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NextGen UI for Concur Request – End Users

Section 1: Overview

Michigan State University is pleased to introduce a new interface for Concur Request. The NextGen UI for Concur Request provides an intuitive, integrated, efficient experience. The following pages describe the enhancements and is meant to serve as a comprehensive End User Guide.

In this Guide

In this guide, the previous interface version (the one MSU has used since July 2019) is called the existing UI. The Next Generation user interface (MSU’s new Request page) for Concur Request is called NextGen UI.

Affected Users

The NextGen UI for Concur Request affects end-user pages and processes. It does not affect Profile.Screen Samples and Features

Remember, Concur Request features have been configured by MSU so the fields, layout, options, etc. shown in this guide may differ from those chosen by MSU.
Section 2: Manage Requests Page

When you click the Requests tab, the Manage Requests page appears.

The Manage Requests page has been simplified, and there are a number of changes to the page:

- Request Tiles
- View List
- Request Lists
- Create New Request
- Delete, Copy, Close/Inactivate Buttons
Request Tiles

When viewing active requests on the Manage Requests page, requests are now displayed as individual tiles.

Existing UI

In the existing UI, your active requests are displayed in a list.

NOTE: In the existing UI, you can copy and delete selected requests from this page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.
**NextGen UI**

In the NextGen UI for Concur Request, each active request is displayed as an individual tile. The tiles are 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 banner color indicates request status
  - Red: Create
  - Blue: Not Submitted
  - Yellow: Pending Approval
  - Green: Approved
View List

The **Manage Requests** page in the NextGen UI for Concur Request still has a **View** list for viewing requests by status and for viewing all requests. The **View** list has the same selections, but the selection names have been updated to be more concise.

**Existing UI**

In the existing UI, the **View** list looks like this.

![View list in existing UI](image)
**NextGen UI**

In the NextGen UI for Concur Request, the **View** list still defaults to *Active Requests*, but you can easily view other requests.

From the **View** list, select one of the request statuses or *All Requests*. 
For example, if you select *Not Submitted*, the unsubmitted requests appear.

To sort, click the column headings.

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

To simplify the process for creating a new request, in the NextGen UI for Concur Request, the Create New menu above the Manage Requests page is removed and there is now a Create New Request tile and button on the page.

Existing UI

In the existing UI, users can create a new request by clicking New Request from the Create New menu.
In the NextGen UI for Concur Request, when *Active Reports* is selected from the View list on the Manage Requests page, there is a Create New Request tile at the top of the page.

When *Not Submitted, Pending Approval, Approved, Cancelled, Closed, or All Requests* is selected in the View list, there is a Create New Request button at the top of the page.
Clicking the **Create New Request** tile or **Create New Request** button opens the **Create New Request** page.

For more information about creating requests in the NextGen UI for Concur Request, refer to the **New Request and New Expenses – The Basics** section in this guide.
Delete, Copy, Close/Inactivate Buttons

In the existing UI, you can copy, delete, close, and inactivate selected requests from the Manage Requests page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.

For more information about copying, deleting, closing, and inactivating requests in the NextGen UI for Concur Request, refer to the Edit Requests, Copy Requests, Delete Requests and Expected Expenses, and Close/Inactivate Requests sections in this guide.

Existing UI

In the existing UI, the Delete Request, Copy Request, and Close/Inactivate Request buttons are located at the top of the Manage Requests page.

NextGen UI

In the NextGen UI for Concur Request, requests can be deleted by clicking the delete icon, located next to the request name and amount.
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.

In an approved request, a request can be copied, closed, inactivated, or recalled from the **More Actions** list.
Section 3: New Request and New Expenses and Segments – The Basics

Just as before, typically when you create a new request, you start with the general request-specific page (the Request Header tab) and then move to the Segments tab to add the applicable travel segments. Though this basic process has not changed, the pages are more streamlined and easier to manage. In virtually all cases, when working with requests:

- The fields are larger and easier to navigate.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

New Request

**Existing UI**

In the existing UI, the Request Header tab on the Request page looks like this.

![New Request and New Expenses and Segments – The Basics](image)
NextGen UI

In the NextGen UI for Concur Request, the header page is called **Create New Request**. The fields are larger and easier to navigate.

![Create New Request](image)

**NOTE:** The fields that appear on this page may vary based on MSU’s configuration, so your **Create New Request** page may be different from the one shown here.

Complete the fields and click the **Create** button to move to the next page.

**Expected Expenses**

In the existing UI, the **Expenses** tab is located after the **Segments** tab on the **Request** page. In the NextGen UI for Concur Request, after filling out the request header 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 same page, 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 cost.
**Existing UI**

In the existing UI, expected expenses are entered on the **Expenses** tab.

**NextGen UI**

In the NextGen UI for Concur Request, after clicking the **Create** button on the **Create New Request** page, the **Expected Expenses** page opens. The **Expected Expenses** page is cleaner and has fewer "sections" – making the page easier to navigate.
CREATE AN EXPECTED EXPENSE – TYPICAL PROCESS

To get started, click the **Add** button to view the list of expense types and segment types, and then select the applicable expense type.

