Concur Request: Printed Reports Configuration

Setup Guide

Last Revised: October 1, 2022

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
October 1, 2022	Updated screenshots and edited content for the new user experience.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 29, 2021	Updated the copyright year; no other changes; cover date not updated
July 20, 2020	Removed the *Request/Authorization Request/Concur Request* 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 27, 2020	Removed the *Graphics* section under the *Configuring Print Templates* section. As of the January 2020 release, graphics are no longer supported for printed reports (requests that are formatted for printing).
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 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 28 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
Decemer 8 2016	Updated the guide content to new corporate style; no content changes.
October 20 2016	Updated the *Permissions* section and guide content to new corporate style; no content changes.
May 13 2016	Updated the *Permissions* section and guide content to new corporate style; no content changes.
November 20 2015	Updated the Travel Details definition in the *Content Types and Content IDs* section.
November 12 2015	Updated the *Important: Hidden Fields and Visibility in Printed Reports* section.
July 31 2015	Updated the Travel Details content type spelling.
July 10 2015	Added the text Travel Details content type.
April 10 2015	Added the Audit Trail content type.
February 9 2015	Updated the *Content Types and Content IDs* section.
February 6 2015	Added the Matching the Default Printed Report Style section, added new Approval flow content ID, and updated screenshots to the enhanced UI.
September 17 2014	Added information about two user interfaces; no other content changes.
January 17 2014	Cover and copyright; no content changes

Date	Notes / Comments / Changes
February 26 2013	Name change from "Travel Request" to "Request" – ***no other content changes***
December 28 2012	Made rebranding and/or copyright changes; no content changes
June 6 2012	Initial publication

Printed Reports Configuration

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

AA 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 Concur Request

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: Concur Request Configurations

Not all Concur Request features are available for all Concur 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

Printed report is a generic term used to define a request that has been formatted for printing. Printed reports are used primarily:

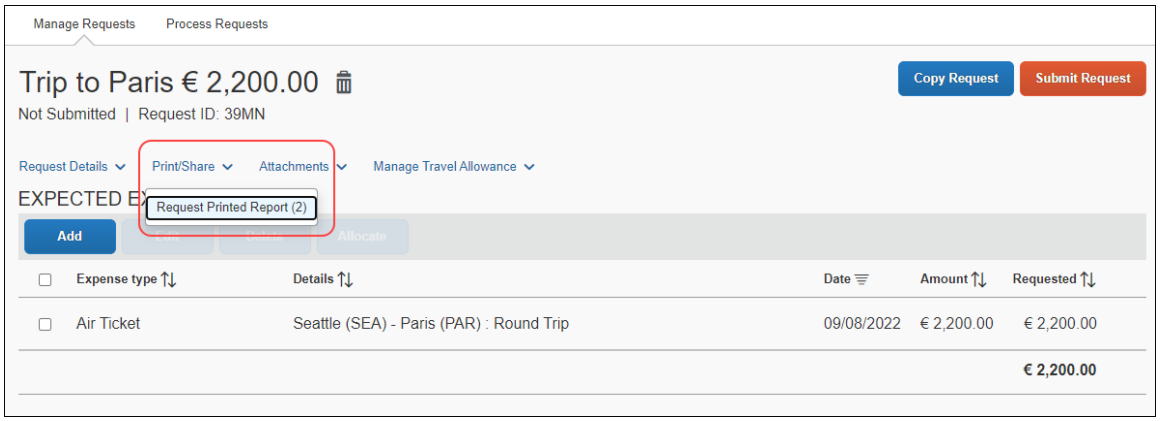
- To be included in or attached to the notification email sent to the travel agency for pre-booking (request created) and booking (request approved)
  – or –
- By the user to have a printed copy of the request

Agency Notification Emails

This guide describes how to configure printed reports. However, the process for generating the associated notification emails – and including a printed report with the email – is described in the *Concur Request: Policies and Groups Setup Guide* and the *Concur Request: Workflow - General Information Setup Guide*.

Printed by Users

A user can print a request (based on the printed report format) from the **Print/Share** menu on the request.



The *default* report appears on the **Print/Share** menu. Using the Printed Reports feature, the administrator can create additional formats as desired. Once the new formats are assigned to the user's policy, the new formats appear on the **Print/Share** menu.

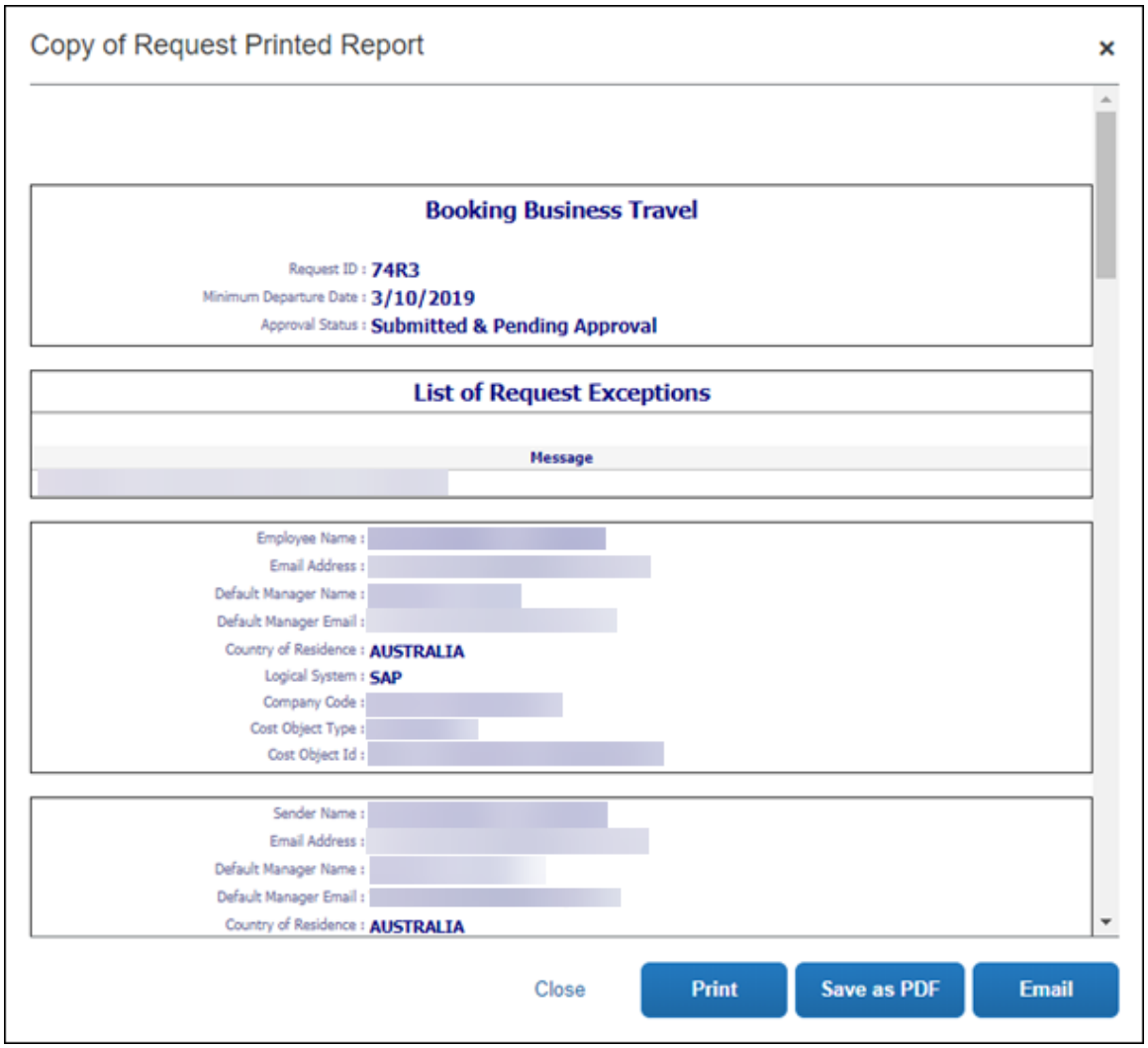
When the user selects from the **Print/Share** menu, the system opens the printable request in a separate browser window and provides options that include the **Print** button.

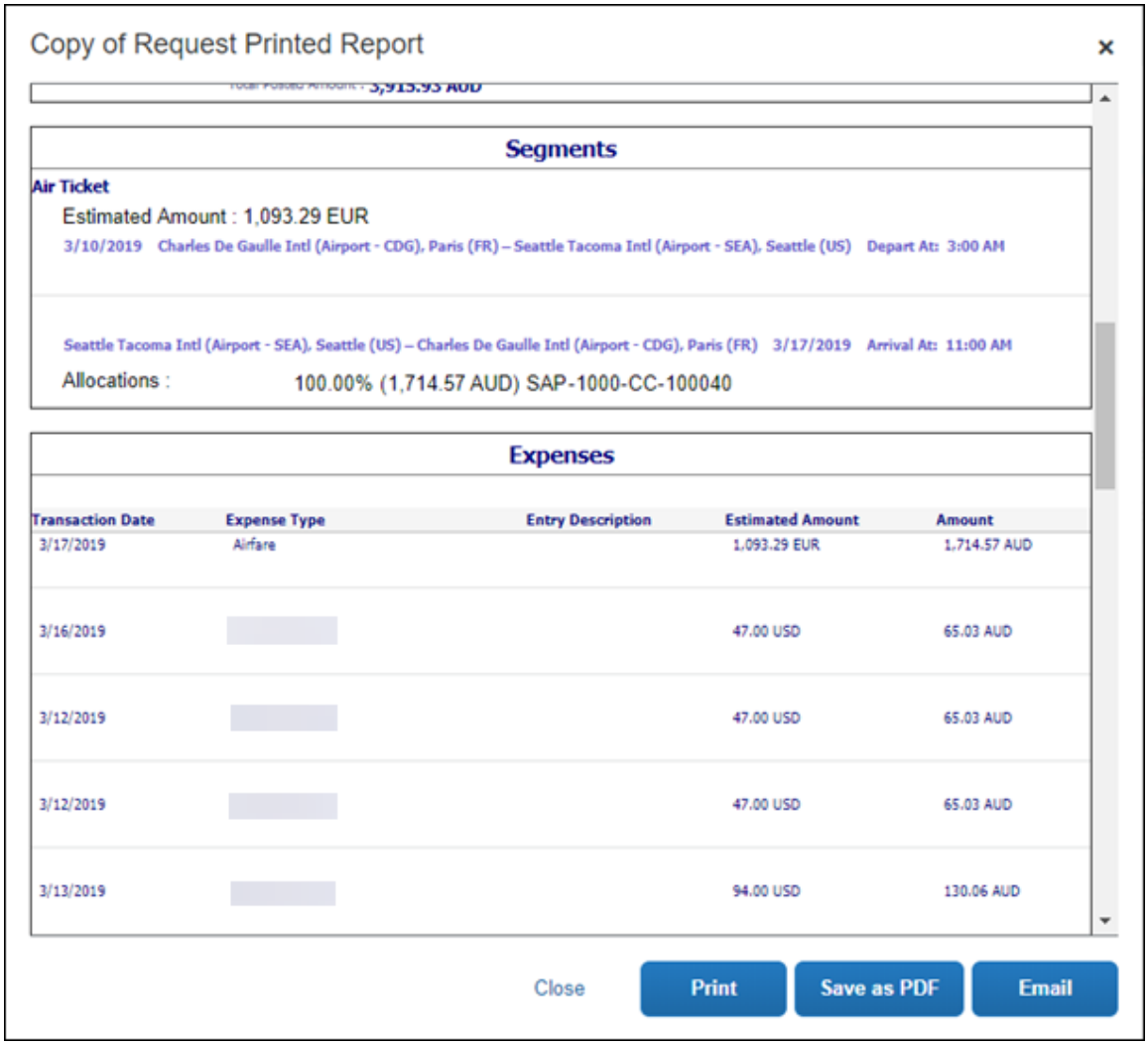
Default Printed Report

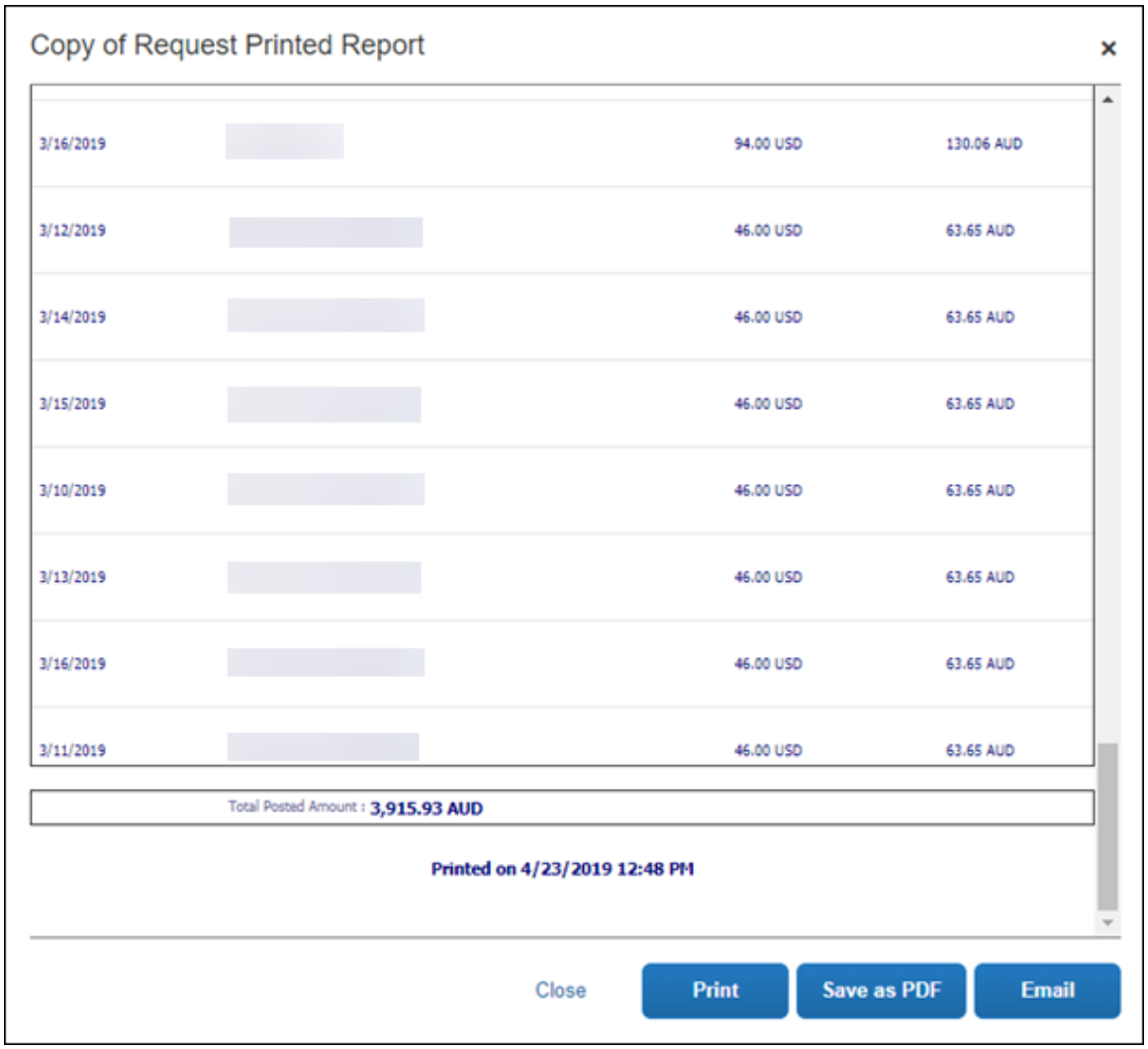
The *default* printed report appears as shown below – whether it is included in a travel agency notification email or printed by a user. The buttons for saving the

report as a PDF, emailing the report, printing the report, or closing the report are located at the bottom of the printed report page.

