

# Concur Request: Event Requests

## Setup Guide

**Last Revised: May 4, 2023**

Applies to these SAP Concur solutions:

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



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# Revision History

Date	Notes / Comments / Changes
May 4, 2023	<p>Made the following updates to the <i>End-User Experience &gt; Event Manager</i> section:</p> <ul style="list-style-type: none"> <li>• Replaced all references to the <b>Create New Event Request</b> tile with the <b>Create New Request</b> button and <i>Create New Event Request</i> selection.</li> <li>• Replaced images of the <b>Create New Event Request</b> tile with images of the new <b>Create New Request</b> button in the <i>Active Requests</i> view on the <b>Manage Requests</b> page.</li> <li>• Replaced image of the old <b>Create New Request</b> button with image of the new <b>Create New Request</b> button available in the other views on the <b>Manage Requests</b> page.</li> </ul>
October 1, 2022	Updated screenshots and edited content for the new user experience.
January 24, 2022	<p>Added the following note to the <i>What the User Sees &gt; Event Manager</i> section:</p> <p><b>NOTE:</b> When searching for event attendees in Concur Request, the search results currently have a limit of 100 event attendees, so the search results will be limited to the first 100 event attendees returned by the search.</p>
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
July 20, 2020	Removed the <i>Request/Authorization Request/Concur Request</i> section to align with Concur Request product branding.
June 5, 2020	Changed "Authorization Request" to "Concur Request" in Request guide references to align with Concur Request product branding.
June 3, 2020	Changed "Authorization Request" to "Concur Request" in guide title to align with Concur Request product branding.
April 22, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 10, 2020	Updated the copyright; no other changes; cover date not updated
January 18, 2019	Updated the copyright; no other changes; cover date not updated
April 12, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 27 2018	Updated the copyright; no other changes; cover date not updated
May 17 2017	Updated the <i>What the User Sees &gt; Delegate</i> section.
December 14 2016	Changed copyright and cover; no other content changes.
December 8 2016	Updated the guide content to new corporate style; no content changes.
May 13 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
February 9 2016	Updated <i>Overview</i> section.
August 14 2015	Removed references to the current UI; made general updates to the content

Date	Notes / Comments / Changes
September 17 2014	Added information about two user interfaces; no other content changes.
January 20 2014	Cover and copyright changes; no other content changes
December 23 2013	Added a note about having the Request Event Manager role but not the Request Proxy Logon role
May 30 2013	Additional explanation of roles and relationships (Overview)
May 17 2013	Initial publication



# Event Requests

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

## Section 1: Permissions

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

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

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

## Section 2: Overview of the Request Feature

Refer to the *Concur Request: Overview Guide* for general information about requests, such as what the user sees, what the approver sees, workflow, settings, configuration basics, etc.

## Section 3: Request Configurations

Not all Request features are available for all Request configurations.

Configuration	Is this feature available?
Stand-alone	Yes, Optional
Integrated with Concur Expense (but not Concur Travel)	Yes, Optional
Integrated with Concur Travel (but not Concur Expense)	Yes, Optional
Integrated with Concur Expense and Concur Travel	Yes, Optional

## Section 4: Overview

Assume that an assistant works for several employees and all those employees will be attending the same conference. Without the Event Request feature, the assistant would have to create almost identical requests over and over – one for each of the employees.

With the Event Request feature, the assistant creates one "master" request that contains the names of the employees and all the common information such as flight, hotel, conference fees, etc. Then – with one click – the assistant creates a copy for each employee and sends each employee a notification. The employees then use their own copies as a starting point, add any additional information, and submit their request.

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! **IMPORTANT:** The Event Request feature supports the Travel Integration process where once the request is approved, then the user is notified to book ("Approve then book").

Given that Participant Event Requests are immediately generated from the Master Event Request, it doesn't support the Travel Integration process where the request is generated based on a travel booking.

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### Required Roles

To fully manage event requests, the assistant described above **must have these two roles:**

- **Request Event Manager:** This role allows the user to create and manage event requests.
- *and* –
- **Request Proxy Logon:** This role provides access to the employees who will be included on the event request. It also provides the admin access to the individual requests.