**NOTE:** In the search box at the top of the list, you 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.
Complete the fields and click **Save**. The expected expense is added to the **Expected Expenses** list.

---

**Segments**

How segments appear in a request has **significantly** changed between the existing UI and the NextGen UI for Concur Request. While the functionality of segments is the
same, how they are created and displayed for a request in the NextGen UI is different.

**Existing UI**

In the existing UI, segments are created for a request on the **Request** page by clicking a segment type icon and entering the segment information on the **Segments** tab.

**NextGen UI**

In the NextGen UI for Concur Request, 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, you select 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.
CREATE A SEGMENT – TYPICAL PROCESS

To get started, click 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, you 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.
Clicking a segment type opens the page for the selected segment type.

![New Expense: Air Ticket](image)

Complete the fields and click **Save**. The segment type is added to the **Expected Expenses** list.

![EXPECTED EXPENSES](image)

**Navigating 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 you 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.

**Attachments**

The process for adding attachments, such as an image or PDF, to a request is the same in the NextGen UI for Concur Request.

**Existing UI**

In the existing UI, attachments are added to the request by clicking *Attach Documents* in the **Attachments** list on the **Request** page.
NextGen UI

In the NextGen UI for Concur Request, attachments are added to the request by clicking *Attach Documents* in the *Attachments* menu on the *Expected Expenses* page.

Clicking *Attach Documents* opens the **Document Upload and Attach** dialog.

Click **Upload and Attach** to add an attachment to the request.
After adding an attachment to a request, the attachments icon, 💾, is displayed next to the Attachments menu to indicate that the request has attachments.

You 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 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.

**Section 4: Additional Menus on the Request**

The following menus appear on the request:

- **Request Details**: The **Request Details** menu is a new menu in the NextGen UI for Concur Request. The menu contains selections for editing the request header, accessing the request timeline, otherwise known as
the approval flow in the existing UI, audit trail, allocation summary, and other selections, such as Cash Advance.

- For more information about the request timeline, refer to the Approval Flow/Request Timeline section in this guide.
- For more information about the audit trail, refer to the Audit Trail section in this guide.
- For more information about allocations, refer to the Allocations section in this guide.
- For more information about cash advances, refer to the Cash Advance section in this guide.
• **Print** or **Print/Share**: On the **Print** and **Print/Share** menu, the options should be the same as your current menu. The **Print/Email** menu in the existing UI is named **Print/Share** in the NextGen UI for Concur Request.

• **Attachments**: On the **Attachments** menu, the options should be the same as your current menu. The View Documents in a new window...
selection in the existing UI is named View Documents in the NextGen UI for Concur Request.

![View Documents in NextGen UI](image)

**NOTE:** The options in these lists are configured by MSU so yours may be different from what is shown here.

### Section 5: Allocations

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

**NOTE:** The allocation options are configurable by your company so your Allocate page may be different from the one below.

**Existing UI**

In the existing UI, the *Allocations for Request* page looks like this.
After selecting the segments or expected expenses to allocate and clicking **Allocate Selected Expenses**, the **Allocations for Request** page looks like this.

NextGen UI

In the NextGen UI for Concur 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.

If you select an individual segment on the **Expected Expenses** page, and then click **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.

Clicking **OK**, opens the **Allocate** page for the selected segments.
Allocate Expected Expenses and Segments

To allocate one or more expected expenses or segments, open the request, and on the Expected Expenses page, select the expected expenses and/or segments you want to allocate.

When you select one or more expected expenses or segments on the page, the Allocate button becomes available. Click Allocate.

The Allocate page appears.

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 you that any amount that you do not allocate is automatically charged to your default allocation, for example, to your own department.

If you have allocations configured and enabled for individual expected expenses in Concur Request, you 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, select the Percent or Amount tab, if your configuration allows.
Add a New Allocation

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

On the New Allocation tab, select or enter the appropriate information for each field. 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 your department is responsible for the remaining half. Adjust the Marketing percentage to 50%; the default row (your 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 your cost center.

Add as many allocations as desired. Depending on your configuration, you may be able to adjust percentages/amounts.

**Remove an Allocation**

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

**Add to Favorites**

If you have a particular set of allocations that you use a lot, save them as a favorite.
When you click **Save as Favorite**, the **Save as Favorite** dialog appears.

![Save as Favorite dialog](image)

In the **Favorite Name** field, enter a name and click **Save**.

### Use a Favorite

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

![Allocate dialog](image)

Click the desired favorite and then click **Replace Allocations**.
The allocation is applied.

View Allocations

When you are 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.
Clicking the **Allocated** link opens a summary of the allocation information for the segment or expected expense.

Clicking the **View Allocation** link opens 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, click **Allocation Summary**.