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



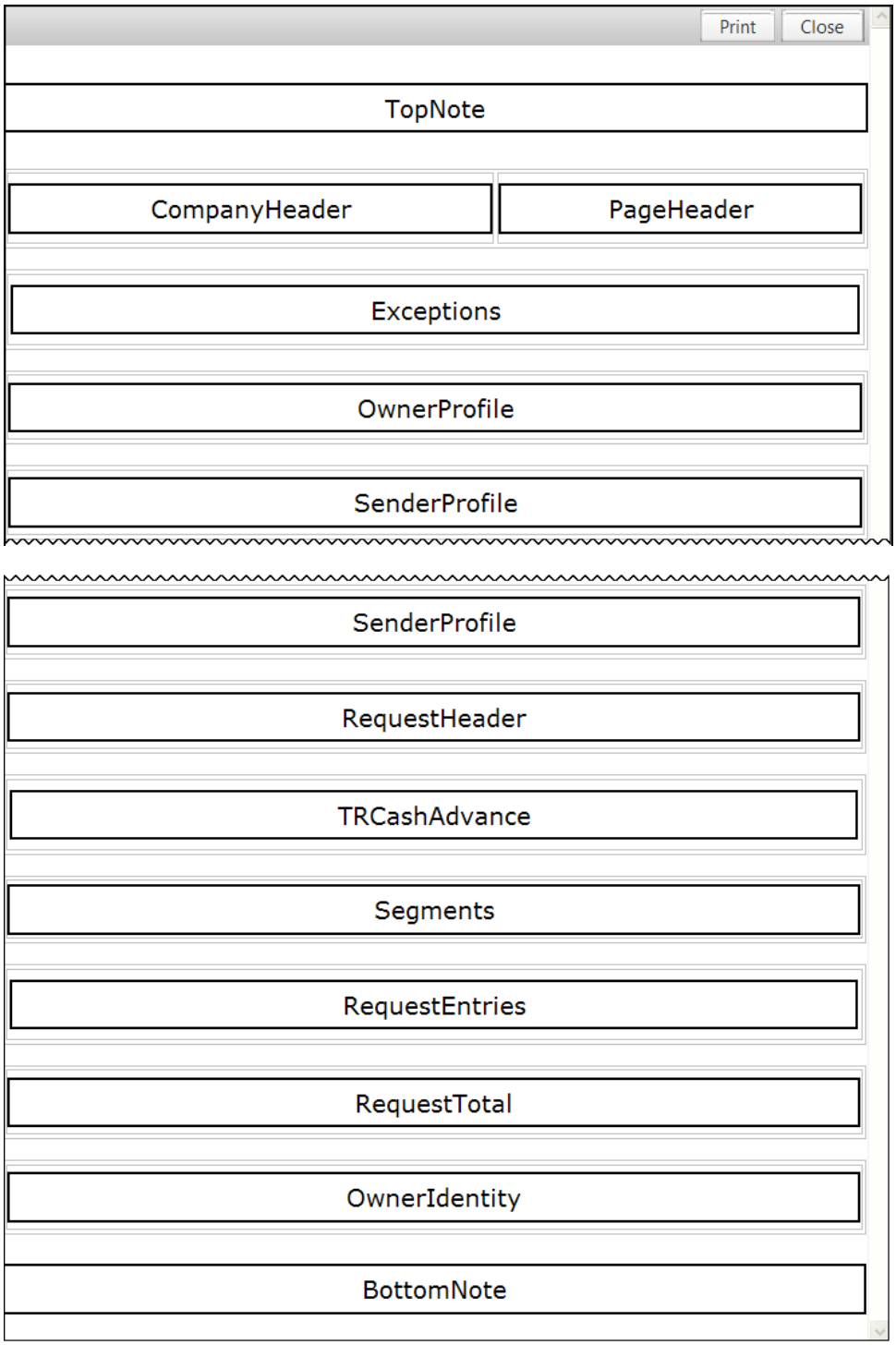




Sections of the Default Printed Report

The actual "skeleton" of the default printed report looks like this and contains these sections.

NOTE: A section does not print if there is no data. Some of the sections shown below do not appear on the sample above because there is no data in those sections.



The sections are:

Section	Description
Top Note	Additional information for the addressee
Company Header	Additional information about the company

Section	Description
Page Header	General information, such as the request ID and approval status
Exceptions	List of exceptions
Owner Profile	Information about the owner of the request, such as name, email, approver, and approver email
Sender Profile	Information about the person who sent the request – which may be the owner or perhaps a delegate – such as name, email, approver, and approver email
Request Header	Request-level information, such as start/end dates, policy, and purpose
Cash Advance	Cash advance information, such as amount, status, and comment
Segments	Segment information, such as type (air, hotel, etc.), dates, and locations
Request Entries	Entry information, such as amounts and expense types
Request Total	Amounts
Owner Identity	Additional owner information, such as birthdate, passport(s), and driver's licenses
Bottom Note	Additional information for the addressee

Section 5: Configuration Overview

Two Components

A printed report has two main components:

- A ***print template*** defines *where* the data appears on the printed report.

  NOTE: Modifying the template requires HTML skills.

- A ***print format*** defines *what* information appears on the printed report and *how* it looks.

Basic Process of Configuration

If the *default* printed report does not contain the desired information or if it is not laid out in the way that the company needs, the administrator can create new print templates (for layout) and print formats (for fields and format).

The process is as follows:

Step 1: If a new print *template* is required, copy an existing print template and then edit the copy.

Step 2: If a new print *format* is required, either create a new print format or copy an existing print format and then edit the copy.

Step 3: Assign the appropriate print format to each request policy.

Matching the Default Printed Report Style

The default printed reports all use one look and feel. If you want to add a new section to a default printed report, you can match the existing default style by updating the template and the format using the steps in this section.

To update the print template:

1. Click **Administration** > **Request**.
2. Click **Printed Reports** (left menu) > **Print Templates**.
3. Select an existing template, and either click **Copy** or click **Edit**.
4. At the location that you would like to add a section (after one of the #end marks), enter the following HTML:

```
<table class="cStdForm" border="1" bordercolor="silver" style="width:
100%" summary="Summary for print report request">

<tr><td>SECTION_VARIABLE</td></tr>

</table>
```

This will add the new variable and surround it with the expected borders.

Refer to the *Adding a New Content ID* section of this guide for more information about the section variables.

5. Click **Save**.

To update the print format:

1. Click **Administration** > **Request**.
2. Click **Printed Reports** (left menu) > **Print Formats**.
3. Select an existing format.

4. Click **Copy**.
5. Enter the desired name.
6. In the **Print Template** field, select the print template you updated in the previous procedure.
7. Click **Save**.
8. Click the new print format.
9. Click **Modify Content**.
10. Click the desired section to modify.
11. Click **Modify Content**.
12. Select the following options:

Field	Description/Action
Heading	Enter the title for the section.
Heading Style	Select cReqPageHeaderCenter
List Field Label Style	Select cReqListHdrLeft
List Field Data Style	Select cReqListValLeft

13. Click **Save**.

Section 6: Configuring Print Templates

Overview

The *print template* defines the layout of the printed report. You would edit a print template mainly to:

- Add a graphic logo to the printed report
- Add new sections to the printed report
- Separate sections into multiple sections
- Change location of the sections
- Add white space padding around content, using the HTML padding property

Do ***not*** edit a print template for the following changes:

- Do not embed text into the HTML template – it is not localized. Instead, create a text content ID and add the text in the print format.
- Do not change the style of text in HTML by using the style property. Instead, use one of the text styles in PrintStyles.css or create a new one (requires customization).

- It is not necessary to delete unwanted sections from the template. To "not include" a section, simply do not include any information in the print format – sections that do not have data do not print.

Template Code

A template is source code. It is a block of text that contains variable-named references to the content defined by the print format. The variables are surrounded by HTML tags that provide the layout and formatting control.

You should have HTML or programming knowledge before you attempt to modify any print *templates*. HTML knowledge is helpful in modifying print *formats* when modifying text variables but not necessary.

Content Types and Content IDs

The template contains content IDs and content types enclosed in HTML tables and table cells. Content IDs, such as RequestHeader, can be any terminology you want, but the content types must be one of these types:

Section	Description
Text	Displays as text on the printed report, such as instructional text or printed date/time of the report *Syntax:* `$text_XXXX` (where `XXXX` is the section, such as `$text_TopNote`)
Travel Details	This special version of the Text content type displays the Trip information for the request, if provided by Concur Travel, and if the trip includes a policy violation **NOTE**: If there are no travel policy violations, this section will include the following message: This trip conforms to the company's Travel policy, there are no policy violations to display. *Syntax*: `$text_TravelDetail`
Form Data	Displays request-level or employee-level data *Syntax:* `$rqformdata_XXXX` (where `XXXX` is the section, such as `$rqformdata_RequestHeader`)
List Data	Displays the list of entry data *Syntax:* `$rqlistdata_XXXX` (where `XXXX` is the section, such as `$rqlistdata_RequestEntries`)
List Segment Data	Displays segment data *Syntax:* `$rqlistseg_XXXX` (where `XXXX` is the section, such as `$rqlistseg_Segments`)

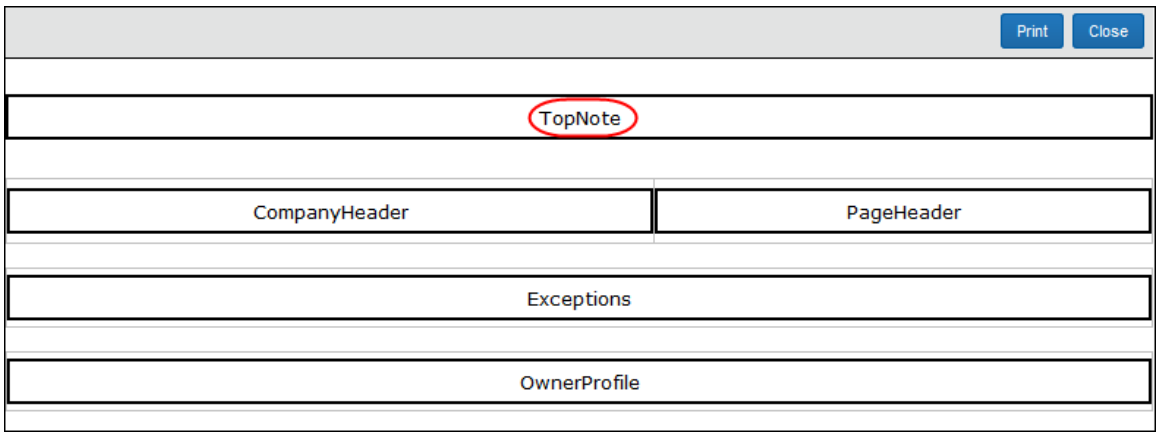
Section	Description
List Exception Data	Displays list of exceptions associated with a request *Syntax:* `$rqlistexc_XXXX` (where `XXXX` is the section, such as `$rqlistexc_Exceptions`)
List Cash Advances	Displays list of cash advances associated with a request *Syntax:* `$rqlistcash_XXXX` (where `XXXX` is the section, such as `$rqlistcash_TRCashAdvance`)
Approval Flow Data	Displays approvers associated with a request *Syntax:* `$rqapproval_XXXX` (where XXXX is the section, such as `$rqapproval_WorkflowSection`)
Audit Trail	Displays the Audit Trail information for the request *Syntax*: `$rqaudidata_XXXX` (where XXXX is the section, such as `$rqaudidata_AuditTrail`)

Components of the Template Code

In the template code, each variable has a content type attached to it preceded by a dollar sign ($), such as: `$text_TopNote`

When adding a new section or editing an existing section, it must contain the dollar sign ($), then the content type, an underscore, and then a unique name, for example `<tr><td>$text_TopNote</td></tr>`. When you add a new section, it creates its own table cell, but you can create a table cell or table for the new parameter as well.

The name specified after the underscore will display as the section label in the Preview Layout view:



The section heading that appears to the user in the printed report is configured in the Modify Content area of the print format.

For more information, refer to the *Editing a Print Format – Modify Content (Styles, Headings, Text, Grouping)* section of this guide.

