Concur Request: Overview

Guide for Concur Standard Edition

Last Revised: May 4, 2023

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

Table of Content

Revision History

Date	Notes / Comments / Changes
May 4, 2023	Made the following updates: • In the *End User Experience > Request Menu and Home Page* section, replaced the images of the **Manage Requests** page with the **Create New Request** tile with the new **Create New Request** button • In the *End User Experience > Create the Request* section, replaced reference to the **Create New Request** tile with the **Create New Request** button, and updated the image of the **Create New Request** button on the **Manage Requests** page. • In the *End User Experience > Approve the Request* section, updated the outdated images of the **Approvals** page for Concur Request. • In the *End User Experience > Approve the Request > View Requests Pending Approval* section, changed "view list" to the **Limit results to** list, and updated the image to show the **Limit results to** list. • In the *End User Experience > Managing Requests > View Requests* and Sort Requests sections, replaced the images of the **Manage Requests** page with the **Create New Request** tile with the new **Create New Request** button, and updated the images of the **Create New Request** button on the **Manage Requests** page for other views. • In the *End User Experience > Managing Requests > Close/Inactivate Requests* section, replaced the image of the **Manage Requests** page with the **Create New Request** tile with the new **Create New Request** button.
February 17, 2023	Renamed **Active Reports** to **Active Requests** in the *End-User Experience* section.
October 1, 2022	Updated screenshots and edited content for the new user experience.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
November 10, 2021	Made the following updates: • Added "for Concur Standard Edition" to the guide title on the cover page • Fixed the format of the Heading 2 style in the guide • In the *Submitting the Request* section, replaced the image of the **Users Information** page with an image of the **Request** tab in the **Products** section of the **Add User** or **Edit User** page. Also replaced the references to the **User Information** page with information about the **Request Manager** field on the **Add User** or **Edit User** page.
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
July 24, 2020	Removed the *Request/Authorization Request/Concur Request* section and changed "Authorization Request" reference to "Concur Request" in the *Overview* section to align with Concur Request product branding.
June 5, 2020	Changed "Authorization Request" to "Concur Request" in Request guide references to align with Concur Request product branding.
June 1, 2020	Changed "Authorization Request" to "Concur Request" in guide title to align with Concur Request product branding.

Date	Notes / Comments / Changes
April 23, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 10, 2020	Updated the copyright; no other changes; cover date not updated
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
January 23, 2019	Updated the copyright; no other changes; cover date not updated
August 21, 2018	Updated note referencing setting up fields for the Request header in Cost Tracking under the *Creating the Request* > *Creating the Header* section. Note referred to the old Standard Setup UI.
April 12, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 14 2018	Updated the copyright; no other changes; cover date not updated
December 15 2016	Changed copyright and cover; no other content changes.
December 8 2016	Updated the *Permissions* section and guide content to new corporate style; no content changes.
June 12 2015	New document.

Concur Request – Overview

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 an SAP Concur representative. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview

The Concur Request product is designed to help businesses control expenses by requiring employees to obtain approval before incurring expenses, for example, for travel, office equipment purchases, business meals and client entertainment, subscriptions, etc.

Concur Request can send the request information to the specified travel agency, who can then book the travel.

Permissions Used in Concur Request

The available user roles are:

- Can Submit Requests
- Can Approve Requests

The available administrator roles are:

- Can Administer (Includes Request)
- Can Process Expense Reports (Includes Request)

For more information, refer to the *Shared: Users Setup Guide*.

Travel Agency Functionality

Request can be configured to notify travel agencies when requests reach final approval to allow the agents to perform the travel booking. Each policy group in Concur Request can be associated with a different travel agent email address.

For more information, refer to *Shared: Policies Setup Guide*.

The specified travel agent will receive email notifications when the following actions happen in Concur Request:

- The request reaches final approval
- The request is cancelled post-approval

The emails to the travel agents will be sent in the language of the policy group's country.

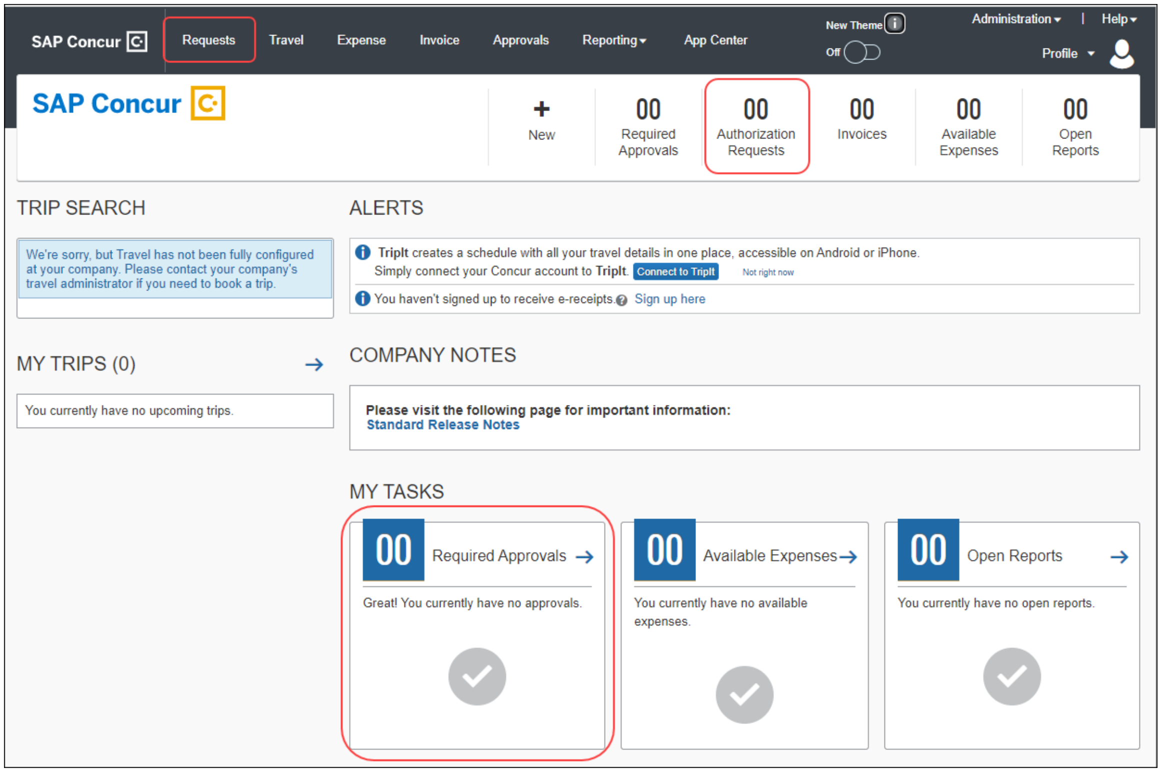
Section 3: End-User Experience

This section describes the user experience for Concur Request.

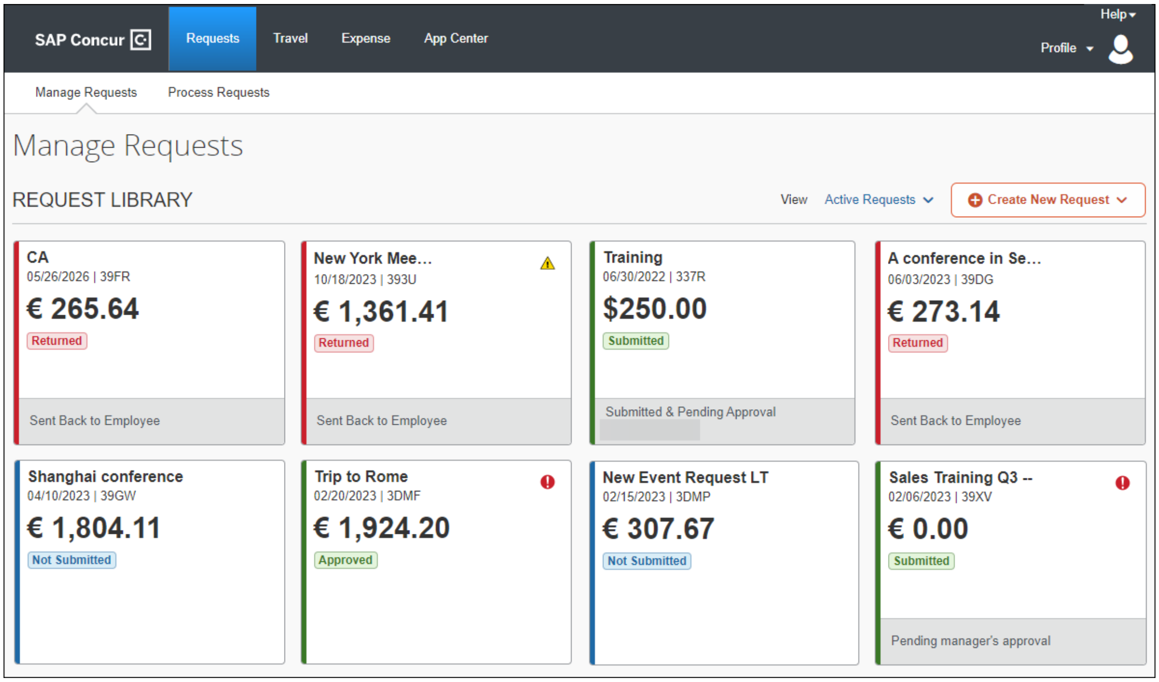
Request Menu and Home Page

If the user has the Can Submit Requests or Can Approve Requests role, the user sees request information in the following places:

- The **Requests** option appears on the menu.
- Open Requests and Authorization Request approvals may appear in the **My Tasks** area of the home page.
- An **Authorization Requests** tile may appear in the Quick Task bar of the home page.


SAP Concur
Requests
Travel
Expense
Invoice
Approvals
Reporting
App Center
New Theme
Off
Administration
Help
Profile
SAP Concur
New
00 Required Approvals
00 Authorization Requests
00 Invoices
00 Available Expenses
00 Open Reports
TRIP SEARCH
We're sorry, but Travel has not been fully configured at your company. Please contact your company's travel administrator if you need to book a trip.
ALERTS
TripIt creates a schedule with all your travel details in one place, accessible on Android or iPhone.
Simply connect your Concur account to TripIt. Connect to TripIt
Not right now
You haven't signed up to receive e-receipts. Sign up here
MY TRIPS (0)
You currently have no upcoming trips.
COMPANY NOTES
Please visit the following page for important information:
Standard Release Notes
MY TASKS
00 Required Approvals
Great! You currently have no approvals.
00 Available Expenses
You currently have no available expenses.
00 Open Reports
You currently have no open reports.

Clicking **Requests** takes users to the **Manage Requests** page which displays active requests in individual tiles sorted by date of creation.

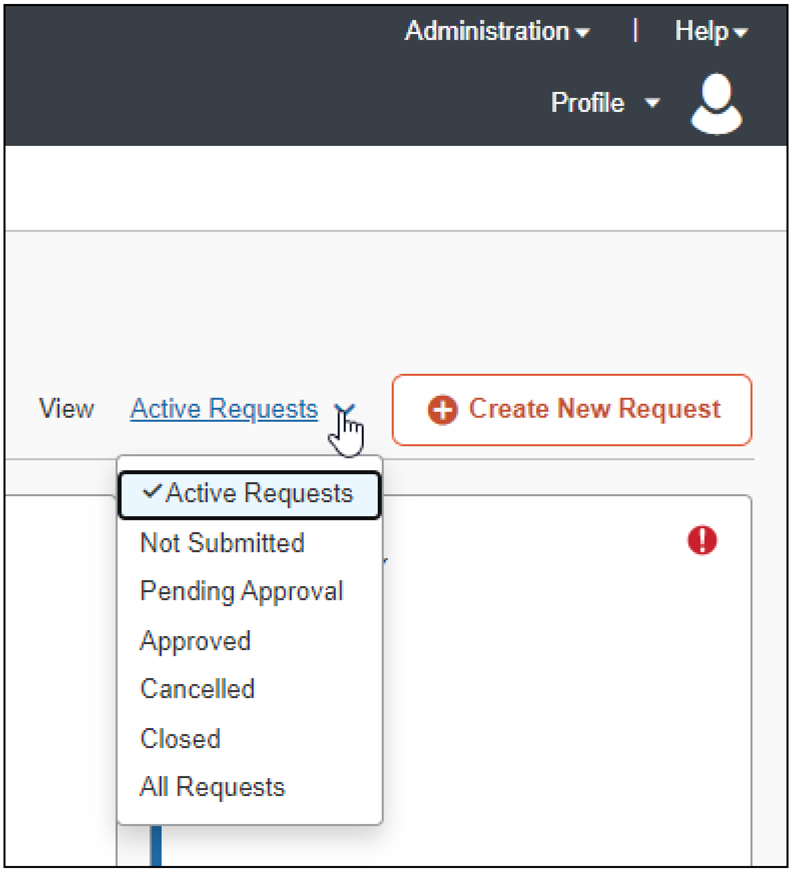


Each tile includes the following information:

- Request name
- Status
- Request date
- Total
- Alert indicator (if request contains any alerts)
- Request's workflow status, such as Submitted and Pending Approval (if applicable)
- Approver's name (if applicable)
- Tile color bar indicates request status

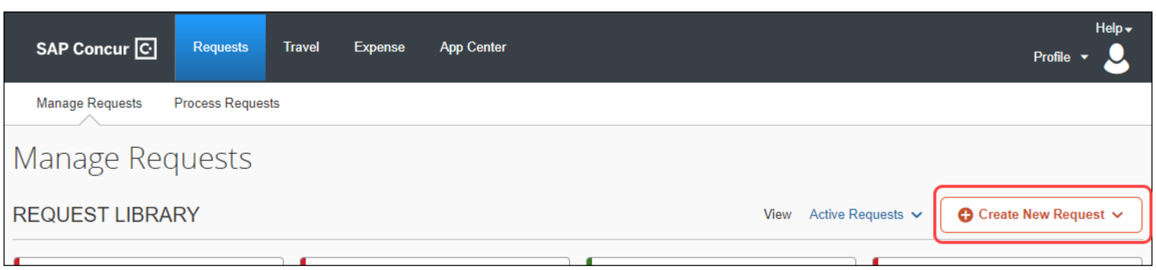
On the **Manage Requests** page, the user can:

- Click **Create New Request** to create a new request.
- Click the **View** list to view all requests or filter the list of requests. The **View** list defaults to *Active Requests*.



Create the Request

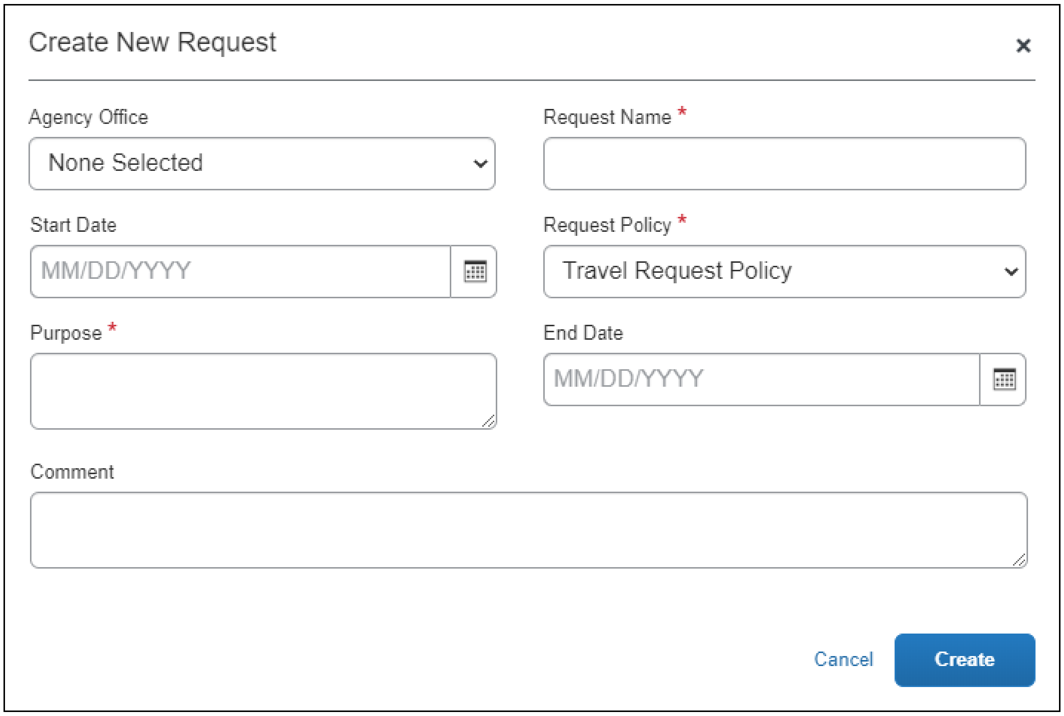
On the **Manage Requests** page, there is a **Create New Request** button at the top of the page.



Clicking the **Create New Request** button opens the **Create New Request** page. The blank request is ready for the user to complete the fields for the request header.

Create Requests

On the **Create New Request** page, the user provides the general information about the requested trip. The user completes the required fields and optional fields as directed by their company. When done, the user clicks **Create**. Once the request is created, the request ID and request name display at the top of the request.



NOTE: If custom fields are created on the **Custom Fields** page in Product Settings, the custom fields will appear on the **Create New Request** page.

After filling out the request information on the **Create New Request** page and clicking the **Create** button, users are prompted to create the expected expenses and/or segments for the request on the **Expected Expenses** page.

REQUEST MENUS

The following menus appear on a request:

- **Request Details:** contains selections for editing the request header, accessing the request timeline (approval flow), audit trail, allocation summary, and other selections.

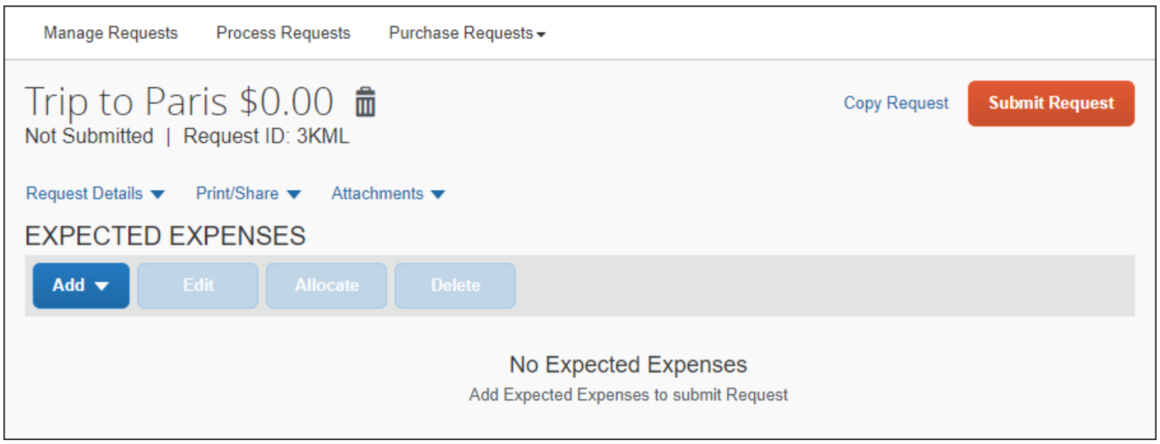
- **Print/Share:** allows users to print and share requests. Refer to *Print Requests* in the *Managing Requests* section in this guide.

- **Attachments:** allows users to view, add, and delete attachments to a request. Refer to the *Attachments* section in this guide.

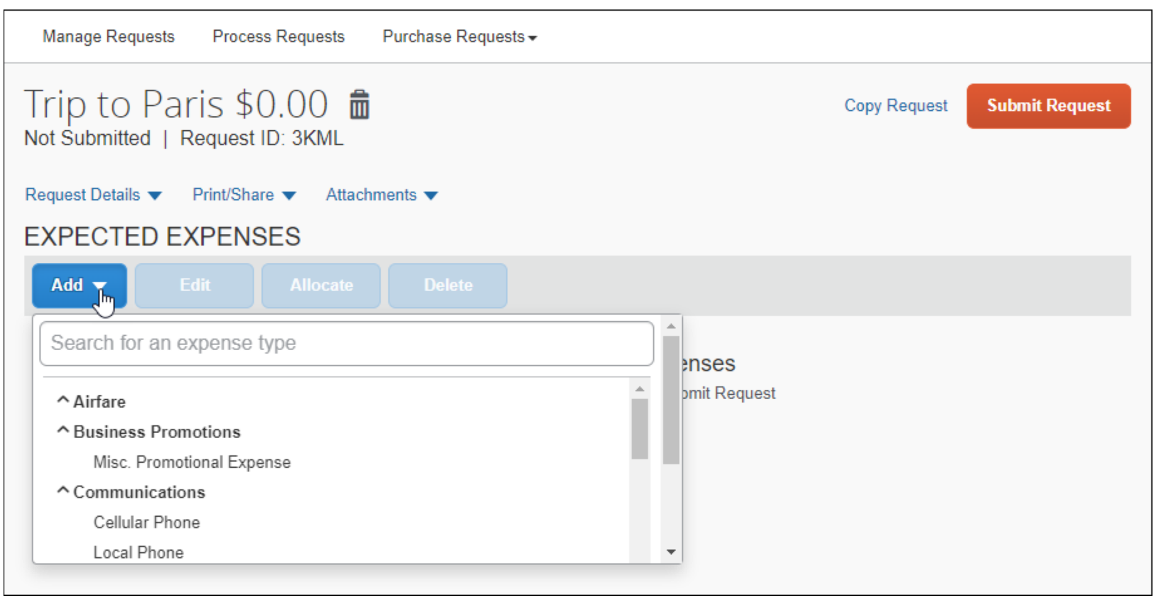
Create an Expected Expense

If the Expected Expenses feature is enabled, after clicking the **Create** button on the **Create New Request** page, the **Expected Expenses** page opens.

Users are prompted to create the expected expenses and/or segments for the request on the **Expected Expenses** page. Having expected expenses and segments on the same page ensures all segments will have an entry in the **Expected Expenses** list that represents the segment's fare.

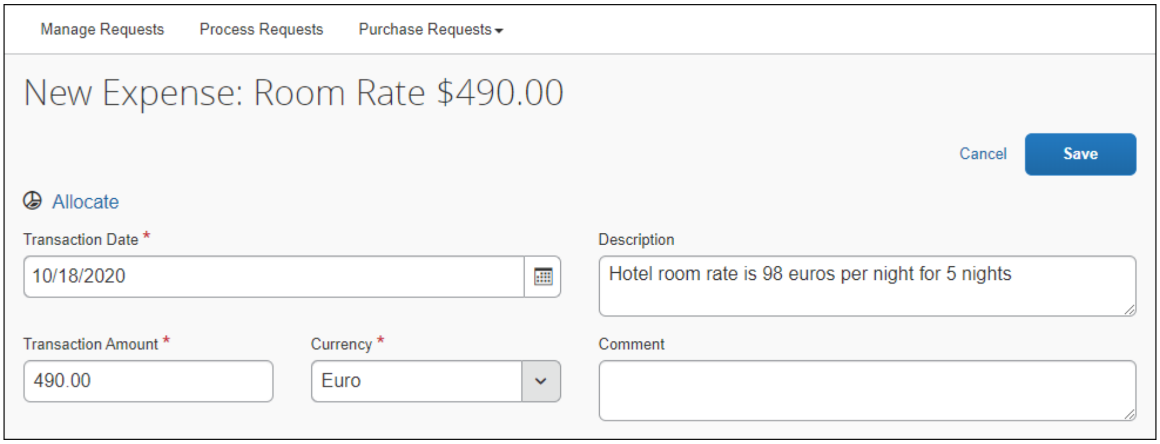


The user clicks the **Add** button to view the list of expense types and segment types, and then selects the applicable expense type.