Clicking **Allocation Summary** opens the **Allocation Summary** dialog.
Section 6:  Cash Advance

Concur Request users can request a cash advance as part of a request. In addition to requesting approval for segments (like air and rail) and expected expenses (like meals), the user can request a cash advance for taxi, tips, incidentals, etc.

Existing UI

In the existing UI, cash advance information is defined for a request on the Request Header tab.

To create a cash advance, in the Cash Advance Amount field, enter the amount of the cash advance, select the cash advance currency, and in the Cash Advance Comment field, enter any comments about the cash advance.
If Concur Request is configured to allow multiple cash advances per request, the **New Cash Advance** button appears in the **Cash Advance** section of the request header. For the first cash advance, the user enters the amount; selects the currency; enters a comment, if desired or required; and then clicks **New Cash Advance**.

Clicking **New Cash Advance** adds another cash advance entry to the **Cash Advance** section.

The cash advance enters its approval workflow only after the request has been approved. Once the request has been approved, the cash advance shows the appropriate status (depending on the workflow) on the **Expense > Cash Advances > Active Cash Advances** page.
NOTE: Concur generates the cash advance name, which is comprised of the request name and the currency, such as Sales Training Q3 - USD.

All cash advances on the request are imported into the expense report.

NextGen UI

In the NextGen UI for Concur Request, a cash advance is added to a request using the **Request Details > Add Cash Advance** menu selection in the request.

![Image of cash advance details page](image)

Clicking **Add Cash Advance** opens the cash advance details page. Complete the fields on the page.

NOTE: Currently in the NextGen UI, fields configured to copy down from the Request Header to the Cash Advance form are not copying down to the corresponding fields, and the field values are not appearing on the cash advance details page.
When you click **Save**, the cash advance information is displayed in the **CASH ADVANCES** section above the **Expected Expenses** list.

If Concur Request is configured to allow multiple cash advances per request, you can click the **Add Cash Advance** menu selection for each cash advance you want to create for the request.

**NOTE:** The **Add Cash Advance** menu selection is not available on the **Request Details** menu once a request is submitted. The **Add Cash Advance** menu selection will also not be available if a cash advance limit is configured, and the limit has been met.

When you add multiple cash advances to a request, the **CASH ADVANCES** section displays the number of cash advances for the request, the total amount of the combined cash requests in the user’s currency, and the individual cash advance amounts.
For example, if you created a cash advance for $100 US dollars and add a second cash advance for €25 Euros, when you click **Save** on the cash advance details page, the **CASH ADVANCES** section is updated from 1 cash advance to 2, the **Amount** is updated to show the total of both cash advances - $127.36 US dollars, and both cash advance amounts are listed - $100.00 and EUR 25.00.
Trip to Paris $841.71
Sent Back to Employee | Request ID: 3F7F

CASH ADVANCES: 2
Amount
$127.36
$100.00, EUR 25.00

EXPECTED EXPENSES

Add ▼ | Edit | Allocate | Delete

Expense type | Details
To view the cash advance details, click the **CASH ADVANCES** section.

Clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog.

Select one of the cash advance entries, and then click **Select**.
Clicking **Select** opens the cash request details.

![SAP Concur interface](image)

**NOTE:** If the amount for a segment or expected expense that is eligible for cash advances is modified or deleted, even if the amount is manually modified or deleted, the following message is displayed:

You have added or changed the amount of a segment that is managed by Cash Advance. Do you want the Cash Advance amount to be updated? Click Yes to recalculate the Cash Advance amount. Click No to save the changes on the segment only.

Clicking **Yes** updates the cash advance amount, incorporating any cash advance limit rates, and opens the request details page. When **No** is selected, the cash advance amount is not updated, and the request details page opens.
Request a Cash Advance – Typical Process

To request a cash advance in Concur Request:

1. On the Expected Expenses page for the request, click the Request Details > Add Cash Advance menu selection. The cash advance details page appears.

![Cash Advance Details Page](image1.png)

2. Enter the cash advance amount, select the applicable currency, and complete the remaining fields on the page as directed by your company. Use the Manage Attachments link to add attachments, if applicable.

**NOTE:** The fields that appear on this page are configurable by your company, so your cash advance details page may be different from the one shown here.

3. On the cash advance details page, click Save. The cash advance information is displayed in the CASH ADVANCES section above the Expected Expenses list.
Once the request is submitted and approved, the cash advance appears on the Cash Advances page (Expense > Cash Advances > Active Cash Advances) in Concur Expense, and the cash advance's tile indicates the cash advance is submitted.
Once submitted, the cash advance request goes through an approval process and then on to the Cash Advance administrator for issuing. The company then distributes the cash according to its internal process.

**Edit a Cash Advance**

*To edit a cash advance*

1. On the *Expected Expenses* page, click the *CASH ADVANCES* section to open the cash advance detail.

   If the request has multiple cash advances, clicking the *CASH ADVANCES* section opens the *Cash Advances* dialog. Select cash advance you want to edit, and then click *Select* to open the cash advance detail.