HTML Editors

Before changing the template code, you should be aware of a few things to reduce the amount of errors and make coding easier:

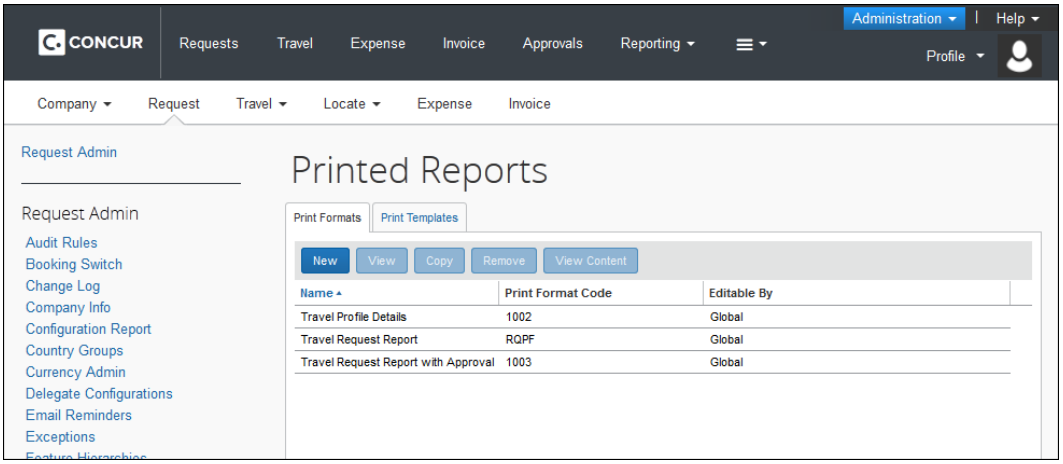
- It is highly recommended that you are well-versed in HTML and programming.
- You can use any HTML editor by copying and pasting the template code into the editor. Once complete, you can copy the code back into the Printed Reports tool.
- If you copy the code from the Printed Reports tool, paste the code *within* the Body tags of the HTML editor.

Accessing Print Templates

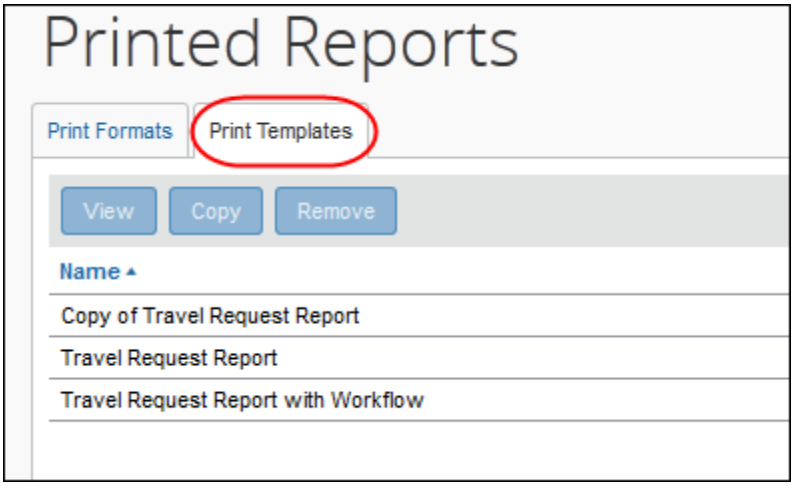
Only the Global administrator can access the print templates.

To access Print Templates:

1. Click **Administration** > **Request.**
2. Click **Printed Reports**. The **Print Formats** tab of the **Printed Reports** page appears.



3. Click the **Print Templates** tab.



Creating a New Template

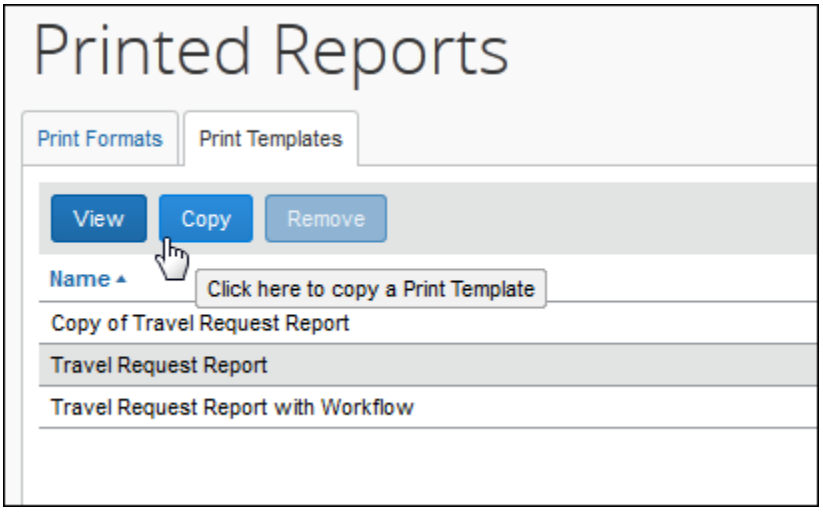
Remember:

- The ***print template*** defines *where* the data appears on the printed report.
- The ***print format*** defines *what* information appears on the printed report and *how* it looks.

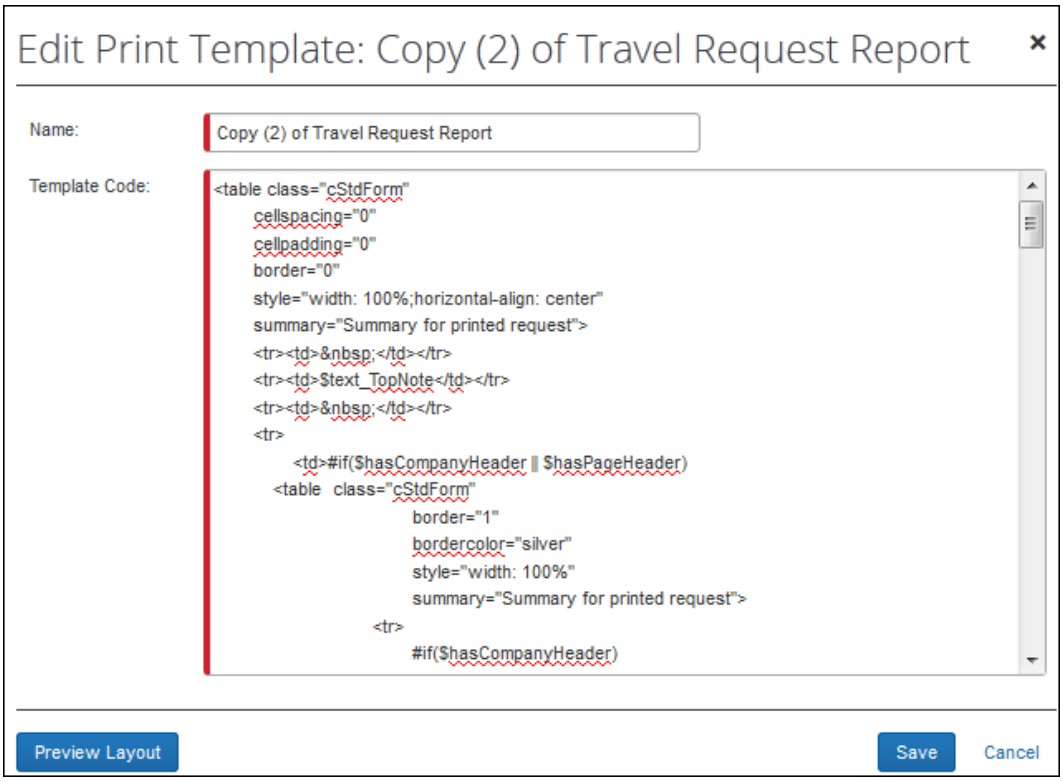
To create a template, copy an existing one and then edit the copy.

To create a new template:

1. On the **Print Templates** tab, click the template you want to copy.



2. Click **Copy**. The **Edit Print Template** window appears.



3. In the **Name** field, type the name of the new template.

NOTE: This name appears in the templates list when editing Print Formats; it does not appear to the employee.

4. In the **Template Code** area, edit the code as desired.

   Refer to *Template Code* in this guide.

5. Click **Preview Layout** to view the template.

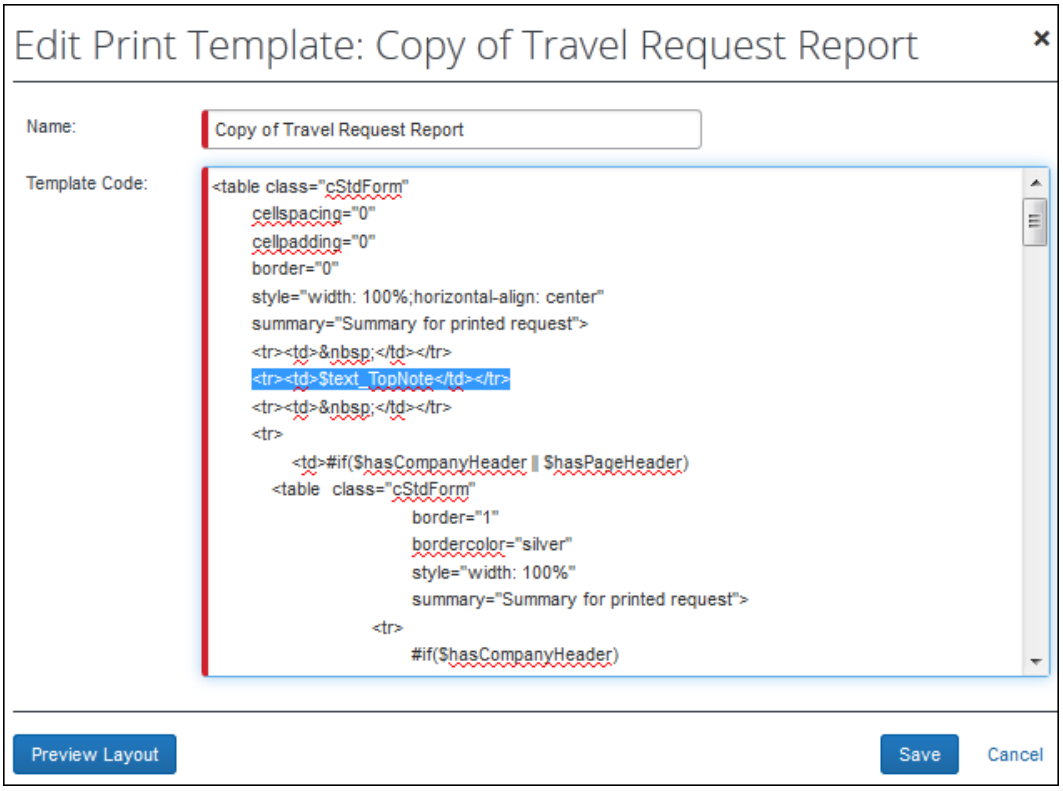
6. Click **Save**.

Adding a New Content ID

In this example, we will add a second section to the TopNote area.

To add a new content ID to the template code:

1. On the **Edit Print Template** page, select the code you want to copy.

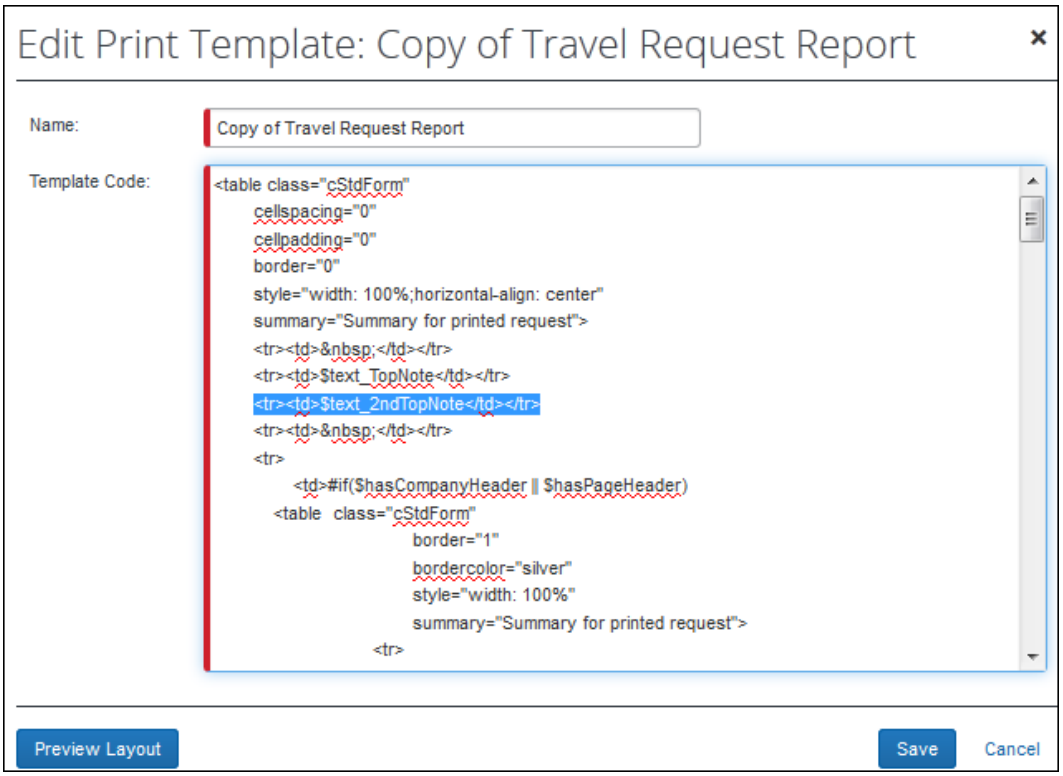


NOTE: As stated in the *Template Code* section, you can copy and paste this entire code into an HTML editor or edit it within this field. If you choose to use another editor, be sure to copy the entire text and copy it within the Body tags.

2. Copy a part of the code that has the same type of content type you want to create, such as *text*. Be sure to include the entire cell and/or table.