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**NOTE:** When assigning the Request Proxy Logon role, the User Admin selects one or more groups for which the proxy can manage requests. For more information, refer to *Relationship Between the Event Manager, Request Owner, Event Attendees, and Groups* on the following pages.

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### Exception – No Proxy Role

If the admin has the Request Event Manager role but **not** the Request Proxy Logon role **and** if all affected users are in the same group, the admin can create the event request and then generate the individual requests. That admin cannot later affect – or even view – the individual requests in any way. Each individual owner must complete and submit their individual request.

## Terminology

These terms are used for this feature:

- **Event manager:** The user with the Request Event Manager role, who creates the main event request
- **Event participant:** The employees who are participants in the event and are listed on the main event request
- **Main event request:** The "master" event request that is created by the event manager and contains the information common to all event attendees
- **Participant event request:** The event participant's copy of the request, which contains the common information but can be edited to include the information specific to that event participant
- **Request owner:** The user who created the request (if created on their own behalf) or on whose behalf the request was created. The request owner can fully manage the main event request – just like the event manager.



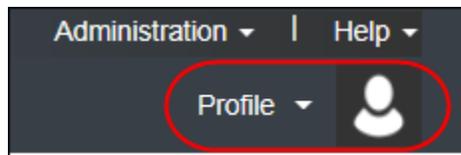
Refer to *Relationship Between the Event Manager, Request Owner, Event Attendees, and Groups* on the following pages.

## Relationship Between the Event Manager, Request Owner, Event Participants, and Groups

### *Event Manager and Request Owner*

Each main event request has a request owner.

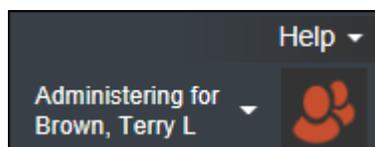
- The event manager can also be the request owner. If so, the event manager creates the main event request while working on their own behalf.



In the example above, if the event manager creates the event request for themselves, so they are also the request owner. The user icon on the right is white and has the **Profile** label.

– or –

- The event manager can work on behalf of another user. If so, as the first step in creating the main event request, the event manager uses Proxy Search to find the desired user. In this case, that user will be the request owner.



In the example above, the event manager is working on behalf of Terry Brown. The event manager creates the main event request, but Terry is the request owner. The user icon is orange, and the label states: "Administering for <username>."

### ***Proxy Logon Groups***

As noted previously, the event manager must also have the Request Proxy Logon role. When assigning the Request Proxy Logon role, the User Admin selects one or more groups for which the proxy can manage requests.

- When the event manager (proxy) works on behalf of another user, the event manager (proxy) can select any user that belongs to the group(s) assigned by the User Admin.

Example: The event manager (proxy) is assigned to manage Group A (by the User Admin). The event manager (proxy) can create and manage event requests for any user in Group A.

- The event manager (proxy) does not have to belong to the group(s) assigned by the User Admin.

Example: The event manager (proxy) is assigned to manage Group A (by the User Admin) but personally belongs to Group B. The event manager (proxy) can create and manage event requests on the behalf of any user in Group A - but not Group B.

### ***Groups, Proxies, and Event Participants***

All event participants must belong to the same group as the request owner.

- If the request owner belongs to Group A, then all event participants must belong to Group A.

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**NOTE:** This ensures that all participants – the request owner and the event participants – are using the same policy.