2. Make the applicable changes.

3. Click *Save*. 
Delete a Cash Advance

To delete a cash advance

1. On the Expected Expenses page, click the CASH ADVANCES box to open the cash advance details page.

   If the request has multiple cash advances, clicking the CASH ADVANCES section opens the Cash Advances dialog. Select cash advance you want to delete, and then click Select to open the cash advance details page.

2. Click the delete icon, 🗑️.

3. Click Yes when asked, Are you sure you want to delete this cash advance?.

   The cash advance is deleted and the Cash Advances page in Concur Expense opens.

View the Cash Advance Timeline

To view the cash advance timeline

1. On the Expected Expenses page, click the CASH ADVANCES section to open the cash advance details page.

   If the request has multiple cash advances, clicking the CASH ADVANCES section opens the Cash Advances dialog. Select cash advance with the timeline you want to view, and then click Select to open the cash advance details page.

2. Click the Cash Advance Timeline link.
The **Cash Advance Timeline** dialog opens.

The Cash Advance Timeline dialog opens.

<table>
<thead>
<tr>
<th>Cash Advance Timeline</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Taxi to Client Site</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

**Approval Flow**

- Cash Advance Approval
- Davis, Pat R.
- Cash Advance Reviewed

**Comments History**

3. When you are done viewing the timeline, click **Close**.

**View the Cash Advance Audit Trail**

- **To view the cash advance audit trail**

  1. On the **Expected Expenses** page, click the **CASH ADVANCES** section to open the cash advance details page.

     If the request has multiple cash advances, clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog. Select cash advance with the audit trail you want to view, and then click **Select** to open the cash advance details page.

  2. Click the **Audit Trail** link.

     The **Audit Trail** dialog opens.

     **Audit Trail** dialog opens.

     | Audit Trail |  |
     |-------------|---|
     | Trip to Paris | $100.00 |

     | Date/Time | Updated By | Action | Description |
     |-----------|------------|--------|-------------|
     | 11/13/2019 2:46 PM | Brown, Tanya | Status Change | Status changed from: Submitted to: Filed. Comment |
3. When you are done viewing the audit trail, click Close.

Section 7: Approval Flow/Request Timeline

The Approval Flow feature in the existing UI has a new name, Request Timeline, and new location in the NextGen UI for Concur Request. The Request Timeline option shows approval workflow and comments for the request.

Existing UI

In the existing UI, you can view a request's approval workflow from the Approval Flow tab on the Request page.
In the NextGen UI for Concur Request, you 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 you do not have a request approver assigned to you or have permissions to change the request approver, click the **Edit** link on the **Request Timeline** page to add or edit the request approver.
Clicking the **Edit** link opens the **Edit Approval Flow** dialog.

You can add comments to the request by clicking the **Add Comment** link on the **Request Timeline** page. Clicking the **Add Comment** link opens the **Add Comment** dialog.

Enter a comment and click **Save**.
Saved comments are displayed in the **Request Summary** section of the **Request Timeline** page.

<table>
<thead>
<tr>
<th>Request Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Comment</strong></td>
</tr>
<tr>
<td>Brown, Terry 03/25/2019</td>
</tr>
<tr>
<td>Diane requested I attend the client onsite visit.</td>
</tr>
</tbody>
</table>

**Add Comment**
Section 8: Printed Report/Email Page

The printed report page for requests has a new look and feel but is essentially the same between the existing UI and the NextGen UI for Concur Request with just a small number of changes.

Existing UI

In the existing UI, the buttons for saving the report as a PDF, emailing the report, printing the report, or closing the report are located at the top of the printed report page.

<table>
<thead>
<tr>
<th>Booking Business Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request ID : 337D</td>
</tr>
<tr>
<td>Minimum Departure Date : 10/05/2015</td>
</tr>
<tr>
<td>Approval Status : Submitted &amp; Pending Approval</td>
</tr>
</tbody>
</table>

| Employee Name : Brown, Terry L. |
| Email Address : terrybrown@randomverbs.com |
| Default Manager Name : Davis, Pat R. |
| Default Manager Email : patdavis@randomverbs.com |
| Country of Residence : UNITED STATES |
| Org Unit 1/Division : Development |

| Sendee Name : Brown, Terry L. |
| Email Address : terrybrown@randomverbs.com |
| Default Manager Name : Davis, Pat R. |
| Default Manager Email : patdavis@randomverbs.com |
| Country of Residence : UNITED STATES |
| Org Unit 1/Division : Development |

| Start Date : 10/05/2015 |
| End Date : 10/17/2015 |
| Request Policy : Default Request Policy |
| Purpose : Sales Conference in Q4 |

Segments
Segments

Air Ticket

Foreign Amount: $1,000.00
10/05/2015 Seattle Tacoma Intl (Airport - SEA), Seattle (US) – La Guardia (Airport - LGA), New York (US) Depar At: 11:00 AM

10/17/2015 La Guardia (Airport - LGA), New York (US) – Seattle Tacoma Intl (Airport - SEA), Seattle (US) Depar At: 09:00 AM
Allocations: 100.00% ($1,000.00)