3. Paste the code into the desired section.

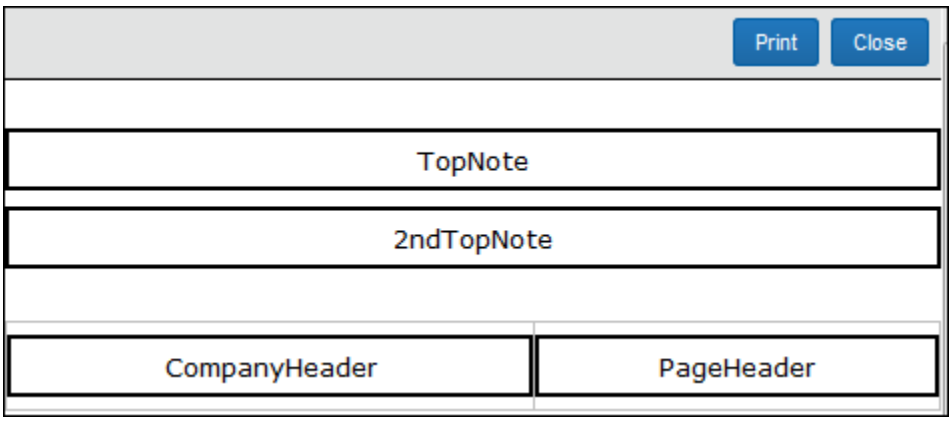
4. Change the Content ID to a unique ID, such as 2ndTopNote.



5. Make any other necessary HTML changes.

6. Click **Preview Layout** to view the layout with your new addition.

   In this case, the 2ndTopNote – added above – looks like this:



7. Click **Save**.

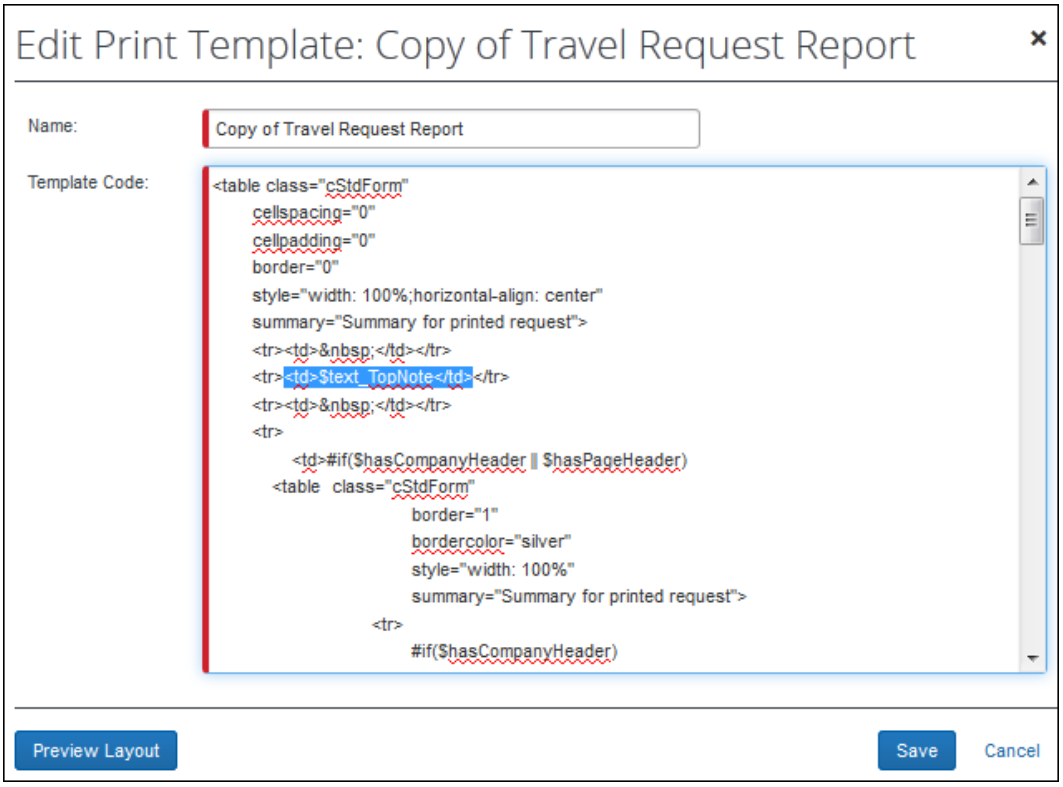
8. When you create a new content ID, the system automatically generates the content ID in Print Formats. Configure the new content ID as described in *Configuring Print Formats* in this guide.

Splitting a Content ID into Two Sections

In this example, we will split the TopNote area into two sections.

To split a content ID into two sections:

1. On the **Edit Print Template** page, select the code you want to copy.

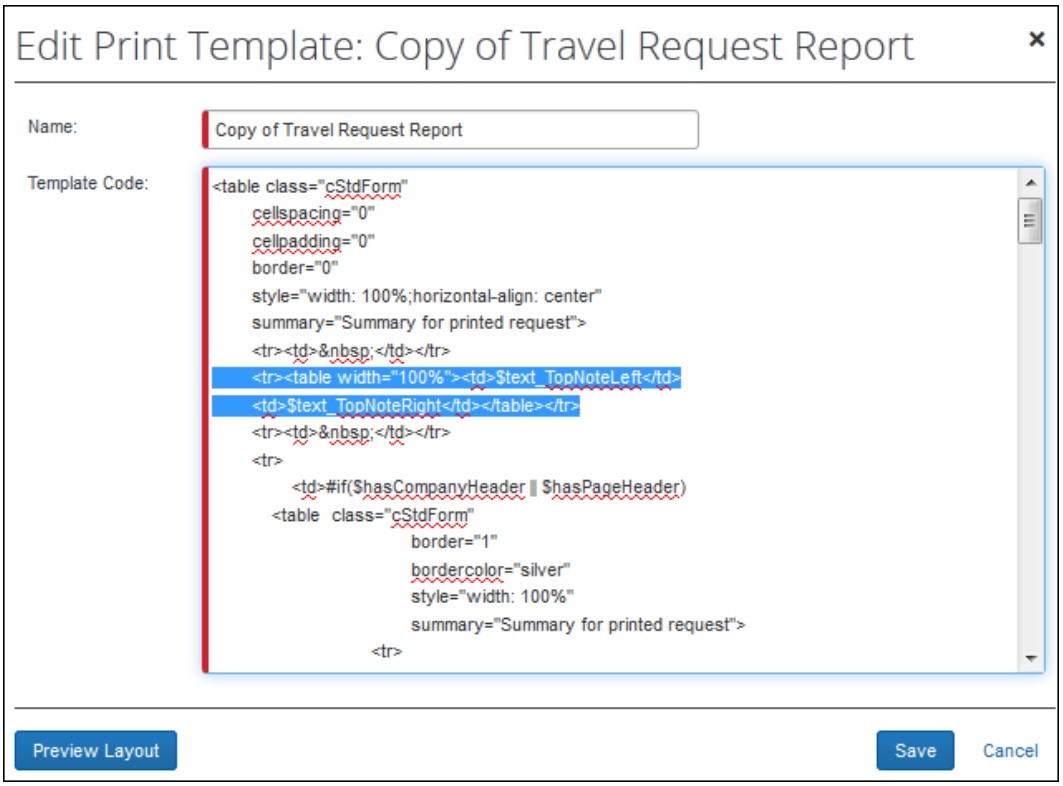


NOTE: As stated in the *Template Code* section, you can copy and paste this entire code into an HTML editor or edit it within this field. If you choose to use another editor, be sure to copy the entire text and copy it within the Body tags.

2. Copy a part of the code that has the same type of content type you want to create, such as text. Be sure to include the entire cell and/or table.

3. Paste the code into the desired section and make the required HTML edits.

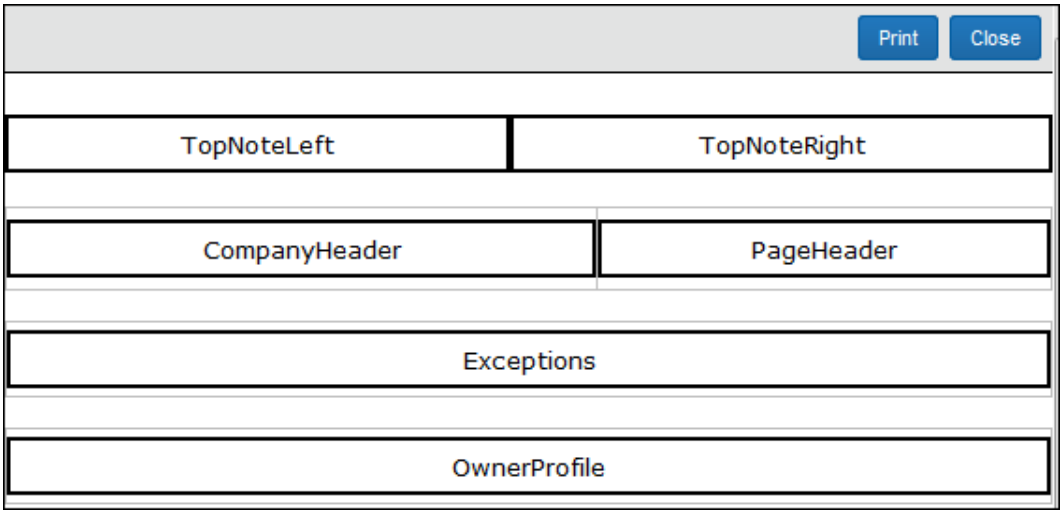
4. Change the Content ID of at least one of the sections, such as TopNoteRight.



There are several ways to achieve these results. In this case, we used a table within a table.

5. Click **Preview Layout** to view the layout with your new addition.

   In this case, the TopNoteLeft and TopNoteRight look like this:



6. Click **Save**.

7. When you create a new content ID, the system automatically generates the content ID in Print Formats. Configure the new content ID as described in *Configuring Print Formats* in this guide.

Section 7: Configuring Print Formats

Overview

Remember:

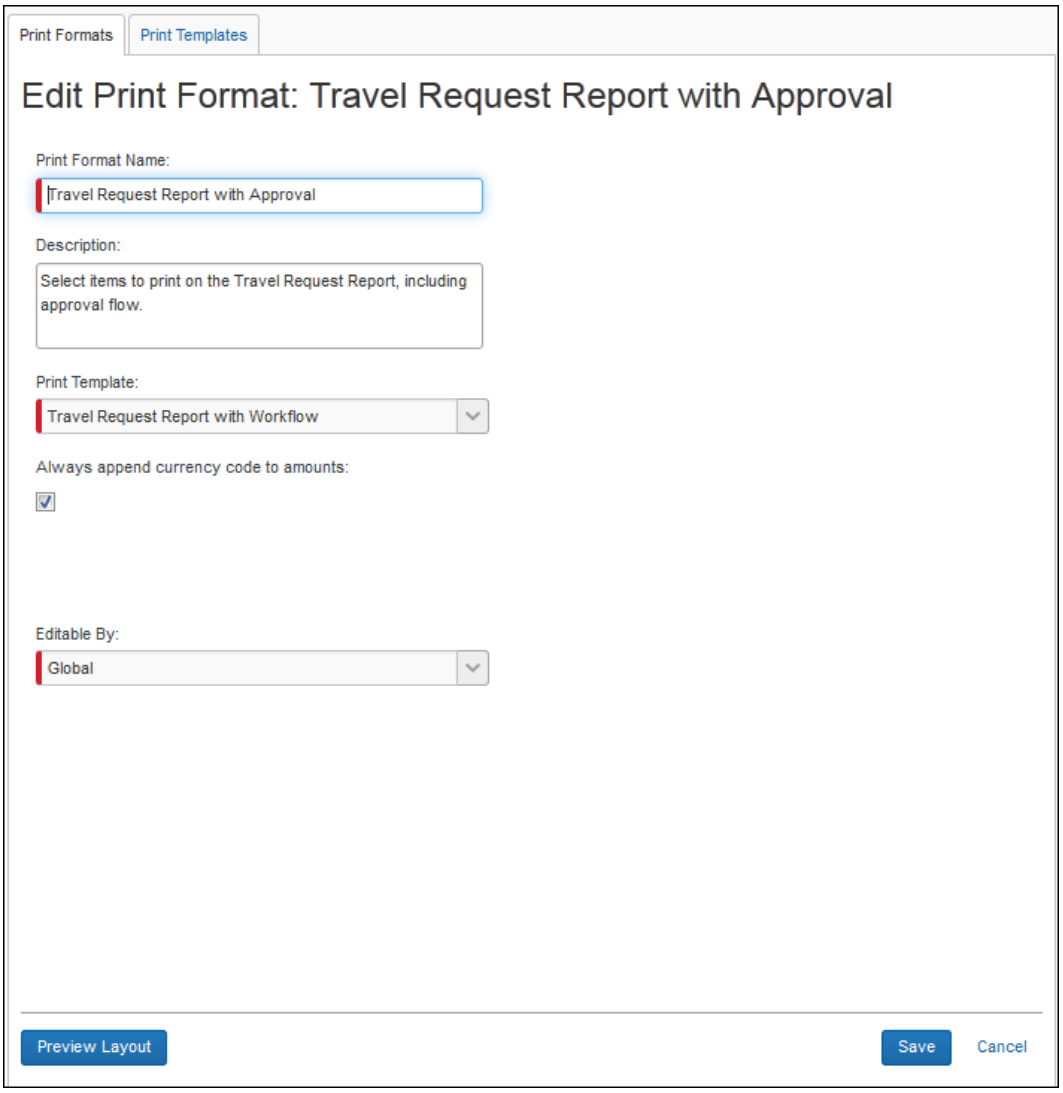
- The ***print template*** defines *where* the data appears on the printed report.
- The ***print format*** defines *what* information appears on the printed report and *how* it looks.

Each print format is owned by the Global or Group administrator who created it. A Global print format can be viewed by a Group administrator, but can be edited only by the Global administrator. A print format created by one Group administrator cannot be viewed by Group administrators of other groups but can be viewed by the Global administrator.

