Concur Expense: Site Settings

Setup Guide

Last Revised: July 1, 2020

Applies to these SAP Concur solutions:

- Expense
  - Professional/Premium edition
  - Standard edition

- Travel
  - Professional/Premium edition
  - Standard edition

- Invoice
  - Professional/Premium edition
  - Standard edition

- Request
  - Professional/Premium edition
  - Standard edition
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<tr>
<td>July 1, 2020</td>
<td>Updated information about the existing UI and NextGen UI; made modifications throughout; cover revision date updated</td>
</tr>
<tr>
<td>June 8, 2020</td>
<td>Changed &quot;Authorization Request&quot; to &quot;Concur Request&quot; in Request guide references to align with Concur Request product branding.</td>
</tr>
<tr>
<td>April 9, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
</tr>
<tr>
<td>January 2, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>September 20, 2019</td>
<td>Added the <strong>Non Domestic Tax Enabled</strong> option and description to the <strong>Overview</strong> section.</td>
</tr>
<tr>
<td>May 11, 2019</td>
<td>Updated the section on copying a report regarding offsets when a new start date is on the header. One day is no longer the default offset.</td>
</tr>
<tr>
<td>January 4, 2019</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>November 17, 2018</td>
<td>Updated the Feature/Setting information for Expense Assistant to include the new trip-based options.</td>
</tr>
<tr>
<td>October 4, 2018</td>
<td>Added:</td>
</tr>
<tr>
<td></td>
<td>• Information about the existing UI and NextGen Expense</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Allow a multiple use of the same receipt for multiple expense entries within an expense report</strong> setting</td>
</tr>
<tr>
<td>September 6, 2018</td>
<td>Added a mention of the setting Allow a multiple use of the same receipt for multiple expense entries within an expense report</td>
</tr>
<tr>
<td>April 4, 2018</td>
<td>Changed the check boxes on the front cover; no other changes; cover date not updated</td>
</tr>
<tr>
<td>January 17, 2018</td>
<td>Updated the guide reference in the <strong>Use Request allocation data (first) and Expense data (second) to pre-populate allocation fields</strong> setting description</td>
</tr>
<tr>
<td>January 9, 2018</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>December 29, 2017</td>
<td>Corrected reference to the setting Automatic creation of an expense report when available expenses arrive</td>
</tr>
<tr>
<td>October 14, 2017</td>
<td>Added information about Expense Assistant.</td>
</tr>
<tr>
<td>July 26, 2017</td>
<td>Further clarified the use of both <strong>Employee ID</strong> and <strong>Logon ID</strong> when selecting additional employee fields to display in user search results.</td>
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<tr>
<td>March 8, 2017</td>
<td>Clarified the use of both <strong>Employee ID</strong> and <strong>Logon ID</strong> when selecting additional employee fields to display in user search results.</td>
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<tr>
<td>March 3, 2017</td>
<td>Added a note that the order that <strong>Site Settings</strong> page displays settings may vary.</td>
</tr>
<tr>
<td>December 14, 2016</td>
<td>Changed copyright and cover; no other content changes.</td>
</tr>
<tr>
<td>December 9, 2016</td>
<td>Updated the guide content to new corporate style; no content changes.</td>
</tr>
<tr>
<td>Date</td>
<td>Notes / Comments / Changes</td>
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<tr>
<td>September 9, 2016</td>
<td>Updated information about the <strong>Allow users to combine expenses into a single merged expense</strong> setting now that Concur supports merging additional kinds of expenses.</td>
</tr>
<tr>
<td>August 12, 2016</td>
<td>Upgraded graphics of Receipt Library to show the new column, Report ID.</td>
</tr>
<tr>
<td>May 13, 2016</td>
<td>Updated instances of he/she to they.</td>
</tr>
<tr>
<td>March 18, 2016</td>
<td>Added a new setting, <strong>Use reclaim extraction factors at tax rate level (Canada tax only)</strong>, to support the new <strong>Tax Rate Level Canada Extraction Factors</strong>.</td>
</tr>
<tr>
<td>November 20, 2015</td>
<td>Added clarification about the <strong>Enable Validation Rules</strong> option.</td>
</tr>
<tr>
<td>May 15, 2015</td>
<td>Updated the screen shots to the enhanced UI</td>
</tr>
<tr>
<td></td>
<td>Added information about the <strong>If set to true, allow more than one authorization request to be assigned to a single report</strong> option.</td>
</tr>
<tr>
<td>December 12, 2014</td>
<td>Updated the <strong>Allow users to combine expenses into a single merged expense</strong> setting information.</td>
</tr>
<tr>
<td>October 17, 2014</td>
<td>Addition of the <strong>Allow users to combine expenses into a single merged expense</strong> setting.</td>
</tr>
<tr>
<td>September 24, 2014</td>
<td>Added information about two user interfaces; no other content changes.</td>
</tr>
<tr>
<td>April 11, 2014</td>
<td>Added about the <strong>Use Request allocation data (first) and Expense data (second) to pre-populate allocation fields</strong> check box.</td>
</tr>
<tr>
<td>March 12, 2014</td>
<td>Added information about the <strong>Enable Approvers To View Reports Approved as a Delegate</strong> check box.</td>
</tr>
<tr>
<td>February 7, 2014</td>
<td>Added information about the <strong>Allow amounts to appear in limit-based exception messages (enable only if used)</strong> check box.</td>
</tr>
<tr>
<td>November 22, 2013</td>
<td>Addition of the <strong>Use Named Groups for Car Configuration</strong> check box that allows the administrator to select mileage rates for their car users from a configured list in the Car Configuration tool</td>
</tr>
</tbody>
</table>
| October 18, 2013  | Addition of two new setting:  
  - **Enable Validation Rules** removes the **Validation** tab and functionality from the Audit Rules tool  
  - **Provide Default Exchange Rate for Cash Advance Issuance** provides the default exchange rate to the Cash Advance administrator when issuing cash advances in a foreign currency |
| July 23, 2013     | Addition of new setting for the Mileage Quick Expenses entry grid and information about this feature.                                                                                                                    |
| April 3, 2013     | Removed all references to the *legacy* Authorization Request feature in Concur Expense  
  Changed any references to Concur's Travel Request service to Request, Concur Request, or Authorization Request, depending on the situation  
  No other content changes |
<p>| December 28, 2012 | Made rebranding and/or copyright changes; no content changes.                                                                                                                                                          |</p>
<table>
<thead>
<tr>
<th>Date</th>
<th>Notes / Comments / Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 21, 2012</td>
<td>Removed references to Travel Request; Travel Request now has its own <strong>Site Settings</strong> page</td>
</tr>
<tr>
<td>September 14, 2012</td>
<td>Addition of two new Cash Advance related settings.</td>
</tr>
<tr>
<td>July 13, 2012</td>
<td>Addition of new setting for the Quick Expenses entry grid and information about this feature</td>
</tr>
<tr>
<td>June 22, 2012</td>
<td>New document,</td>
</tr>
</tbody>
</table>
Site Settings