Hotel Reservation

Foreign Amount: $2,200.00
10/05/2015 New York-Manhattan (US) 10/17/2015 Check-In: Sat 10/17, Check-Out: Wed 10/19
Allocations: 100.00% ($2,200.00)

Expenses

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Expense Type</th>
<th>Entry Description</th>
<th>Foreign Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/05/2015</td>
<td>Airfare</td>
<td></td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>10/05/2015</td>
<td>Lodging</td>
<td></td>
<td>$2,200.00</td>
<td>$2,200.00</td>
</tr>
<tr>
<td>10/05/2015</td>
<td>Taxi</td>
<td></td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>10/06/2015</td>
<td>Meals</td>
<td></td>
<td>$250.00</td>
<td>$250.00</td>
</tr>
</tbody>
</table>

Printed on 01/29/2015 02:47 PM

NextGen UI

In the NextGen UI for Concur Request, the buttons for saving the report as a PDF, emailing the report, printing the report, or closing the report are located at the bottom of the printed report page. In the existing UI, the button for saving the
report as a PDF file is named PDF. In NextGen UI, the PDF button is renamed to **Save as PDF**.

Each section of the printed report page is now enclosed in an individual box to help improve the readability of the report by making each section visually distinct.
### Segments

**Air Ticket**

- **Estimated Amount**: 1,093.29 EUR
- **3/19/2019** Charles De Gaulle Intl (Airport - CDG), Paris (FR) – Seattle Tacoma Intl (Airport - SEA), Seattle (US)  Depart At: 3:00 AM
- **3/17/2019** Seattle Tacoma Intl (Airport - SEA), Seattle (US) – Charles De Gaulle Intl (Airport - CDG), Paris (FR)  Arrival At: 11:00 AM
- **Allocations**: 100.00% (1,714.57 AUD) SAP-1000-CC-100040

### Expenses

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Expense Type</th>
<th>Entry Description</th>
<th>Estimated Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/17/2019</td>
<td>Airfare</td>
<td></td>
<td>1,093.29 EUR</td>
<td>1,714.57 AUD</td>
</tr>
<tr>
<td>3/14/2019</td>
<td></td>
<td></td>
<td>47.00 USD</td>
<td>65.03 AUD</td>
</tr>
<tr>
<td>3/12/2019</td>
<td></td>
<td></td>
<td>47.00 USD</td>
<td>65.03 AUD</td>
</tr>
<tr>
<td>3/12/2019</td>
<td></td>
<td></td>
<td>47.00 USD</td>
<td>65.03 AUD</td>
</tr>
<tr>
<td>3/13/2019</td>
<td></td>
<td></td>
<td>94.00 USD</td>
<td>130.06 AUD</td>
</tr>
</tbody>
</table>
### Copy of Request Printed Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/16/2019</td>
<td>$4.00</td>
<td>USD</td>
</tr>
<tr>
<td>3/12/2019</td>
<td>$46.00</td>
<td>USD</td>
</tr>
<tr>
<td>3/14/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
<tr>
<td>3/15/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
<tr>
<td>3/10/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
<tr>
<td>3/13/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
<tr>
<td>3/16/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
<tr>
<td>3/11/2019</td>
<td>$46.00</td>
<td>AUD</td>
</tr>
</tbody>
</table>

**Total Posted Amount:** $3,915.93 **AUD**

*Printed on 4/23/2019 12:48 PM*
Section 9: Audit Trail

You can view the request and expected expense-level activity for a request in the request's audit trail. The audit trail has a new location in the NextGen UI for Concur Request.

Existing UI

In the existing UI, you can view a request's audit trail from the Audit Trail tab on the Request page.
NextGen UI

In the NextGen UI for Concur Request, you can view a request's audit trail from the Audit Trail page. To access the Audit Trail page, on the Request Details menu, click Audit Trail.

The Audit Trail page displays the request name and amount and details the request-level and expected expense-level activity for the request. Segment-level activity is displayed in the Expected Expense Level section of the page.
Section 10: Multi-Leg Flights and Rail Trips

The NextGen UI for Concur Request supports multi-leg flights and rail trips. The NextGen UI has the same multi-leg functionality as the existing UI with one new addition. In the NextGen UI for Concur Request, the destination in the To field of the previous leg is now auto-populated in the From field of the next leg of the flight or rail trip.

Existing UI

In the existing UI, you have to manually enter the previous leg's destination in the From field for the next leg of a flight or rail trip.
NextGen UI

In the NextGen UI for Concur Request, the destination from the **To** field of the previous leg is automatically populated in the **From** field of the next leg of the flight or rail trip.

Section 11: Expense Reports Associated with Requests

In the NextGen UI for Concur Request, when expense reports are associated with an approved request, you can access the expense reports from within the request.
When an expense report is associated with a request, the **REPORTS** section is displayed below the **Request Details** menu on the **Expected Expenses** page.

The **REPORTS** section displays the total number of expense reports associated with the request, the total amount of the combined expense report amounts, and the individual expense report amounts.

