



Communicating ER Submission Status to Travelers

Purpose: Travel representatives can create expense reports up to the point of submission, but the traveler must submit the report. Without clear communication, travelers could submit expense reports created on their behalf before they are ready for submission.

Add Comment:

Once Travel Rep has completed the expense report and cleared all audit rules, type, **“Ready for Submission.”** in the comment field of the Expense Report Header and click **Save**.

The screenshot shows the 'Report header for: Guest Travel #2' form. The form is divided into several sections:

- Report Information:** Report/Trip Name (Guest Travel #2), Report Date (06/02/2017), Trip Type (In State), Travel Start Date (05/08/2017), Travel End Date (05/10/2017), Policy (*FSU-GENERAL-Expense Policy), Report Key (440).
- Traveler Information:** Traveler Type (Faculty/Staff), Report/Trip Purpose (Conference/Convention), Benefit to University (Enrich classroom experience), Does this trip contain personal travel? (No).
- Financial Summary:** Report Id (BE80638712744EF48B3E), Report Currency (US, Dollar), Approval Status (Not Submitted), Report Total (0.00), Personal Expenses (0.00), Amount Not Approved (0.00), Amount Approved (0.00), Amount University Paid (0.00), Amount Due University (0.00), Amount Due User (0.00), Amount Due University Card (0.00), Total Amount Claimed (0.00).
- Guest Information:** Guest ID ((G0000005) Billy Joe Bobbo B), Guest Address (Seminole2), Comment (Ready for Submission), Will be the last report for this request? (No).
- Accounting Information:** Department ((029000) Controller), Fund ((110) E&G General Revenue), PCBU, Project/Activity, and three Chartfield fields.

A red arrow points to the 'Comment' field, which contains the text 'Ready for Submission'. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.



As Viewed by Traveler:

When the traveler opens Concur and clicks on the **Expense** button, the comment appears on the tile for that ER, indicating that it's ready for the traveler to submit.

The screenshot shows the Concur Expense page with a grid of expense reports. The top navigation bar includes 'CONCUR', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main content area is titled 'Manage Expenses' and 'ACTIVE REPORTS'. A 'Create New Report' button is visible on the left. The grid contains several reports with their status, dates, amounts, and exception indicators. The 'Guest Travel #2' report is highlighted with a red circle around the 'Ready for Submission' status.

Status	Report Title	Date	Amount	Exceptions	Additional Info
RETURNED	Guest Test #1	06/07/2017	\$1,992.00	Exceptions	
RETURNED	Guest Travel #2	06/07/2017	\$3,592.16	Exceptions	
RETURNED	Header test - Out of state	04/27/2017	\$1,633.05	Exceptions	
NOT SUBMITTED	Guest Test #1	06/15/2017	\$260.00	Exceptions	
NOT SUBMITTED	Guest Travel #2	06/02/2017	\$0.00	Ready for Submission	
NOT SUBMITTED	In-state-ccd-workflow	05/09/2017	\$222.00	Exceptions	
NOT SUBMITTED	test mileage	04/03/2017	\$275.34	Exceptions	
SUBMITTED		06/22/2017			