Section 1: Permissions

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

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

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP. In this case, the client must initiate a service request with support.
Section 2: Two User Interfaces for Concur Expense End Users

SAP is in the process of transitioning from the existing user interface (existing UI) to the new user interface (NextGen UI).

NextGen UI brings some long-awaited usability enhancements – some are significant (involving new pages and processes) while others are minor (involving only look-and-feel).

⚠️ IMPORTANT: Be aware that the NextGen UI enhancements affect only the end-user experience. Approvers and processors will still use the existing UI.

This Guide – What the User Sees

During this transition period – as clients are moving from the existing UI to NextGen UI – this guide will show both UIs. If there is an end-user screen sample that shows the existing UI, then there will be a NextGen UI sample as well.
Transition Guide for End Users

A detailed end-user guide is available. It describes all changes in NextGen UI.

Section 3: Overview

The Site Settings page allows the admin to enable or disable certain Concur Expense features.

This table describes the settings on this page. Some of the settings are further described later in this guide; some are further described on other guides. That information, too, is in the table below.

⚠️ IMPORTANT: The This setting affects column lists the associated SAP products. That means:
- If you enable the setting here, you enable it in the products listed.
- If you disable the setting here, you disable it in the products listed.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>This setting affects...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow users to opt into Concur Expense Assistant</td>
<td>If disabled, a user will not have the option to turn on Expense Assistant on their <strong>Expense Preferences</strong> page in Profile.</td>
<td>Concur Expense</td>
</tr>
</tbody>
</table>
| Allow users to email reports and print reports in PDF | If enabled, allows a user to generate a PDF copy of their expense report. The user can send the PDF copy to one or more email recipients.  
  ⚠️ For more information, refer to the Concur Expense: PDF and Email Reports Setup Guide. | Concur Request and Expense |
| Enable personal card charge import         | If enabled, allows a user to import card data when using their personal credit card for business expenses.  
  ⚠️ For more information, refer to the Concur Expense: Personal Card Import Setup Guide. | Concur Expense          |
| If set to true, allow more than one authorization request to be assigned to a single report. | If enabled, allows a user to attach more than one authorization request to an expense report. | Concur Expense          |
| Allow users to remove e-receipts without creating expenses | If enabled, allows a user to delete e-receipts from Concur Expense without creating associated expenses. | Concur Expense          |
| Allow users to remove trip segments without creating expenses | If enabled, allows a user to delete trip segments from Concur Expense without creating associated expenses. | Concur Expense          |
### Section 3: Overview