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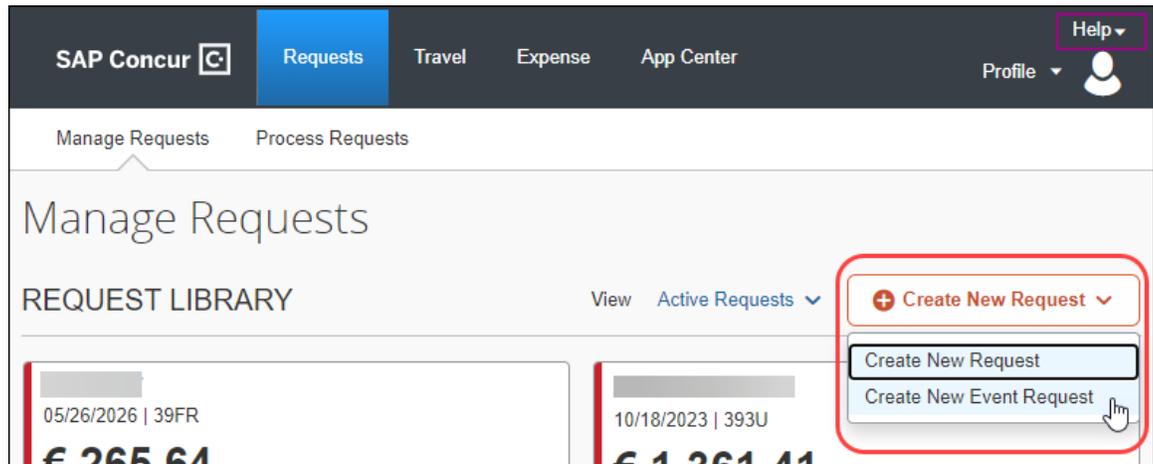
- If the event manager belongs to Group B and creates an event request on their own behalf, then all participants must belong to Group B. Even if the event manager (proxy) is assigned to manage other groups including Group B, the event manager (because they are also the request owner) is restricted to participants that belong to their own group (the owner's group)– in this case, Group B.

## **Section 5: End-User Experience**

### **Event Manager**

The event manager clicks **Requests** to view the **Manage Requests** page. Users assigned to the Request Event Manager role and the Request Proxy Logon role will

see the *Create New Event Request* selection when they click the **Create New Request** button.



**NOTE:** If the event manager is creating the main event request on their own behalf, the event manager uses the path above to create the request. In this case, the event manager is also the request owner.

If the event manager is working on behalf of another user, the event manager uses Proxy Logon to locate the desired user and then creates the request. In this case, the selected user is the request owner.

Clicking the *Create New Event Request* selection opens the **Create a New Event Request** page.

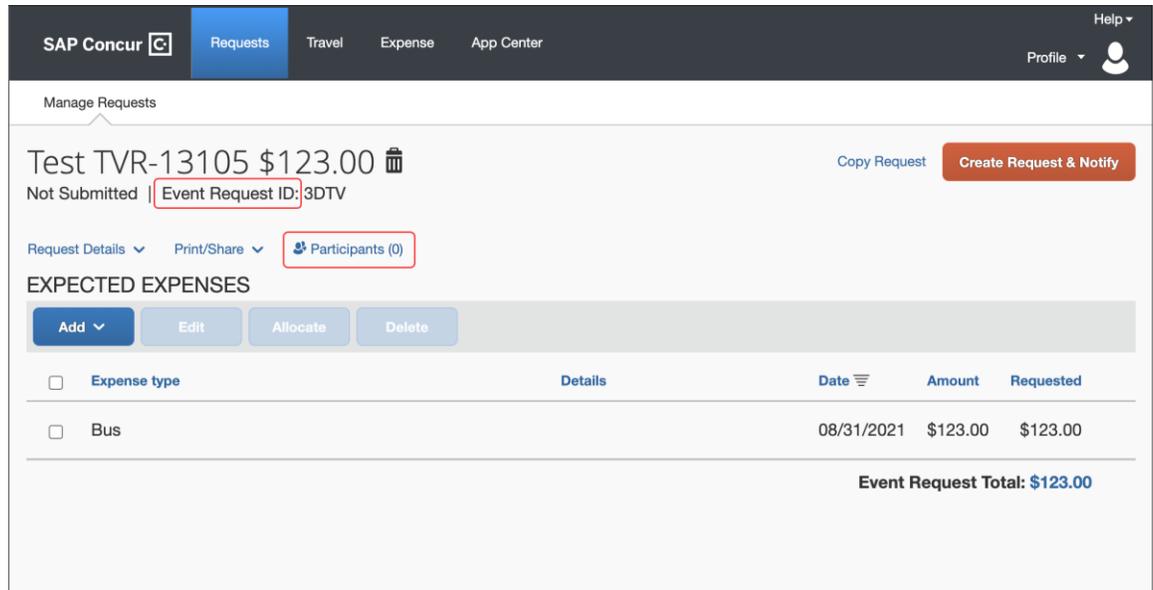
On the **Create a New Event Request** page, the event manager enters the name, purpose, dates, etc., then clicks **Create**.