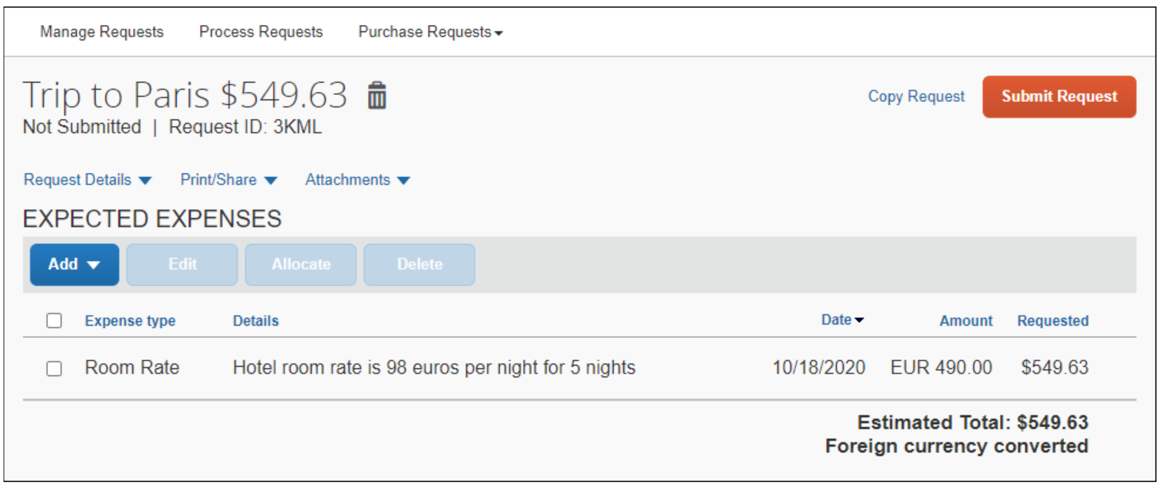


NOTE: In the search box at the top of the list, users can enter all or part of an expense type or segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.

Clicking an expense type opens the expected expense details page for the selected expense type.



The user completes the fields and clicks **Save**. The expected expense is added to the **Expected Expenses** list.

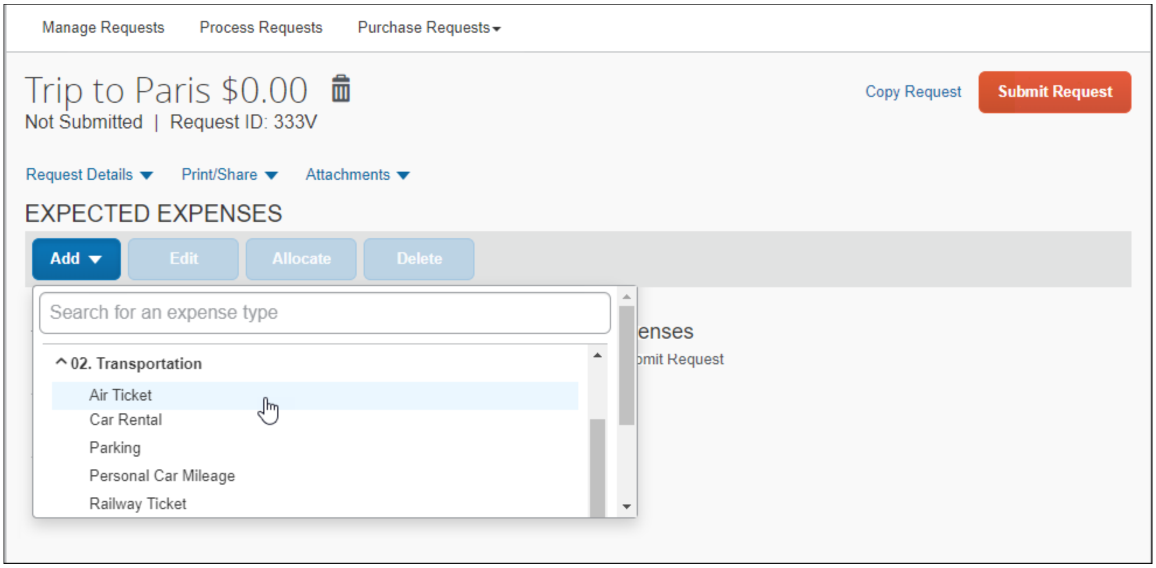


Create Segments

The steps for adding a segment to a request is the same as adding an expected expense on the **Expected Expenses** page, but instead of selecting an expense type in the **Add** list, the user selects the applicable segment type from the **Add** list.

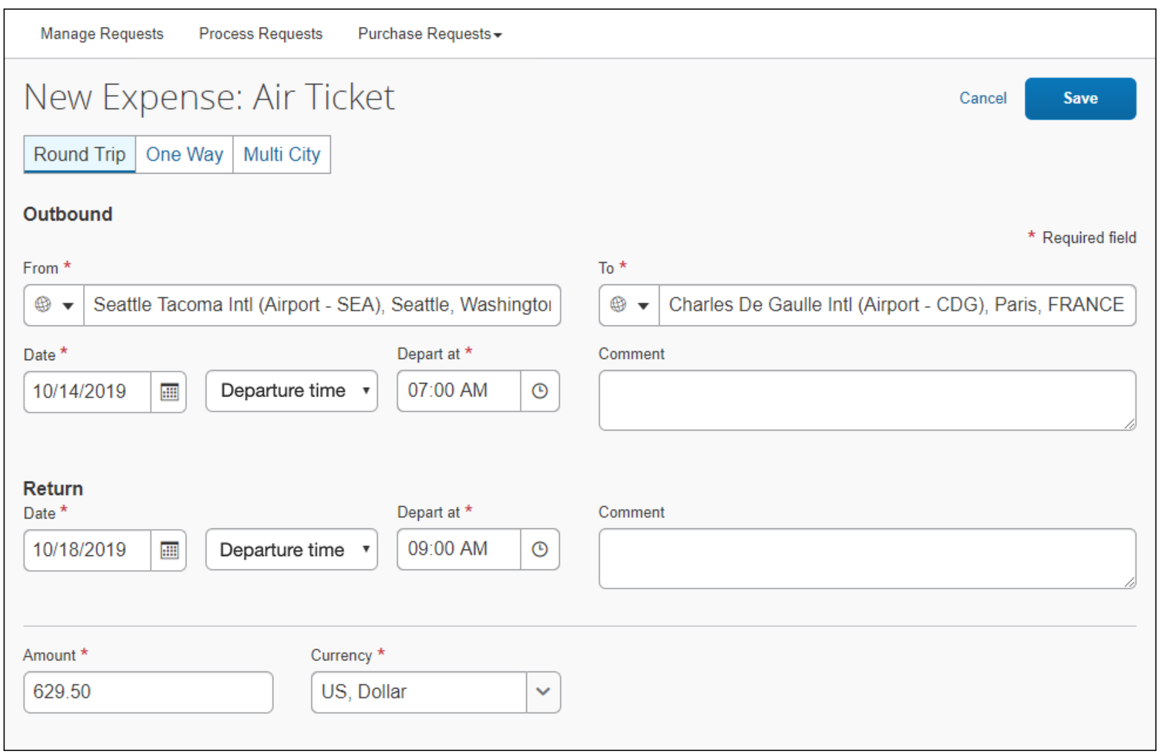
NOTE: When adding expected expenses and segments, the **Expense Type** list includes the names of both the expense types and the segment types set up for Concur Request. If an expense type has the same name as a segment type, it may appear as if there are duplicate items in the list, when in fact, the list is displaying both the name of the expense type and the name of the segment type.

The user clicks the **Add** button to view the list of expense types and segment types, and then select the applicable segment type.



NOTE: In the search box at the top of the list, the user can enter all or part of a segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.

When a user clicks a segment type, a page opens for the selected segment type.



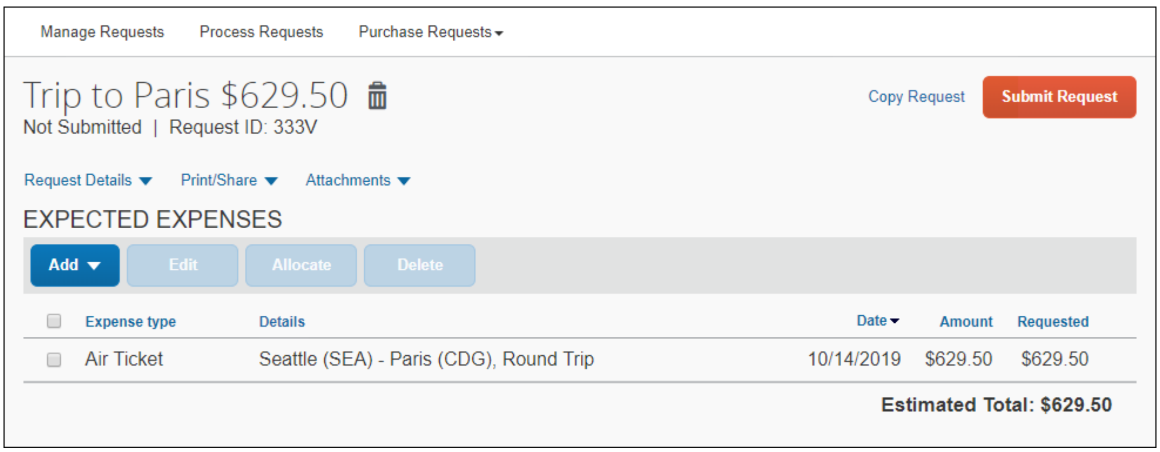
The user completes the fields – including the approximate requested amount of the segment – and clicks **Save.** The segment type is added to the **Expected Expenses** list.

Note the following about these fields:

- **Amount:**
  - ♦ For each segment, the user enters the total amount for the trip. Specifically, for car rental and hotel, the user enters the total amount – not the daily rate.
  - ♦ The default is 0.00. The user can leave it as zero – even though the field is required.
  - ♦ As the user saves segments, the running total appears in the lower left corner of the request.
- **Comment:** The user enters any information that the travel agent needs to properly book the trip.

Note the following about the **Location Detail** fields (car rental and hotel):

- The user enters *location* information as instructions for the travel agency, such as "pick-up at airport" or "hotel near the waterfront."



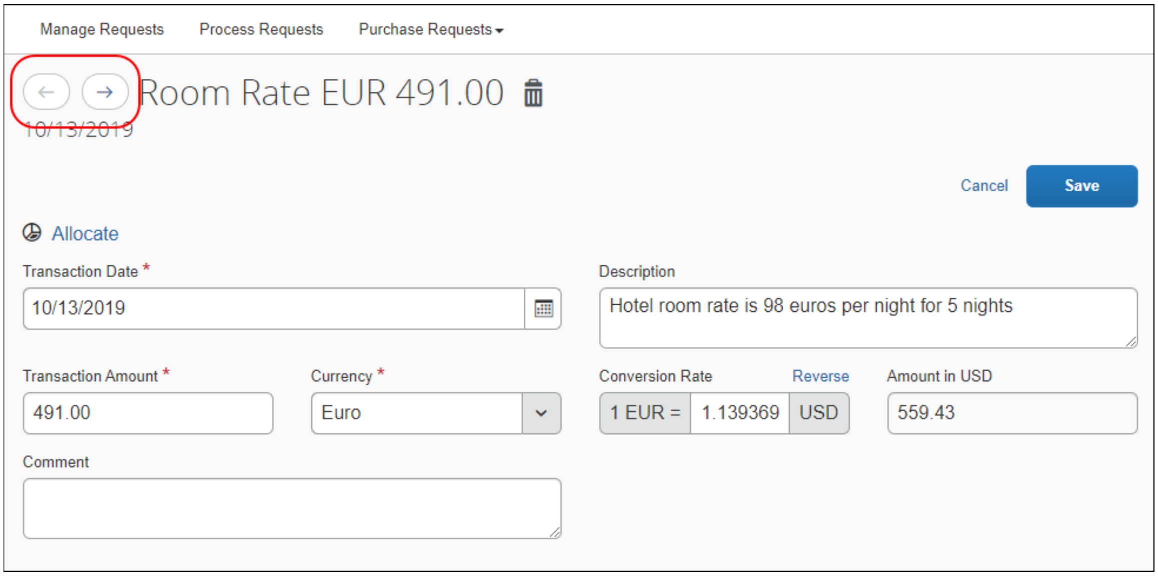
After saving one segment, the user clicks **Add** to select another segment.

Again, the user completes the fields, clicks **Save**, and follows these same steps to complete any remaining segments that apply to the request.

📖 The administrator can configure which segments appear, by policy group. For more information, refer to the *Concur Request: Segment Types Setup Guide*.

Navigate Between Expected Expenses and Segments

If a request contains multiple expected expenses and/or segments, on the expected expense or segment details page, left and right navigation arrows are displayed to the left of each expected expense or segment name in the request. The navigation arrows allow users to quickly navigate between the expected expenses and/or segments in the request without having to return to the **Expected Expenses** page.



For the first expected expense or segment in the request, the left navigation arrow will be disabled. For the last expected expense or segment in the request, the right navigation arrow will be disabled.

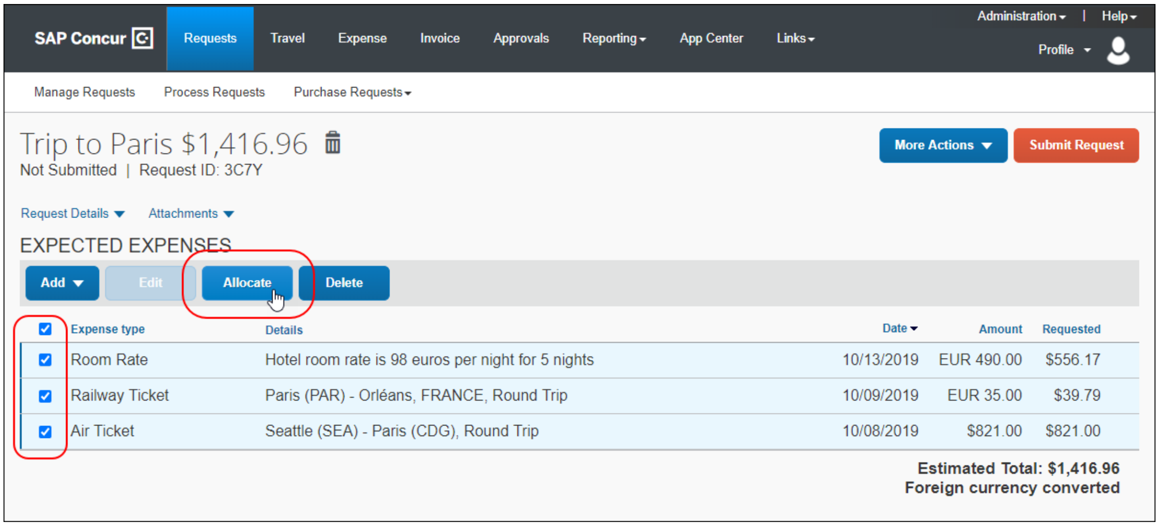
Allocations

The Allocations feature allows a user to allocate a request to projects, cost centers, or departments. For example, assume that Sales and Marketing have agreed to split the travel costs for the company trainer to provide customized, off-site training. When the company trainer creates the request, the trainer can allocate the segments so that Sales pays 50% and Marketing pays 50%.

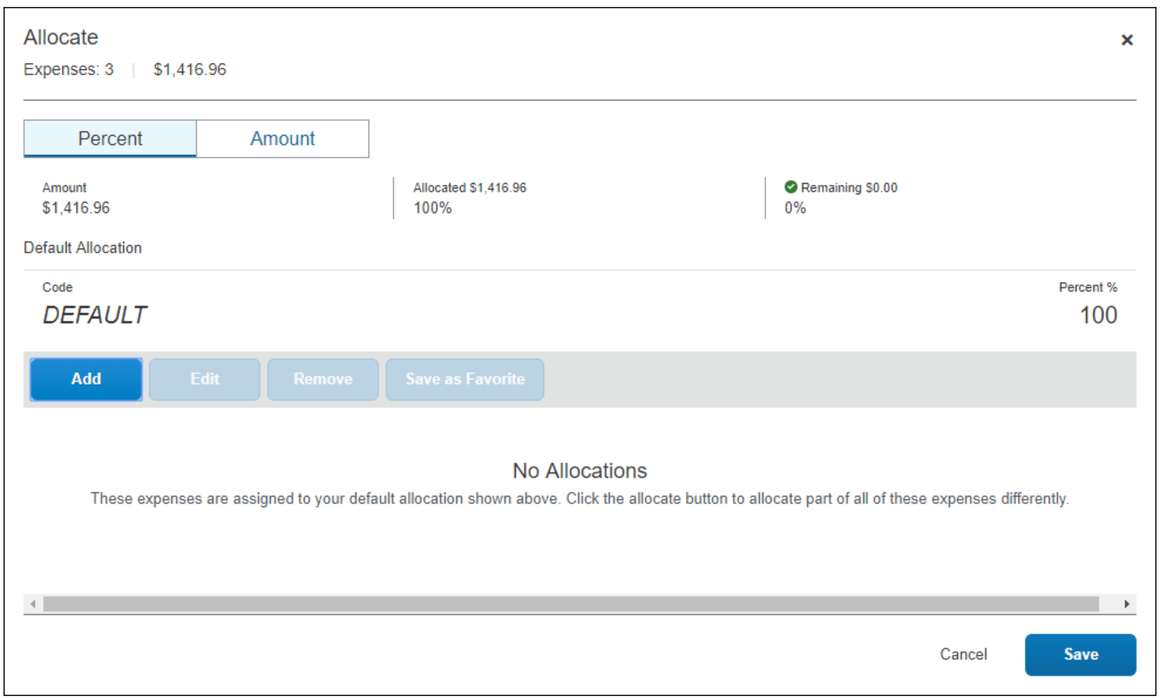
Allocation Considerations

- Users can allocate a single expected expense or several expected expenses at the same time.
- For segments, users can allocate segments, but they can only allocate all segments in a request as a group. Users cannot allocate individual segments in a request.

Segments and expected expenses are allocated from the **Expected Expenses** page by selecting the applicable segments and/or expected expenses, and then clicking **Allocate**.



Allocations are defined on the **Allocate** page.



The allocation field options include all selected custom fields that are visible on the Request Allocation level.

📖 For more information, refer to the *Shared: Custom Fields Setup Guide*.

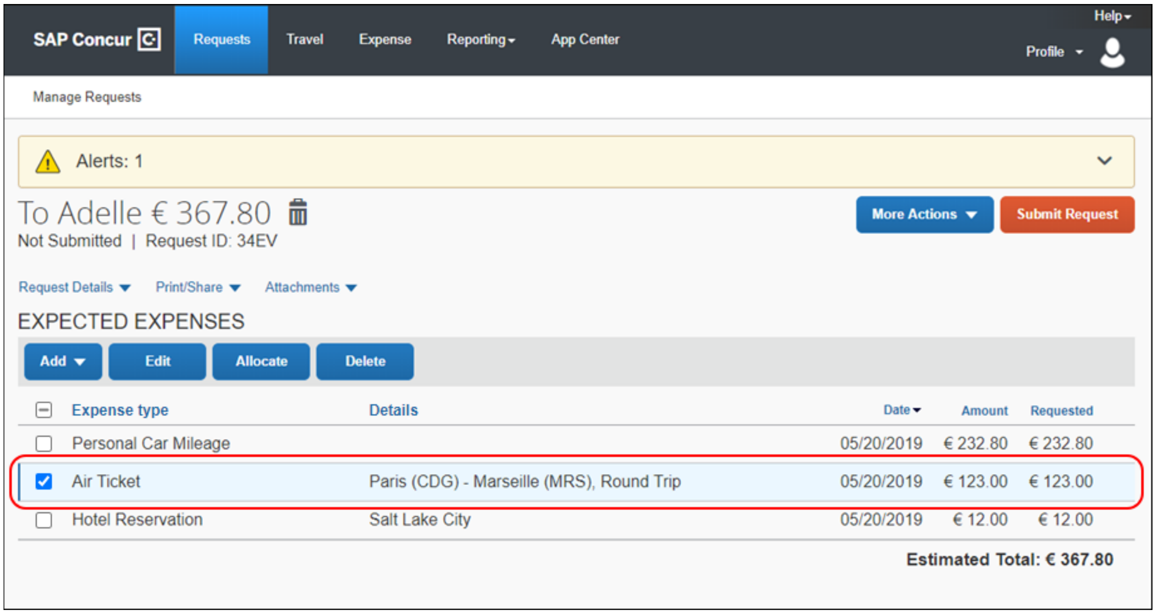
Note the following:

- The user can define the allocation as a percentage or an amount.
- Request allocations do not have to total 100%.

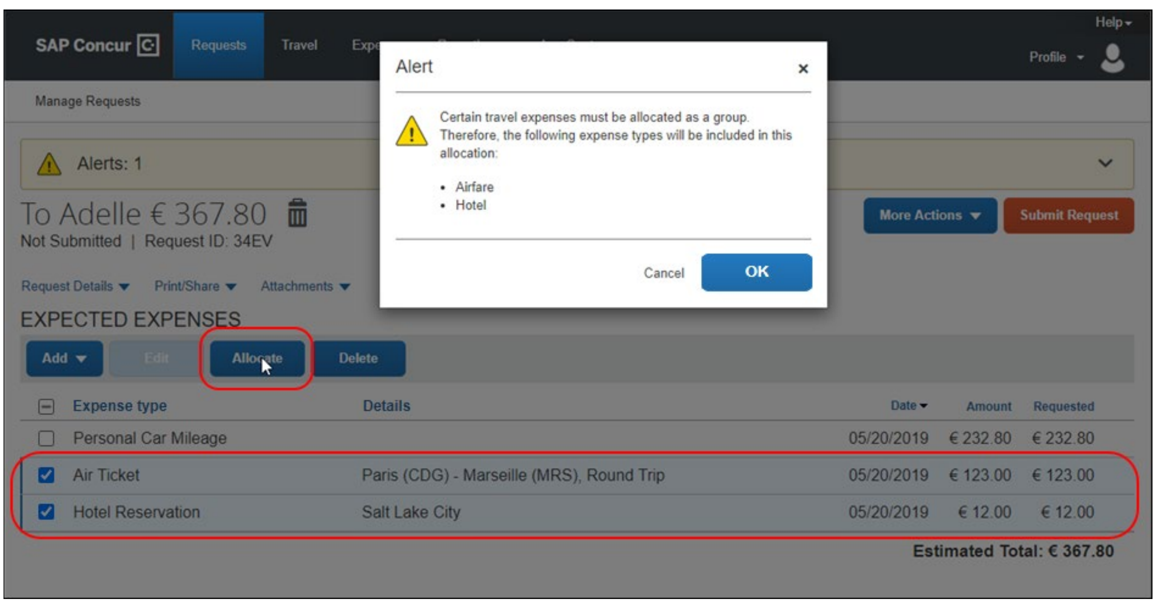
If a user selects an individual segment on the **Expected Expenses** page, and then clicks **Allocate**, all of the segments in the request will automatically be selected for allocation.

EXAMPLE

There are two segments in the request, Air Ticket and Hotel Reservation. Only the Air Ticket segment is selected.



When **Allocate** is selected, both the Air Ticket and Hotel Reservation segments are selected on the **Expected Expenses** page, and an alert opens listing the segments in the request that must be allocated together as a group.

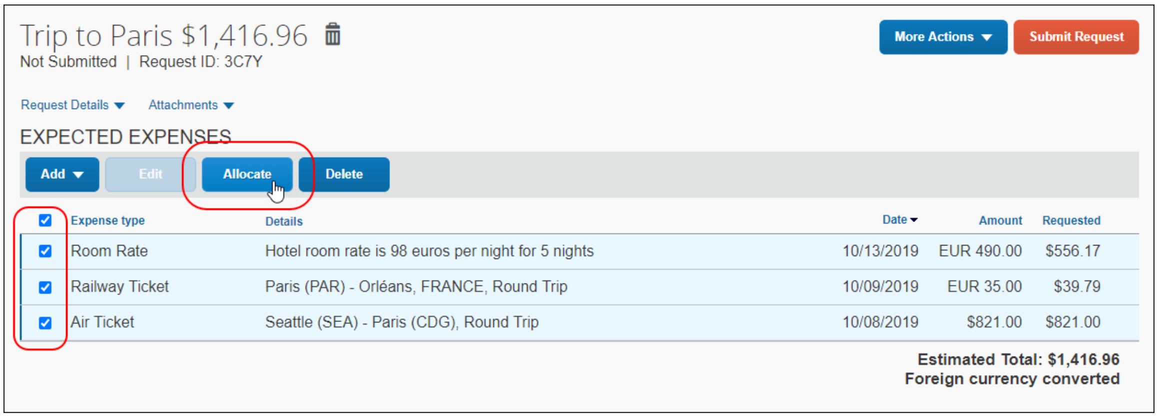


When the user clicks **OK**, the **Allocate** page opens for the selected segments.