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>This setting affects...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow users to combine expenses into a single merged expense</td>
<td>If enabled, displays the <strong>Combine</strong> button which is used to merge two selected expenses. For information about this feature, refer to <em>Additional Information</em> later in this guide.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Use Request allocation data (first) and Concur Expense data (second) to pre-populate allocation fields</td>
<td>If enabled, defines how allocations from Request are copied down into Concur Expense allocations. For more information and additional configuration requirements, refer to the <em>Concur Request: Allocations Setup Guide</em>.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Use Named Groups for Car Configuration</td>
<td>If enabled, allows a user to set up a group record and give it a name. This group record is then applied to the car mileage configuration of a specific group. For more information, refer to the <em>Concur Expense: Car Configuration Setup Guide</em>.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Non Domestic Tax Enabled</td>
<td>If enabled, allows a company to have a single code that is understood by the client's financial system to represent &quot;non-domestic&quot; transactions. For the <strong>Non Domestic Tax Field</strong>, the custom field selected will correspond to the Entry Line in the extract. Without this selection, no tax line will appear for these expenses in the extract. For more information, refer to the <em>Shared: SAP Integration with Concur Solutions for SAP ECC and SAP S/F HANA Setup Guide</em>.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Use reclaim extraction factors at tax rate level (Canada tax only)</td>
<td>If enabled, allows a user to select Extraction Factor from the Calculation Method menu when adding a new extraction factor tax rate type. For more information, refer to the <em>Concur Expense: Value Added Tax (VAT) / Tax Administration Setup Guide</em>.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Allow traveler to add Commuter Pass Route</td>
<td>If enabled, adds links to the user's Profile page under Expense Settings to allow the user to add commuter pass routes in profile. Use this feature with the Japanese Public Transportation feature. For more information, refer to <em>Concur Expense: Japanese Public Transportation User Guide</em>.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Allow users to copy reports</td>
<td>If enabled, allows a user to select any report and copy it whether the report is unsubmitted, already paid, or any other statuses. The user can edit the copy as desired. For information about this feature, refer to <em>Additional Information</em> later in this guide.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
<td>This setting affects...</td>
</tr>
<tr>
<td>--------</td>
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<td>------------------------</td>
</tr>
<tr>
<td>Allow users to add expenses via Quick Expenses grid</td>
<td>If enabled, allows a user to enter expense entries in the Quick Expenses grid – an Excel-like format for rapid entry additions. For information about this feature, refer to Additional Information later in this guide.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Allow users to add mileage expenses via Mileage grid</td>
<td>If enabled, allows a user to enter Mileage expense entries in the Mileage grid in an Excel-like format for rapid entry additions. For information about this feature, refer to Additional Information later in this guide.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Allow approvers to view reports approved as a delegate</td>
<td>If enabled, the delegate approver can see all reports they approved – all in one place. When the delegate approver views the list of reports they approved – all approved reports appear, including those approved while working as a delegate. For information about this feature, refer to Additional Information later in this guide.</td>
<td>Concur Expense</td>
</tr>
<tr>
<td>Allow users to manage favorite allocations</td>
<td>If enabled, allows a user to create a list of allocation favorites so they can quickly apply sets of allocations to expenses. For more information, refer to Concur Expense: Allocations Setup Guide.</td>
<td>Concur Request and Concur Expense</td>
</tr>
<tr>
<td>Allow Cash Advance Administrator to Create &amp; Issue Cash Advances</td>
<td>If enabled, allows the Cash Advance admin to create and issue cash advances using the Cash Advance Admin tool. For more information, refer to the Concur Expense: Cash Advance Administrator User Guide.</td>
<td>Concur Request and Concur Expense</td>
</tr>
<tr>
<td>Allow Cash Advance Administrator to Record Return Amount</td>
<td>If enabled, allows the Cash Advance admin to record the return of all or part of an issued cash advance, which was manually returned by the user. For more information, refer to the Concur Expense: Cash Advance Administrator User Guide.</td>
<td>Concur Request and Concur Expense</td>
</tr>
<tr>
<td>Allow amounts to appear in limit-based exception messages (enable only if used)</td>
<td>If enabled, the admin can create specific audit rules with specific exception messages that contain variables for amounts. NOTE: If you do not intend to use variables in exception messages, do not enable this check box. This may cause slowing of your Concur Expense processing. For more information, refer to the Concur Expense: Exceptions Setup Guide.</td>
<td>Concur Expense</td>
</tr>
</tbody>
</table>
Section 4: Access and Use the Site Settings Page

