How to link a Request to the Expense Report

A request can be added to the expense report in the following way:

In the **Expenses** tab, choose your expense report. Once it has opened, click **report title** (ex. "Training Request 2020").



The details of the trip will show and at the very bottom of the pop-up, you will find an "Add" button.

Report header for: Train	ing Request 2020				□ ×
Comments To/From Approvers/Processors					·
Business Unit (SACST) SACST - Cal State	Fund (MDS01) MDS01 - General C Project	Department (48100) 48100 - /	Accounts Pa	jram,	∽
Report Currency US, Dollar Amount Not Approved 0.00 Amount Due User 55.00	Approval Status Not Submitted Amount Approved 145.00 Amount Due University Card 0.00	Report Total 155.00 Amount University 100.00 Total Amount Clain 145.00	Pers 10.0 Paid Amo 0.00 1ed	onal Expenses 00 unt Due University 0	
Requests Requests Request Name	lequest ID	Cancelled	Request Total	Amount Approved	Add Remove Amount Remaining

Choose the request and then click **Add**. Choose **Save**. The Request is now linked.

	Request	Request ID	Cancelled	Request	Amount	Amount
	Blanket	3KXN	No	\$664.00	\$664.00	\$664.00
	CHELF	3KHN	No	\$1,193.10	\$1,193.10	\$137.33
1	Training	3YLX	No	\$0.00	\$0.00	\$0.00

*If your request is not showing up in Available Requests, then it was automatically closed. You can email <u>sacstatetravel@csus.edu</u> with the Request ID # and we can reopen the request for you.

Please be aware requests automatically close 61 days after the travel end date, as Travel Policy states all reports should be submitted within this time frame.

equests					Add Remove
Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
Training Request 2020	3YLX	No	\$0.00	\$0.00	\$0.00

In the future, make sure to start an expense report from the **Requests** tab and choosing the **Expense** link, under the Action column on the right side of your approved request, and submit the report within 60 days of your trip return date.

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Manag	e Requests New Request	Process Requests	Quick Search					
Activ	Active Request Copy Request Close Inactivate Request							
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	Request Name	Request ID Status	Request Dates •	Date Submitted	Total Approved a	Remaining Action		
	Training Request 2020	3YLX Approve	d 12/01/2019	12/17/2019	\$0.00 \$0.00	\$0.00 Expense		
			12/03/2019					