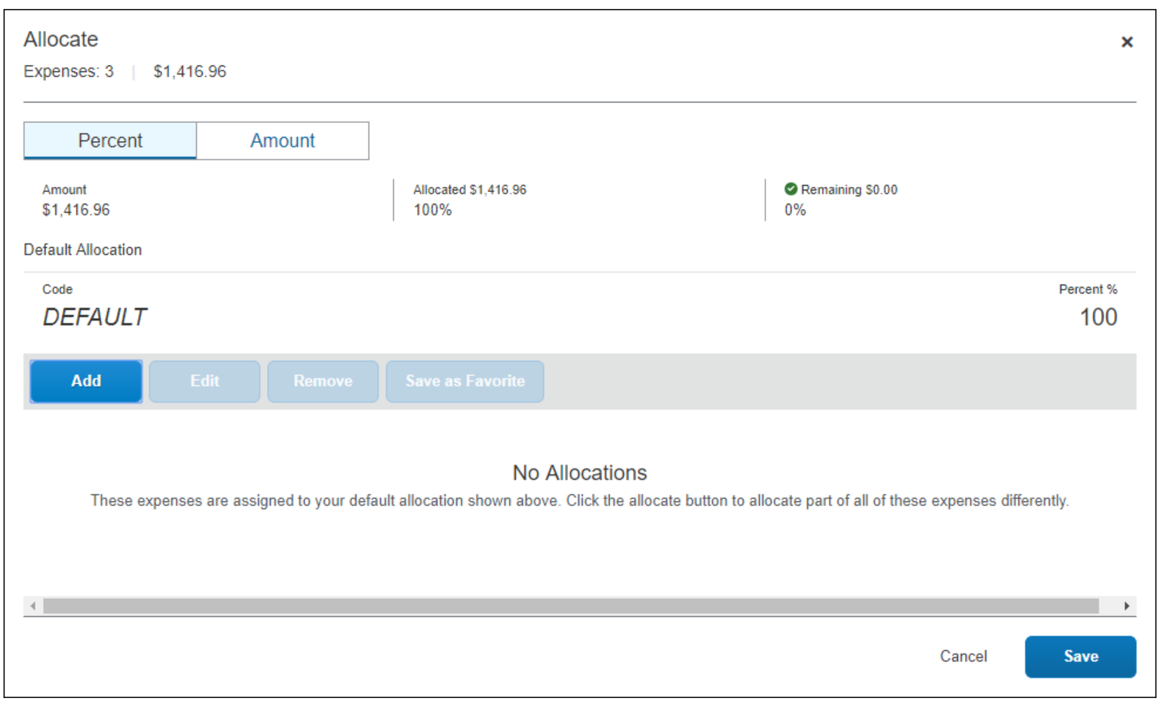
Allocate Expected Expenses and Segments

To allocate one or more expected expenses or segments, the user opens the request, and on the **Expected Expenses** page and selects the expected expenses and/or segments they want to allocate.

When a user selects one or more expected expenses or segments on the page, the **Allocate** button becomes available. The user clicks **Allocate** to open the **Allocate** page.

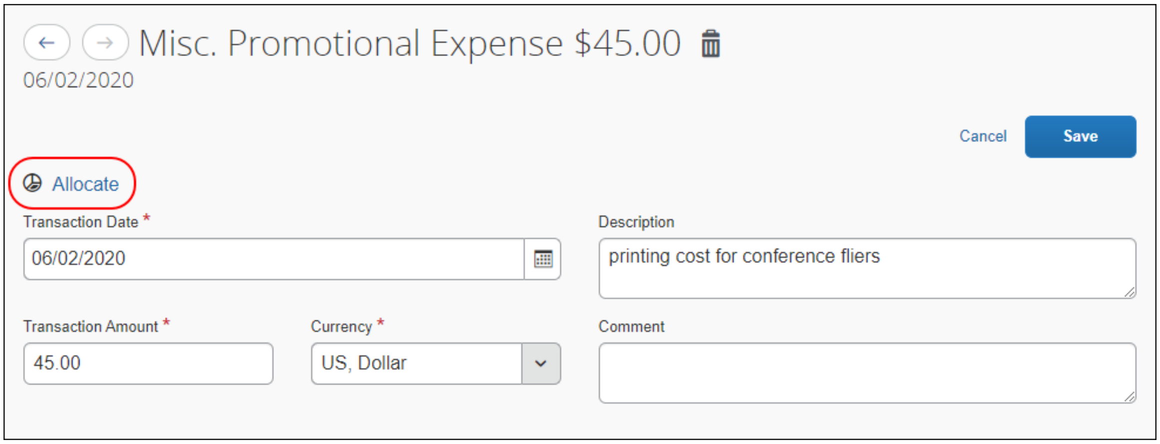


Note that the amount on the **Allocate** page includes only the amount for the selected expected expenses and/or segments.



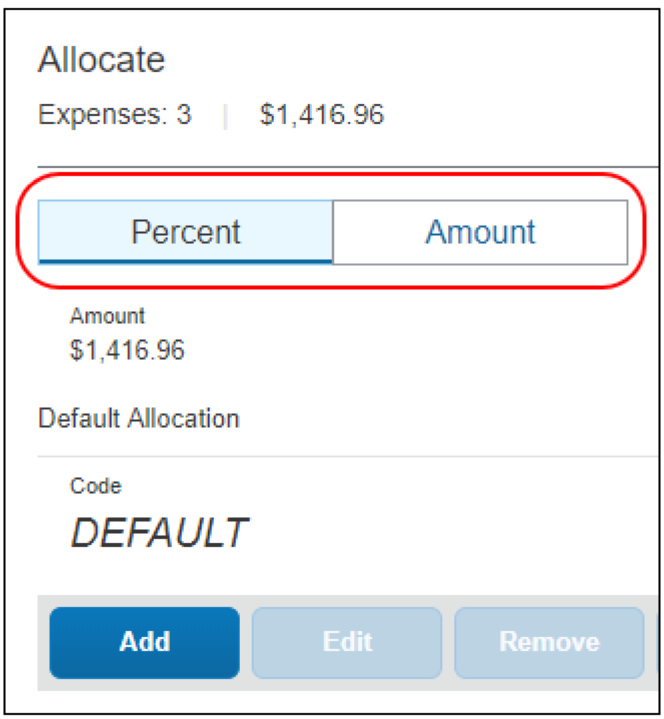
On the "blank" **Allocate** page, a default allocation appears. It is a reminder to users that any amount that they do not allocate is automatically charged to their default allocation, for example, to their own department.

Users can also allocate individual expected expenses from the expected expense details page by clicking the **Allocate** link. Clicking the **Allocate** link opens the **Allocate** page for the expected expense.



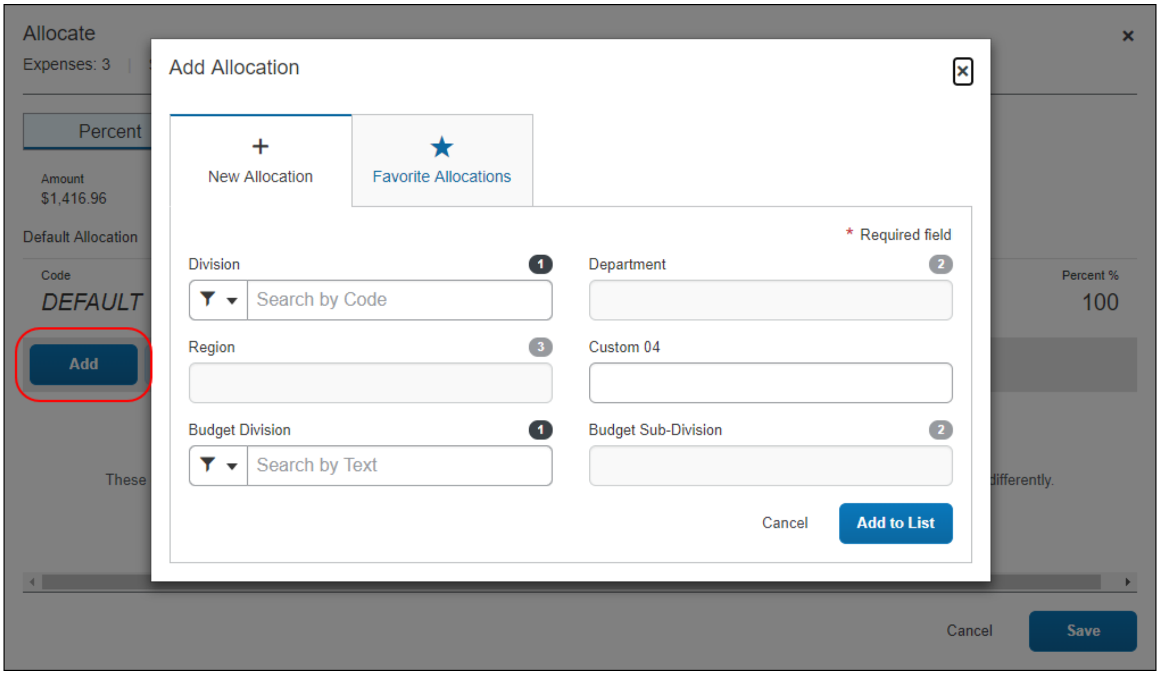
CHOOSE PERCENT OR AMOUNT

At the top of the page, users select the **Percent** or **Amount** tab, depending on configuration.



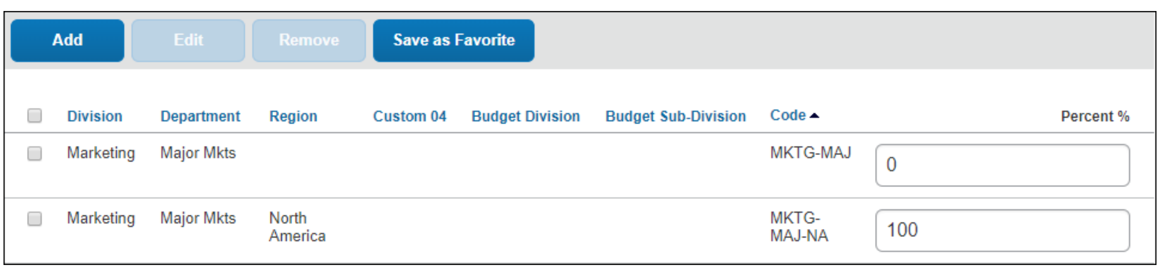
Add a New Allocation

To add a new allocation, users click **Add**. The **Add Allocation** dialog appears.

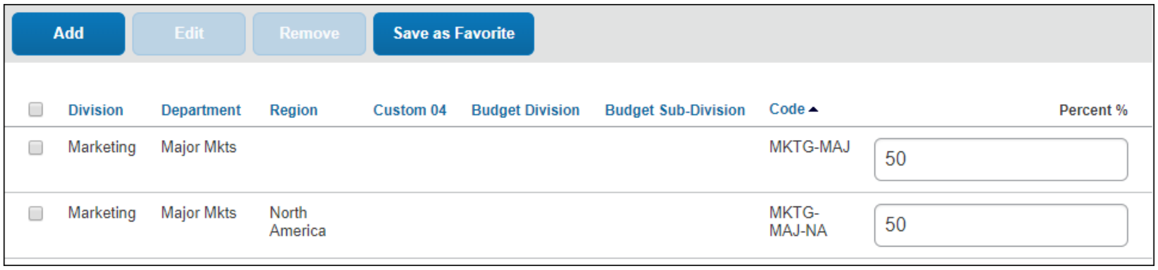


On the **New Allocation** tab, users can select or enter the appropriate information for each field, then click **Add to List**. The allocation is added to the list and the ***entire*** allocation amount (100%) is added to the newly added allocation.

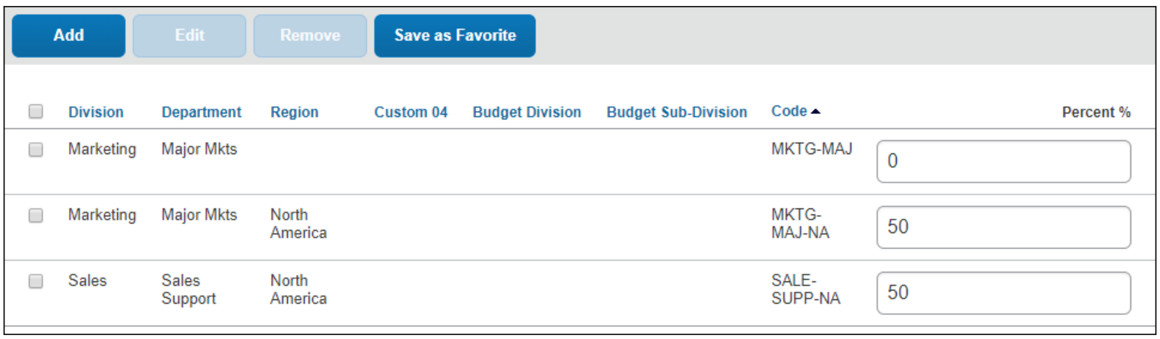
In this example, assume that Marketing is responsible for the entire cost of the expense.



In this example, assume that Marketing is responsible for half and the user's department is responsible for the remaining half. Adjust the Marketing percentage to 50%; the default row (the user's cost center) automatically adjusts to assume the remaining 50%.



In this example, assume that Marketing is responsible for half and Sales is responsible for the remaining half. None of the expense is to be charged to the user's cost center.



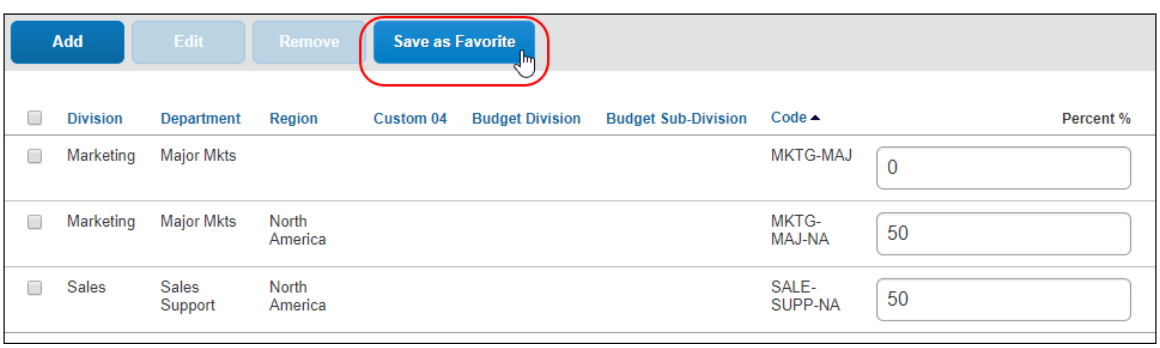
Add as many allocations as desired.

Remove an Allocation

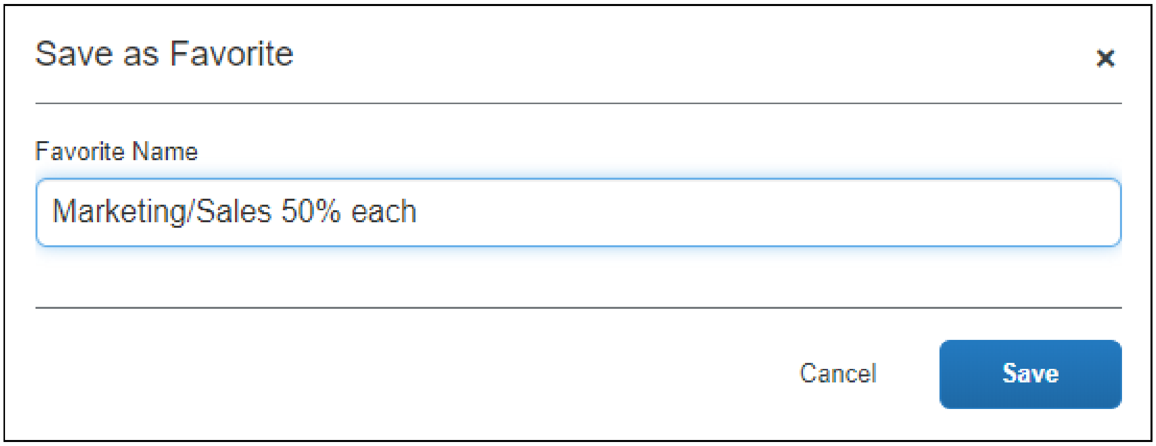
To remove an allocation, users select the check box for the desired allocation and click **Remove**.

Add to Favorites

If users have a particular set of allocations that they use a lot, they can save them as a favorite.



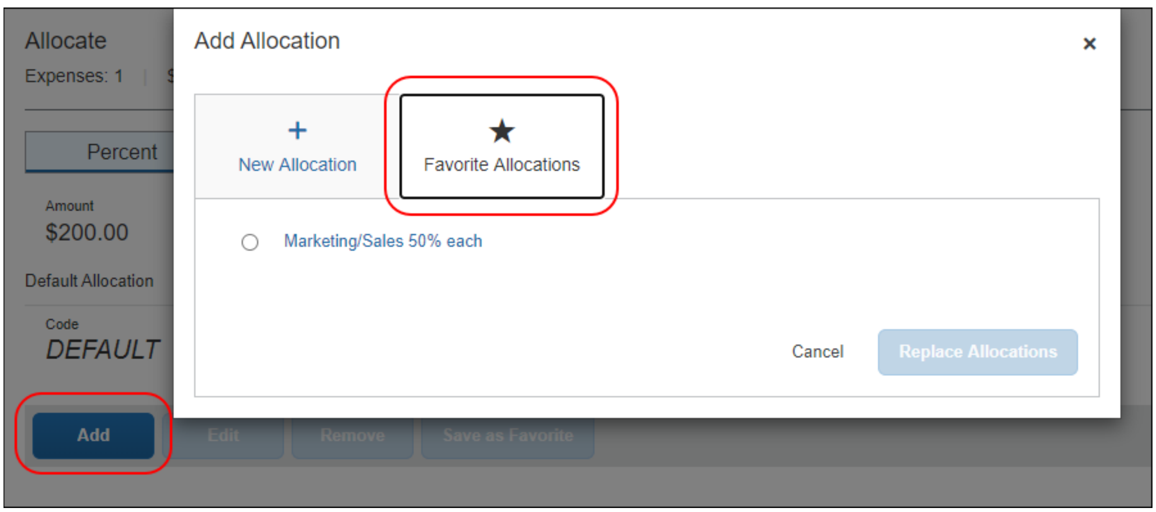
When users click **Save as Favorite**, the **Save as Favorite** dialog appears.



In the **Favorite Name** field, the user enters a name and clicks **Save**.

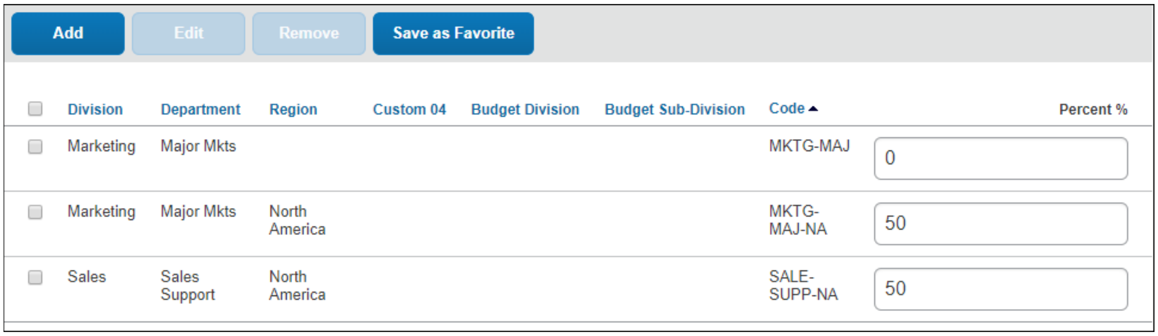
USE FAVORITES

To use an allocation favorite, on the **Allocate** page, the user clicks **Add** and then clicks the **Favorite Allocations** tab in the **Add Allocation** dialog.



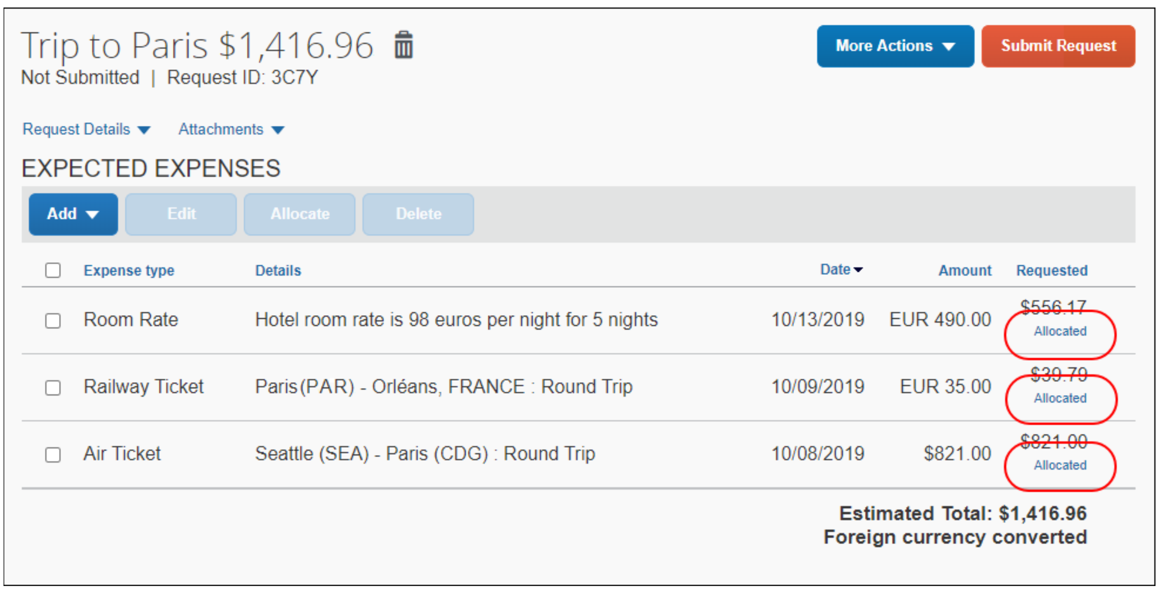
The user clicks the desired favorite and then click **Replace Allocations**.

The allocation is applied.