## Section 5: End-User Experience

When the event request is created, the **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, the event manager clicks the **Participants** link.

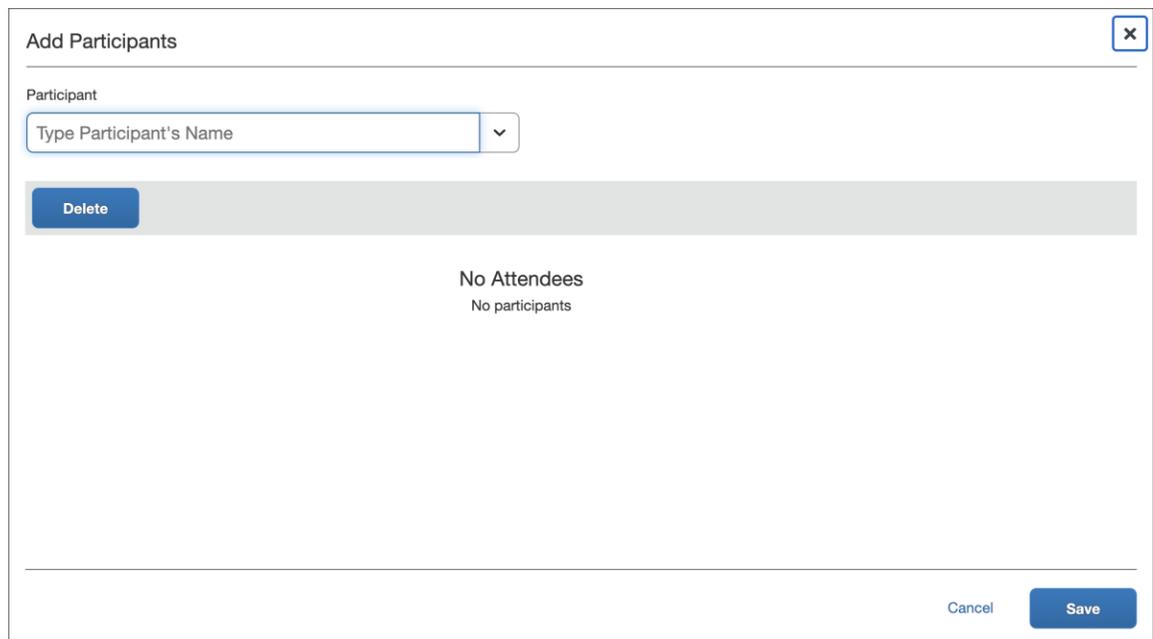


The screenshot shows the SAP Concur interface for managing an event request. The header includes 'SAP Concur', navigation tabs for 'Requests', 'Travel', 'Expense', and 'App Center', and user profile information. The main content area is titled 'Manage Requests' and displays details for a request: 'Test TVR-13105 \$123.00'. It indicates the request is 'Not Submitted' and shows the 'Event Request ID: 3DTV'. A 'Participants (0)' link is highlighted with a red box. Below this, the 'EXPECTED EXPENSES' section contains buttons for 'Add', 'Edit', 'Allocate', and 'Delete'. A table lists the expected expenses:

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Bus		08/31/2021	\$123.00	\$123.00

The total for the event request is shown as 'Event Request Total: \$123.00'.

Clicking the **Participants** link opens the **Add Participants** page.



The 'Add Participants' dialog box is shown. It has a title bar with a close button. Below the title, there is a 'Participant' section with a text input field containing the placeholder 'Type Participant's Name' and a dropdown arrow. A 'Delete' button is located below the input field. The main area of the dialog is empty, displaying the message 'No Attendees' and 'No participants'. At the bottom right, there are 'Cancel' and 'Save' buttons.

In the **Participant** list, the event manager types the event participant's name, when the participant appears in the list, and selects 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.