To access the site settings:

1. Click **Administration > Expense**.

**NOTE:** Depending on your permissions, the page may appear immediately after you click **Administration**.
2. Click **Site Settings** (left menu). The **Site Settings** page appears.

![Site Settings Page](image)

**NOTE:** The order that this page displays these settings may vary.

3. Make the desired changes, referring to the table in the **Overview** section of this guide for details on each option.

4. Click **Save**.
Section 5: Additional Information

Feature/Setting Information: Copy a Report

Once the Allow users to copy reports setting is enabled, a user can select any expense report and copy it as a template for the new report. This option is available whether the report is unsubmitted, already paid, or any other statuses. The user can then edit the copied report as desired.

Note the following when copying a report:

- The new name of the report is Copy of <report name>.
- Copied expense entries are automatically adjusted to a user-defined interval or adjusted based on the report start date (if configured on the header) provided.
- Attendees and allocations are copied to the new report.
- Information that is unique to each expense is not copied, for example images, audit trails, comments, pay confirmation history, etc.
- Travel allowance entries, such as fixed meals and fixed lodging, are not copied to the new report.

What the User Sees – Existing UI

To copy a report:

1. On the SAP Concur home page, click Expense > Report Library (upper-right corner).
2. Select the desired report.

3. Click **Copy Report**. The **Copy Report** window opens.

4. Change the report name, if desired.
Section 5: Additional Information

5. The **Earliest Date of Expense Entries on Source Report** field is a read-only field that displays the oldest transaction date in the list of entries for the source report.

   In the **Starting Date for Expense Entries on New Report** field, enter the desired starting date of the new report entries. The system calculates the remaining entries on the new report based on the new starting date (that is, number of days difference and then increments the date for each entry on the new report by the same number of days).

6. Click **OK**. The report is copied with the new name and information. The report is automatically opened and ready for the user to edit.

Note the following:
- If an entry cannot be copied over, the user receives a message about the issue.
- If none of the entries can be copied over (for example, travel allowance fixed expenses), then the report header is copied but there are no expense entries.

**What the User Sees – NextGen UI**

- **To copy a report:**
  1. Open the desired report.
  2. Click **More Actions > Copy Report**.
The **Copy Report** window appears.

![Copy Report Window]

3. On the **New Report Name** field, change the name if desired.

4. In the **Starting date for copied expenses** field, enter the desired starting date of the new report entries. The system calculates the remaining entries on the new report based on the new starting date (that is, number of days difference and then increments the date for each entry on the new report by the same number of days).

**NOTE:** The **Previous Date** field displays the oldest transaction date in the list of entries for the source report.

5. Click **Create New Report**. The report is copied with the new name and information. The report is automatically opened and ready for the user to edit.

Note the following:

- If an entry cannot be copied over, the user receives a message about the issue.
- If none of the entries can be copied over (for example, travel allowance fixed expenses), then the report header is copied but there are no expense entries.

**Feature/Setting Information: Enhanced Employee Search**

The Enhanced Employee Search settings improve the search capabilities and search results display for:

- Employee Administrators who are searching for delegates and approvers
- Users who are searching for delegates and approvers (in Profile and Approval Flow)
- Expense Proxies who are searching for users
By default, this is the display:

There are two additional options:

- **Employee ID as search criteria:** By default, these types of searches can be completed using the employee's name, email address. With this setting, the administrator can also allow the employee ID as search criteria by adding Employee ID to the Select additional employee fields to display in user search results field.

- **Additional fields in the search results:** The administrator can elect to display more information in the search results, ensuring that the correct user is selected.
  - The administrator can include up to three additional fields, including:
    - Employee ID
    - Logon ID
    - Organization unit fields (Org Unit #)
    - Custom fields
Field labels that display are the localized field-level labels.

Note the following:

- If the administrator uses either of these two settings, note that it affects Concur Expense, Concur Request, and Concur Invoice.
- Including the Employee ID in a search or search results display is disabled by default; this prevents the display of sensitive information (for example, employee tax ID) that may be used for this value.