If only one expense report is associated with the request, clicking the **REPORTS** section opens the expense report in Concur Expense.

If more than one expense report is associated with the request, clicking the **REPORTS** section opens the **REPORTS** page. The **REPORTS** page displays the list of expense reports associated with the request.

To view an expense report in Concur Expense, click the expense report name or ID in the **Report Name** column.
Clicking on the REPORTS page, returns the user to the Expected Expenses page.

**Section 12: Confirmation Agreement**

If confirmation agreements are configured for request policies, when a user clicks **Submit Request** the Submit Confirmation Agreement assigned to the selected request policy appears.

When the request approver clicks **Approve**, the Approval Confirmation Agreement assigned to the selected request policy appears.

**Existing UI**

In the existing UI, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Submit** to complete the request submission.

![Final Review](image)
When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.

**Final Confirmation**

I hereby confirm that all expenditures listed herein are correct and are appropriate for reimbursement in accordance with applicable written Corporate policies and procedures.

[Final Confirmation]

**NextGen UI**

In the NextGen UI for Concur Request, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Continue** to complete the request submission.

**Final Review**

Request Submit Confirmation

Acceptance of Liability

By submission of this request, I certify that the expenses claimed as reimbursable on the form are a true and accurate accounting of the necessary business-related expenses to be incurred for this business trip.

I have not, and will not, be receiving reimbursement from any source for expenditures claimed as reimbursable nor have any expenditures claimed as reimbursable been paid by another entity.

[Final Review]

When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.
Section 13: Risk Management

Risk Management is a free service within Concur Request that allows clients to manage duty-of-care (risk, travel warnings, reminders) for their employees.
Existing UI

In the existing UI, when the user creates a trip that involves travel to a country that is defined as a risk, risk-related information appears for the user on the Request Header tab.

The user clicks the Travel Advisory tab to view the travel advisory and consent information.

The user clicks the link in the Risk Level column, reads the travel advisory, and then clicks the check box in the Traveler Consent column.
When the user clicks **Save**, the user's consent information appears in the **Traveler Consent** column.

<table>
<thead>
<tr>
<th>Request 334D</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Country</strong></td>
</tr>
<tr>
<td>ARGENTINA</td>
</tr>
</tbody>
</table>

**NextGen UI**

When Risk Management is enabled and a country associated with a travel advisory is selected in the request header and/or segments, the **Travel Advisory** menu selection becomes available on the **Request Details** menu under **Linked Add-ons**.
Also, the *Missing required field: Traveller Consent* alert is displayed at the top of the request.

Clicking the **View** link in the alert opens the **Travel Advisory** dialog for the selected country. You can also open the **Travel Advisory** dialog for the selected country by clicking the **Travel risk advisory** link in the **Travel Advisory** dialog.
Here is an example of the **Travel Advisory** dialog for the United States:

The United States of America (USA) is a **High Risk** destination: reconsider travel. High-risk locations can be dangerous and may present unexpected security risks. Travel is possible, but there is a potential for severe or widespread disruptions.

**COVID-19:** Travellers should reconsider their need to travel to High Risk locations, which have severely restricted international travel and partially restricted domestic travel and internal movement. These locations have community transmission of the SARS-CoV-2 virus but decreasing numbers of new COVID-19 cases.

**Political Stability:** The United States is a liberal democratic state with a federal political structure characterised by a relatively high degree of political stability until the election of Donald Trump as president in 2016. The national political system consists of an elected president and a bicameral legislature, and is dominated by two broad party coalitions, the Democrats and the Republicans. The 35-day government shutdown in 2018–2019 resulted in significant implications for the
Clicking the **Travel Advisory** menu selection in the **Request Details** menu opens the **Travel Advisory** dialog.

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Risk Level</th>
<th>Traveller Consent</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFGHANISTAN</td>
<td>Travel risk advisory - Risk Level: Extreme (Level 5)</td>
<td>Adam User, brigadier, 2020-11-04</td>
</tr>
<tr>
<td>SYRIAN ARAB REPUBLIC</td>
<td>Travel risk advisory - Risk Level: Extreme (Level 5)</td>
<td></td>
</tr>
</tbody>
</table>

If you consent, in the **Traveller Consent** column, click the check box for the country. After you select the check box, your name and date will appear in the **Traveller Consent** column for the country.

**NOTE:** The travel advisory for the selected country must be read before selecting the **Traveller Consent** check box for the country.

If you attempt to select the **Traveller Consent** check box for the country before reading the travel advisory for the country, the following message appears:

![Warning](image)

**NOTE:** Request approvers can also view the travel advisory for the selected country or countries and can view the traveler consent information in the **Travel Advisory** dialog.

One difference between the Risk Management functionality in the existing UI and the NextGen UI for Concur Request is that in the NextGen UI, the risk level fields are not displayed by the **Main Destination City** and **Main Destination Country** fields on the **Edit Request Header** page, and the risk level fields are not displayed by the **From**, **To**, or other location fields on the expected expense details and segment details pages.
EXISTING UI EXAMPLE:

On the Request Header tab, the Main Destination Risk Level and Highest Location Risk Level fields are located by the Main Destination City and Main Destination Country fields.