Add Participants ✕

Participant

Type Participant's Name ▼

Event Request Total: \$123.00

Delete

Participant Name	Request ID	Request Status	Request Amount
<input type="checkbox"/> Event A1 User			\$0.00
<input type="checkbox"/> Event A2 User			\$0.00

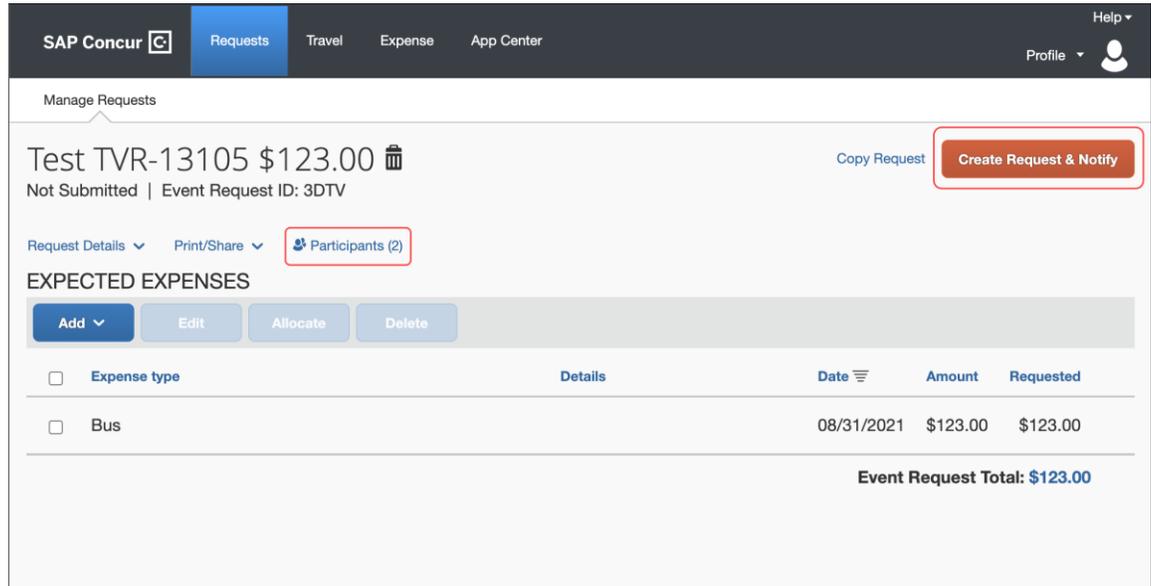
Participant Total: \$0.00

Cancel Save

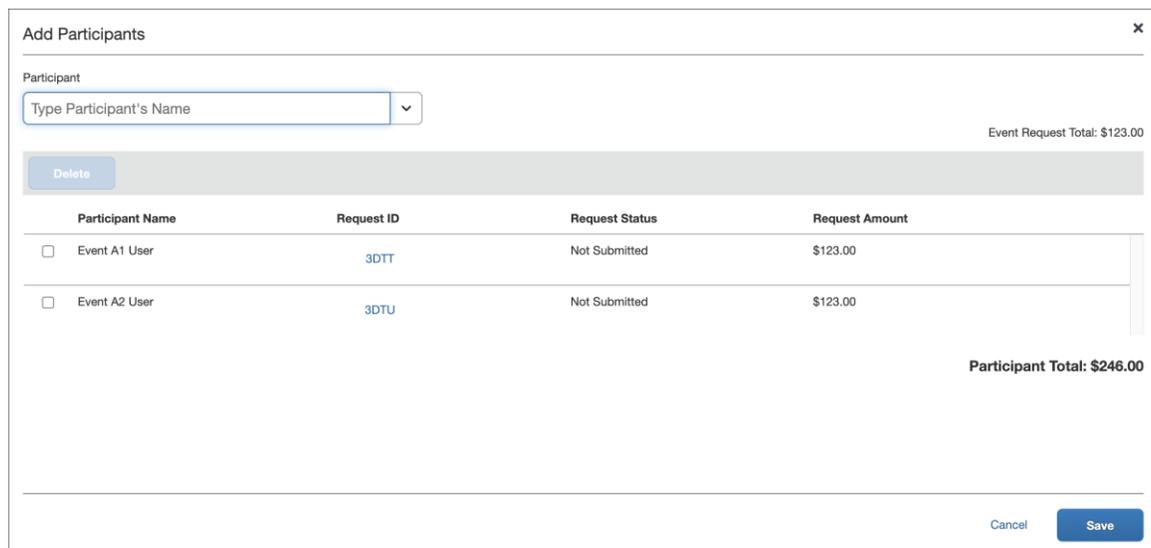
The event manager clicks **Save** to save the participants for the event request.