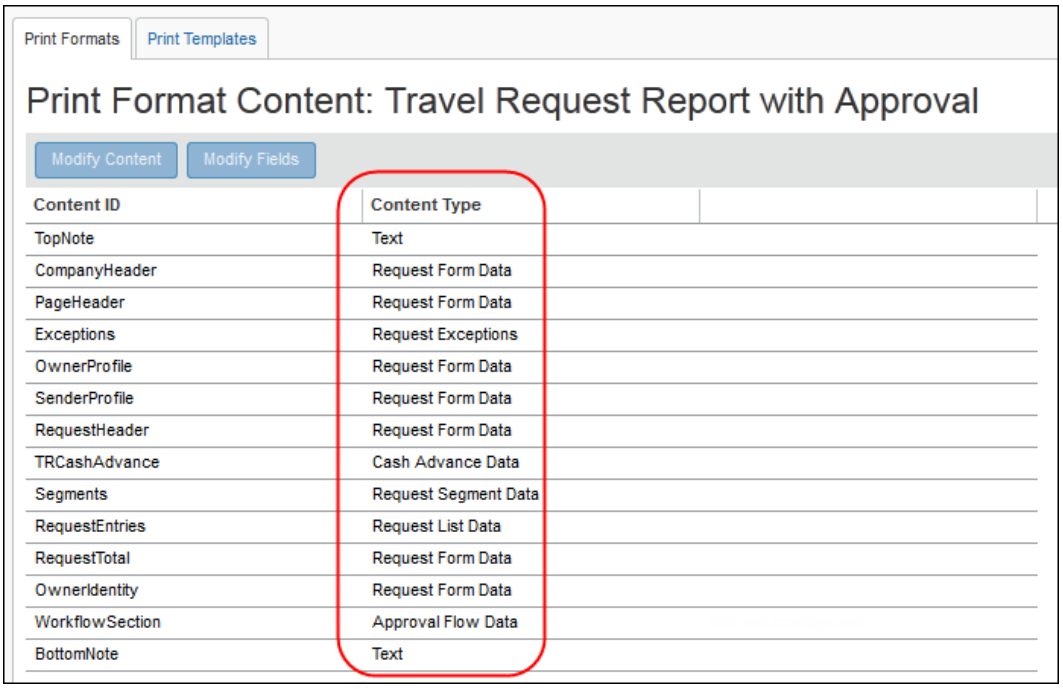
Print Format Components

There are two main components to creating or modifying a print format:

- **General information:** General information includes the name of the print format, the name of the associated print template, and the "editable by" groups.



- **Content:** Content is *what* appears (fields, text in the section headings) and *how* it appears (styles, centering, grouping, etc.). What you can add, what you can change, and how you can format it all depend on the type of content: text, form, list, segment, exception, cash advance – as shown in the **Content Type** column.



As shown in the sample above, there are four buttons – **Modify Content**, **Modify Fields**, **Modify Grouping**, and **Modify Allocation Fields** – at the top of the page. These buttons define the type of modifications you can make to each content type – and they vary by content type.

The table below shows the relationship between the content type and the types of modifications you can make for each.

Content Type	**You can modify.....**			
	Content	**Fields**	**Grouping**	**Allocation Fields**
Text	x			
Form Data	x	x		
List Data	x	x	x	
Segment Data	x	x	x	x* (see note below)
Exceptions	x	x	x	
Cash Advance	x	x		

Content Type	You can modify…..			
Approval Flow Data	x			
Audit Trail	x			

* By default, the **Modify Allocation Fields** button appears only for the *Segment* content type. You can, however, have it appear for the *List* (request entries) content type. (Technically, you can also have it appear for *Cash Advance* and *Exceptions* but its usefulness is limited.) For more information, refer to the information about the **Enable customization of allocation details for expenses field** in this guide.

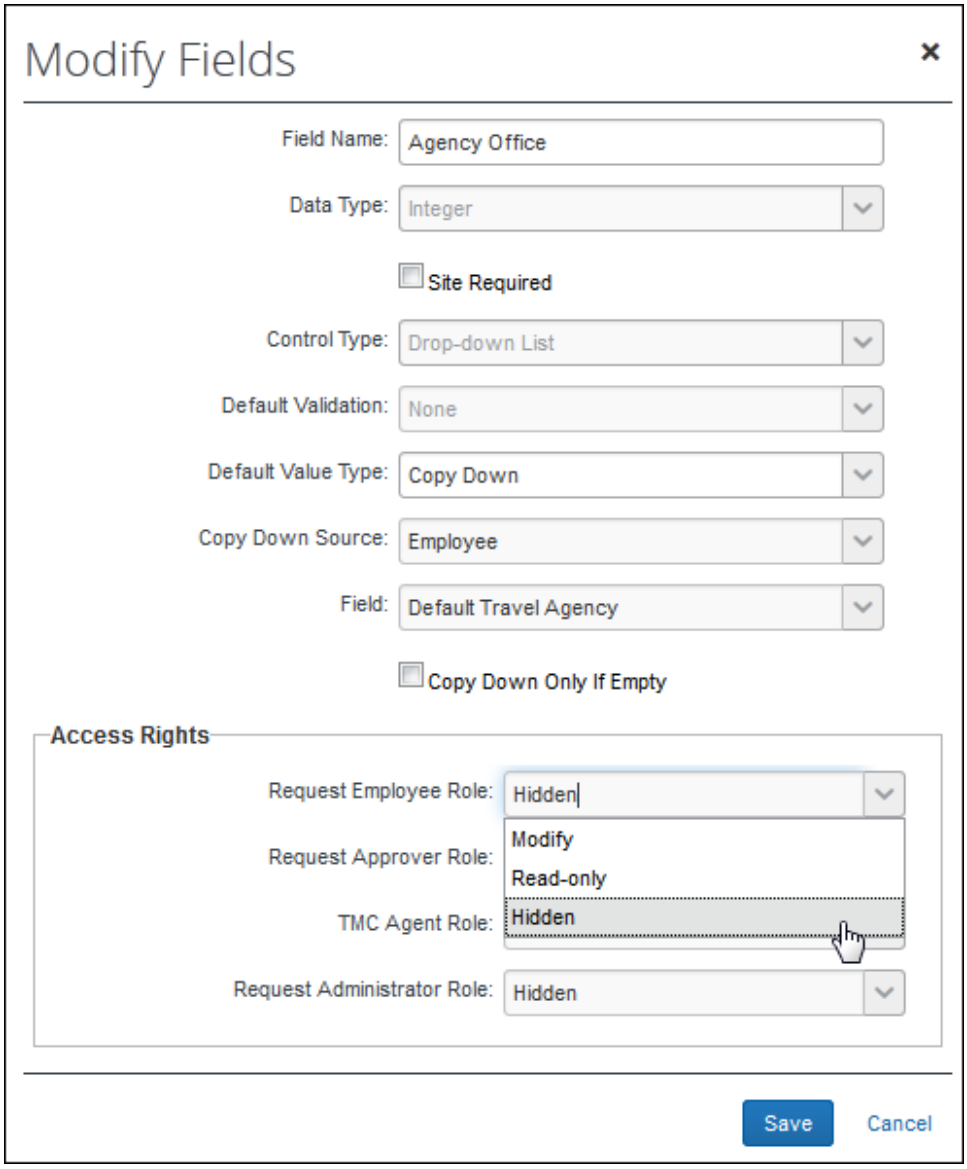
Important: Hidden Fields and Visibility in Printed Reports

Most fields can be added to a printed report, as described on the following pages. However, whether or not a field actually displays on the printed report is determined by these additional factors:

- The field access settings of a field, such as Hidden or Read-Only, as defined on the **Fields** tab of Forms and Fields. The visibility settings on the **Form Fields** tab in Forms and Fields do not apply to the printed reports.
  – and –
- The role of the user printing the report.

If a field is marked as Hidden for the Request Employee Role (on the **Fields** tab of Forms and Fields) and that field is included in a printed report, that field will not appear on the printed report for the employee. This logic also applies to the approver and processor roles.

In this case, if you wanted that field to appear on the printed report for employees, then that field must be set to Read-only or Modify – ***not*** Hidden.

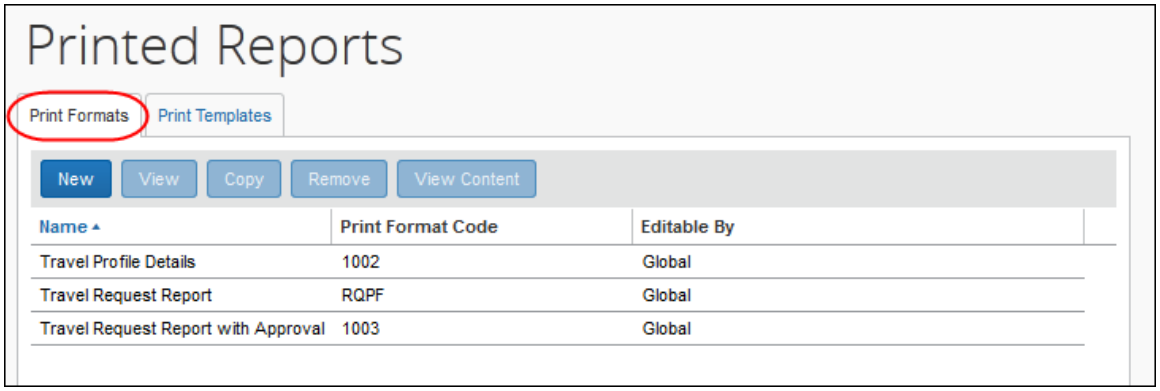


NOTE: This is set at the field level - not the form field level.

Accessing Print Formats

To access Print Formats:

Click **Administration** > **Request** > **Printed Reports**.
The **Print Formats** tab of the **Printed Reports** page appears.



Adding a Print Format – General Information Portion

There are two ways to add a new print format:

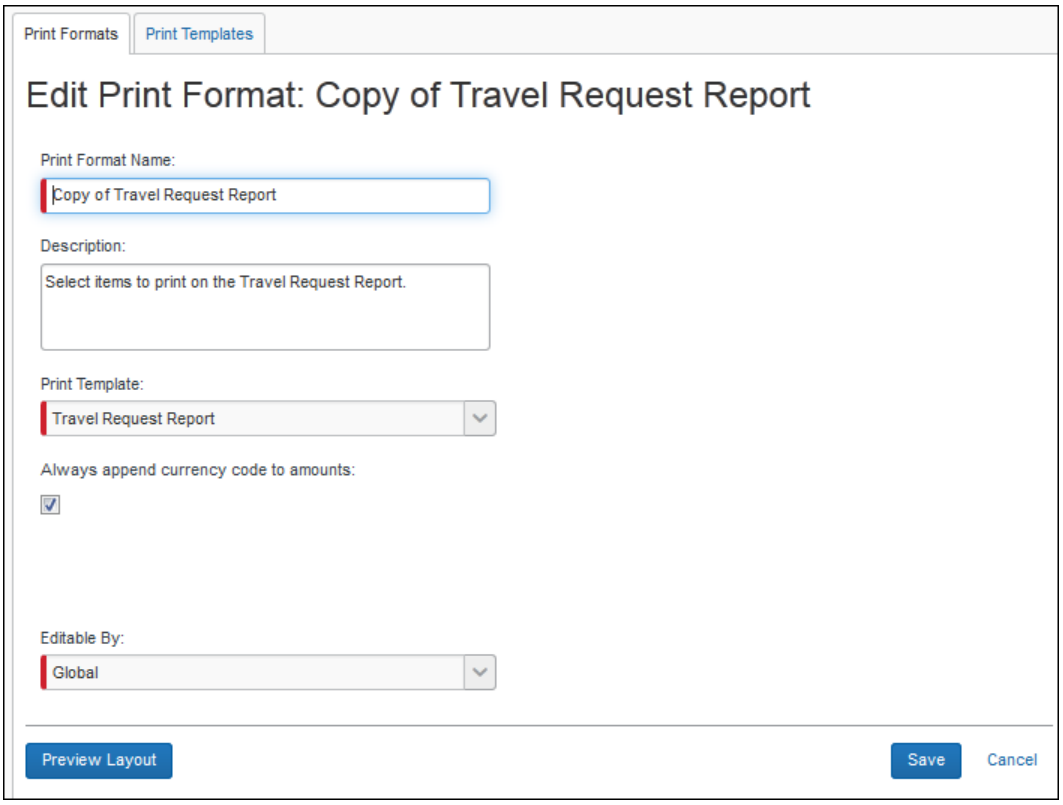
- **New:** With this method, you create a generic printed report based on the selected template. Then, you navigate through the various sections and make the desired customizations.
- **Copy:** With this method, you create a copy of an existing printed report. Then, you navigate through the various sections and make the desired customizations.

NOTE: Copying an existing print format, such as the default Travel Request Report, takes much less work as the Content sections are already configured.

To edit the general information portion of a print format:

1. On the **Print Formats** tab, either:
   - Click **New** to add a new print format.
     – or –
   - Click an existing format and then click **Copy**.

The **Add Print Format** or **Edit Print Format** page (whichever is applicable) appears.



2. Complete or edit all applicable fields.

Field	Description
Print Format Name	Enter or edit the name, which must be unique.
Description	Type a description of this format.
Print Template	Select the print template that you will use for the layout. As described previously, the template determines the *layout* of the various sections of the printed report.
Always append currency code to amounts	Select (enable) this check box to display the currency symbol if it is available (£, $, €…). If the symbol is not available, the 3-character ISO currency code (USD, CAD, etc.) appears on the printed report. **NOTE:** Printed reports sent by email only support the 3-character ISO currency code.
Editable By	Select the group rights that an administrator must have to modify this print format.

3. Click **Preview Layout** to display the template layout that you have chosen.

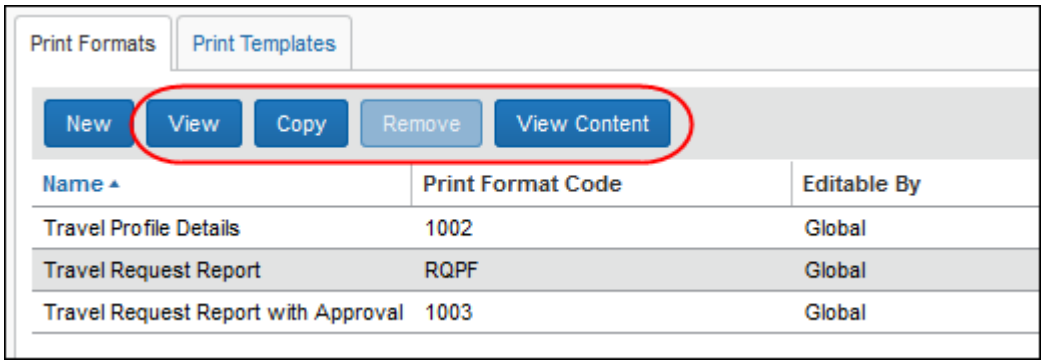
4. Click **Save**.

