

Concur Expense: PDF and Email Reports

Setup Guide

Last Revised: July 1, 2020

Applies to these SAP Concur solutions:

- ☒ Expense
 - ☒ Professional/Premium edition
 - ☐ Standard edition
- ☐ Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Invoice
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes / Comments / Changes
September 17, 2022	Removed Section 2: Two User Interfaces for Concur Expense End Users and Section 4: What the User Sees – Existing UI Minor edits
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
January 7, 2021	Updated the copyright; no other changes; cover date not updated
July 1, 2020	Added information about the existing UI and NextGen UI; made modifications throughout; cover revision date updated
April 9, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 2, 2020	Updated the copyright; no other changes; cover date not updated
August 10, 2019	Added a note to the Overview section stating that limit for emails that use the SAP Concur notification service is 10MB. Outgoing emails that have attachments larger than 10MB are not delivered.
January 4, 2019	Updated the copyright; no other changes; cover date not updated
April 4 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 9 2018	Clarified the steps to PDF, email, or print reports.
April 22 2017	Updated information about print formats that contain bar codes; no other content changes
December 14 2016	Changed copyright and cover; no other content changes.
May 13 2016	Updated instances of he/she to they.
May 13 2015	Updated the screen shots to the enhanced UI; menu option changes
September 24 2014	Added information about two user interfaces; no other content changes.
April 15 2014	Changed copyright and cover; no other content changes
December 28 2012	Made rebranding and/or copyright changes; no content changes
February 2012	Changed copyright; no content change
December 31 2010	Updated the copyright and made rebranding changes; no content changes
February 19 2010	Added information about policy setting that suppresses the Print menu until after report submit.
December 2009	Changed to stand-alone setup guide; no content change
November 13 2009	Added information about: <ul style="list-style-type: none"> • An Audit Trail entry is created when the user emails a report. • All available report formats – except those that contain bar codes – appear on the Email menu.
June 4 2009	Updated the screen shot; Comments field available

Date	Notes / Comments / Changes
October 17 2008	Initial publication

PDF and Email Reports

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view but not create or edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP. In this case, the client must initiate a service request with support.

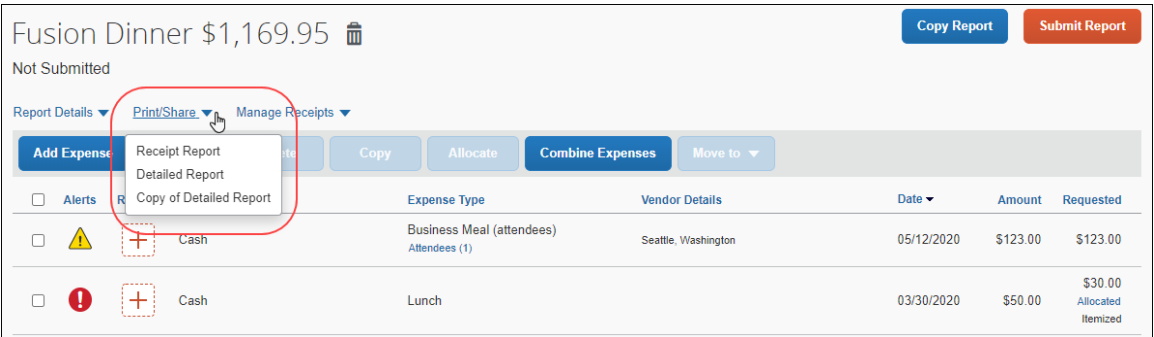
Section 2: Overview

The PDF and Email Report feature gives the Concur Expense user, approver, or processor the ability to generate a PDF copy of an expense report. The user, approver, or processor can email the PDF copy to one or more recipients.

NOTE: The limit for emails that use the SAP Concur notification service is 10MB. Outgoing emails that have attachments larger than 10MB are not delivered.

