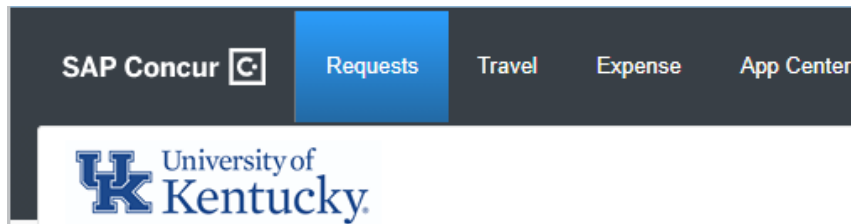


## Concur – Travel Request Options

**Process:** In Concur, it may be necessary to **recall** and revise a request, **cancel** an approved request because the trip will not occur, or **delete** a request that has been started but not submitted through workflow. Additionally, a request can be **copied** for travelers who make routine business trips to the same location. When a request has been used to create the expense report and no longer needs to remain open for future expenses, the request should be **closed/inactivated**.

### Procedures

**From the Concur main login screen, choose Requests.**



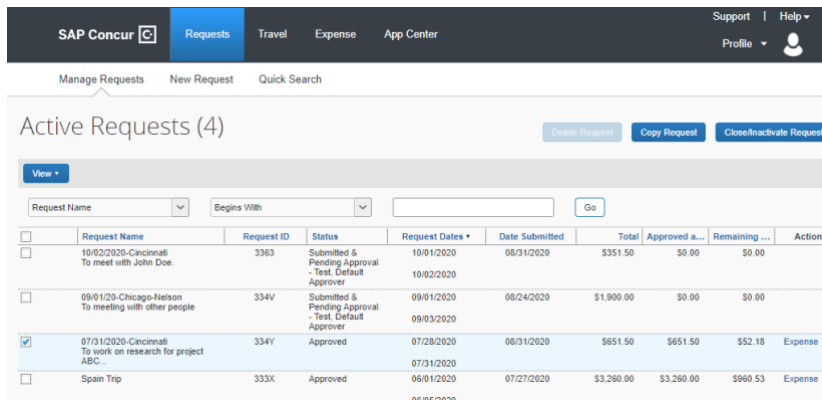
Depending on the action needed, follow the directions for one of the options below:

- Close/inactivate a request
- Cancel a request
- Recall a request
- Copy a request
- Delete a request

For instructions on how to create a travel request, refer to the “Concur – Create a Travel Request” quick reference guide.

**Close/Inactivate a Request – Use this option when the trip is over and all of the expenses related to the request have been submitted on an expense report**

- On the Manage Requests screen, click on the request for which the expense report has been completed and submitted.



Quick Reference Card – Travel Request Options

- Click on the Close/Inactivate Request button.

SAP Concur | Requests | Travel | Expense | App Center | Support | Help | Profile

Manage Requests | New Request | Quick Search

Active Requests (4) | Delete Request | Copy Request | **Close/Inactivate Request**

View ▾

Request Name ▾ | Begins With ▾ | [ ] | Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	10/02/2020-Cincinnati To meet with John Doe.	3363	Submitted & Pending Approval - Test, Default Approver	10/01/2020 10/02/2020	08/31/2020	\$351.50	\$0.00	\$0.00	
<input type="checkbox"/>	09/01/20-Chicago-Nelson To meeting with other people	334V	Submitted & Pending Approval - Test, Default Approver	09/01/2020 09/03/2020	08/24/2020	\$1,900.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	07/31/2020-Cincinnati To work on research for project ABC...	334Y	Approved	07/28/2020 07/31/2020	08/31/2020	\$651.50	\$651.50	\$52.18	Expense
<input type="checkbox"/>	Spain Trip	333X	Approved	06/01/2020 06/05/2020	07/27/2020	\$3,260.00	\$3,260.00	\$960.53	Expense

- Click Yes to confirm closing/inactivating the request.

Confirm [X]

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

Yes No

- To see any closed/inactivated requests, click on the View button on the Manage Requests Screen and choose Closed/Inactivated Requests.

View ▾

- Unsubmitted Requests
- Active Requests
- Pending Requests
- Approved Requests
- Cancelled Requests
- **Closed/Inactivated Requests**
- All Requests

Quick Reference Card – Travel Request Options

- A list of closed/inactivated requests will appear for review.