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.

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

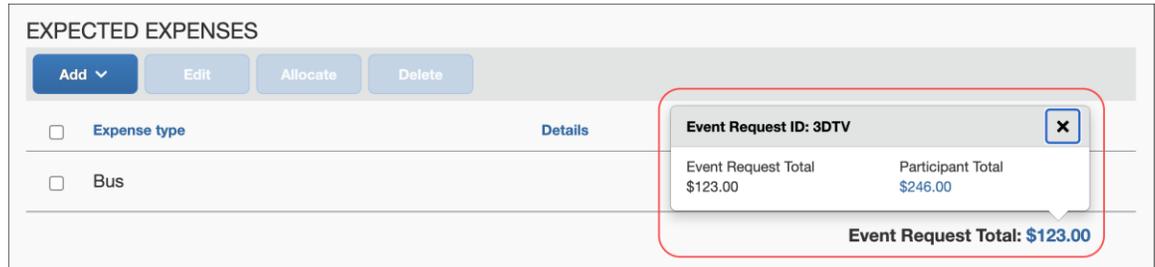


After clicking the **Create Request & Notify** button, the event manager can click the **Participants** link to open the **Add Participants** page and view the Request ID, Request Status, and Request Amount assigned to each participant. Users and admins can click the Request ID link for a participant to view the copy of the event request for the participant.

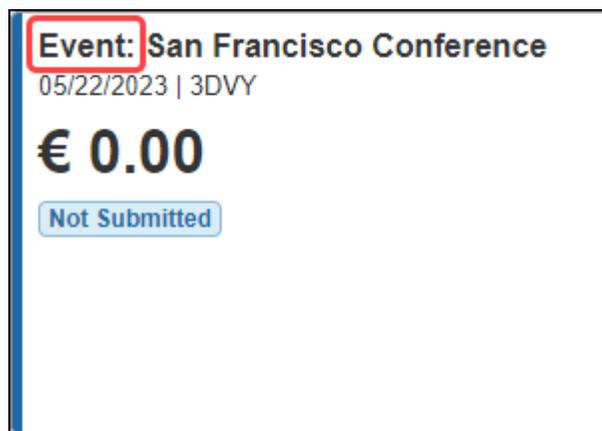


On the **Expected Expenses** page, users can click the **Event Request Total** amount to view the **Participant Total** for the event request. It is the same amount displayed in the **Participant Total** field on the **Add Participants** page.

Users 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 users quickly identify event requests.



When viewing a list of requests on the **Manage Requests** page, *Event* displays in the **Request Type** column to help users quickly identify event requests in the request list.

Request Type ↑↓	Request Name ↑↓	Status ↑↓	Request Dates	Requested ↑↓	Approved ↑↓	Remaining amount ↑↓
Travel	CA ID: 39FR	Sent Back to Employee 06/14/2022	05/26/2026	€265.64	€265.64	€265.64
Travel	New York Meeting ID: 393U	Sent Back to Employee 09/10/2021	10/18/2023	€1,361.41	€1,361.41	€1,361.41
Travel	A conference in Seattle ID: 39DG	Sent Back to Employee 03/28/2022	06/03/2023	€273.14	€273.14	€273.14
<b>Event</b>	San Francisco Conference ID: 3DVV	Not Submitted	05/22/2023			
Travel	ISS ID: 3DVX	Not Submitted	04/29/2023	€484.00	€484.00	€484.00

## Process Considerations

The event manager should be aware of the following:

- The main event request can contain segments, expected expenses (with or without participants), allocations, and attachments.

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**NOTE:** Note that items attached at the main event request level are *not* copied to the participant's event requests.

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- Cash advances cannot be part of the main event request.
- Only employees who are also Concur Request users can be event attendees.
- The event manager can complete these actions for the main event request: Cancel, Save, Print/Email, Delete Request
- The event manager can be added as an event participant if they are attending the same event and belong to the same group as the request owner.
- Each participant must use the same policy as the one used for the event request. If the event manager selects an event participant who – for any reason – cannot use the policy, then while generating the participant event request, the event manager will receive a warning that it will not be possible to generate the participant event request.