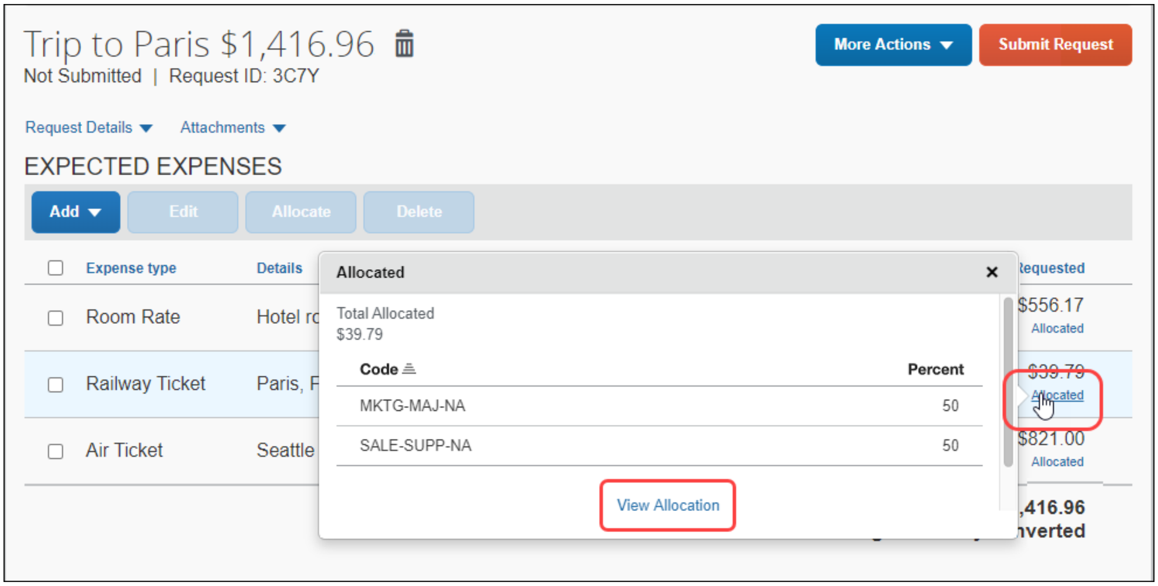


VIEW ALLOCATIONS

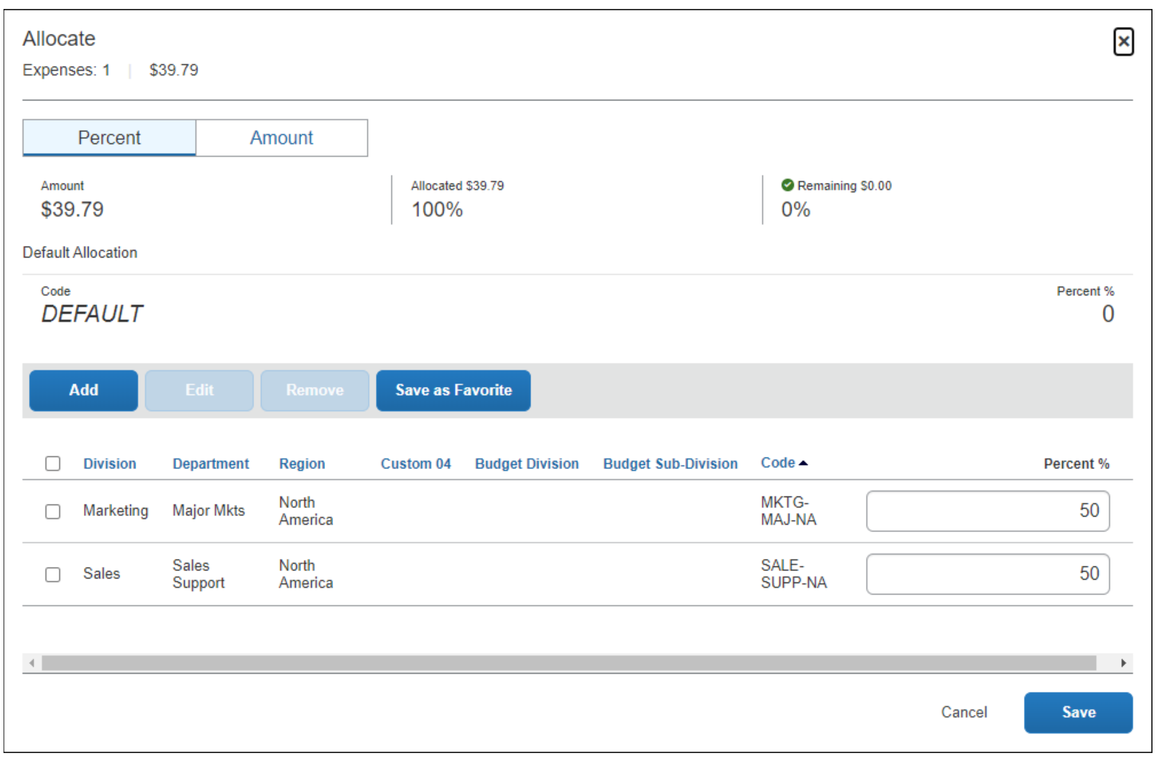
When the user is finished allocating segments and/or expected expenses for a request on the **Allocate** page, after saving the allocations and closing the **Allocate** page, on the **Expected Expenses** page, the **Allocated** link is displayed in the **Request** column for each allocated segment or expected expense.



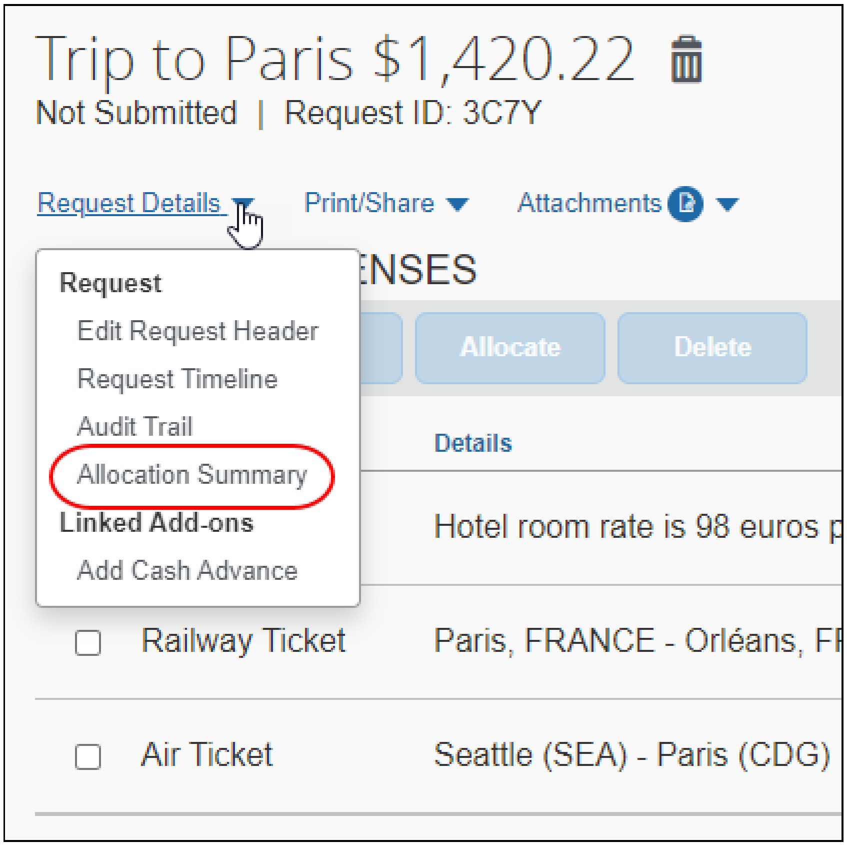
The user clicks the **Allocated** link to open a summary of the allocation information for the segment or expected expense.



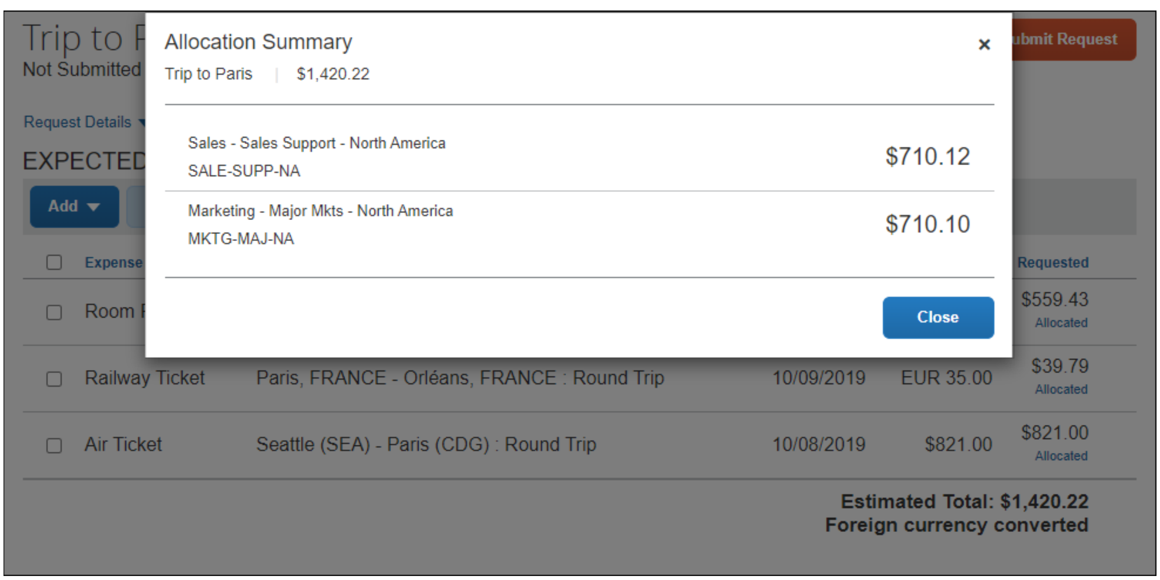
The user clicks the **View Allocation** link to open the **Allocate** page for the segment or expected expense.



To view a summary of the allocations for the entire request, on the **Request Details** menu, the user clicks *Allocation Summary*.

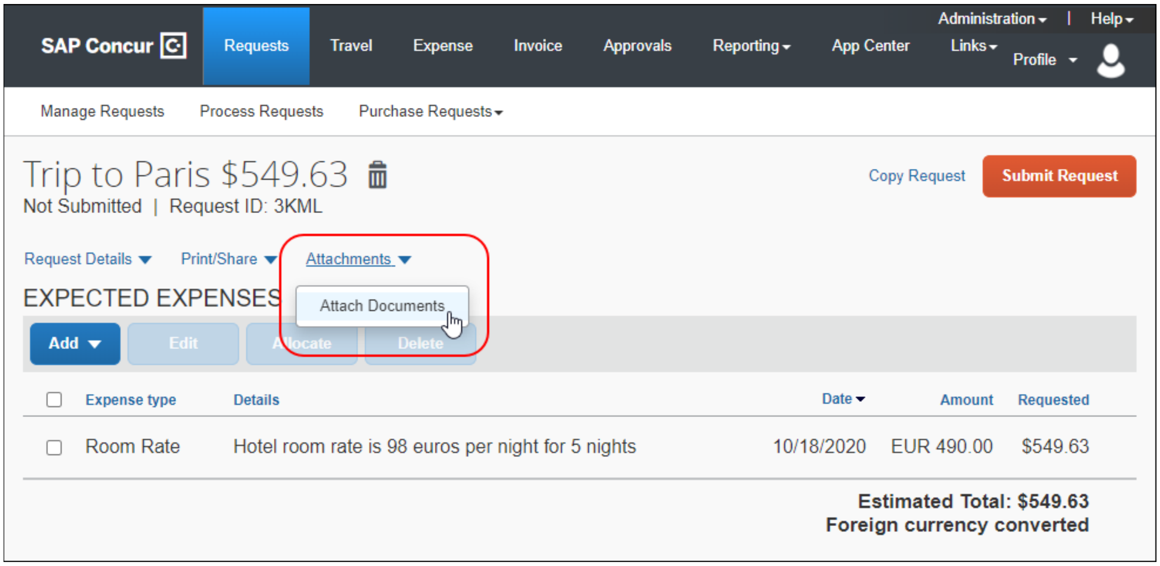


Clicking *Allocation Summary* opens the **Allocation Summary** dialog.

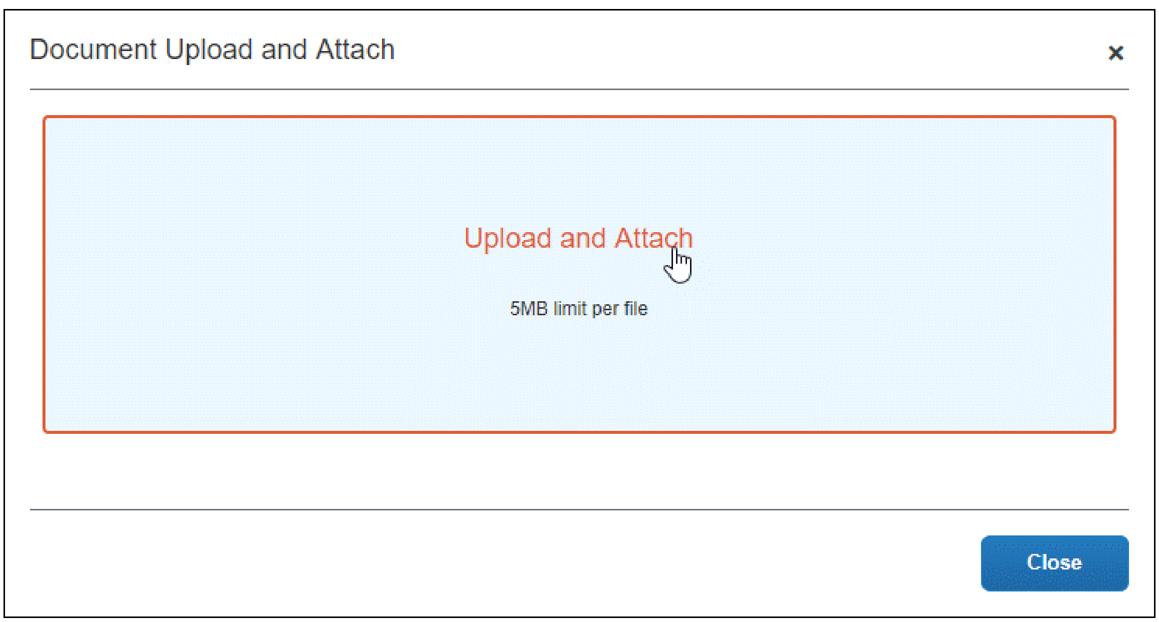


Attachments

Adding attachments, such as an image or PDF, to a request is done by clicking *Attach Documents* in the **Attachments** menu on the **Expected Expenses** page.

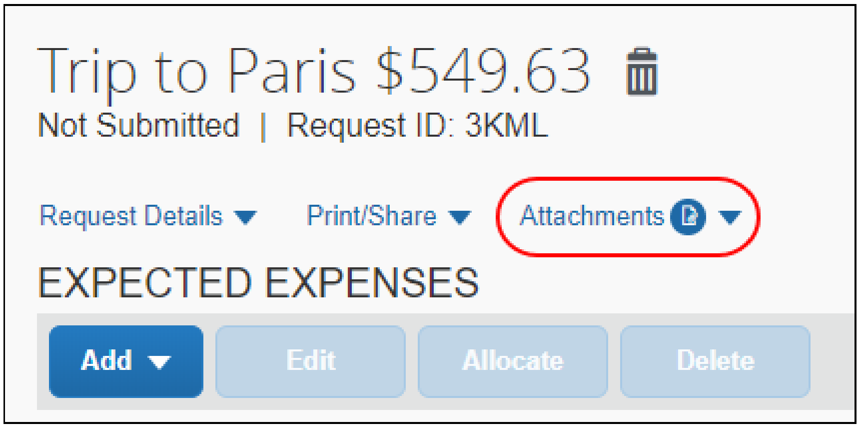


Users click *Attach Documents* to open the **Document Upload and Attach** dialog.

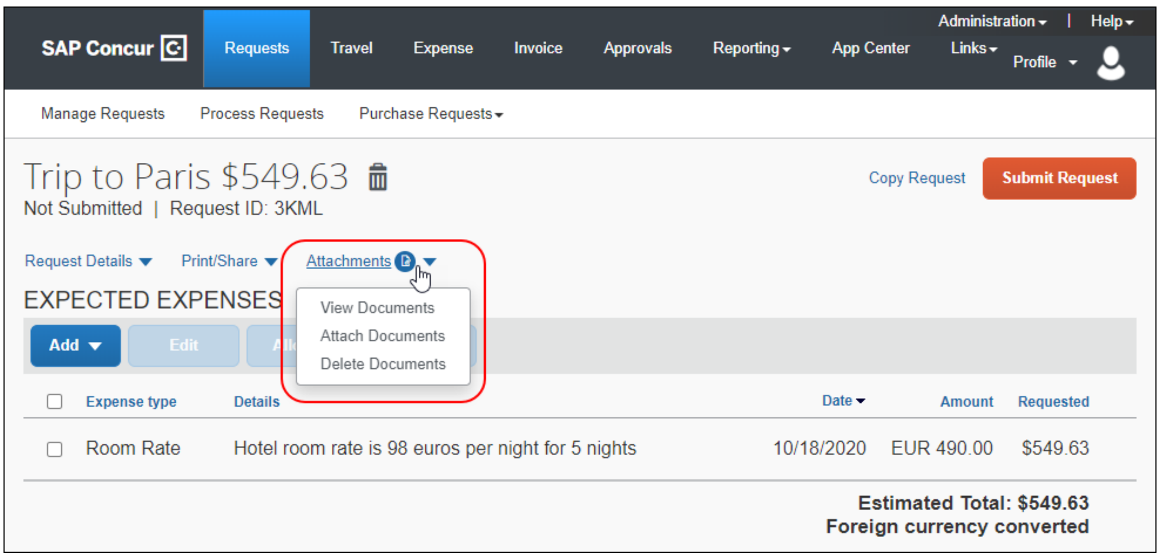


Users then click **Upload and Attach** to add an attachment to the request.

After an attachment is added to a request, the attachments icon, , displays next to the **Attachments** menu to indicate that the request has attachments.



Users can view, delete, or add additional attachments from the **Attachments** menu.



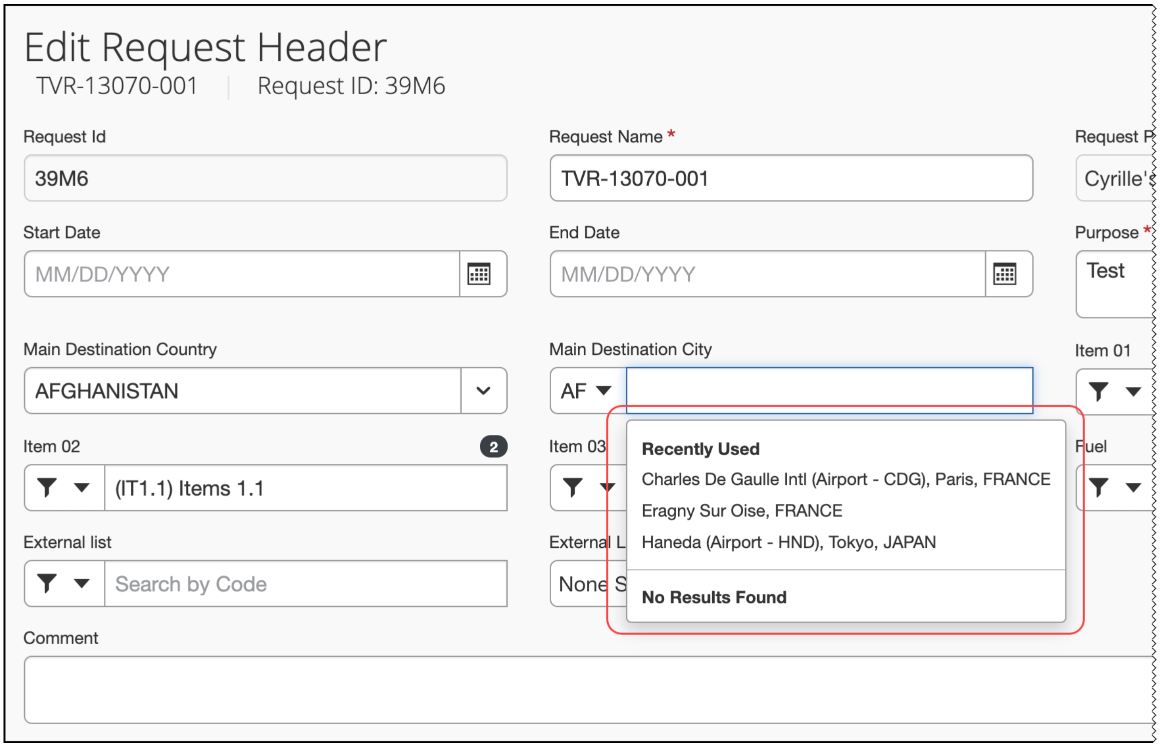
Recently Used Feature for List Fields

List fields on the Concur Request forms display the most recently used selections when filling out a list field. When you click in a list field, the most recently used selections are displayed under **Recently Used** at the top of the list of selections.

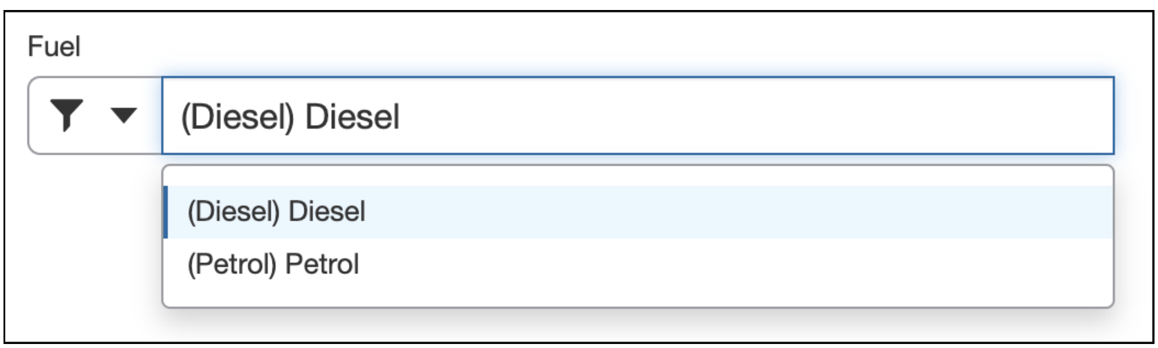
The Recently Used feature is available for list and connected list fields and all location list fields. The Recently Used feature is available for these fields on the request header, and the segment, and expected expense details page.

The Recently Used feature is not currently available for country/region, currency, policy, or vendor list fields.

The most recently used selections for a list field are displayed under **Recently Used** in a list field's list of selections.

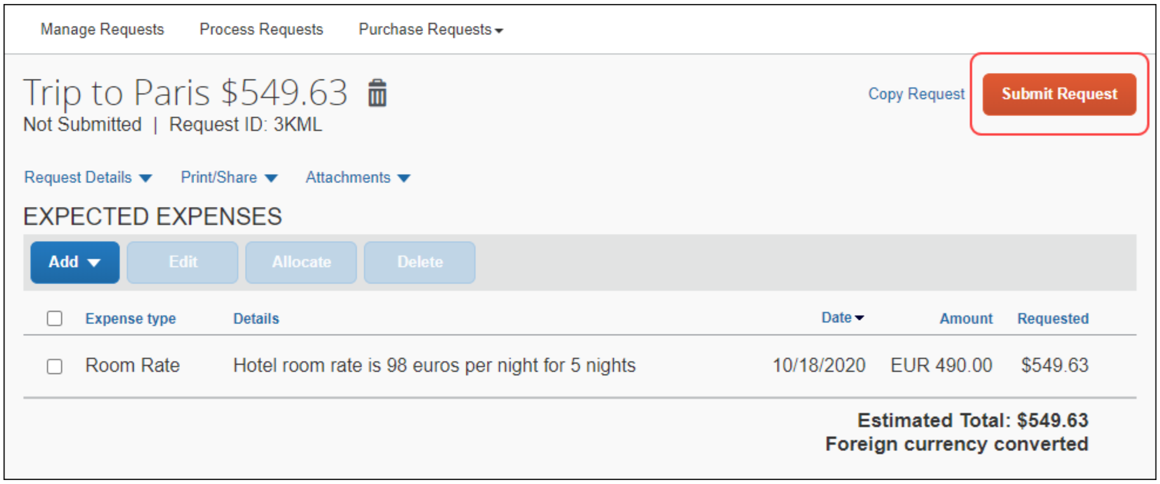


If no selections have been made for a list field before, the **Recently Used** list is not displayed at the top of the list field's list of selections.

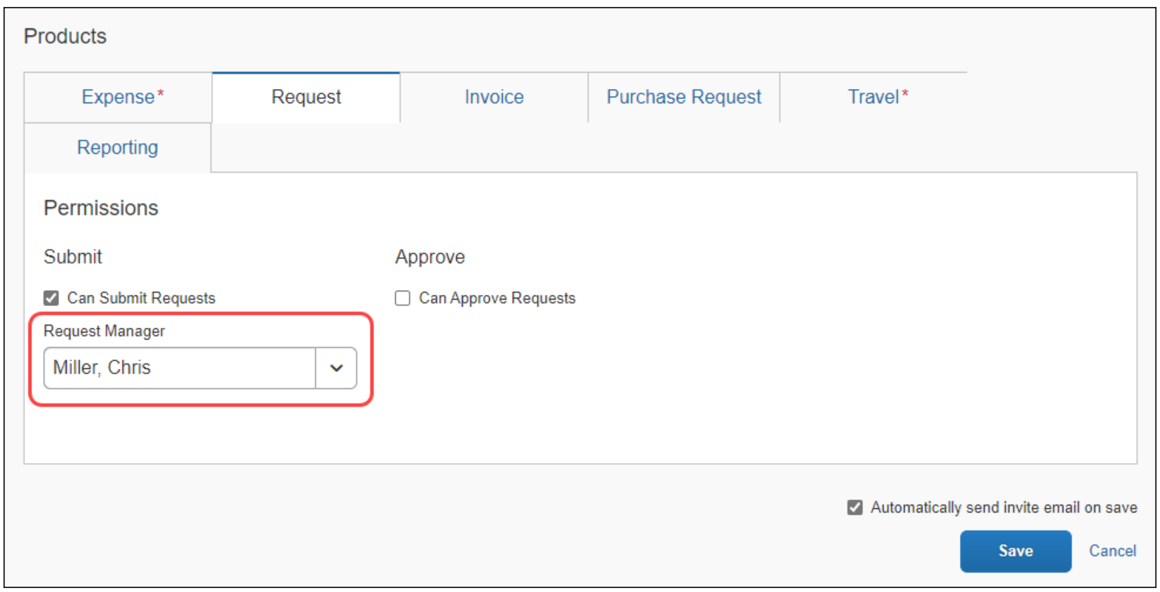


Submit the Request

When ready, the user clicks **Submit Request**.