Closed/Inactivated Requests (3)

View +

Request Name Begins With Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input type="checkbox"/>	07/31/2020-Cincinnati To work on research for project ABC...	334Y	Approved	07/28/2020 07/31/2020	08/31/2020	\$651.50
<input type="checkbox"/>	20200714Cleveland	333E	Approved	07/09/2020 07/13/2020	07/14/2020	\$2,130.00
<input type="checkbox"/>	20200627ParkCity	3337	Approved	06/24/2020 06/26/2020	06/27/2020	\$2,253.00

- Click on the request to view the request details.

Request 334Y

Attachments Print / Email

Trip Name: 07/31/2020-Cincinnati Status: Approved  
 Additional Information: To work on research for project Amount: \$651.50

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Policy  
 \*UK-TEST USER-General Travel Request

Trip Name	Destination City	Trip Start Date	Trip End Date
07/31/2020-Cincinnati	Cincinnati, Ohio	07/28/2020	07/31/2020
Trip Purpose	Trip Type	Traveler Type	How will you book this travel?
09. Research/Teaching	Domestic	01. Employee	01. Self-booked in Concur Travel
Does this trip include personal travel?	Personal Dates of Travel?		
No			
Additional Information	Comments To/From Approvers/Processors		
To work on research for project ABC...			
Cost Object Type	Cost Object ID	Fund	Statistical Order
(CC) Cost Center	(1012013010) UFS OPERATING		

**Cancel a Request – Use this option when the business trip will not take place and there will be no expense report submitted for the approved request.**

- On the Manage Requests screen, click on the request for which the expense report will not be submitted.

Manage Requests New Request Quick Search

Active Requests (18)

Delete Request Copy Request Close/Inactivate Request

View +

Request Name Begins With Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input checked="" type="checkbox"/>	07/15/20-Frankfort Trip to meet with other AP departments	3344	Approved	07/13/2020 07/15/2020	07/29/2020	\$288.75	\$288.75	\$288.75	Expense

## Quick Reference Card – Travel Request Options

- When the request appears, click on the Cancel Request button at the top of the screen.

Request 3344

Create Expense Report Attachments Print / Email **Cancel Request** Close/Inactivate Request

Trip Name: 07/15/20-Frankfort  
Additional Information: Trip to meet with other AP  
depar... Status: Approved  
Amount: \$288.75

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Policy  
\*UK-TEST USER-General Travel Reque...

Trip Name: 07/15/20-Frankfort Destination City: Frankfort, Kentucky Trip Start Date: 07/13/2020 Trip End Date: 07/15/2020

Trip Purpose: 06. Meeting/Collaboration Trip Type: Domestic Traveler Type: 01. Employee How will you book this travel?: 02. AAA - Direct Call

Does this trip include personal travel? No Personal Dates of Travel?

Additional Information  
Trip to meet with other AP departments Comments To/From Approvers/Processors

Cost Object Type: (CC) Cost Center Cost Object ID: (1012013010) UFS OPERATING Fund: Statistical Order: (000000000030) CMN - Endowment Transac

- The Cancel Request box will appear. Enter a Comment to explain the reason the request is being canceled and click OK.

Cancel Request

Comment History

Creation date	Entered By	Comment Text
---------------	------------	--------------

Add a comment to explain why you are cancelling the request. Then click OK to confirm the cancellation.

Comment  
Trip to Frankfort to meet with other AP departments was canceled.

OK Cancel

- The status of the request has changed to "Cancelled".

Request 3344

Create Expense Report Attachments Print / Email **Close/Inactivate Request**

Trip Name: 07/15/20-Frankfort  
Additional Information: Trip to meet with other AP  
depar... Status: Cancelled  
Amount: \$288.75

- Click on Manage Requests to close the request.

Manage Requests New Request Quick Search

Request 3344

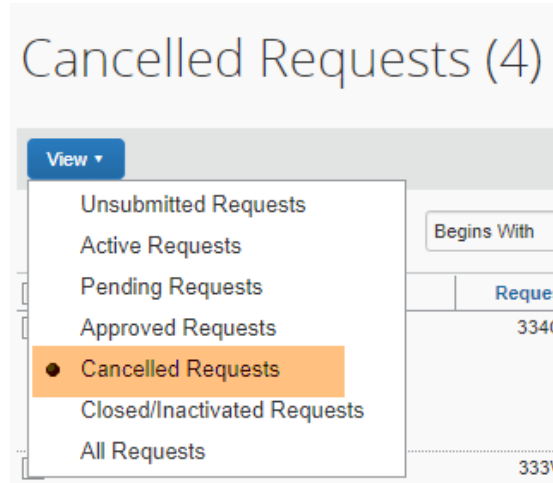
Trip Name: 07/15/20-Frankfort  
Additional Information: Trip to meet with other AP  
depar...