Editing a Print Format – Modify Content (Styles, Headings, Text, Grouping)

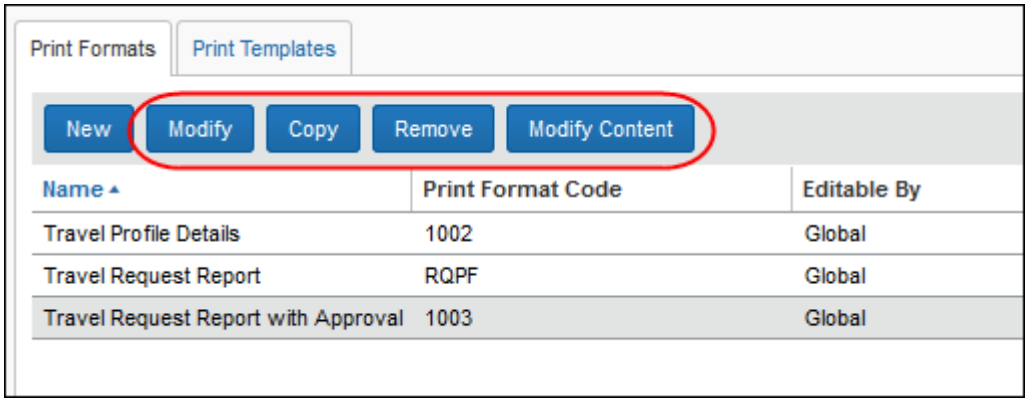
Regardless of whether you create a new format or copy an existing one, the next step is to edit the printed report to meet your needs.

View vs Modify

Be aware that not all content can be edited. For example, when you select the *default* printed report, you can view the "general information" (**View** button) and view the content (**View Content** button).



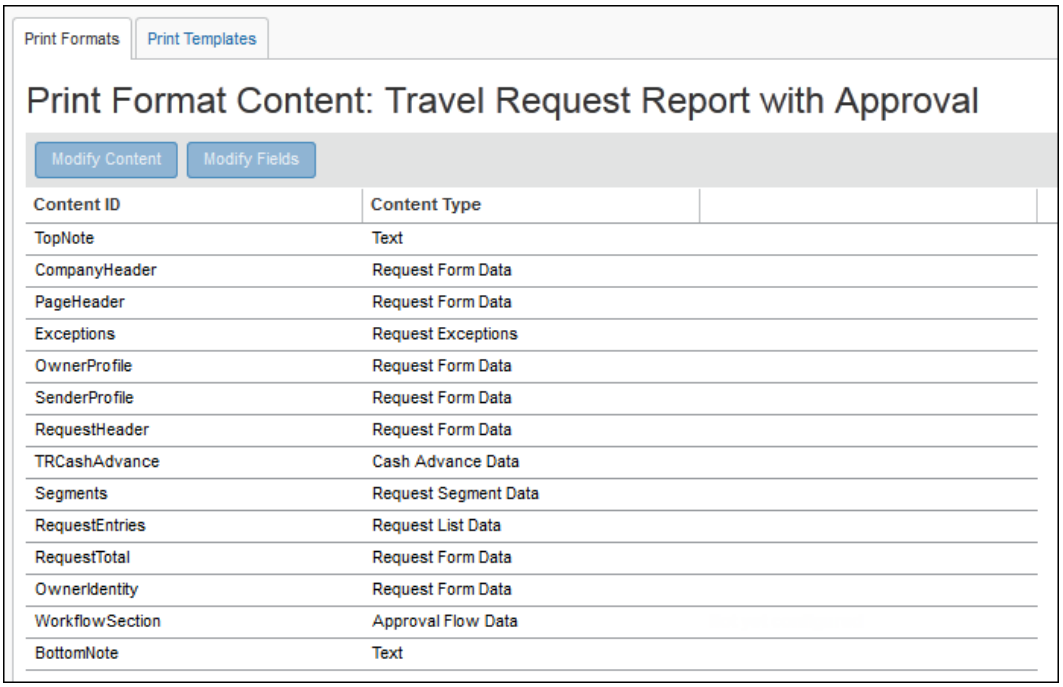
When you select a print format that you created (or have rights to), the **View** and **View Content** buttons become **Modify** and **Modify Content**.



Modifying Content – Styles, Heading, and Text

To modify the content:

1. On the **Printed Formats** tab, click the desired format.
2. Click **Modify Content**. The **Print Format Content** page appears.



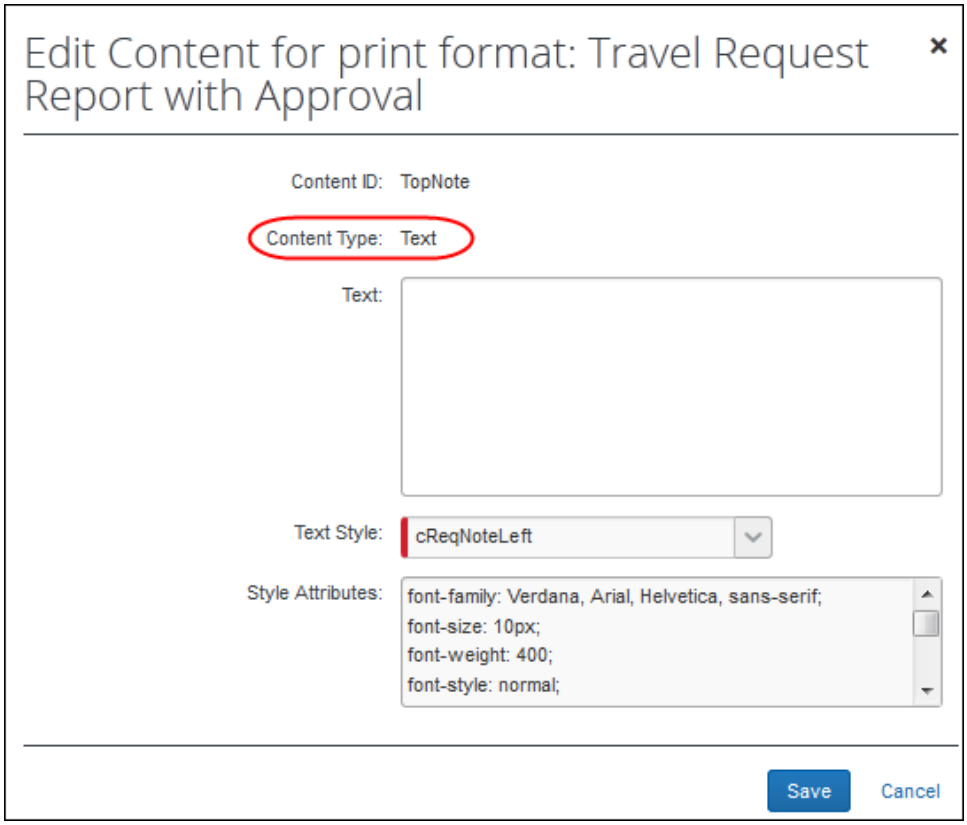
Content ID	Content Type
TopNote	Text
CompanyHeader	Request Form Data
PageHeader	Request Form Data
Exceptions	Request Exceptions
OwnerProfile	Request Form Data
SenderProfile	Request Form Data
RequestHeader	Request Form Data
TRCashAdvance	Cash Advance Data
Segments	Request Segment Data
RequestEntries	Request List Data
RequestTotal	Request Form Data
OwnerIdentity	Request Form Data
WorkflowSection	Approval Flow Data
BottomNote	Text

NOTE: You cannot remove any sections (Content IDs) from this page; however, if there are no fields or text in the section, then that section does not print on the printed report.

3. On the **Print Format Content** page, click a Content ID.

4. Click **Modify Content**. The **Edit Content for print format** page appears. The fields that appear on the page differ by content type.

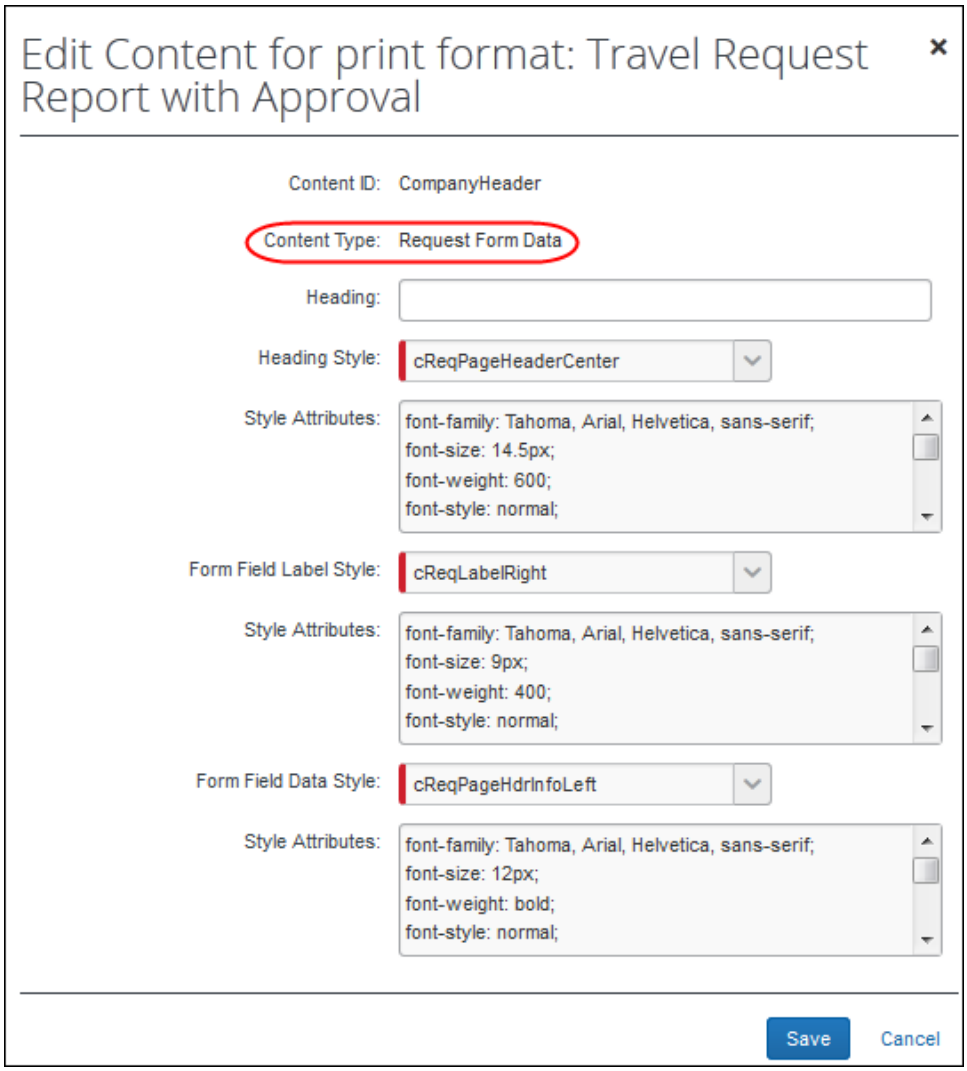
   - Content type: ***Text***



Field	Description
Content ID Content Type	Read-only

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Text</td><td>For the Text field, the maximum length is 1000 characters.
You can use some special character tags that are replaced by the equivalent HTML tags. The supported special character tags are:
<table>
<tr><th>Purpose</th><th>Special Tags</th><th>HTML Tag Inserted</th></tr>
<tr><td>Bold</td><td>[b] [/b]</td><td> </td></tr>
<tr><td>Italic</td><td>[i] [/i]</td><td> </td></tr>
<tr><td>Underlined</td><td>[u] [/u]</td><td><u> </u></td></tr>
<tr><td>Numbered list</td><td>[ol] [/ol]</td><td> </td></tr>
<tr><td>Bulleted list</td><td>[ul] [/ul]</td><td> </td></tr>
<tr><td>List item</td><td>[li] [/li]</td><td> </td></tr>
<tr><td>Line space</td><td>[br]</td><td>
</td></tr>
<tr><td>Anchor tag</td><td>[a name=] [/a]</td><td>(a name=value) (/a)</td></tr>
<tr><td>Link</td><td>[a href= value] [/a]</td><td>(a href=value) (/a)</td></tr>
</table>
NOTES:
• All characters in the square brackets MUST be in lower case.
• When using the Travel Details text content ID, leave this field blank.</td></tr>
<tr><td>Styles/Attributes</td><td>Each style list has a Style Attributes field, which describes the formatting associated with the style shown in the list above it.
You can select a different style from the list if desired.
📖 Refer to the Matching the Default Printed Report Style section in this guide for more information.</td></tr>
</table>

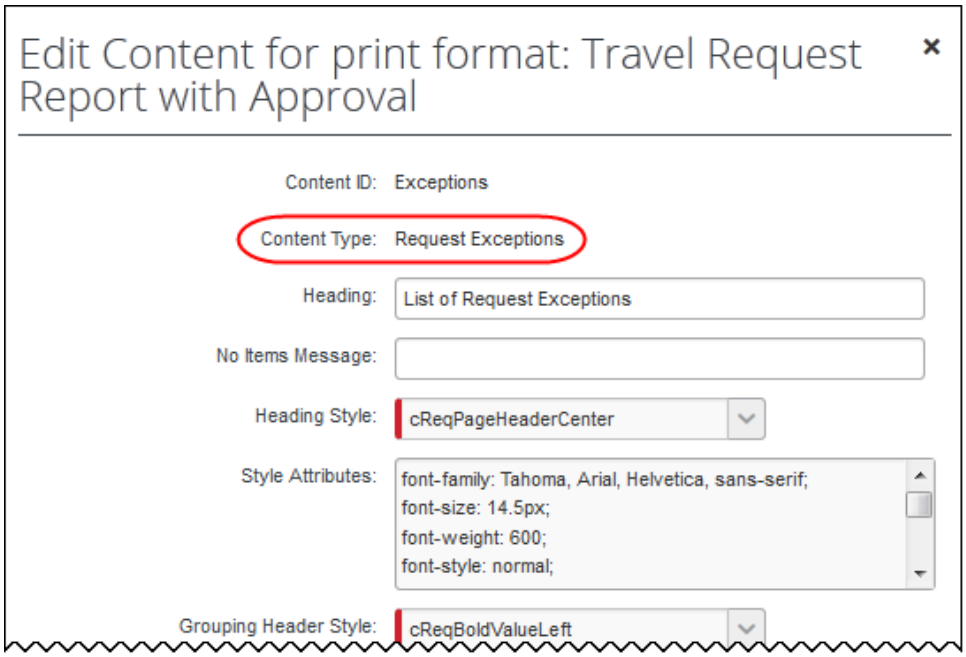
- Content type: ***Data***



Field	Description
Content ID Content Type	Read-only
Heading	Text that is displayed directly above the fields for this section on the printed report. If the style is centered, then the heading is centered to the width of the form data fields. Maximum length is 256 characters. You can use the formatting tags (for example, bold and italic) described for the **Text** field in the Text content type.