The request is sent to the approver. The request approver is the user selected in the **Request Manager** field on the **Add User** or **Edit User** page. The **Request Manager** field is located on the **Request** tab in the **Products** section of the page.



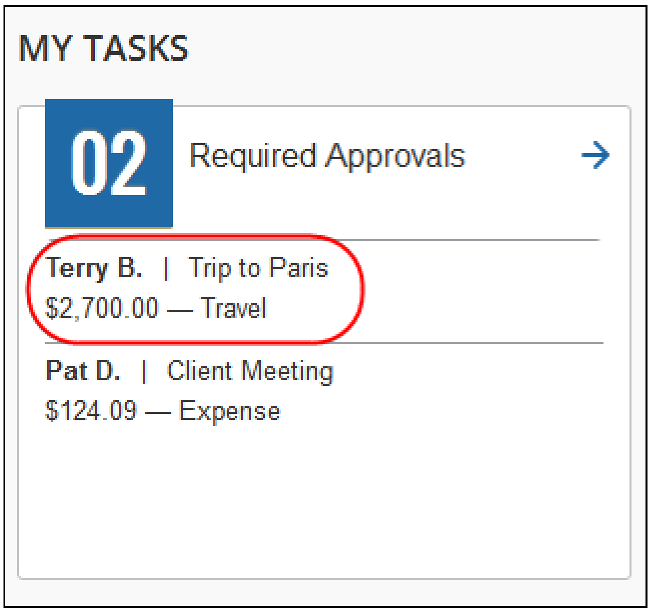
For more information, refer to the *Shared: Users Setup Guide for Concur Standard Edition*.

Approve the Request

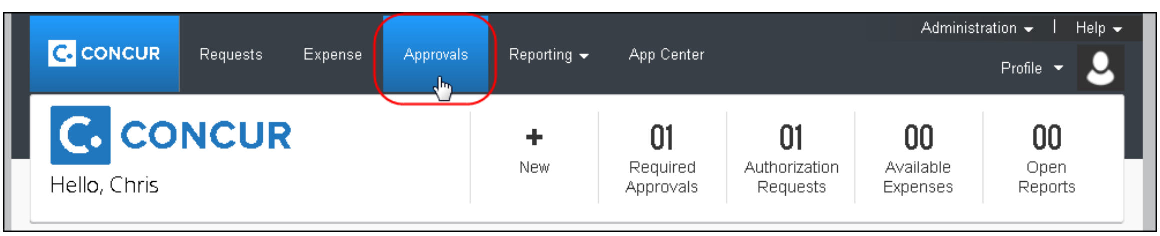
If the user has the **Can Approve Requests** role:

- The **Requests** option appears on the menu.
  – and –
- Requests pending approval appear in the **Required Approvals** area of **My Tasks**.

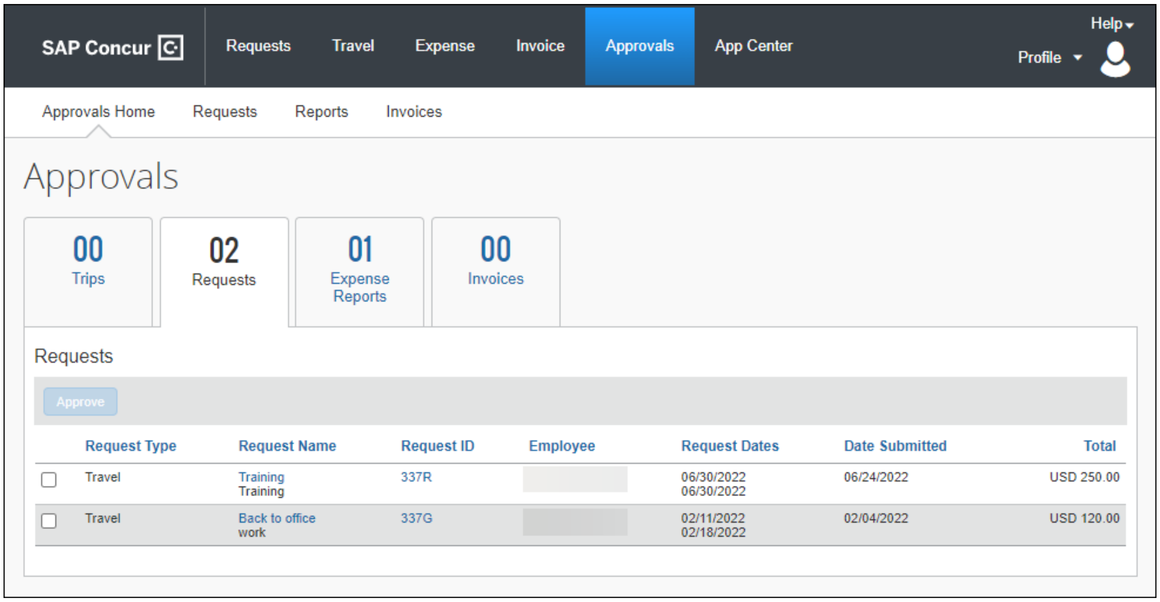
The user clicks the request summary to see the request details.



The approver can also use the **Approvals** menu option to view all the items pending approval.



In the request list, the approver clicks the request name to view the header, segments, expense summary, approval flow, audit trail, and allocations.



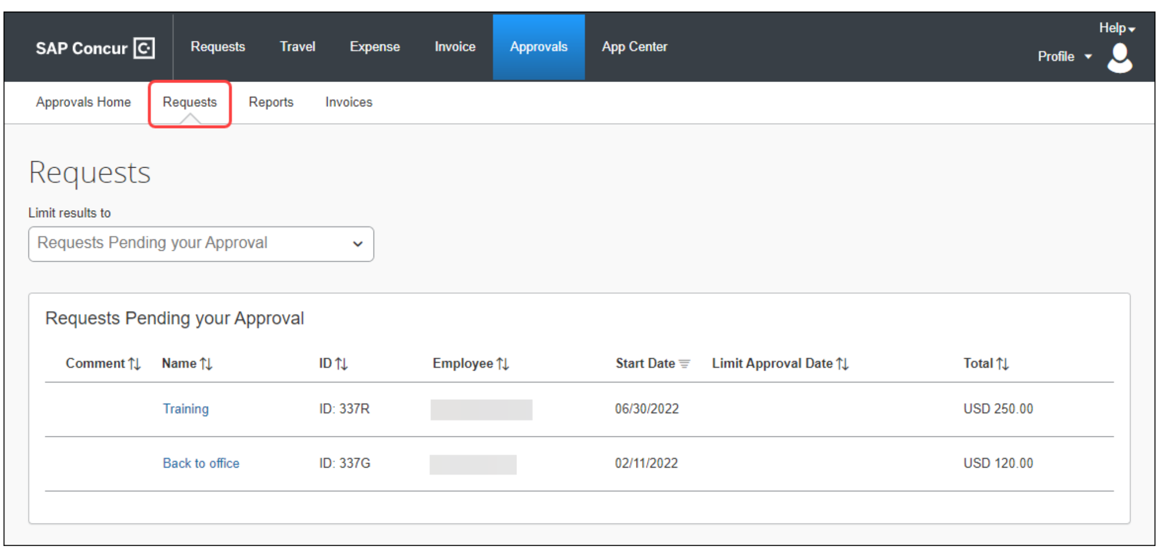
A request approver can then:

- Approve the request
- Approve the request and forward it to another approver
- Send the request back to the user with a comment to perhaps change and resubmit the request or to decline the request

Note the following:

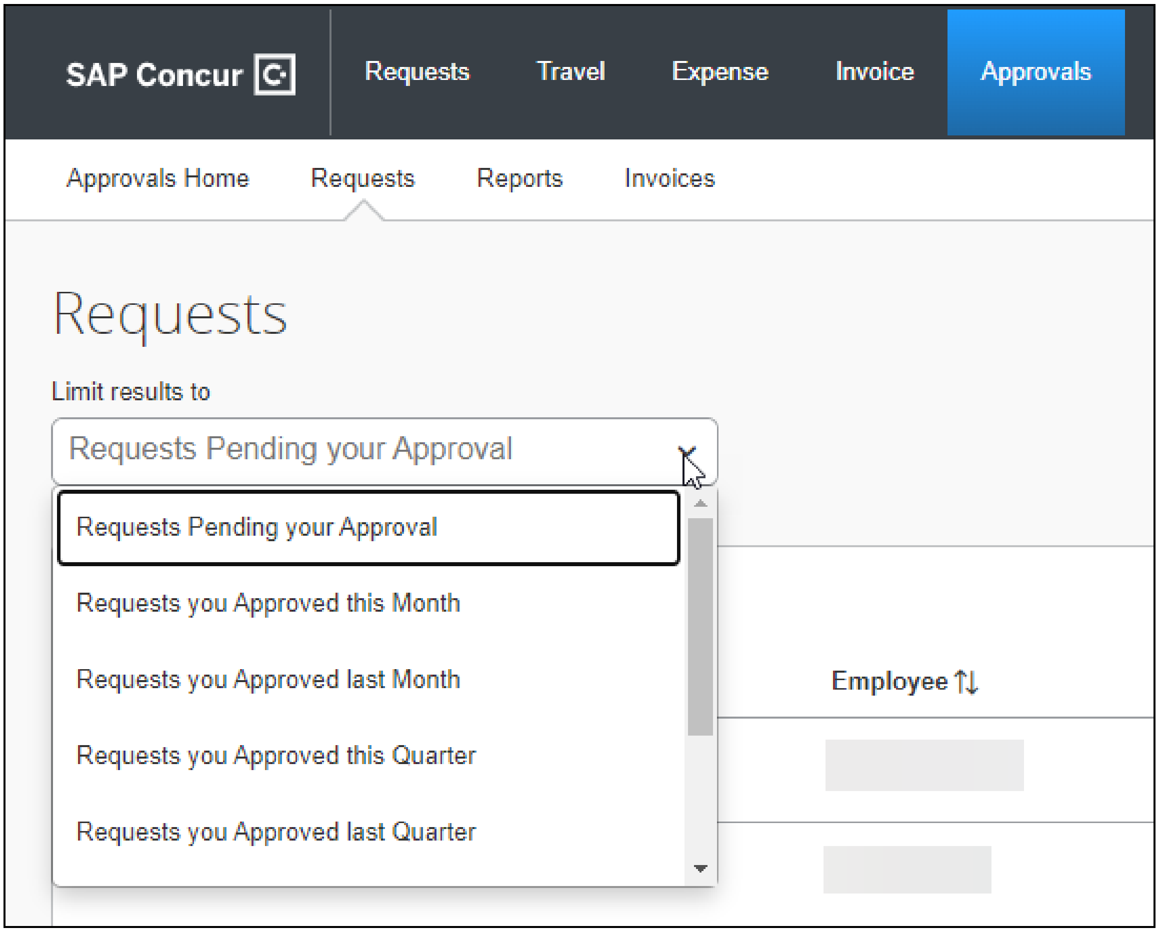
- Approvers cannot adjust amounts.

Approvers click **Requests** at the top of the **Approvals** page to open the **Requests Pending your Approval** page.



View Requests Pending Approval

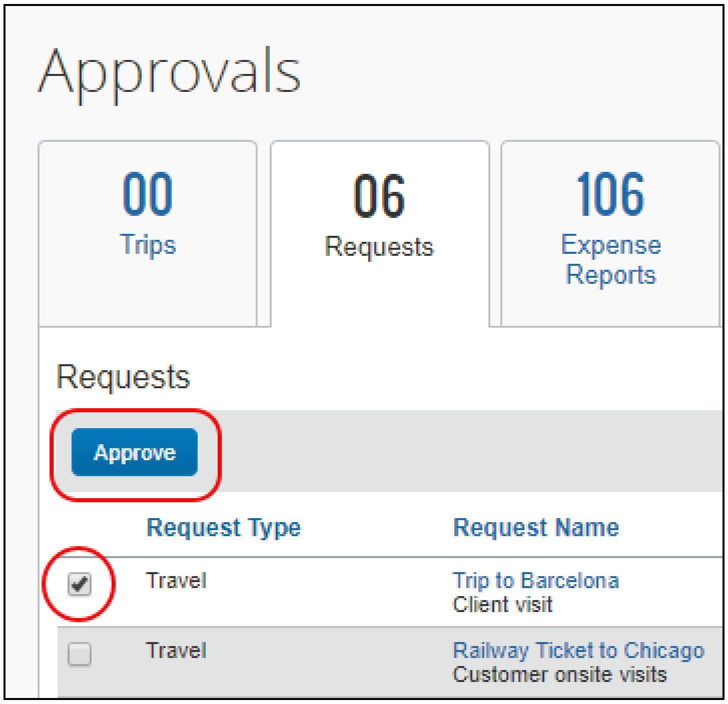
On the **Requests Pending your Approval** page, the approver can open the **Limit results to** list to view approved requests or navigate back to the **Requests Pending your Approval** page.



Approve the Request

Approvers can approve a request from the **Approvals** page or from within a request.

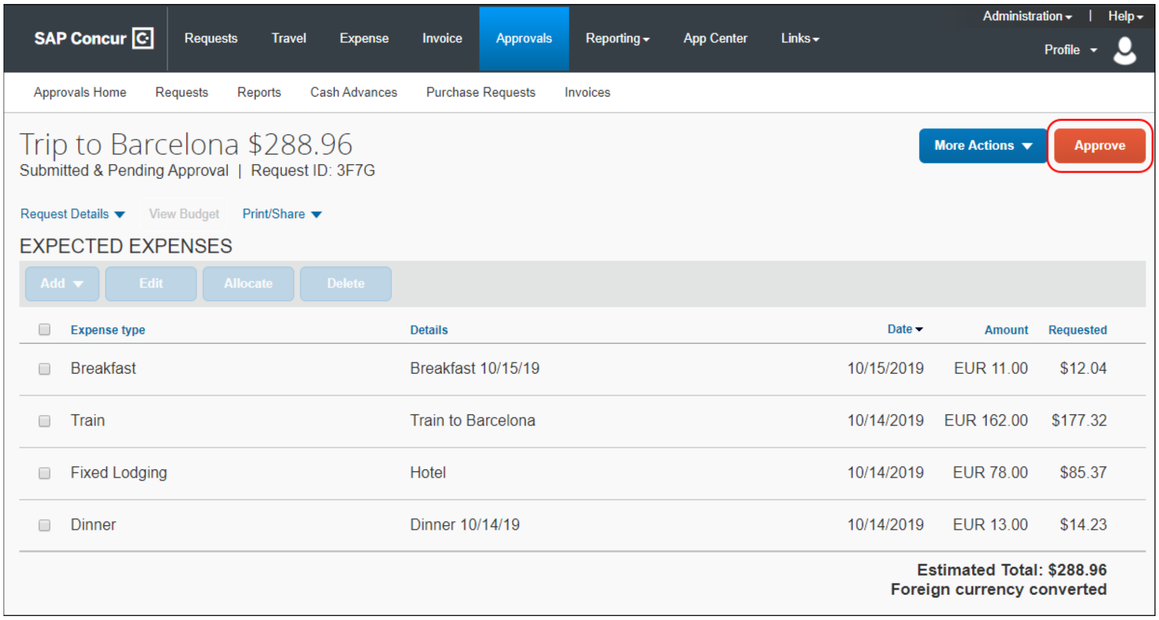
To approve a request from the **Approvals** page, approvers select the check box for the request and then click **Approve**.



To approve a request from within a request, approvers open the **Expected Expenses** page, and then click **Approve**.

To open the **Expected Expenses** page for a request from the **Approvals** page, approvers click the request link in the **Request Name** or **Request ID** column.

To open the **Expected Expenses** page for a request from the **Requests Pending your Approval** page, approvers click the request link in the **Request Name** column.

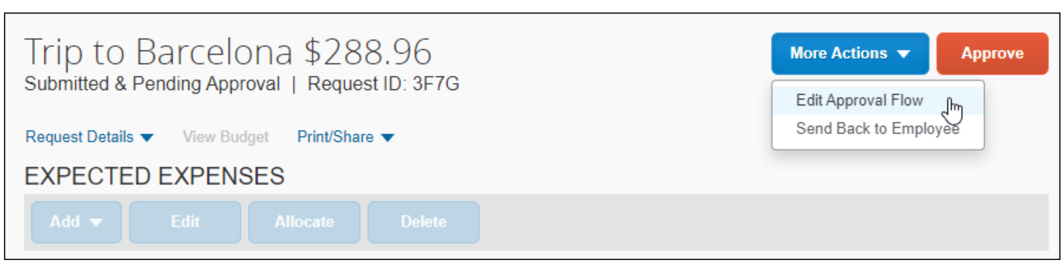


Approve and Forward a Request

Approvers use the **More Actions > Edit Approval Flow** selection to approve and forward a request to another approver.

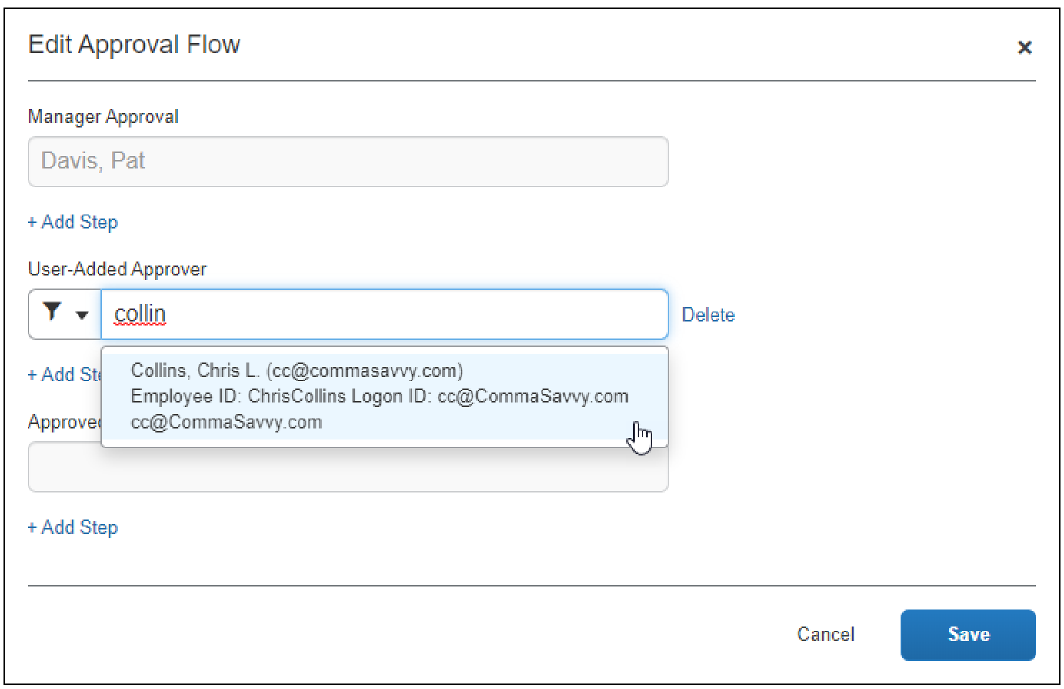
To approve and forward a request to another approver:

1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
2. Click **More Actions > Edit Approval Flow**.



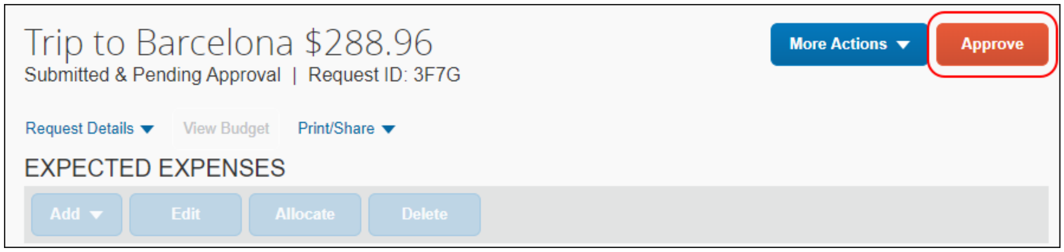
3. In the **Edit Approval Flow** dialog, click **Add Step**.

4. In the **User-Added Approver** field, start typing the approver's name to search for the additional approver, and then click their name to populate the field.



5. Click **Save**.

6. Click **Approve**.



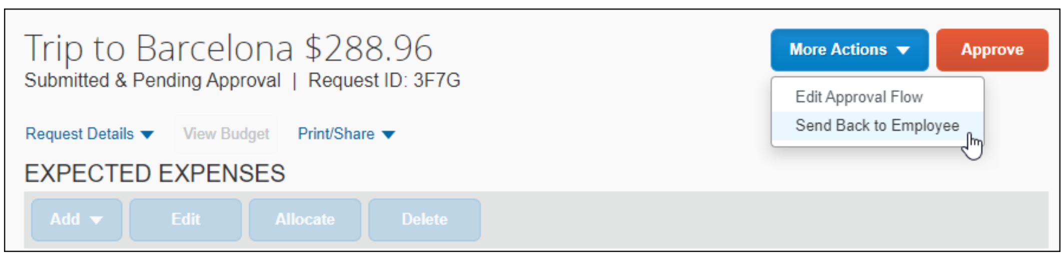
The request is approved and forwarded to the next approver.

Send a Request Back to Submitter

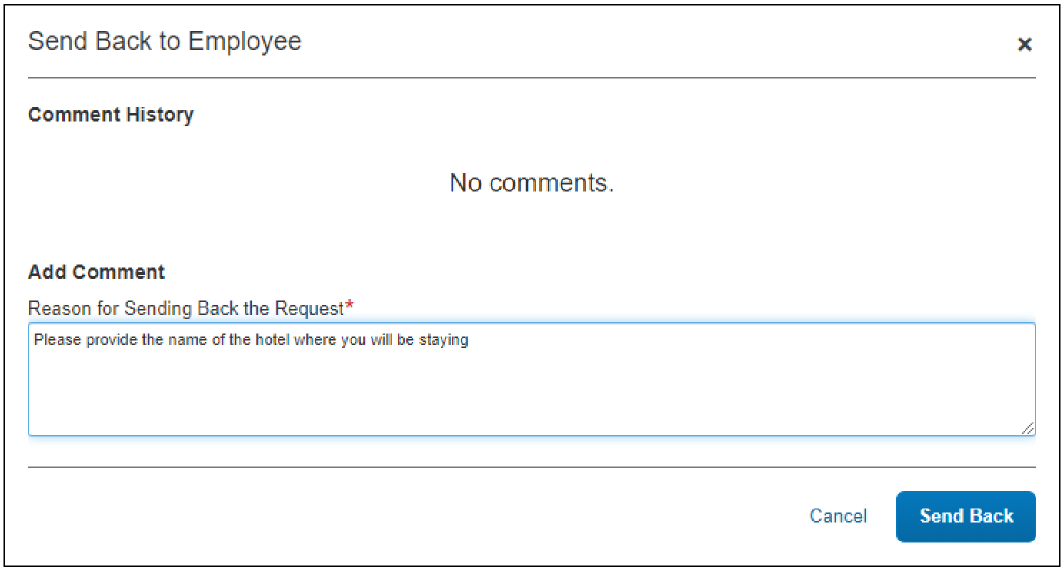
Approvers use the **More Actions > Send Back to Employee** selection to send a request back to the submitter.

To send a request back to the request submitter:

1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
2. Click **More Actions > Send Back to Employee**.