**Feature/Setting Information: Expense Assistant**

Expense Assistant adds all expenses in your Available Expenses list to any open expense report. An open report can be a user-created expense report or an expense report auto-created by Expense Assistant. Expense Assistant continues to add all new incoming expenses that have a date that matches the calendar month of the expense report to that expense report.

If more than one expense report is open, Expense Assistant uses the following logic to determine which report new expenses are added to:

1. Expense Assistant will add the expenses to an open expense report auto-created by Expense Assistant if the expense transaction date is in the same month as the expense report month.

2. If the expense transaction date does not match the month of the auto-created expense report, Expense Assistant adds the expenses to an open user-created expense report for that month.

3. If there are multiple open user-created reports for the same month, Expense Assistant adds the expenses to the user-created expense report with the most recent date for that month.
4. If there are no open user-created expense reports, then Expense Assistant will automatically create a new expense report and add the expenses to the new report.

Expense Assistant will auto-create a new expense report for each calendar month, or by trip depending on what is selected on the Configuration for Group page (Administration > Expense > Group Configuration > Expense tab). The choices are:

- **Monthly or By Trip** – Users in the group can enable Expense Assistant. If a user in the group enables Expense Assistant, the user can choose whether Expense Assistant automatically creates calendar-based or trip-based expense reports for that user. The user can only use one of these options, the user cannot use both.

- **Monthly only** – Users in the group can enable calendar-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant will automatically create calendar-based expense reports for that user.

- **By Trip only** – Users in the group can enable trip-based Expense Assistant. If a user in the group enables Expense Assistant, Expense Assistant automatically creates trip-based expense reports for that user.

- **None** – Expense Assistant will not be available to users in the group.

**NOTE:** Expense Assistant will work for delegates. The user whom the delegate is delegating for will need to have enabled Expense Assistant in Concur Expense or their Expense Preferences.

Once Expense Assistant is enabled for your company, users will need to enable Expense Assistant for themselves.

If the user is using NextGen UI and if the user has at least one unexpensed travel segment (itinerary) in Available Expenses, the Expense Assistant page appears.

There are several ways a user can enable Expense Assistant: when they have Available Expenses, whether or not they have any Available Expenses, and from Profile.

- **When your users log on to Concur Expense and go to the Concur Expense home page,** they will see the following screen. Since Concur Expense needs some available expenses and an unexpensed travel segment (itinerary) present to show how it works, this will show at the first time the user logs in and has available expenses to be used.
If the admin selected *By Trip only* in the **For Expense Assistant, allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select whether or not to use the feature.
Section 5: Additional Information

- If the admin selected *Monthly or By Trip* in the **For Expense Assistant, allow users to opt out or to use** list in Group Configuration (described above), then the **Expense Assistant** page that appears allows the user to select trip-based, calendar-based, or neither.

![Expense Assistant](image)

-Or-

- If users do not currently have any available expenses or an unexpensed travel segment (itinerary), they will see the following message in the **Available Expenses** section:

![Available Expenses](image)

The users need to click **Learn More**, and then click **Try it Now** to begin using Expense Assistant.
-Or-

- If the user wants to enable Expense Assistant and the pages shown above do not appear automatically, the user can enable the feature in Profile. On the **Expense Preferences** page (**Profile > Profile Settings**), the user selects **By Month** or **By Trip** from the **Expense Assistant using this method** list, and then clicks **Save**.

-Or-
Section 5: Additional Information

- On an iPhone.

- On an Android.
Feature/Setting Information: Merge Expenses

Once the **Allow users to combine expenses into a single merged expense** setting is enabled, the **Combine** link appears to the user when they select multiple "like" expense entries on an expense report. When the user clicks **Combine**, the selected expenses are merged into a single entry. This lets the user easily combine two expenses perhaps if one was created in error.

