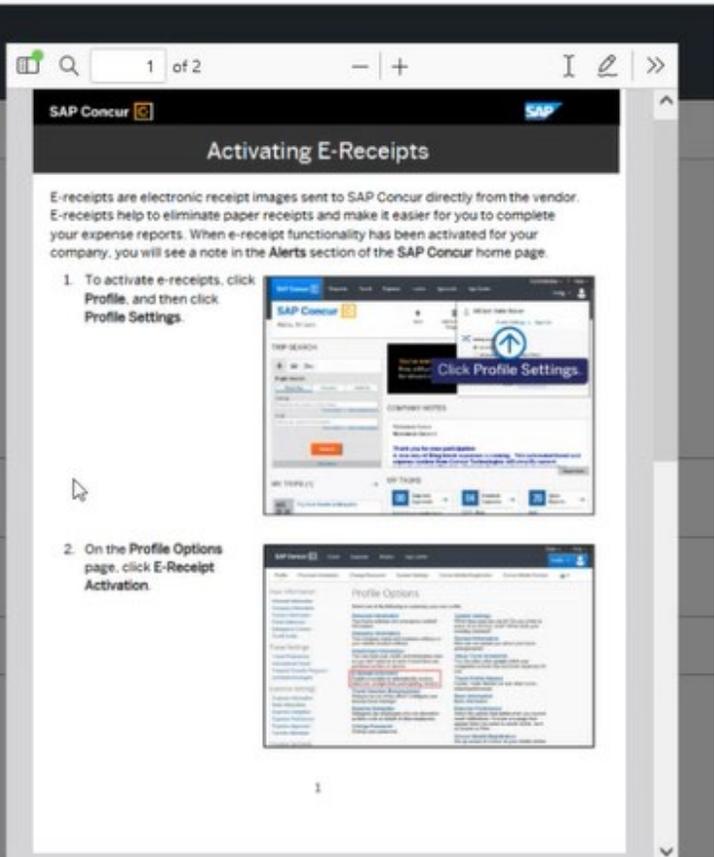
Approve/Reject Travel Expense:**3ENBZQ** for Cy [   ] 4500000053

Workflow System

Status: Ready

Priority: Medium

Approval Preview

Review Attachments

Created on Aug 3, 2023, 11:44 AM

12 To view attachments for a travel expense report, first select an expense report from your list pending work items.

(i)   📋 0   📎 0   🔗 1

Travel Details

This is to inform you that the following Travel Expense has been submitted for your review and approval.

| Trip Number	3ENBZQ
Employee Name	Cy
Employee Number	0C
Cost Center	0001870101INTERNATIO
Trip Name	Out-of-state seminar
Trip Purpose	staff training
Trip Start Date	08/03/2023
Trip End Date	08/04/2023
Travel Destination	Out of State

13 To view supporting documents for the travel request, highlight the Travel Expense # and hold Ctrl + C on your keyboard to copy the ID# (you can also right-click on your mouse and select "Copy"). Then click on "Review Attachments."