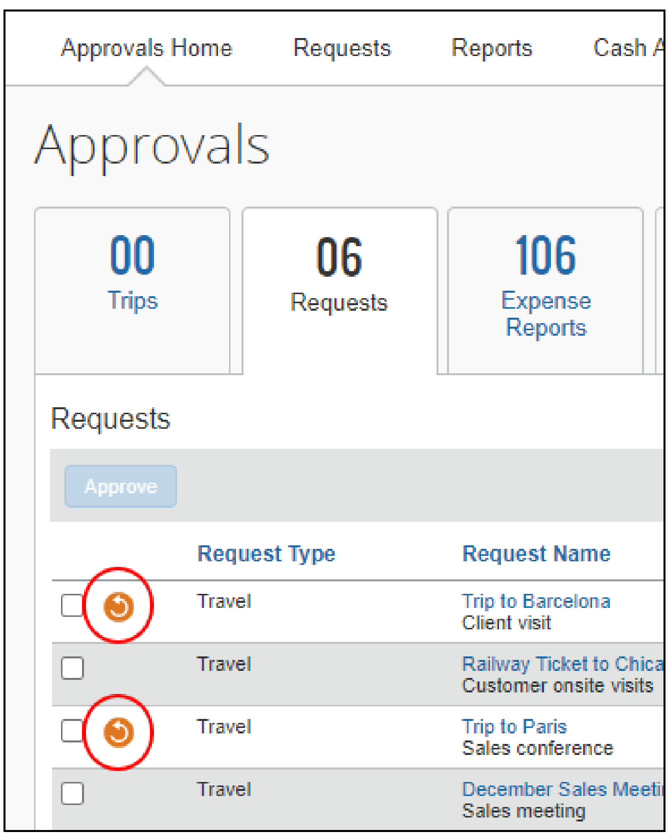


3. In the **Send Back to Employee** dialog, click enter the reason you are sending the request back, and then click **Send Back**.



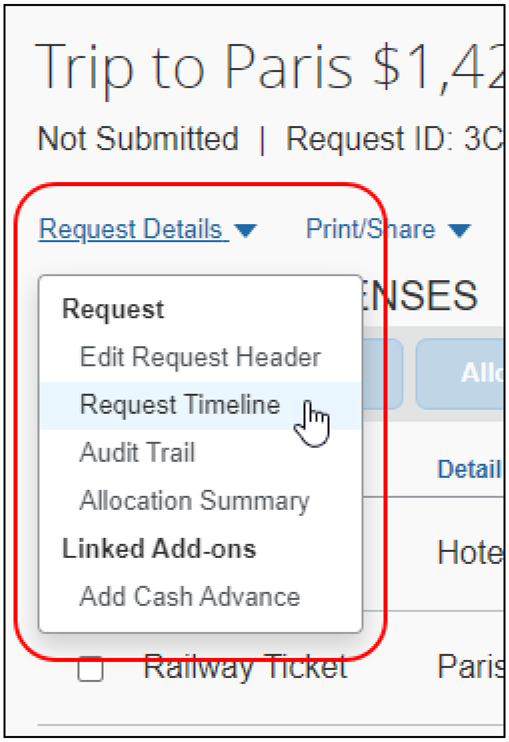
The request is sent back to the request submitter.

After sending back a request to the submitter, when the request submitter resubmits the request, the resubmitted icon, , is displayed for the request on the **Approvals > Approvals Home** page.



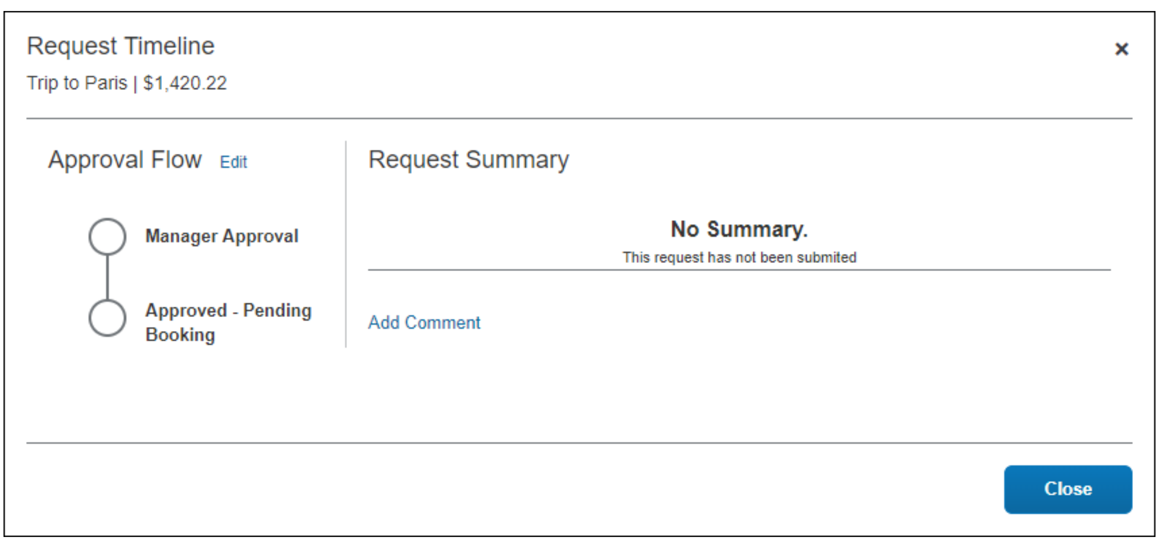
View Request Approval Workflow

Approvers and users can view a request's approval workflow and comments from the **Request Timeline** page. To access the **Request Timeline** page, on the **Request Details** menu, click *Request Timeline*.

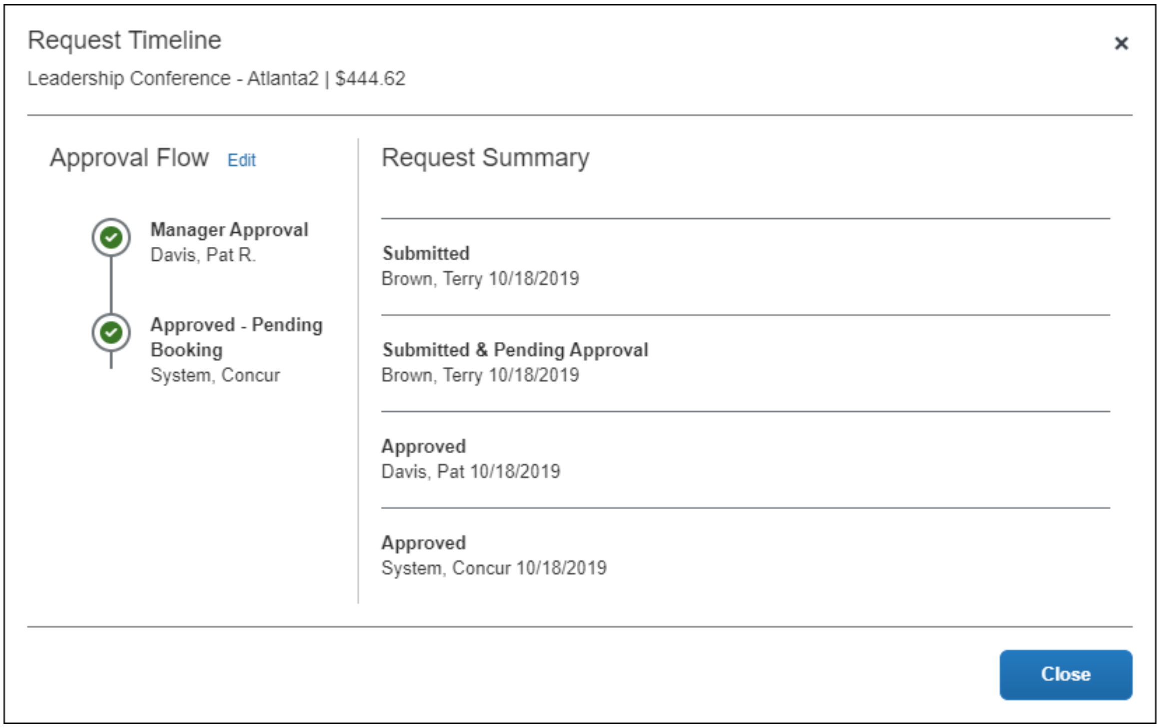


The **Request Timeline** page displays the approval workflow for the request, a summary of the approval activity for the request, and any comments added to the request.

This is the **Request Timeline** page for an unsubmitted request.

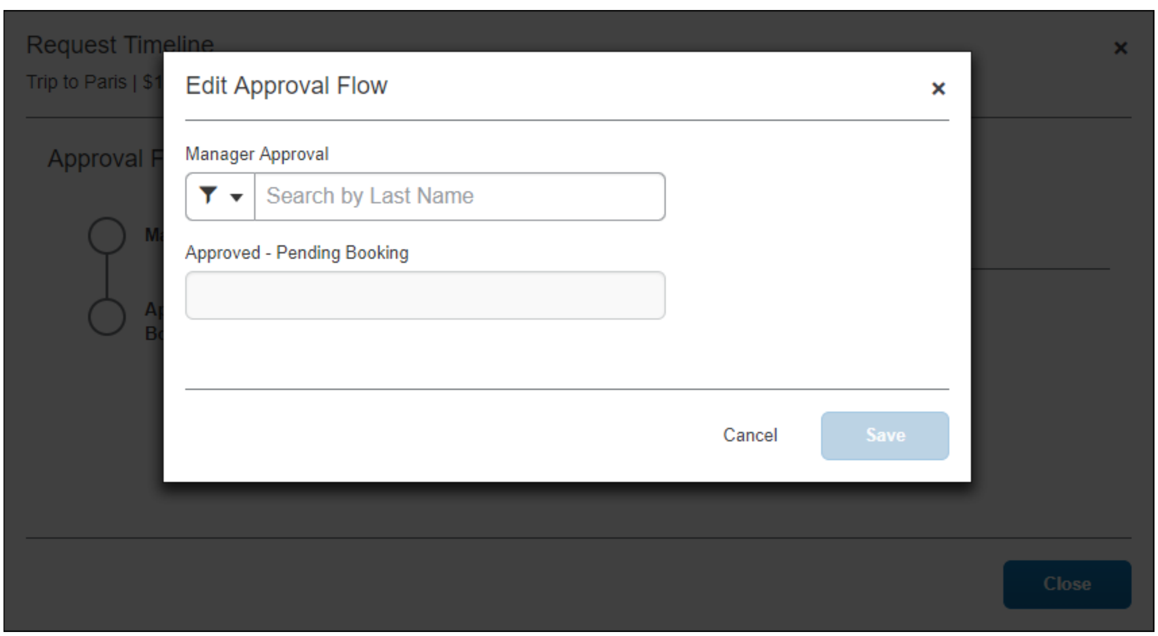


This is the **Request Timeline** page for a submitted and approved request.

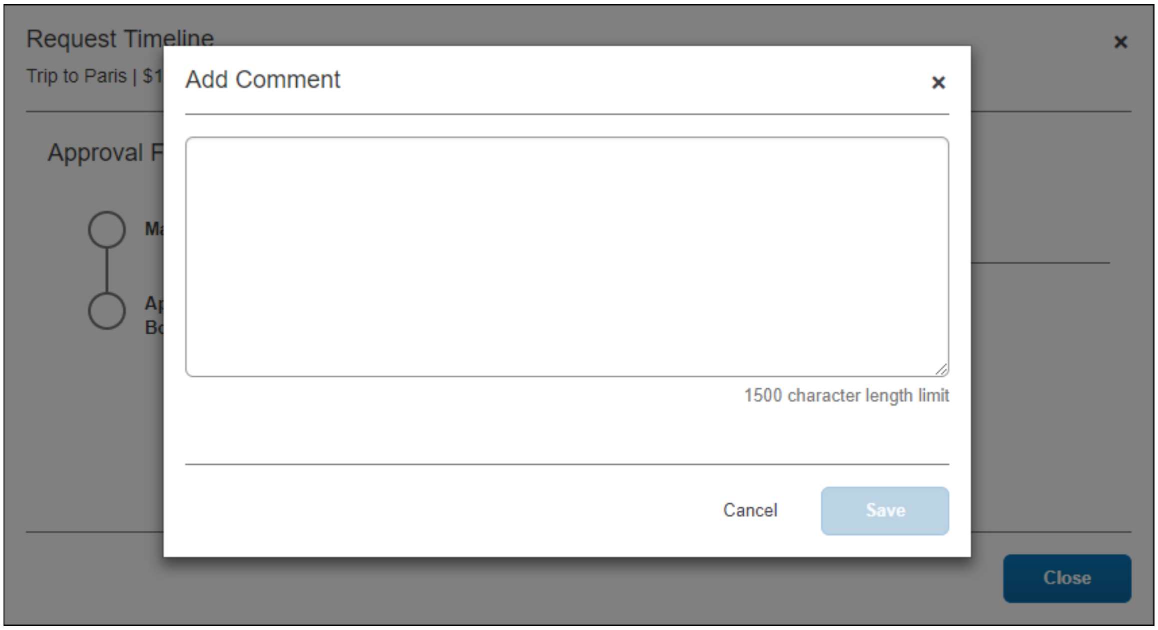


If users do not have a request approver assigned or have permissions to change the request approver, users can click the **Edit** link on the **Request Timeline** page to add or edit the request approver.

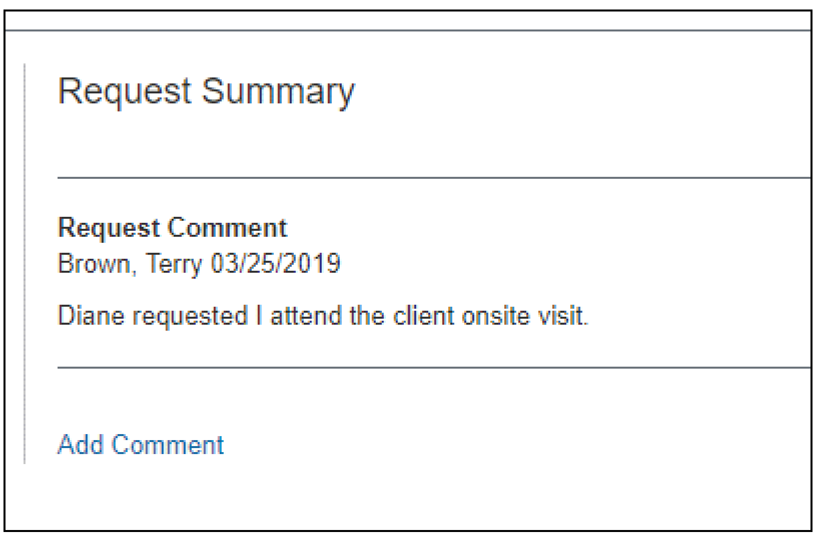
Users click the **Edit** link to open the **Edit Approval Flow** dialog.



Users can add comments to the request by clicking the **Add Comment** link on the **Request Timeline** page. Users click the **Add Comment** link to opens the **Add Comment** dialog to enter a comment and then click **Save**.



Saved comments are displayed in the **Request Summary** section of the **Request Timeline** page.



Travel Agency Notification

After the request is approved by the final approver, Concur Request sends an email with the request segment details to the travel agency email configured for the policy group. The email notification will only include segments that are visible to the agency, as configured in the **Segment Types** step of Setup.

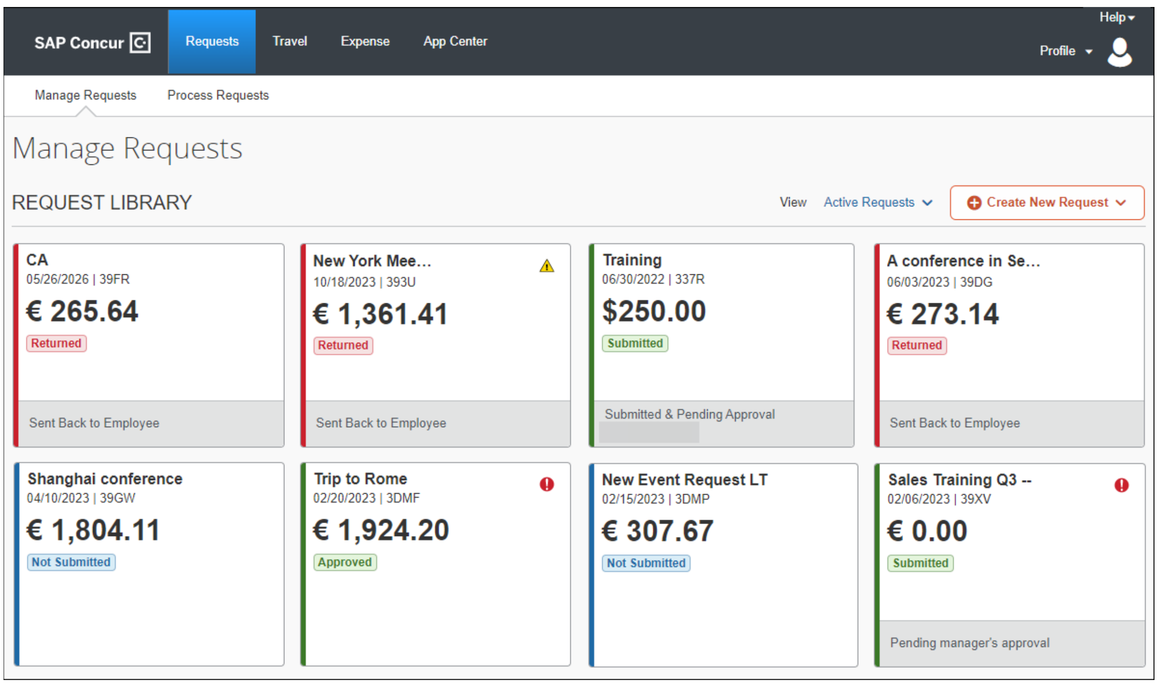
For more information, refer to the *Concur Requests: Segment Types Setup Guide*.

Managing Requests

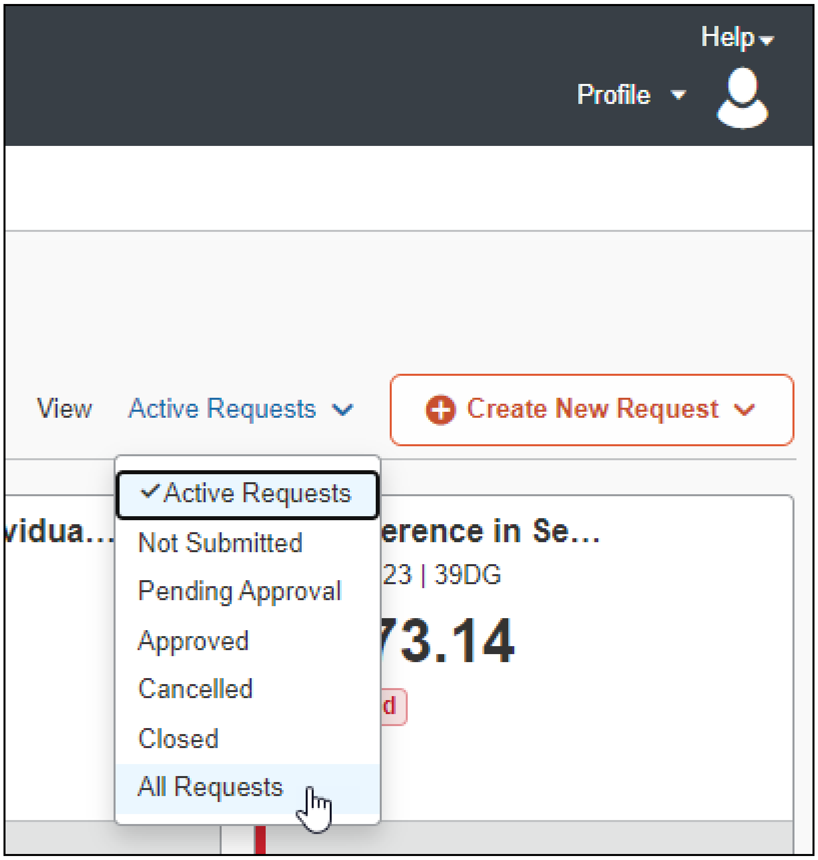
Many of the tasks to manage requests are completed from within a request, such as deleting, copying, or closing/inactivating a request.

View Requests

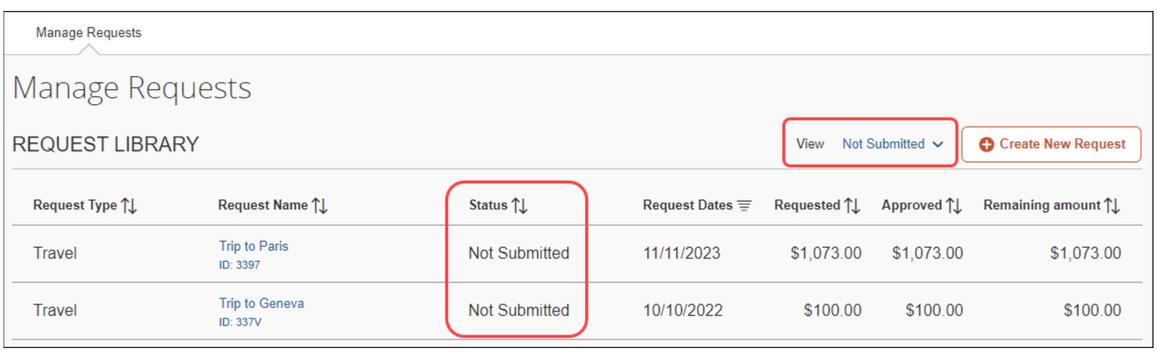
Users click the **Requests** menu to access the **Manage Requests** page which displays active requests in individual tiles sorted by date of creation. The user clicks a request tile to view and edit an individual request.



On the **View** menu, the user can filter requests by choosing a selection such as *All Requests* or *Pending Approval*.



For example, if you select *Not Submitted*, the unsubmitted requests appear.


Manage Requests

Manage Requests

REQUEST LIBRARY

View Not Submitted

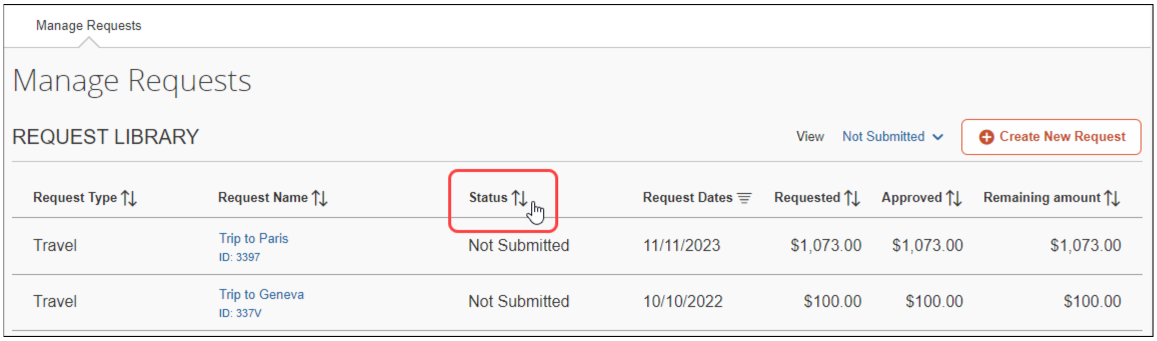
Create New Request

Request Type	Request Name	Status	Request Dates	Requested	Approved	Remaining amount
Travel	Trip to Paris ID: 3397	Not Submitted	11/11/2023	$1,073.00	$1,073.00	$1,073.00
Travel	Trip to Geneva ID: 337V	Not Submitted	10/10/2022	$100.00	$100.00	$100.00

To return to the active requests, select *Active Requests* in the **View** list.

Sort Requests

To sort requests, click the column headings.