Field	Description
Styles/Style Attributes	Each style list has a **Style Attributes** field, which describes the formatting associated with the style shown in the list above it. You can select a different style from the list if desired. Refer to the *Matching the Default Printed Report Style* section in this guide for more information.

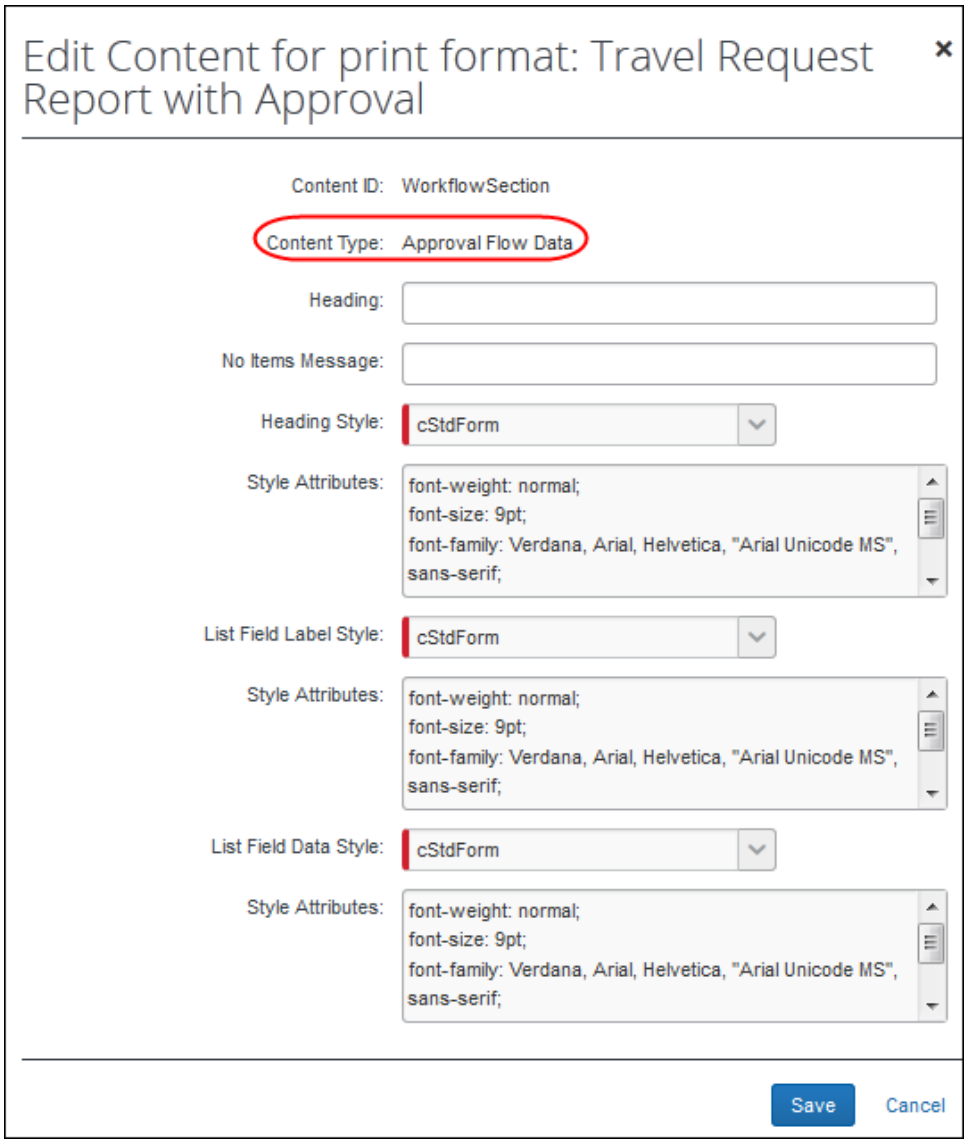
- Content type: ***Exception / Segment / Cash Advance / List***



Field	Description
Content ID Content Type	Read-only
Heading	Text that is displayed directly above the fields for this section on the printed report. If the style is centered, then the heading is centered to the width of the form data fields. Maximum length is 256 characters. You can use the formatting tags (for example, bold and italic) described for the **Text** field in the Text content type.
No Items Message	Text that you want displayed on the printed report if there are no items in the request to be printed in this section. If this field is blank and no items match the list at print time, then nothing appears in this section. Maximum length is 256 characters.

Field	Description
Styles/Style Attributes	Each style list has a **Style Attributes** field, which describes the formatting associated with the style shown in the list above it. You can select a different style from the list if desired. 📖 Refer to the *Matching the Default Printed Report Style* section in this guide for more information.
Enable customization of allocation details for expenses	By default, this check box is selected for the *Segment* content type – and so the **Modify Allocation Fields** button appears on the **Print Format Content** page. You can have the **Modify Allocation Fields** button appear for the *Exception*, *Cash Advance*, and *List* content types by selecting this check box when editing the different content types.
Include entries with no amounts	Select (enable) this check box to display request entries with amount equal to zero or null. Segments, for example, may not have amounts but expected expenses would. You can decide to have only the entries with amounts display. Another example: an employee could also create an entry to get the authorization to use their personal car but there would not be an amount entered.
Include divider line between expenses	Select this check box to display a divider line between each row of expenses in the list.

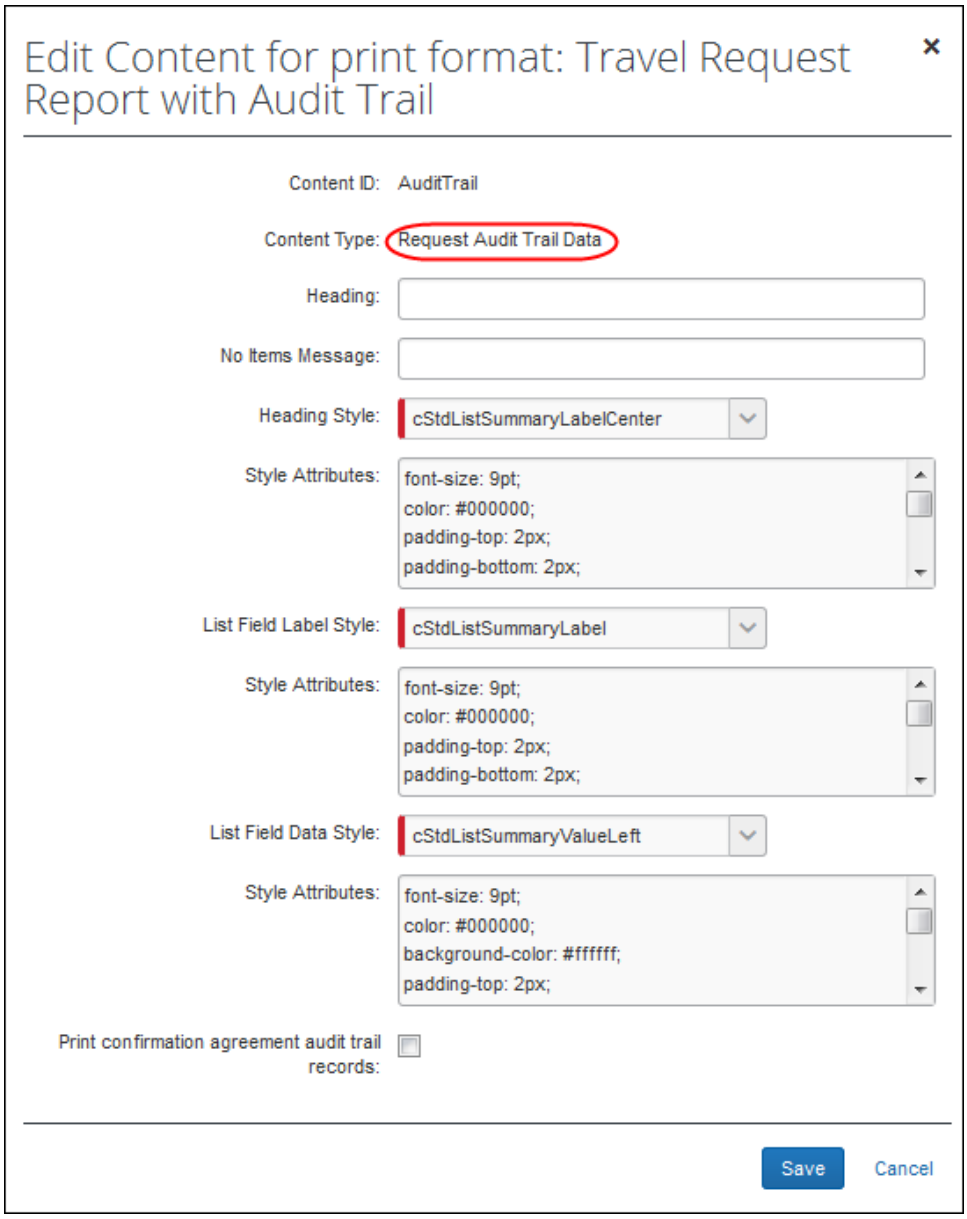
- Content type: ***Approval Flow Data***



Field	Description
Content ID Content Type	Read-only
Heading	Text that is displayed directly above the fields for this section on the printed report. If the style is centered, then the heading is centered to the width of the form data fields. Maximum length is 256 characters. You can use the formatting tags (for example, bold and italic) described for the **Text** field in the Text content type.

Field	Description
No Items Message	Text that you want displayed on the printed report if there are no items in the request to be printed in this section. If this field is blank and no items match the list at print time, then nothing appears in this section. Maximum length is 256 characters.
Styles/Style Attributes	Each style list has a **Style Attributes** field, which describes the formatting associated with the style shown in the list above it. You can select a different style from the list if desired. 📖 Refer to the *Matching the Default Printed Report Style* section in this guide for more information.

- Content type: ***Audit Trail***



Field	Description
Content ID Content Type	Read-only
Heading	Text that is displayed directly above the fields for this section on the printed report. If the style is centered, then the heading is centered to the width of the form data fields. Maximum length is 256 characters. You can use the formatting tags (for example, bold and italic) described for the **Text** field in the Text content type.

Field	Description
No Items Message	Text that you want displayed on the printed report if there are no items in the request to be printed in this section. If this field is blank and no items match the list at print time, then nothing appears in this section. Maximum length is 256 characters.
Styles/Style Attributes	Each style list has a **Style Attributes** field, which describes the formatting associated with the style shown in the list above it. You can select a different style from the list if desired. 📖 Refer to the *Matching the Default Printed Report Style* section in this guide for more information.
Print confirmation agreement audit trail records	Select this checkbox to include confirmation agreement audit trail records in this section.

5. Click **Save**.

Modifying Content – Fields

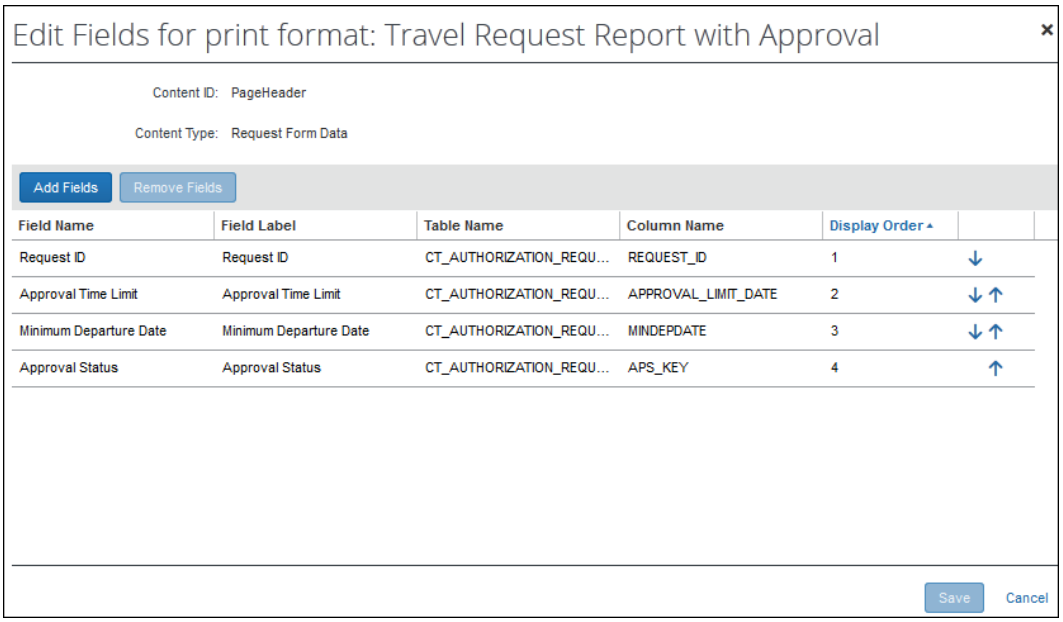
You can add, remove, and reorder fields.

📖 Refer to *Important: Hidden Fields and Visibility in Printed Reports* in this guide.

NOTE: The **Modify Fields** option is available for all content types except *Text*.