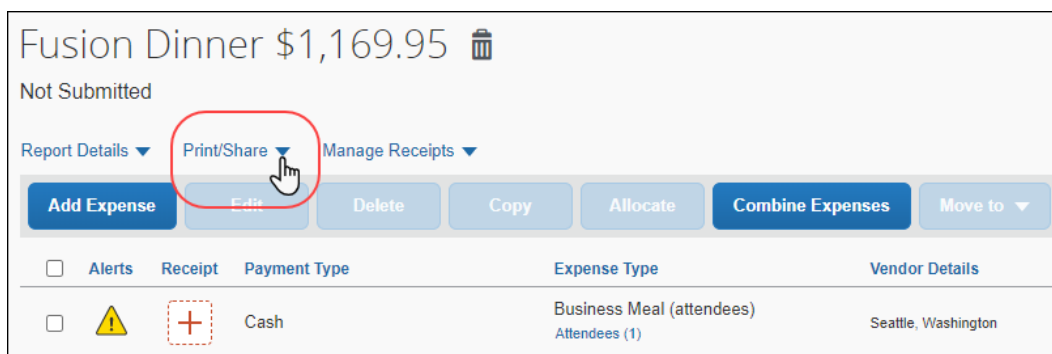
Section 3: User Experience

Once the feature is activated, the **Print/Share** menu changes to **Print/Share**.

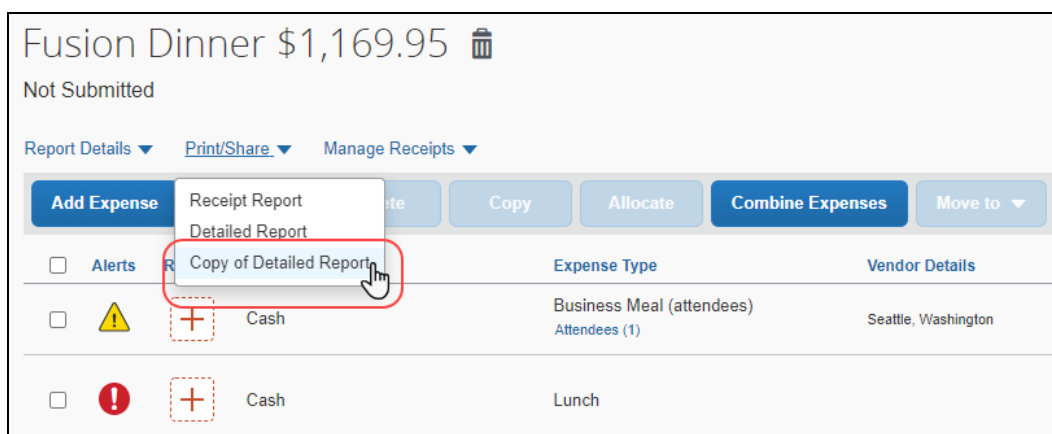


► **To Print, PDF or Email reports:**

1. On the **Manage Expenses** page, click **Print/Share**.



1. From the **Print/Share** list, select **Copy of Detailed Report**.



2. Click **Print**, **Save as PDF**, or **Email**.

The screenshot shows a web application window titled "Copy of Detailed Report" with a close button (X) in the top right corner. At the top left, there are two checkboxes: "Show Expenses" (checked) and "Show Itemizations" (unchecked). The main content area displays the following information:

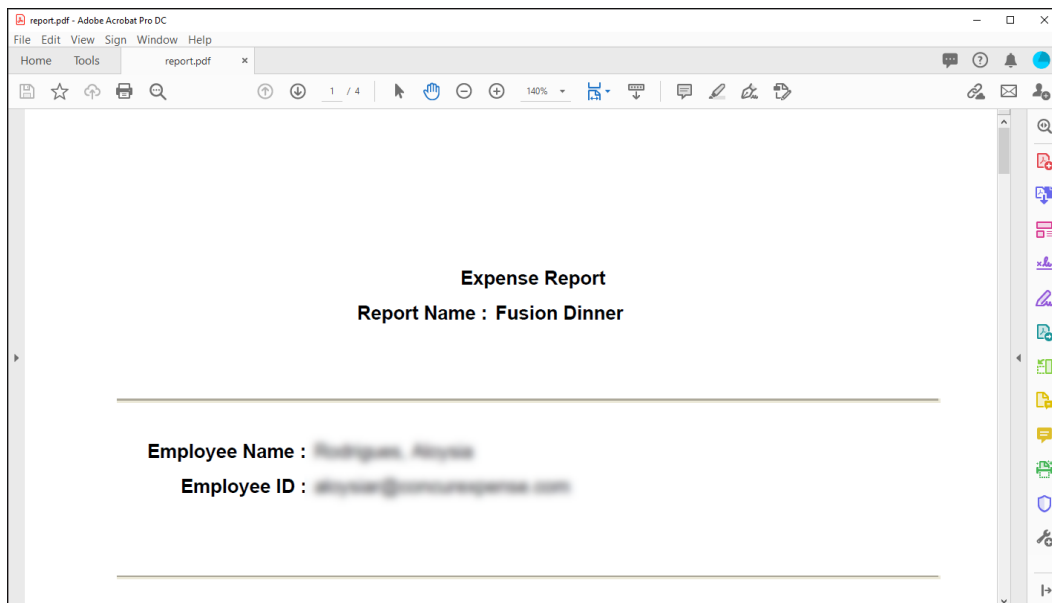
Expense Report
Report Name : Fusion Dinner

Employee Name : [Redacted]
Employee ID : [Redacted]

Report Header
Policy : NextGen Policy
Report Id : 5E0DC25E8FA04962A823
Report Date : 02/27/2020
Approval Status : Not Submitted
Currency : US, Dollar

Close **Print** **Save as PDF** **Email**

3. (Optional) In the report format window, click **Save as PDF**. The PDF appears and can be saved.



4. (Optional) In the report format window, click **Email**. The **Copy a Detailed Report - Send Through Email** window appears.

A screenshot of a dialog box titled 'Copy of Detailed Report' with a close button (X) in the top right corner. Below the title is the subtitle 'Send Through Email'. The dialog contains two input fields: 'Recipient(s) *' with a red asterisk indicating it is required, and 'Comment'. At the bottom right, there are two buttons: 'Cancel' and 'Send'.

NOTE: Multiple email addresses may be separated with commas or semicolons.

! **IMPORTANT:** An emailed comment is not saved anywhere in Concur Expense. An approver should not use this feature in lieu of using the **Send Back to Employee** approval action.

5. Click **Send** to generate a PDF file and send it as an attachment to the email address.

Audit Trail

An entry is created in the report's audit trail when the user uses this feature.

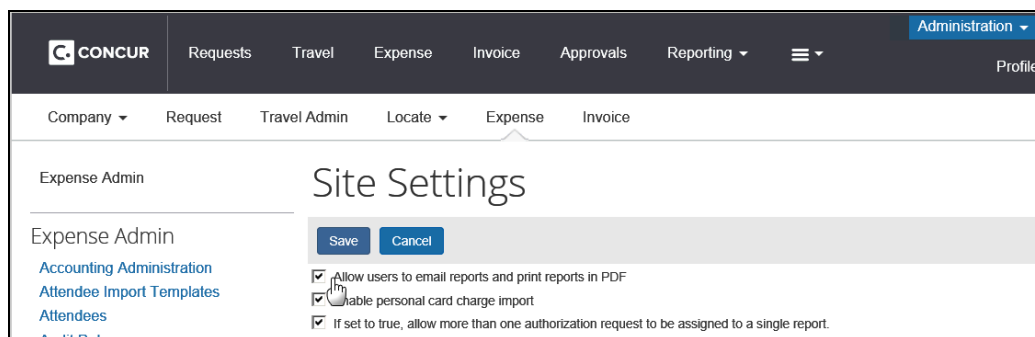
Section 4: Configuration

► To activate the feature:

1. Click **Administration > Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Site Settings** (left menu).



3. Select **Allow users to email reports and print reports in PDF**.
4. Click **Save**.

Once the feature is activated, the **Print** menu becomes **Print/Share**.