Approve   Reject   ↗   10

14 After you sign in with your LAUSD SSO, you will be taken to Concur.
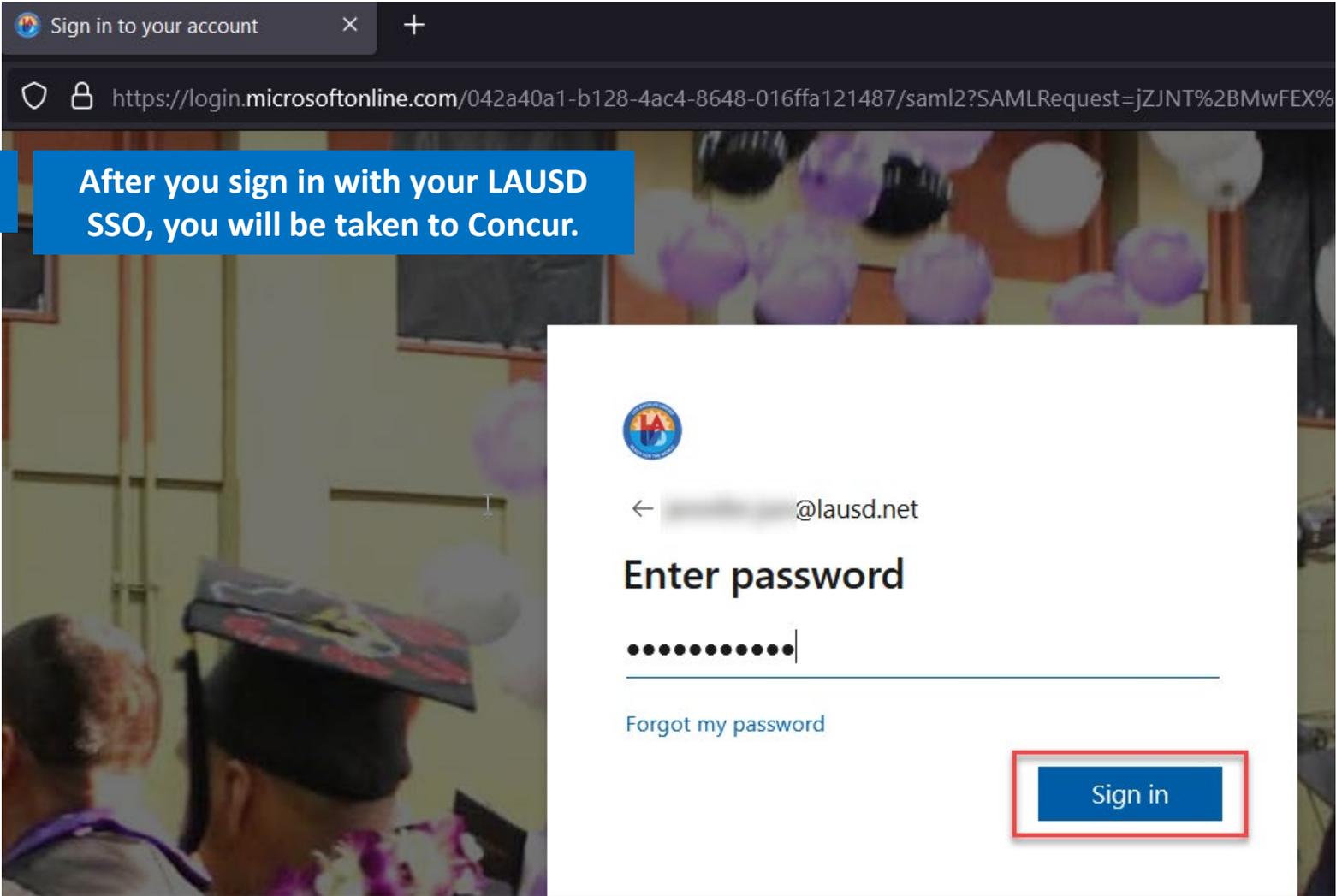
SAP Concur [C·]   Requests   **Expense**   Approvals   App Center

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LAUSD UNIFIED

\+ New

00 Required Approvals

00 Authorization Requests

100 Available Expenses

00 Open Reports

COMPANY NOTES

15   Click on the "Expense" tab.

SAP Concur [C·]   Requests   **Expense**   Approvals   App Center

Manage Expenses   View Transactions   Process Reports

Manage Expense

16   Click on "Process Reports."

REPORT LIBRARY

17

Under "Find every report where" select "Report Number" for the 1st search criteria.

SAP Concur · Requests · Expense · Approvals · App Center

Manage Expenses View Transactions Process Reports

Group: All Groups I Can Access

Run Query ▾ Starting Group ▾ List Settings Create/Manage Queries ▾

18

For the 2nd search criteria, select "Equals."

Find every report where

Report Number ▾ | Equals ▾ | | AND

▾ | ▾ | Go

| | Report Name | Submit Date | Employee Name | Approval Status | Report Total | Receipt Status | Report Type | Cash Advance ... | Payment Status |

Search Results

Group: All Groups I Can Access

Run Query ▾ Starting Group ▾ List Settings Create/Manage Queries ▾

19

For the 3rd search criteria, hold Ctrl +V on your keyboard (or right-click on your mouse and select "Paste") to paste the Report # that you copied earlier. Then click on Go and select the request.

Find every report where

Report Number ▾ | Equals ▾ | 3ENBZQ | AND

▾ | ▾ | Go

	Report Name	Submit Date	Employee Name	Approval Status	Report Total	Receipt Status	Report Type	Cash Advance ...	Payment Status
📎	Out-of-state se...	08/03/2023		Pending Extern...	$740.10	Not Required	Expense Type		Not Paid

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20 Click on the receipt icon or Receipt Image tab to view attachments.