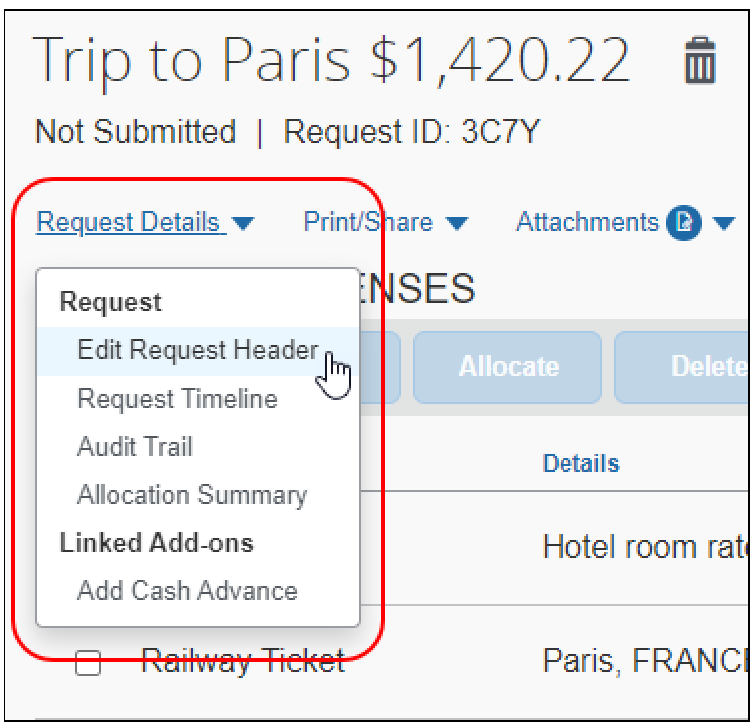


Edit/Change/Update Requests

Once a request is submitted, it cannot be modified. Prior to submission, the request can be modified by users. Requests that have been sent back to the user or recalled by the user can be modified and resubmitted.

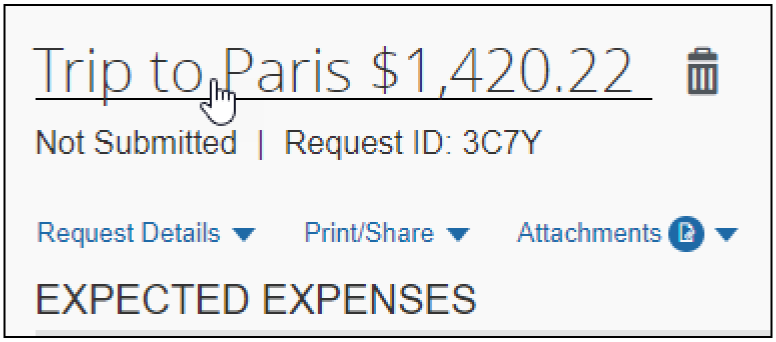
EDIT THE REQUEST HEADER

With the request open, on the **Request Details** menu, users can click *Edit Request Header*.



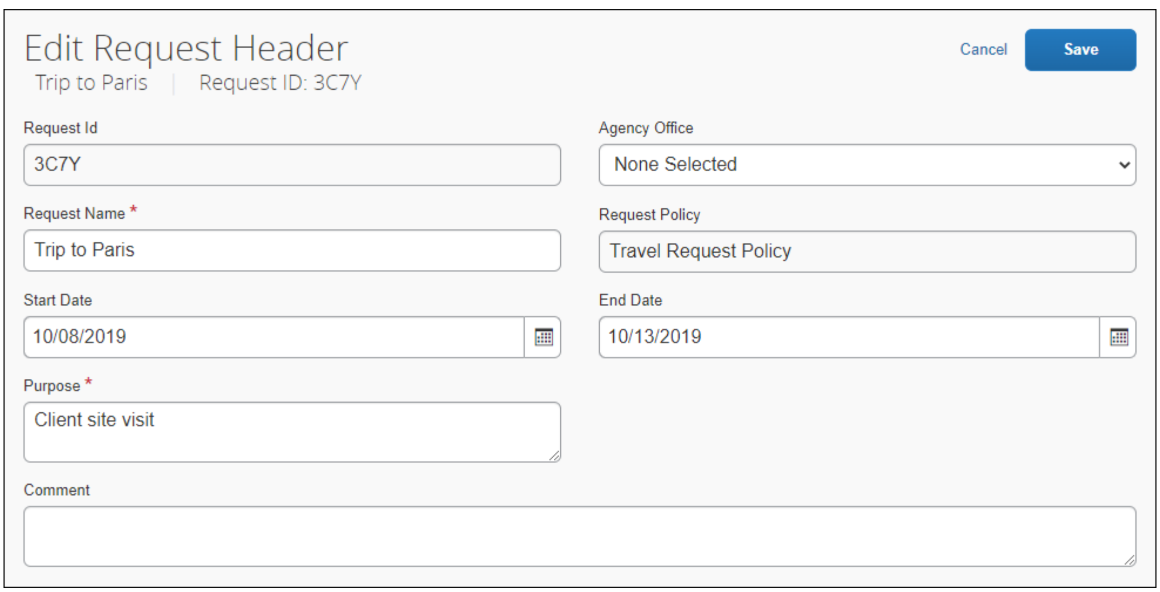
Clicking *Edit Request Header* opens the **Edit Request Header** page.

Users can also click the request's name at the top of the **Expected Expenses** page to open the **Edit Request Header** page. Placing the pointer over the request name turns the name into a link.



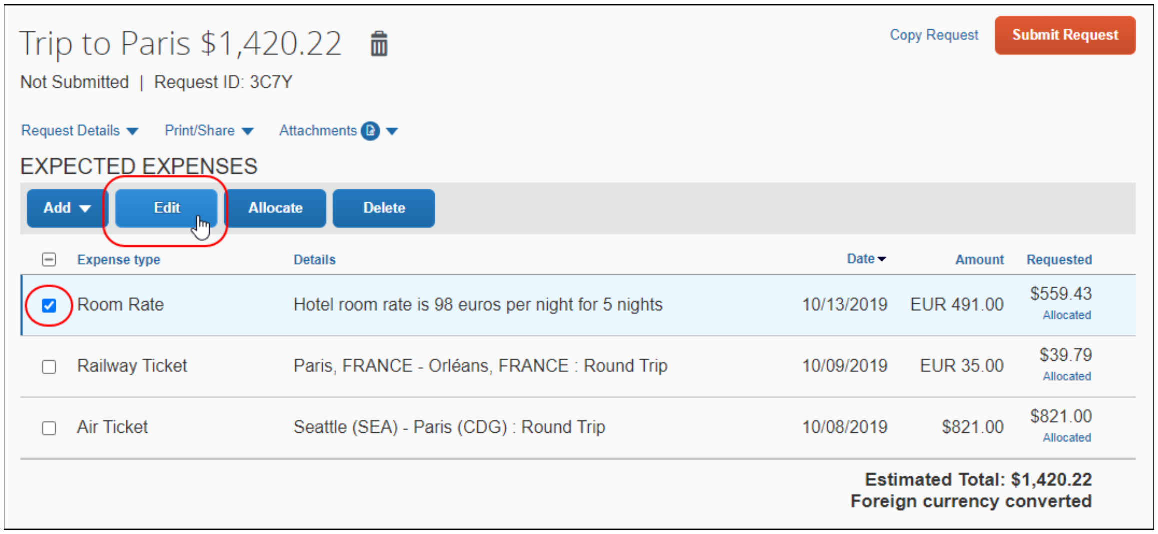
On the **Edit Request Header** page, make your changes and click **Save**.

NOTE: The request policy associated with a request cannot be edited after the request policy assigned to the request is saved during the initial request creation process.



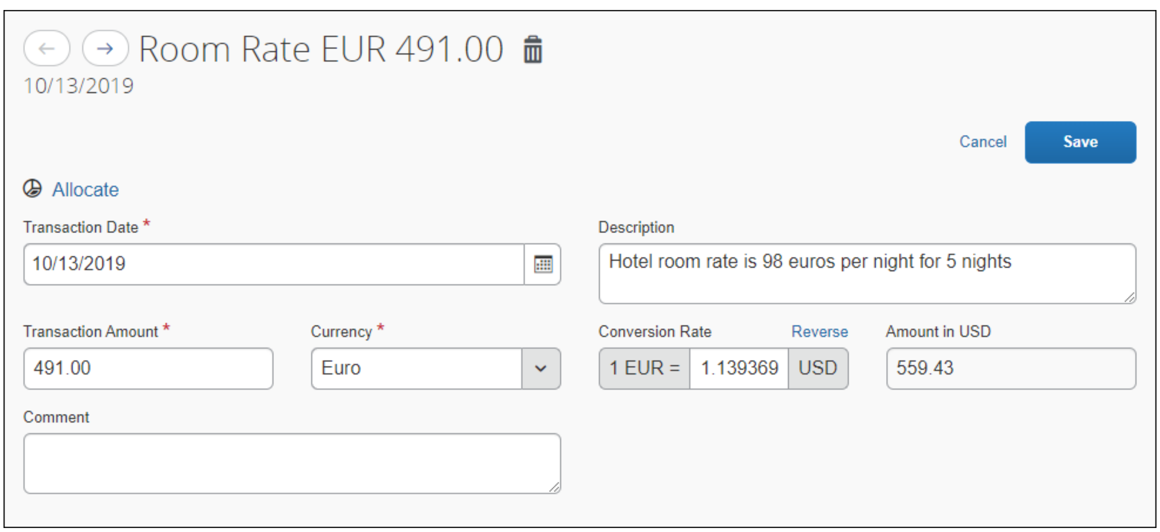
EDIT AN EXPECTED EXPENSE OR SEGMENT

With the request open, users select the expected expense or segment they want to edit and then click **Edit**.



Clicking **Edit** opens the expected expense or segment details page. Users make their edits and click **Save**.

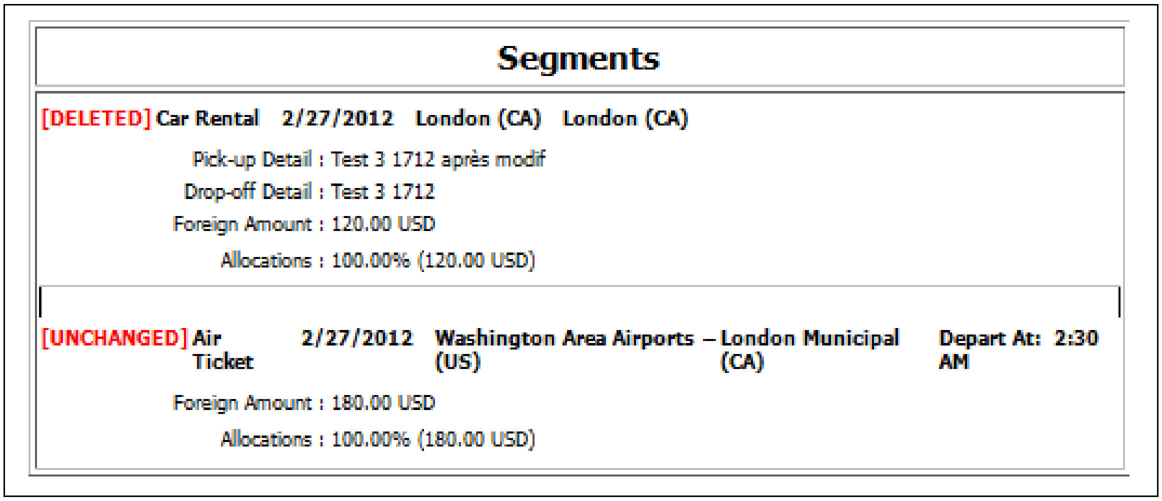
NOTE: The **Conversion Rate** field and **Amounts in [currency]** fields appear as soon as a user chooses a currency that is different from the one defined in on the **Request Information** page in Profile.



EDIT REQUEST CONSIDERATIONS

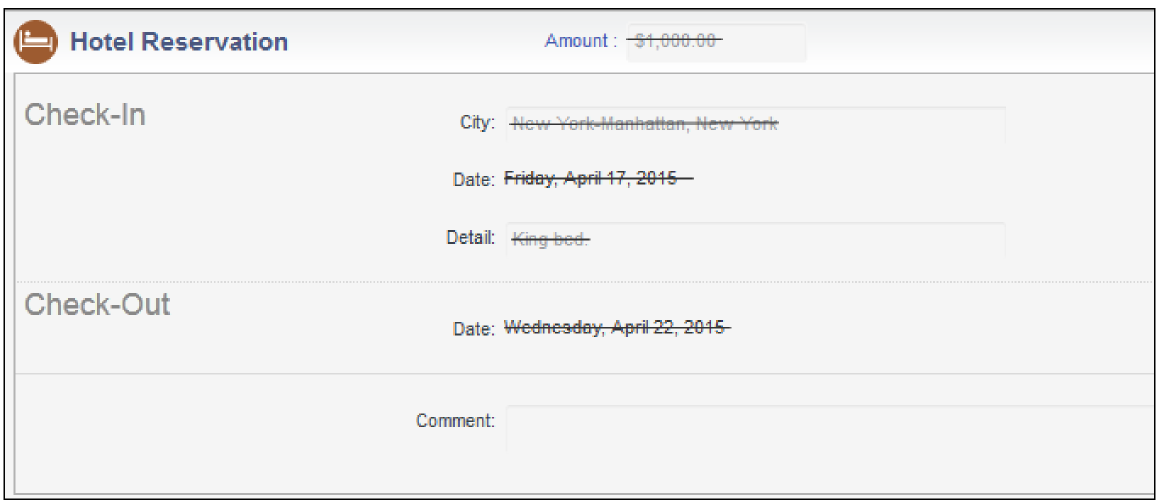
If the segment is configured to appear in emails to the travel agency, the travel agent must be updated when the request changes. After the user changes the request, Concur Request sends a new email to the travel agent with the changes.

Once a request email is sent to the agency, any follow-up to that email contains **[NEW]**, **[UPDATED]**, **[DELETED]**, or **[UNCHANGED]** for each segment.



This way, the agency can easily monitor any changes to the request and update the trip accordingly.

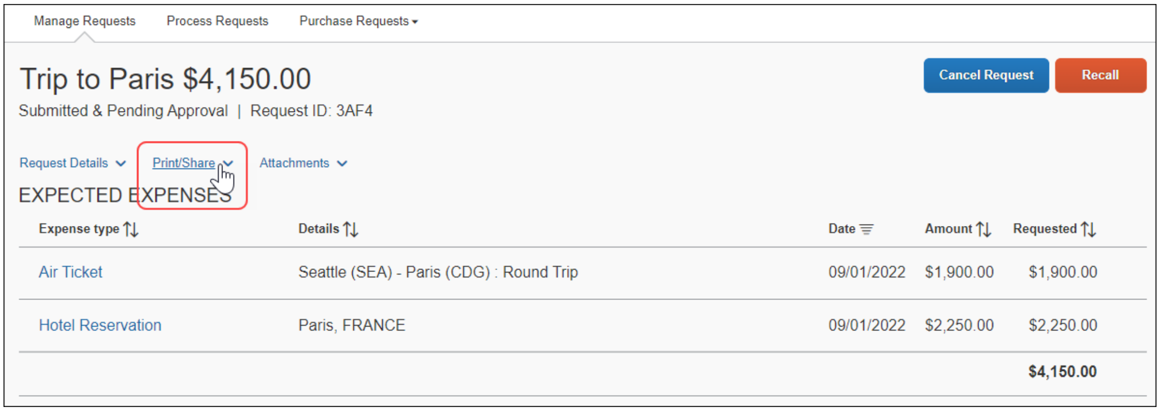
If a user deletes an agency-booked segment, Concur Request formats the segment with strikethrough (shown below) and notifies the user that the segment will not actually be deleted until Concur Request sends a notification message to the agency.



This way, the user can tell whether the agency has received notification about the deletion.

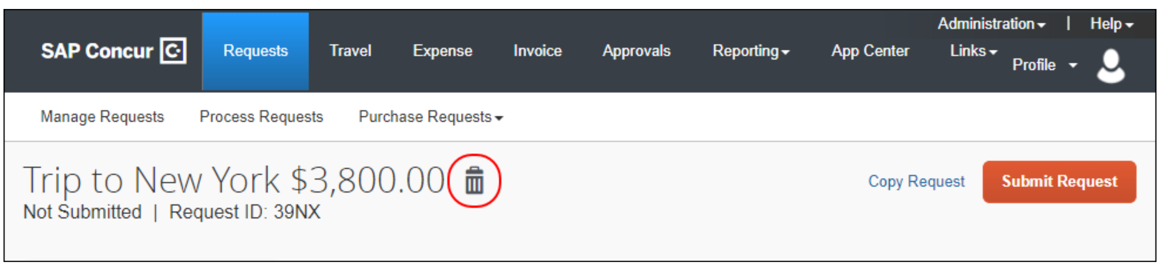
Print/Share Requests

Users can print a request using the **Print/Share** menu on the **Expected Expenses** page.



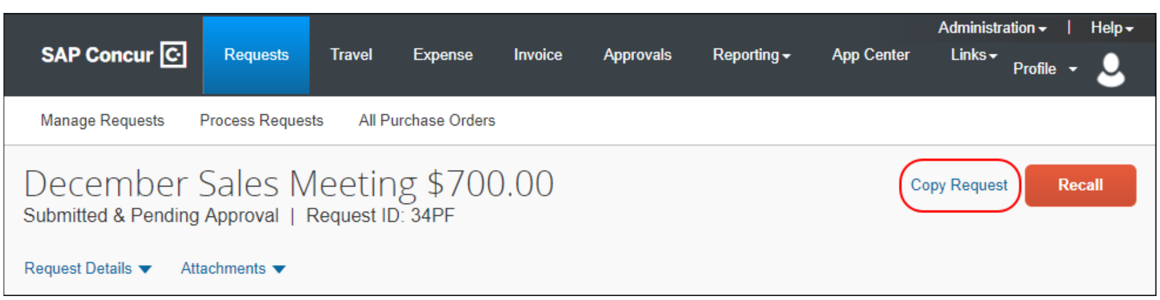
Delete Requests

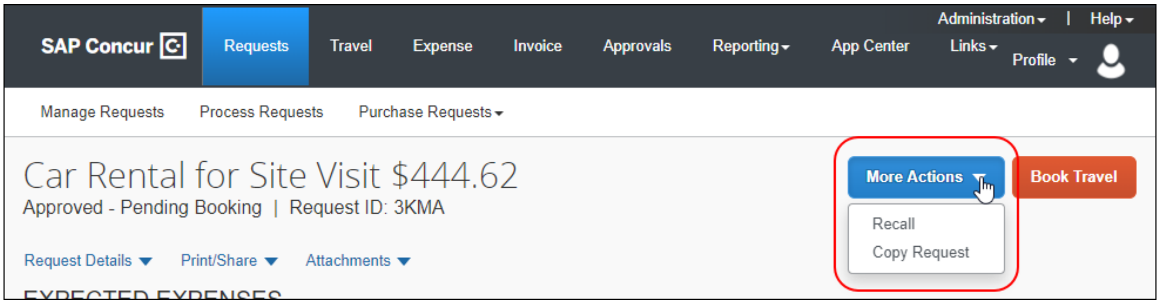
A user can delete any *unsubmitted* request. Requests can be deleted by clicking the delete icon, , located next to the request name and amount.



Copy Requests

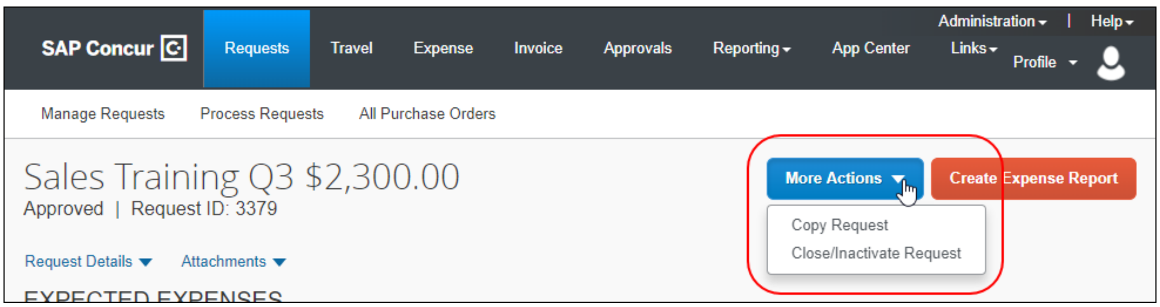
Depending on the request's current status, a request can be copied by clicking the **Copy Request** link or by clicking *Copy Request* from the **More Actions** list.





Close/Inactivate Requests

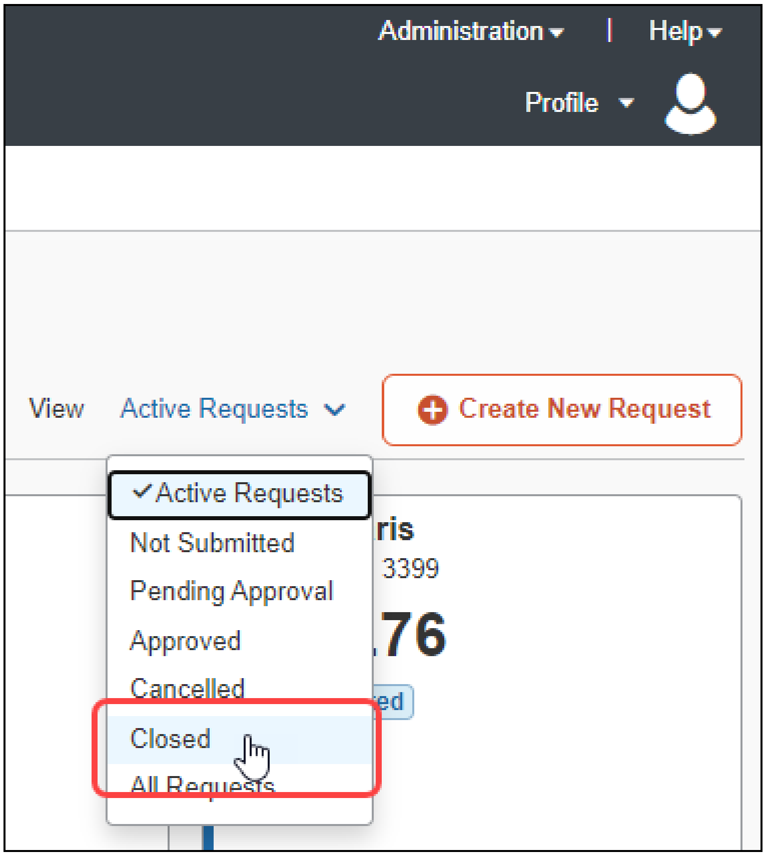
A user can close a request by clicking **Close/Inactivate Request** on the **More Actions** list. Requests that are more than 90 days old will be closed automatically.



Closing a request removes the request from the user's list of requests. For example, a user may want to remove a cancelled or zero-balance request. The user can also close a request that still has a balance. For example, assume the request was approved for $800 for airfare but the airfare expense was actually $760. The user likely will not use the balance so the user can close the request.

View Closed Requests

The user can view closed requests by clicking the *Closed* selection from the **View** list on the **Manage Requests** page.



NOTE: Users cannot reopen a closed request.

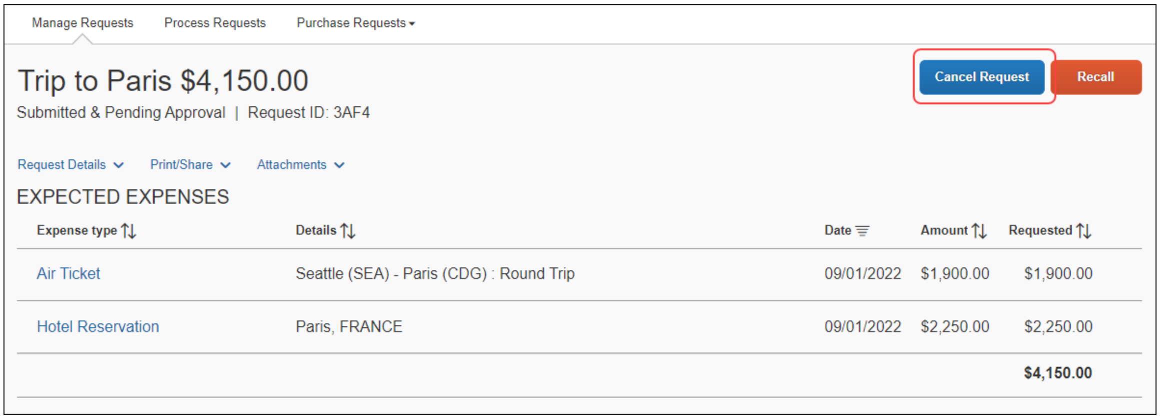
Delegate and Request Processor

A user's delegate can close a request. The processor with the **Can Process Expense Reports (Includes Request)** role can close a request. The processor opens the request and clicks **Close Request**.