NEXTGEN UI EXAMPLE:

Like the existing UI, the Main Destination City and Main Destination Country fields are displayed on the Edit Request Header page, but in the NextGen UI for Concur Request, the Main Destination Risk Level and Highest Location Risk Level fields are not displayed on the Edit Request Header page.
**Section 14: Event Requests**

With the Event Request feature, you can create one request for an event, referred to as an event request, that contains the names of the employees participating in the event and all of the common information for the event, such as flight, hotel, and conference fees.

From an event request, you can create a copy of the request for each employee associated with the event request. Each employee can then use their copy of the event request as a starting point for their request for the event.

**Existing UI**

In the existing UI, when the Event Request feature is enabled, users assigned to the Request Event Manager role and the Request Proxy Logon role will see the New Event Request selection on the Create New menu in Concur Request.

When the event manager clicks Requests > Create New > New Event Request, the Request Header tab opens.

The event manager enters the request header information for the event request and adds the event attendees in the Attendees section. On the Segments and
Expenses tabs, the event manager creates all the expected expenses and/or segments that are common to each of the event attendees.

The event manager then returns to the Request Header tab, and then clicks the Generate & Notify button to create a copy of the event request for each event attendee.

After clicking the Generate & Notify button, the event attendee amounts appear, along with the unique Request ID and request status for each attendee event request.
The main event request appears in the event manager's list of requests.

An attendee's event request appears in the attendee's request list.
When an attendee event request is opened, the request includes both the main event request ID and the attendee event request ID.

**NextGen UI**

When the Event Request feature is enabled, users will see the **Create New Event Request** tile on the **Manage Requests** page for creating new event requests.
Clicking the **Create New Event Request** tile opens the **Create a New Event Request** page.

When you create an event request, **Event Request ID** is displayed next to the event request ID, and the **Participants** link is displayed on the **Expected Expenses** page.

On the **Expected Expenses** page, the event manager creates all the expected expenses and/or segments that are common to each of the event participants.

To add participants to the event request, click the **Participants** link.
Clicking the **Participants** link opens the **Add Participants** page.

In the **Participant** list, begin typing the event participant's name, when the participant appears in the list, select the participant to add the participant to the event request.

**NOTE:** When searching for event participants in Concur Request, the search results currently have a limit of 100 event participants, so the search results will be limited to the first 100 event participants returned by the search.

Click **Save** to save the participants for the event request.
On the **Expected Expenses** page, the **Participants** link is updated to show the number of participants added to the event request. In this example, there are two participants.

Click the **Create Request & Notify** button to create a copy of the event request for each participant and notify the participants about their new event request. The copy of the event request becomes available in each event participant's request list.

After clicking the **Create Request & Notify** button, the event manager can click the **Participants** link to open the **Add Participants** page and view the Request ID, Request Status, and Request Amount assigned to each participant. You can click the Request ID link for a participant to view the copy of the event request for the participant.
On the **Expected Expenses** page, you can click the **Event Request Total** amount to view the **Participant Total** for the event request. It is the same amount displayed in the **Participant Total** field on the **Add Participants** page.

You can click the **Participant Total** amount link to open the **Add Participants** page.

When viewing the request tiles for active requests on the **Manage Requests** page, **Event:** is displayed in front of an event request's name to help you quickly identify event requests.
When viewing a list of requests on the **Manage Requests** page, **Event** is displayed in the **Request Type** column to help you quickly identify event requests in the request list.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Request Name</th>
<th>Status</th>
<th>Request Dates</th>
<th>Requested</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event</td>
<td>Test TVR-12327</td>
<td>Not Submitted</td>
<td>05/24/2021 - 05/28/2021</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Event</td>
<td>Test TVR-12327 GA</td>
<td>Not Submitted</td>
<td>05/24/2021 - 05/28/2021</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>TVR-13070-001</td>
<td>Not Submitted</td>
<td></td>
<td>$2,468.00</td>
<td>$2,468.00</td>
</tr>
<tr>
<td>Travel</td>
<td>CMA-SANDBOX</td>
<td>Not Submitted</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Event</td>
<td>Pipe event request 1</td>
<td>Not Submitted</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Event</td>
<td>Event request</td>
<td>Not Submitted</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Section 15: Edit Requests

Edit the Request Header

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

Clicking Edit Request Header opens the Edit Request Header page.

You can also click the request's name at the top of the Expected Expenses page to open the Edit Request Header page. Placing your 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, select the expected expense or segment you want to edit and then click **Edit**.
Clicking **Edit** opens the expected expense or segment details page. Make your 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.
Section 16: Copy Requests

Copy a Request

With the request open, click the Copy Request link or the Copy Request button, or click More Actions, and then click Copy Request.