## Re-opening Requests

Once the event manager clicks **Create Request & Notify**, the main event request appears in the event manager's active requests on the **Manage Requests** page.

If the event manager re-opens the event request, the event participant amounts appear, along with the unique Request ID and request status for each participant event request.

The event manager can open a participant's request by clicking the request ID.

When the event manager opens the participant event request:

- The request shows the two request IDs – one for the participant's event request and one for the main event request.
- The names of the other event participants do not appear on individual participant event requests.
- The event manager can access the various tabs, modify the request, and, in fact, submit the event request on behalf of the event participant. (More information is available in *Other Actions* on the following pages.)

## Event Participants

Once the event manager clicks **Create Request & Notify**, the participant event request appears in the event participant's active requests.

When the event participant opens the participant event request:

- The request shows the two request IDs – one for the participant's event request and one for the main event request.
- The names of the other event participants do not appear on individual participant event requests.
- The event participant can access the various tabs, modify, and submit the event request.



For more information, refer to *Other Event Request Actions* in this guide.

## Workflow

When each event participant submits their request, it follows the normal workflow for that user, for example, goes to that user's approver, etc. The main event request is never submitted and, hence, does not have a workflow.

## Delegate

If the event participant has a delegate, that delegate inherits the permissions of the event participant. The delegate will not receive email notifications when a participant event request for their delegator is created. Only the event participant is notified when the participant event request is created, even if the delegate is configured to receive email notifications.

If the event manager has a delegate, that delegate **does not** inherit the permissions of the event manager. The delegate can view event requests but cannot edit, submit, etc.

## Processor

When the processor opens a participant event request, both IDs appear – one for the participant's event request and one for the main event request.

## Other Event Request Actions

**Add an attendee:** The event manager can modify the event request to add more event attendees. If so, when the event manager clicks **Create Request & Notify:**

- A participant event request is generated **only** for each newly added participant. New participant event requests are **not** regenerated for existing event participants nor are the existing participant event requests updated in any way.
- A notification is sent **only** for each newly added participant; existing event participants are **not** notified.

**Remove a participant:** The event manager can remove a participant either before the participant event request is generated or if there is no condition preventing the participant event request from being deleted. If there is a reason that a participant event request cannot be deleted, the event manager will be notified.

**Delete a main event request:** The event manager can delete the main event request either before the participant event requests are generated or if the event manager can successfully remove all the event participants.

### Copy a request:

- The event manager can use the copy function to copy an existing main event request.
- The participant can copy the participant event request, but all information related to the main event request is lost.

### Other modifications:

- **Event manager:** As noted above, existing participants are not affected or notified if changes are made to the main event request. If the event manager wants to make changes that affect the participants, then the event manager removes the participants, makes the changes, and adds the participants again. Now the participants are considered to be new – when the event

manager clicks **Create Request & Notify**, the participant event requests are generated and notifications are sent.

- **Event attendee:** Individual event participants can make any changes allowed by their policies and approvers. Changes made by the event participants do not affect the main event request.

## Section 6: Configuration

The only configuration required is to assign the proper roles.

### Assign User Roles

▶ **To assign user roles:**

1. Click **Administration > Company > Company Admin > User Permissions**.

The screenshot shows the Concur Administration interface. The top navigation bar includes 'Administration' and 'Help'. The main navigation bar includes 'Request', 'Travel Admin', 'Locate', 'Expense', and 'Invoice'. The 'Request' tab is selected. The left sidebar shows 'Company Admin Home' and 'Company Admin' with various sub-items. 'User Permissions' is circled in red. The main content area shows 'Step1. Modify Roles By:' with 'User Name' set to 'Fletcher, Erin N'. 'Step2. Search Text:' is 'fletcher'. 'Step3. User Name to Assign Roles:' is 'Fletcher, Erin N'. The 'Available Roles' list includes 'Request Event Manager' and 'Request Proxy Logon', both circled in red. The 'Roles for this User' section shows 'Request User' assigned to the 'Global Development Marketing Sales' group.

2. Locate the desired user(s) and assign the roles as usual.

**NOTE:** You must select one or more groups for the Request Proxy Logon role.

3. Click **Save**.

### Rules - Optional

The *Has Event Request* attribute (Request data object) can be used for audit rules, workflow rules, and email reminder rules.