The user can manually combine the following items:
- Card transaction
- E-receipt
- Expense entry (either entered online or via Mobile)
- ExpenseIt receipt
- Trip segment
- Attendee capture

**NOTE**: Users may not match items of the same type, such as two card transactions.

<table>
<thead>
<tr>
<th>Expense has...</th>
<th>Card Transaction</th>
<th>E-receipt</th>
<th>Expense Entry (Web)</th>
<th>Expense Entry (Mobile)</th>
<th>ExpenseIt Receipts</th>
<th>Trip Segment</th>
<th>Attendee Capture</th>
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</thead>
<tbody>
<tr>
<td>Card Transaction</td>
<td>NA</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>E-receipt</td>
<td>✓</td>
<td>NA</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Expense Entry (Web)</td>
<td>✓</td>
<td>✓</td>
<td>NA</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Expense Entry (Mobile)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>NA</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>ExpenseIt Receipts</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>NA</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Trip Segment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>NA</td>
<td>✓</td>
</tr>
<tr>
<td>Attendee Capture</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>NA</td>
</tr>
</tbody>
</table>
What the User Sees

In an expense report, with multiple expenses from the same transaction selected simultaneously, the user sees the option to combine items.

If the user wants to uncombine expenses, they should remove the combined expense from their expense report. This returns the two expenses to Available Expenses.

For more information about matching logic, refer to the Concur Smart Expenses Matching Fact Sheet.

Feature/Setting Information: One Receipt Image for Multiple Expenses (NextGen UI ONLY)

In NextGen UI, users can attach one receipt image to more than one expense on the same expense report.

**NOTE:** This feature is available only in NextGen UI; it is not available in the existing UI.

What the User Sees – NextGen UI

To use a receipt image more than once, the user completes the first expense as usual and attaches the receipt image. For any other expense that the user wants to associate with the receipt image, while creating the expense entry, the user:

1. Completes the expense as usual.
2. Clicks **Attach Receipt Image** as usual. The **Attach Receipt** window appears.

3. Clicks the **Receipts in Report** tab.

4. Clicks the desired image and then clicks **Attach**.
NOTE: The process is the same if the user attaches receipt images on the report page. For the second and subsequent expense entries, the user can select the desired image from the Receipts in Report tab.

Feature/Setting Information: Quick Expenses Grid Feature

The Quick Expenses entry grid is a rapid data-entry page that lets users quickly enter many simple expenses in an Excel-like format. This is useful for users who enter these types of repetitive expenses, such as meals and taxis. Expenses associated with card transactions can also be entered – the system proposes a match when saved. Once the entries are saved, each entry can then be opened and edited individually, for example, to upload a receipt.

How It Works

With an expense report open, the user clicks Quick Expenses.
The cursor focus is set to the first entry to be added, under **Date**, as shown in the figure below:

The user then begins entering expense types, with options to:

- Use the keyboard to tab from field to field, and from the last field to a new row
- Select from the **Expense Currency** list.
- Click to create an identical row that you can then edit as required.

- Click to delete an entry.

The user enters all of the desired entry information. When the user clicks **Save**, the entries are added to the expense report.
Section 5: Additional Information

**Field Display and Validations**

In use, the page will dynamically include predefined fields relevant to the selected expense type (custom configured fields are not supported). For example, the columns of **From Location**, and **To Location** would appear for the **Taxi** expense type. All of the normal field validations and audit rules logic will be employed as part of the save process, so expense types with additional required fields will be saved with the usual missing required fields notifications for follow-up later, prior to submitting the report.

**Feature/Setting Information: Quick Mileage Expenses Feature**

Once the **Allow users to add mileage expenses via Mileage grid** setting is enabled, the user can use the Mileage grid (same as the Quick Expenses entry grid) to enter their mileage-based expense entries.

With an expense report open, the user clicks **Quick Expenses**.

The user then clicks the **Mileage Expenses** tab.

The user chooses a vehicle using the **Vehicle ID** list. The window then refreshes to show all of the required fields.
The user clicks the **Details** button to display other optional fields/actions.

![Screenshot of Concur interface showing the Details button and options](image)

The user enters all of the desired mileage/trips information. When the user clicks **Save**, the entries are added to the expense report.

**Feature/Setting Information: View Reports Approved as Delegate**

By default, when a delegate – working on behalf of an approver – approves a report and then later wants to view that report, the delegate has to again be working on behalf of that same approver. That is, the approved report appears in the approver's list of approved reports, but not in the delegate's list of approved reports.

If the **Allow approvers to view reports approved as a delegate** setting is enabled, the delegate approver can see all reports they approved – all in one place. When the delegate approver views the list of reports they approved – all approved reports appear, including those approved while working as a delegate.

In this example, Chris Collins is working as a delegate for Pat Davis. Chris approves the report from Terry Brown for a Conference expense.

![Screenshot of Concur interface showing the Approvals tab with approved Conference report](image)
Later, Chris Collins – working as himself; not as a delegate – views the reports he has approved. Terry Brown's report appears in Chris's list of approved reports, even though he approved the report on behalf of Pat Davis.