NOTE: The request's current status and the other actions available to the request determine whether the Copy Request link, the Copy Request button, or the More Actions menu with the Copy Request selection is displayed for the request.
The **Copy Request** dialog appears.

![Copy Request dialog](image)

Complete the fields and then click **Create New Request**.

In the NextGen UI for Concur Request, the information that is copied, and the information that is not copied when copying a request, is the same as in the existing UI.

**Information Copied**

The following information is copied from the source request:

- Segments (if the **Expenses** check box is selected (enabled) on the **Copy Request** page): All agency-booked segments are copied. If the request contains self-booked segments, those segments become agency-booked; they are no longer self-booked.
- Expected expenses (if the **Expenses** check box is selected (enabled) on the **Copy Request** page)
- Attendees
- Allocations
- Latest comment
- Cash advances (if the Cash Advance check box is selected (enabled) on the Copy Request page)
- Other fields, like the Purpose, Start Date (based on the Copy Request page), custom fields, Travel Agency (the system first uses the agency from the source request; if not available, the system searches the Employee profile), etc.

**Information NOT Copied**

The following information is not copied from the source request:
- Attachments (images)
- Workflow
- Audit trail
- Any other information related to a policy that is no longer the user's current policy

**Section 17: Delete Requests, Expected Expenses, and Segments**

**Delete a Request**

With the request open, click the delete icon, located next to the request name and amount.
This message appears.

![Confirm dialog box]

Click **Yes**. The request and its expected expenses are permanently deleted and cannot be recovered.

**Delete an Expected Expense or Segment**

Expected expenses and segments can be deleted from either the **Expected Expenses** page or the expected expense details page.

On the **Expected Expenses** page, select the desired expected expense(s) and then click **Delete**.

![Expected Expenses page with delete button highlighted]
This message appears. Click **Delete from Request**.

The selected expected expenses and/or segments are permanently deleted and cannot be recovered.

On the expected expense details page, click the delete icon, ✎, located next to the expected expense or segment name and amount.

This message appears. Click **Delete from Request**.
The expected expense or segment is permanently deleted and cannot be recovered.

Section 18: Close/Inactivate Requests

If your organization allows requests to be closed or inactivated and a request is eligible to be closed or inactivated, the Close/Inactivate Request button is displayed on the Expected Expenses page.

This action 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.

With the request open, click More Actions, and then click Close/Inactivate Request.

This message appears.

Confirm

You are about to permanently close/inactivate this request. This will release any amounts associated with the request that are not linked to a submitted report and remove it from the list of available requests to assign to an expense report.

Cancel OK
Click **OK**. Clicking **OK** reduces the balance to zero and removes the request from the list.

### Section 19: Cancel Requests

If your organization allows requests to be cancelled after submitting a request for approval, the **Cancel Request** button or the **Cancel Request** selection on the **More Actions** menu is available on the **Expected Expenses** page.

**NOTE:** The request’s current status and the other actions available to the request determine whether the **Cancel Request** button, or the **More Actions** menu with the **Cancel Request** selection is displayed for the request.

With the request open, click the **Cancel Request** button, or click **More Actions**, and then click **Cancel Request**.

![Concur Request Page with Cancel Request Option](image-url)
The **Cancel Request** dialog appears.

![Cancel Request Dialog](image)

In the **Comment** field, enter the reason for cancelling the request and then click **OK**. Clicking **OK** changes the request status to Cancelled.

**Section 20: Recall Requests**

If your organization allows requests to be recalled after submitting a request for approval and/or after a request has been approved, and the request meets the criteria for being recalled, the **Recall** button or the **Recall** selection on the **More Actions** menu is available on the **Expected Expenses** page.

**NOTE:** The request’s current status and the other actions available to the request determine whether the **Recall** button, or the **More Actions** menu with the **Recall Request** selection is displayed for the request.
With the request open, click the **Recall** button, or click **More Actions**, and then click **Recall**.

![More Actions and Recall buttons](image)

This message appears.

![Confirm message](image)

Click **Yes**. Clicking **Yes** changes the request status to Returned.

**BEFORE APPROVAL**

A user can recall a request after it is submitted but before it is approved. If the workflow allows or requires more than one approver, then the user can recall the request until it is **final** approved.

**AFTER APPROVAL**

Users can recall a request after it has been approved.

For example, assume that the user's request for sales training was approved and then the date of the sales training class changed. The user can recall the request, make the desired changes, and submit again. The request will then go through the approval workflow.
The user can recall a request if all of these are true:

- The Workflow setting allowing this feature is enabled.
- The request status is Approved.
- Both the start and end dates are in the future.

**NOTE:** A "blank" date is considered to be "in the past" so the recall option is unavailable.

- There is no expense report (or an invoice from the SAP Concur Central Reconciliation service) associated with the request.

Then, the user can change dates, segments, amounts, etc.

**NOTE:** The user cannot change a cash advance.

For clients using the workflow setting, the user has until the Start Date of the request to resubmit the request.

The user clicks **Submit Request**. The request goes through the current workflow.