📖 For more information, refer to the *Concur Request: Processor User Guide for Standard Edition*.

Cancel Requests

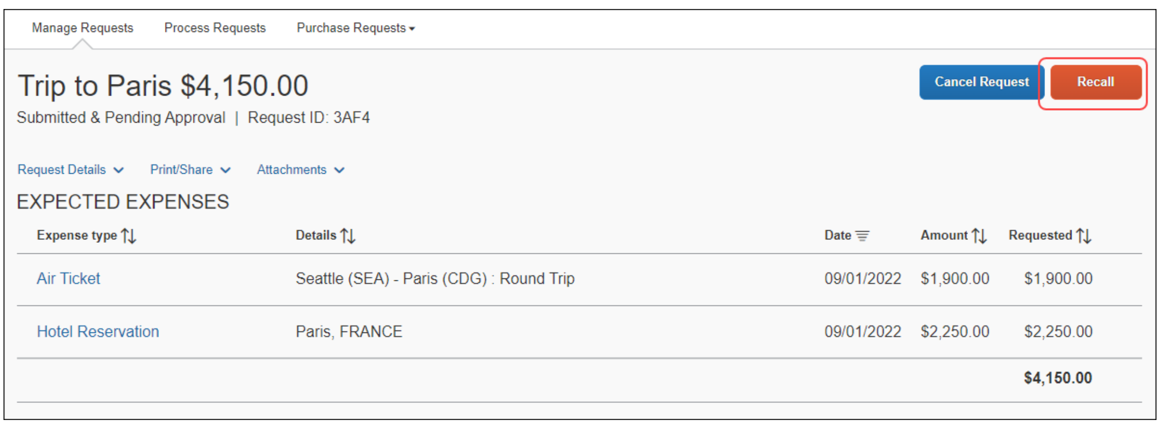
After submission, the user can cancel a request, using the **Cancel Request** button.



Once the request is cancelled, Concur Request will send a cancellation notification email to the travel agency configured for the user's policy group.

Recall Requests

After submission and before approval, the user can recall a request using the **Recall** button.



Add a Request to an Expense Report

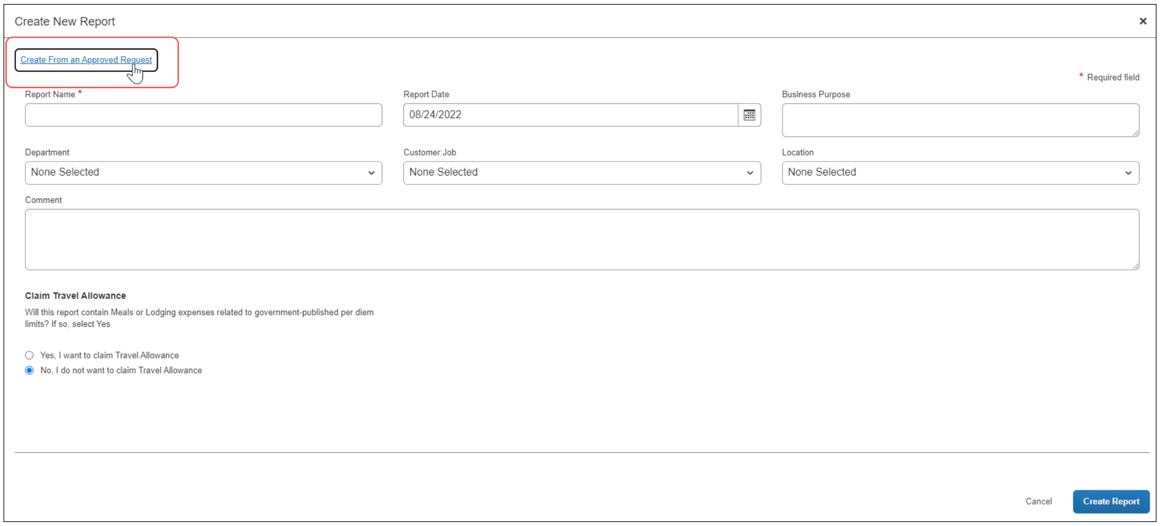
The information in this section depends on your company's configuration.

Users can associate a travel request with an expense report multiple ways:

- Using the **Requests** tab on the expense report header
- Using the **Expense** link on the **Manage Requests** page

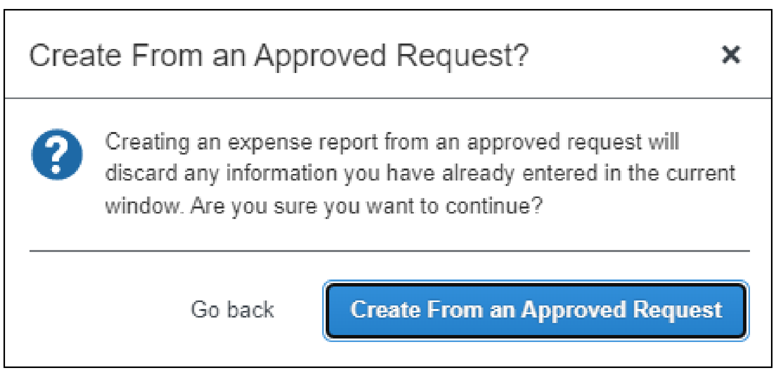
New Report

When creating a new expense report in Concur Expense, the **Create From an Approved Request** link appears on the **Create New Report** page.

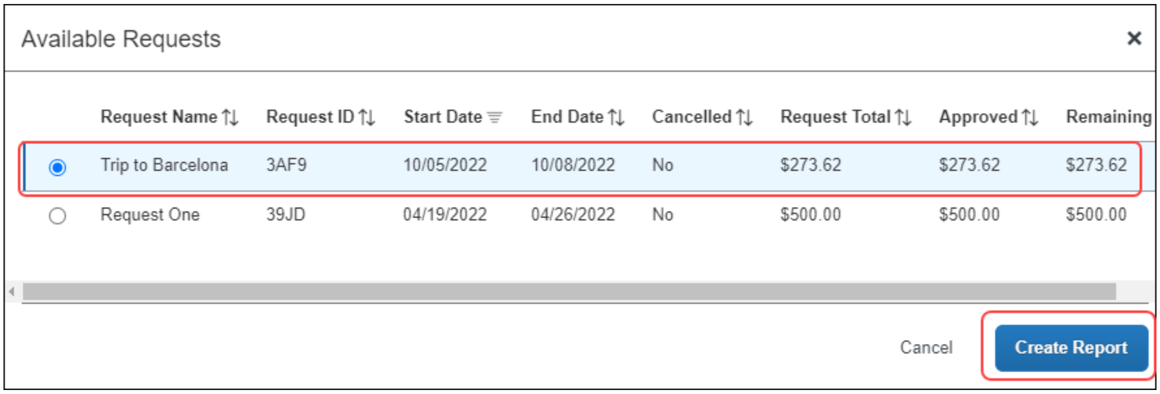


The user clicks the **Create From an Approved Request** link to see their list of approved requests.

The user confirms the action by clicking the **Create From an Approved Request** button in the **Create From an Approved Request** link dialog.

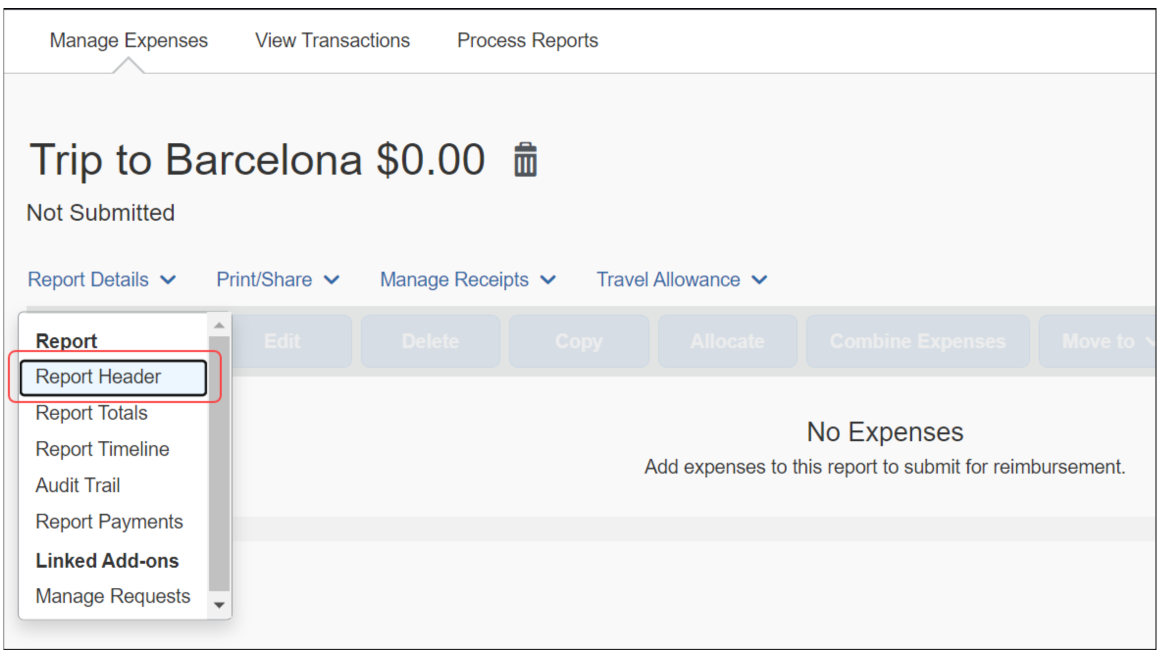


In the **Available Requests** dialog, the user selects the applicable request, then clicks **Create Report** to add the request to the expense report.

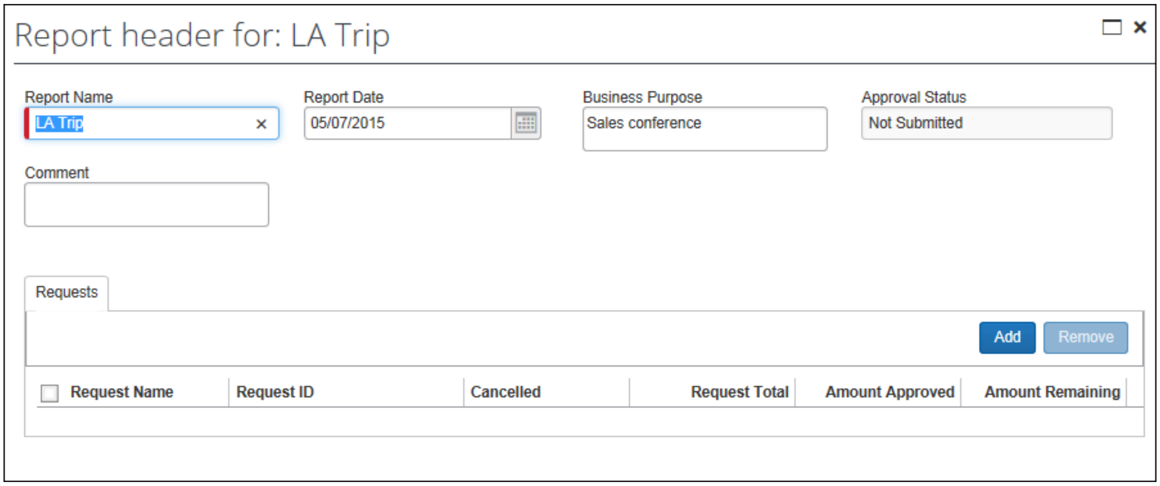


Existing Report

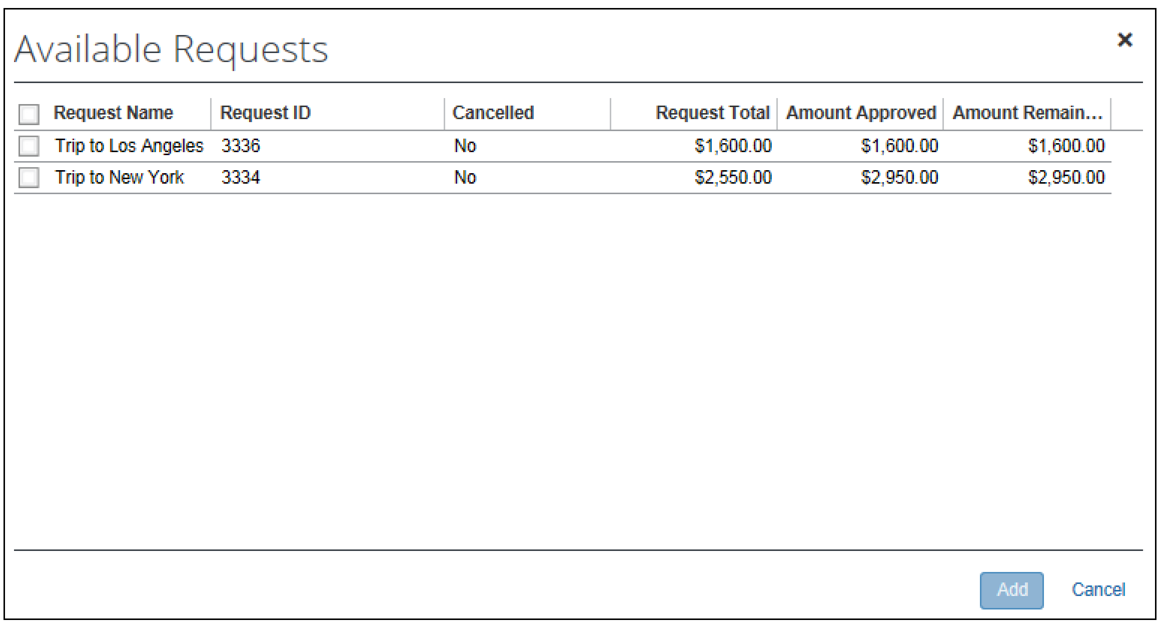
The user can attach a request to an existing report by opening the report, then selecting **Report Details** > **Report Header**.



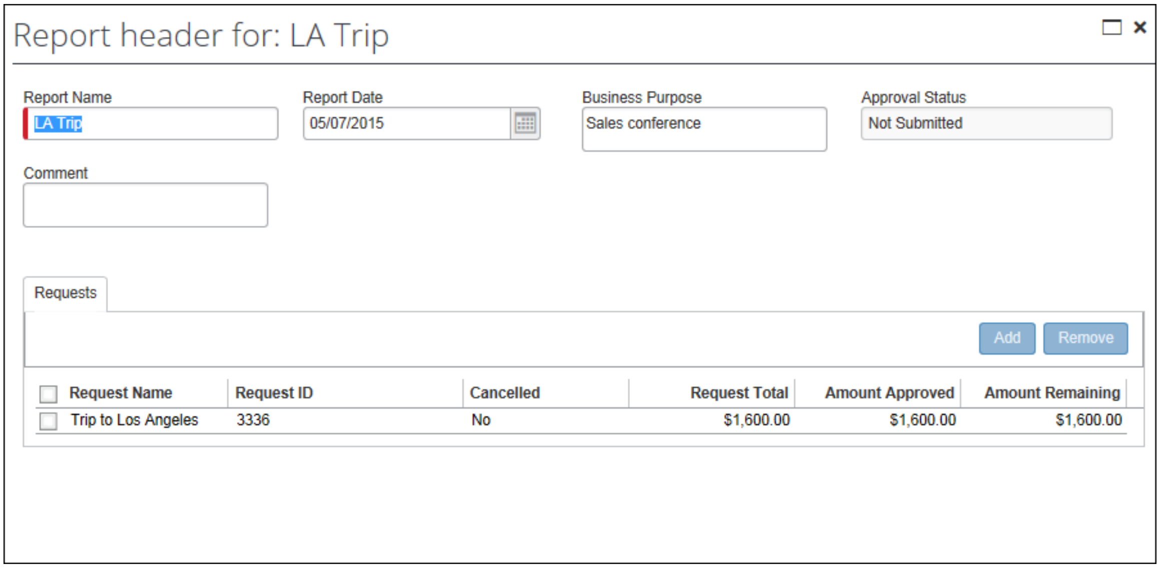
The **Report Header** page displays the **Requests** tab.



The user clicks **Add** to access their available requests.



The user selects the desired request and clicks **Add** to attach it to the expense report.



From a Request

The user can create a report from an approved request on the **Manage Requests** page. Approved requests display the **Expense** link in the **Action** column.

The user clicks **Expense** for the desired request, then the **Create New Report** page loads with the request already associated.

Request Segment Information on New Expense Page

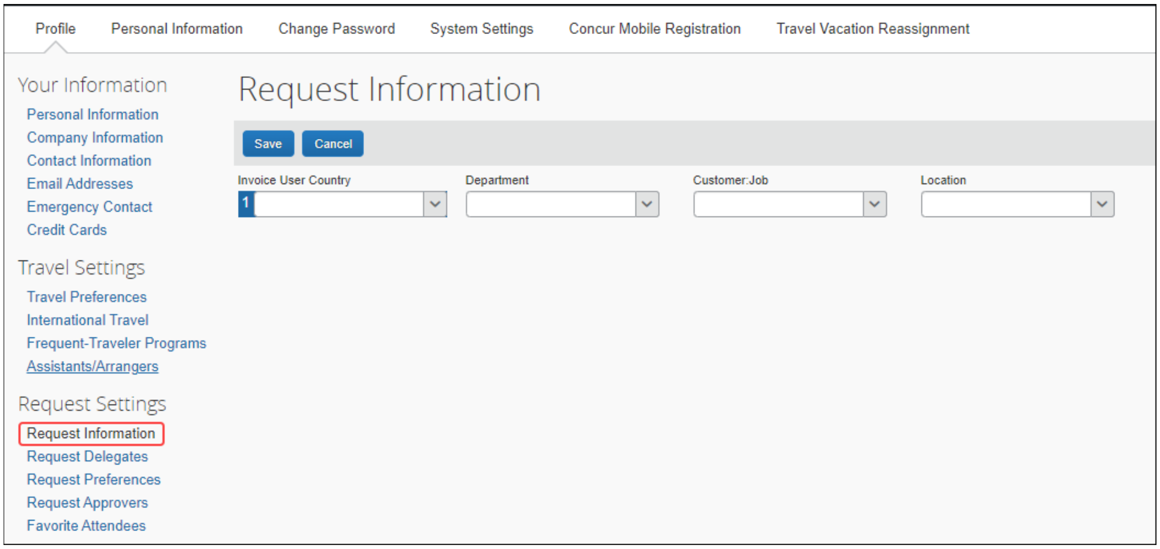
When the user creates an expense entry using an expense type associated with a request segment, the request amount appears in the **Request** field of the **New Expense** page.

Section 4: Request Settings

In Profile, users can select delegates, status notifications, and view their request approver.

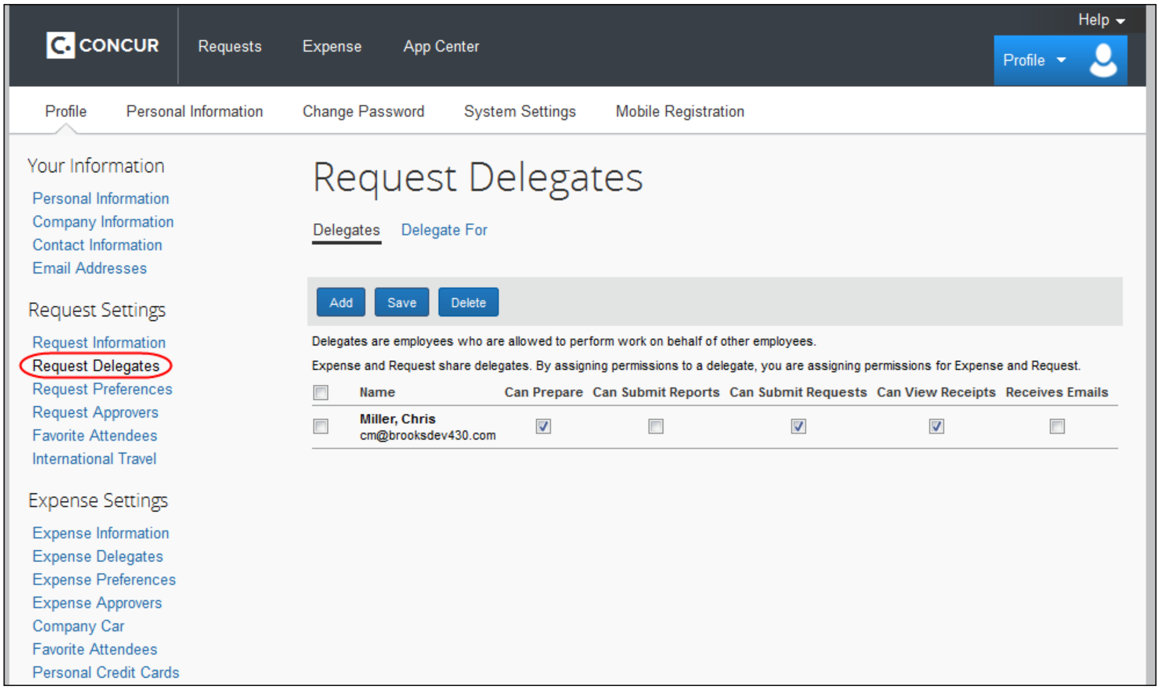
Complete Request Information

Users can complete request information on the **Request Information** page.



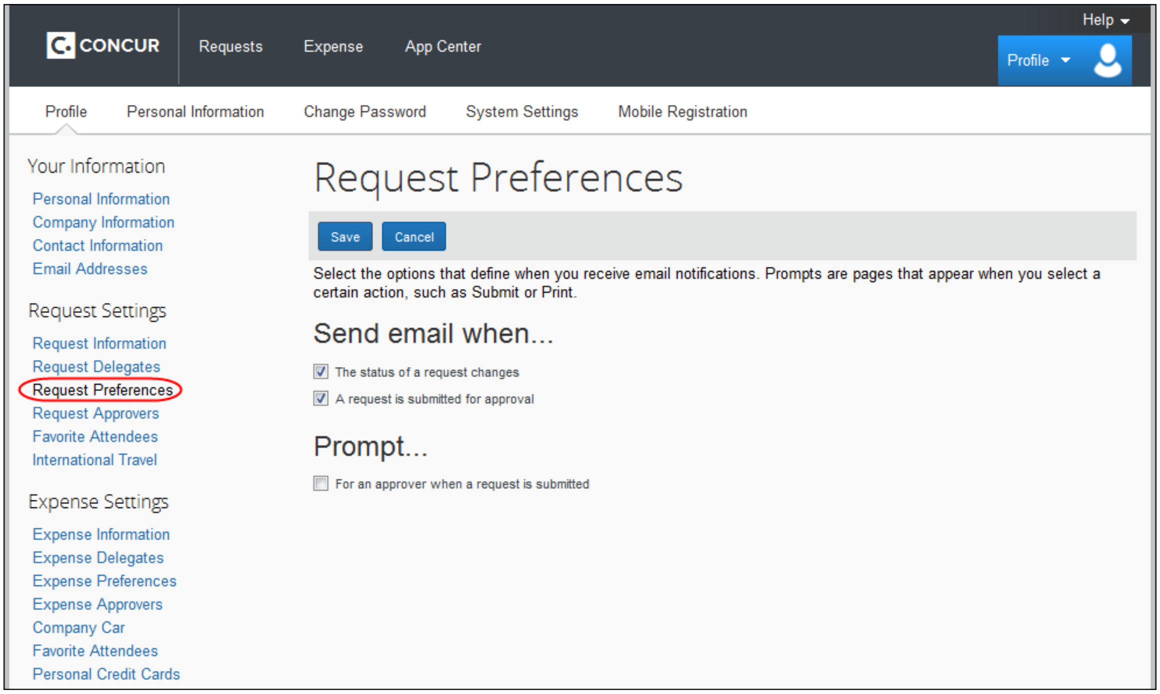
Select Delegates

Delegates are shared with Concur Expense delegates. By assigning permissions to a delegate, the user assigns permissions for Concur Expense and Concur Request.



Select Status Notifications

Users and approvers can choose to have email sent to alert them when a request changes status, such as from pending approval to approved. This option appears in **Profile** > **Profile Settings** > **Request Preferences** (left menu).



View the Request Approver

A user's request approver is the same as their expense report approver. The request approver is displayed in the **Default approver for your Requests** field in **Profile** > **Profile Settings** > **Request Approvers** (left menu).