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Policy

Quick Reference Card – Travel Request Options

- To see any cancelled requests, click on the View button on the Manage Requests Screen and choose Cancelled Requests.



- A list of cancelled requests will appear for review.

Cancelled Requests (4)

Request Name	Begins With	Go
<input type="checkbox"/>	Request Name	Begins With
<input type="checkbox"/>	1/3/21 New York City	334G
<input type="checkbox"/>	Columbus Trip	333V
<input type="checkbox"/>	07/15/20-Frankfort Trip to Frankfort to meet with other University AP departments	3343
<input type="checkbox"/>	07/15/20-Frankfort Trip to meet with other AP departments	3344

Request Name	Request ID	Status	Request Dates	Date Submitted
1/3/21 New York City	334G	Cancelled	12/28/2020 01/03/2021	08/06/2020
Columbus Trip	333V	Cancelled	07/27/2020 07/29/2020	07/24/2020
07/15/20-Frankfort Trip to Frankfort to meet with other University AP departments	3343	Cancelled	07/13/2020 07/15/2020	07/29/2020
07/15/20-Frankfort Trip to meet with other AP departments	3344	Cancelled	07/13/2020 07/15/2020	07/29/2020

- Click on the request to view the request details.

Request 3344

Create Expense Report Attachments Print / Email Close/Inactivate Request

Trip Name: 07/15/20-Frankfort  
 Additional Information: Trip to meet with other AP depar...  
 Status: Cancelled  
 Amount: \$288.75

Request Header Segments Expense Summary Approval Flow Audit Trail

Request Policy  
 \*UJK-TEST USER-General Travel Request

Trip Name	Destination City	Trip Start Date	Trip End Date
07/15/20-Frankfort	Frankfort, Kentucky	07/13/2020	07/15/2020
Trip Purpose	Trip Type	Traveler Type	How will you book this travel?
06. Meeting/Collaboration	Domestic	01. Employee	02. AAA - Direct Call
Does this trip include personal travel?	Personal Dates of Travel		
No			
Additional Information	Comments To/From Approvers/Processors		
Trip to meet with other AP departments	Trip to Frankfort to meet with other AP departments was canceled.		
Cost Object Type	Cost Object ID	Fund	Statistical Order
(CC) Cost Center	(1012013010) UFS OPERATING		(60900000030) CMN - Endowment Transac

## Quick Reference Card – Travel Request Options

**Recall a Request – If a request has not been fully approved, the request can be recalled so that revisions can be made.**

- On the Manage Requests screen, click on the request which requires revisions.

Manage Requests   New Request   Quick Search

All Requests (22)   Delete Request   Copy Request   Close/Inact

View ▾

Request Name ▾   Begins With ▾   Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved a...	Remaining ...
<input type="checkbox"/>			test, Traveler1					
<input checked="" type="checkbox"/>	09/28/20-Chicago Heights	3376	Submitted & Pending Approval - Test, Default Approver	09/24/2020 09/28/2020	09/11/2020	\$1,250.00	\$0.00	\$0.00

Comment: Teaching class for Chemical Engineering professors

- When the request appears, click on the Recall button at the top of the screen.

Manage Requests   New Request   Quick Search

Request 3376   Attachments ▾   Print / Email ▾   Cancel Request   Recall

Trip Name: 09/28/20-Chicago Heights   Status: Submitted & Pending Approval  
Amount: \$1,250.00

Additional Information:

Request Header   Segments   Expense Summary   Approval Flow   Audit Trail

Previous Comment   View all

Entered By Traveler1 Test: Teaching class for Chemical Engineering professors

Request Policy  
\*UK-TEST USER-General Travel Reque ▾

Trip Name	Destination City	Trip Start Date	Trip End Date
09/28/20-Chicago Heights	Chicago Heights, Illinois	09/24/2020	09/28/2020

- Confirm that the request should be recalled.

Please Confirm   ×

Are you sure you want to recall this request?

Yes   No

- The request is now available to make any necessary changes and the status of the request has changed to "Sent Back to User".

Request 3376   Attachments ▾   Print / Email ▾   Cancel Request   Submit Request

Status: Sent Back to User

Quick Reference Card – Travel Request Options

- Make any necessary revisions and click on the Submit Request button at the top of the screen.

- The request is now ready for the workflow approval process and will have the status "Submitted and Pending Approval".

**Copy a Request – Use this option if specific aspects of a request such as the destination and some of the expenses will be the same for another request.**

- From the Manage Requests screen, click on the box to the left of the request that will be copied and choose the Copy Request button.

## Quick Reference Card – Travel Request Options

- Change the Request name and starting date for the new request.

Copy Request x

---

The selected request with appropriate request entries will be copied.

**Existing Request:**  
We have provided a default name. Change the name if desired.

Request Name:

Last Date of Source Request:

**New Request:**  
You can change the start date of the new request.

If you provide a date below, the request start date or the earliest request entry on the new request will be given that date and dates for all other request entries will be adjusted based on that. Otherwise, the start date will be defined as Last date of source request +1.

Starting date for New Request:

Expected Expenses

Segments

---

- Review the information on the Request Header to be sure it is correct. Note the trip end date will calculate based on the number of days in the original trip. Change the date if necessary.

Request 337C

Trip Name: 10/17/20-Chicago Heights

Additional Information:

Request Header | Segments | Expenses | Approval Flow | Audit Trail

Request Policy  
\*UK-TEST USER-General Travel Request

Trip Name 10/17/20-Chicago Heights	Destination City Chicago Heights, Illinois	Trip Start Date 10/15/2020	Trip End Date 10/17/2020
Trip Purpose 09. Research/Teaching	Trip Type Domestic	Traveler Type 01. Employee	How will you book this travel? 01. Self-booked in Concur Travel
Does this trip include personal travel? No	Personal Dates of Travel?		
Additional Information Follow up teaching assignment in October.	Comments To/From Approvers/Processors		
Cost Object Type (CC) Cost Center	Cost Object ID (1012013100) UFS-ACCOUNTS PAYABLE	Fund	Statistical Order

- If the end date has been changed, the following message will appear. Choose the answer that best fits the new travel request.

Confirm x

---

You have changed the Trip End Date field(s) in this request header. Do you also want to overwrite the Trip End Date field(s) in all segments or expenses in this request with the new value entered here? Click Yes to overwrite the values. Click No to save the changes only in the request header.

---



## Quick Reference Card – Travel Request Options

- Make any changes to the segments of the travel request as necessary by clicking the Modify button at the bottom of each segment.

Add Segment  
CLICK ICON TO CREATE SEGMENT

**Hotel Reservation** Estimated Amount: \$1,200.00

Check-In  
City: Chicago Heights, Illinois  
Date: Thursday, October 15, 2020  
Detail:

Check-Out  
Date: Saturday, October 17, 2020  
Comment:

Allocate Delete Modify

- Choose the Save button when a revision has been made to the segment.
- Choose the Delete button if the segment should not be on the travel request.

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment  
CLICK ICON TO CREATE SEGMENT

**Hotel Reservation** Estimated Amount: 850.00 USD

Check-In  
City: Chicago Heights, Illinois  
Date: 10/15/2020 At  
Detail:

Check-Out  
Date: 10/17/2020 At  
Comment:

Save Delete

- Click on the Expenses Tab to review the expenses on the travel request.
  - Choose New Expense to add an expense to the request. Complete all required fields and click Save.

Request 337C

Trip Name: 10/17//20-Chicago Heights  
Additional Information: Follow up teaching assignment in...

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

## Quick Reference Card – Travel Request Options

- Click on the box to the left of the expense and complete one of the actions below.
  - Revise the existing expense in the expense fields to the right. Save the changes.

The screenshot shows the 'Expenses' tab of a travel request system. On the left, there is a table with columns: Date, Expense Type, Amount, and Requested. The table contains three rows: a Hotel expense for \$650.00, a selected Taxi expense for \$50.00, and a Daily Meal Per Diem expense for \$380.00. On the right, the detailed view for the selected Taxi expense is shown, including fields for Expense Type (Taxi), Transaction Date (10/15/2020), Trip Purpose (09: Research/Teaching), Trip Type (Domestic), Traveler Type (01: Employee), Estimated Amount (\$50.00 USD), and a Comment field containing 'taxi from hotel to class'. At the bottom, there are buttons for 'Save', 'Allocate', and 'Cancel', and summary statistics for 'TOTAL AMOUNT' and 'TOTAL REQUESTED' both at \$1,080.00.

- Choose the Delete button to remove the expense from the request.

This screenshot is similar to the previous one but highlights the 'Delete' button in the top navigation bar of the 'Expenses' tab. The table below shows the same three expense rows, with the 'Taxi' row selected and highlighted in blue.

- When all expense types have been reviewed and updated on the travel request, click on Submit Request to begin the workflow approval process.

The screenshot shows the summary page for 'Request 337C'. It includes the trip name '10/17/20-Chicago Heights', additional information 'Follow up teaching assignment in...', and the status 'Not Submitted' with an amount of '\$1,080.00'. At the bottom right, there are buttons for 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request', with the 'Submit Request' button highlighted in orange.

Quick Reference Card – Travel Request Options

**Delete a Request – Use this option if the request has been started but not submitted and the request is no longer needed.**

- The request can be deleted using one of the following options:
  - From the Manage Requests screen, click on the box to the left of the request that has a status of “not submitted” and then click Delete Request button at the top of the screen.

Manage Requests    New Request    Quick Search

Active Requests (19) Delete Request

View ▾

Request Name ▾    Begins With ▾        Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total
<input type="checkbox"/>			Approval - Test, Default Approver	09/28/2020		
<input checked="" type="checkbox"/>	9/15/20-Huntington	3377	Not Submitted	09/13/2020 09/15/2020		\$0.00

- When in the Request, click on the Delete Request button at the top of the request. Notice the status of the request is “not submitted”.

Request 3374 Attachments ▾ Print / Email ▾ Delete Request Submit Request

Trip Name: 09/28/2020-Chicago    Status: Not Submitted  
Amount: \$1,250.00

Additional Information:

Request Header   Segments   Expenses   Approval Flow   Audit Trail

+ New Expense   Delete   <<

<input type="checkbox"/>	Date	Expense Ty...	Amount	Requested
<input type="checkbox"/>	09/24/2020	Hotel	\$1,200.00	\$1,200.00
<input type="checkbox"/>	09/24/2020	Taxi	\$50.00	\$50.00

Expense Type:

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

- The system will ask for confirmation of the request deletion. Click Yes to continue or No to return to the request.

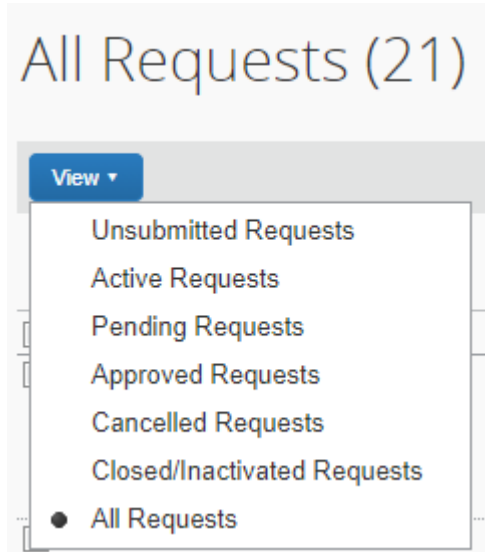
Confirm ✕

? Are you sure you want to delete this request?

Yes   No

Quick Reference Card – Travel Request Options

- Notice there is no view option for Deleted Requests. Because the request was never submitted, it will not appear on any reports in the request view options.



**Notes**

- The request is an estimation of the expenses for a business trip. Therefore, it is likely that the expense amounts or expense types on a request will not be a one-to-one match with an expense report. The “approved amount” and “remaining amount” of a request do not need to match before the request can be closed/inactivated.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved amount	Remaining amount
AP departments			07/15/2020				
MS Allocations	3339	Approved	07/06/2020	06/29/2020	\$57.50	\$57.50	\$57.50
			07/06/2020				
07/04/2020-Frankfort Trip to meet with other AP departments	3346	Approved	07/04/2020	07/29/2020	\$305.00	\$305.00	\$141.54
			07/05/2020				

- Once a request has been closed/inactivated, it is no longer available to create an expense report based on the expenses on the request. Be sure there will be no more expense reports submitted for the travel request before closing/inactivating the report.

**Questions**

- Questions Contact Customer Service:
  - Email – [concurexpense@uky.edu](mailto:concurexpense@uky.edu)