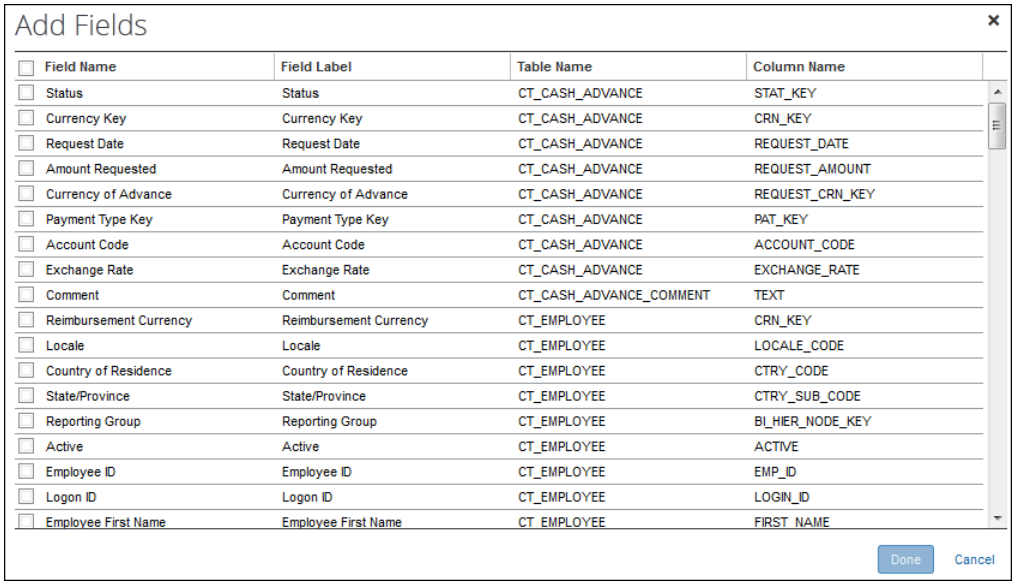
To modify fields:

1. Click the desired row on the **Print Format Content** page.
2. Click **Modify Fields**. The **Edit Fields for print format** page appears.



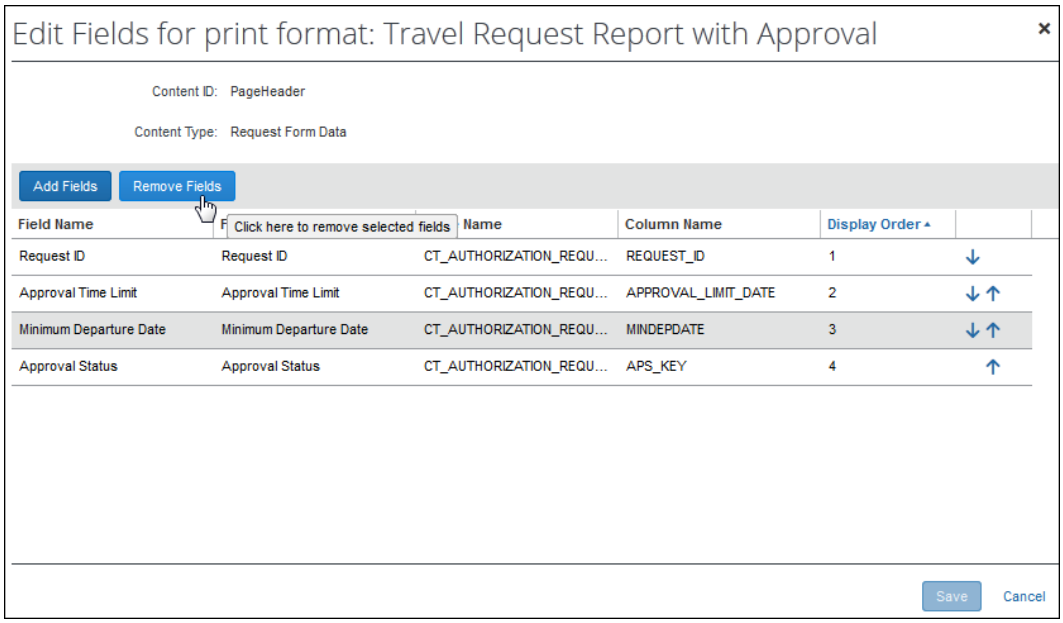
Field Name	Field Label	Table Name	Column Name	Display Order
Request ID	Request ID	CT_AUTHORIZATION_REQU...	REQUEST_ID	1
Approval Time Limit	Approval Time Limit	CT_AUTHORIZATION_REQU...	APPROVAL_LIMIT_DATE	2
Minimum Departure Date	Minimum Departure Date	CT_AUTHORIZATION_REQU...	MINDEPDATE	3
Approval Status	Approval Status	CT_AUTHORIZATION_REQU...	APS_KEY	4

- To add fields, click **Add Fields**. The **Add Fields** window appears. Select one or more fields and click **Done**.



Field Name	Field Label	Table Name	Column Name
Status	Status	CT_CASH_ADVANCE	STAT_KEY
Currency Key	Currency Key	CT_CASH_ADVANCE	CRN_KEY
Request Date	Request Date	CT_CASH_ADVANCE	REQUEST_DATE
Amount Requested	Amount Requested	CT_CASH_ADVANCE	REQUEST_AMOUNT
Currency of Advance	Currency of Advance	CT_CASH_ADVANCE	REQUEST_CRN_KEY
Payment Type Key	Payment Type Key	CT_CASH_ADVANCE	PAT_KEY
Account Code	Account Code	CT_CASH_ADVANCE	ACCOUNT_CODE
Exchange Rate	Exchange Rate	CT_CASH_ADVANCE	EXCHANGE_RATE
Comment	Comment	CT_CASH_ADVANCE_COMMENT	TEXT
Reimbursement Currency	Reimbursement Currency	CT_EMPLOYEE	CRN_KEY
Locale	Locale	CT_EMPLOYEE	LOCALE_CODE
Country of Residence	Country of Residence	CT_EMPLOYEE	CTRY_CODE
State/Province	State/Province	CT_EMPLOYEE	CTRY_SUB_CODE
Reporting Group	Reporting Group	CT_EMPLOYEE	BI_HIER_NODE_KEY
Active	Active	CT_EMPLOYEE	ACTIVE
Employee ID	Employee ID	CT_EMPLOYEE	EMP_ID
Logon ID	Logon ID	CT_EMPLOYEE	LOGIN_ID
Employee First Name	Employee First Name	CT_EMPLOYEE	FIRST_NAME

- To remove fields, select the desired field(s) and click **Remove Fields**.



- To reorder fields, use the blue arrows in the right-most column.

3. Click **Save**.

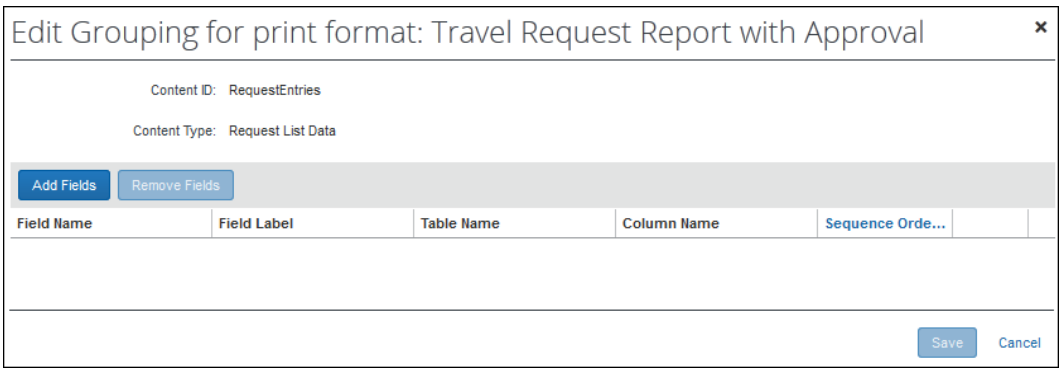
Modifying Content – Grouping

You can group data, for example, by expense type.

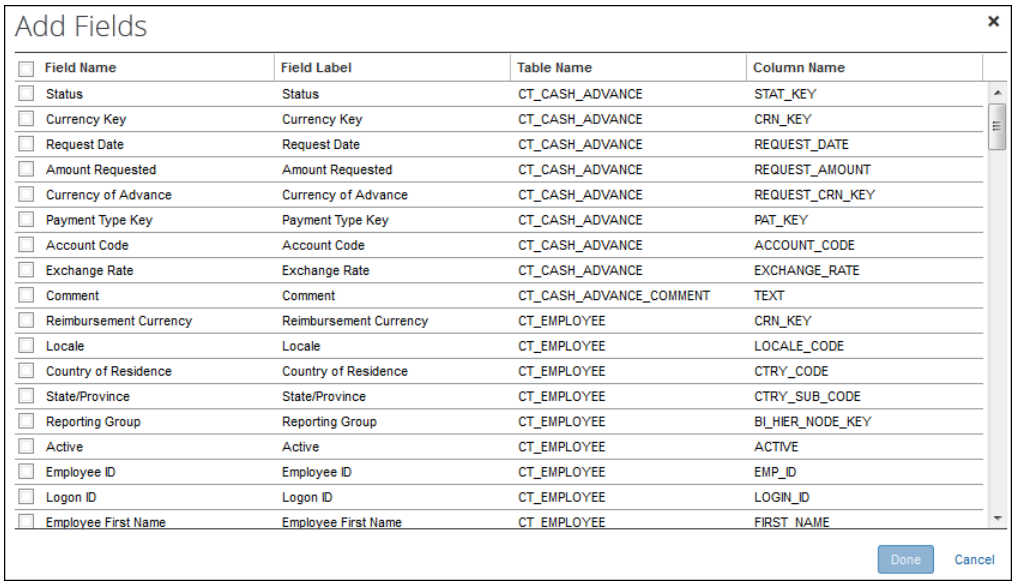
NOTE: The **Modify Grouping** option is available only for *List*, *Segment*, and *Data* content types.

To group data:

1. Select the desired row on the **Print Format Content** page.
2. Click **Modify Grouping**. The **Edit Grouping for print format** page appears.

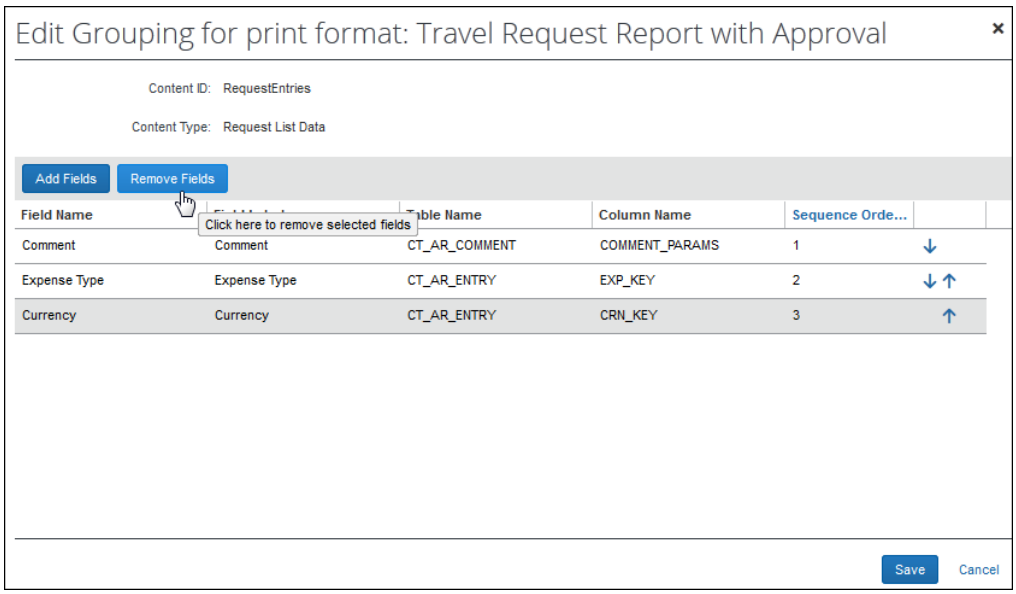


- To add fields, click **Add Fields**. The **Add Fields** window appears. Select one or more fields and click **Done**.



Field Name	Field Label	Table Name	Column Name
Status	Status	CT_CASH_ADVANCE	STAT_KEY
Currency Key	Currency Key	CT_CASH_ADVANCE	CRN_KEY
Request Date	Request Date	CT_CASH_ADVANCE	REQUEST_DATE
Amount Requested	Amount Requested	CT_CASH_ADVANCE	REQUEST_AMOUNT
Currency of Advance	Currency of Advance	CT_CASH_ADVANCE	REQUEST_CRN_KEY
Payment Type Key	Payment Type Key	CT_CASH_ADVANCE	PAT_KEY
Account Code	Account Code	CT_CASH_ADVANCE	ACCOUNT_CODE
Exchange Rate	Exchange Rate	CT_CASH_ADVANCE	EXCHANGE_RATE
Comment	Comment	CT_CASH_ADVANCE_COMMENT	TEXT
Reimbursement Currency	Reimbursement Currency	CT_EMPLOYEE	CRN_KEY
Locale	Locale	CT_EMPLOYEE	LOCALE_CODE
Country of Residence	Country of Residence	CT_EMPLOYEE	CTRY_CODE
State/Province	State/Province	CT_EMPLOYEE	CTRY_SUB_CODE
Reporting Group	Reporting Group	CT_EMPLOYEE	BI_HIER_NODE_KEY
Active	Active	CT_EMPLOYEE	ACTIVE
Employee ID	Employee ID	CT_EMPLOYEE	EMP_ID
Logon ID	Logon ID	CT_EMPLOYEE	LOGIN_ID
Employee First Name	Employee First Name	CT_EMPLOYEE	FIRST_NAME

- To remove fields, select the desired field(s) and click **Remove Fields**.



Field Name		Table Name	Column Name	Sequence Orde...
Comment	Comment	CT_AR_COMMENT	COMMENT_PARAMS	1
Expense Type	Expense Type	CT_AR_ENTRY	EXP_KEY	2
Currency	Currency	CT_AR_ENTRY	CRN_KEY	3

- To reorder fields (if there is more than one field), use the blue arrows in the right-most column.

3. Click **Save**.

Modifying Content – Allocations

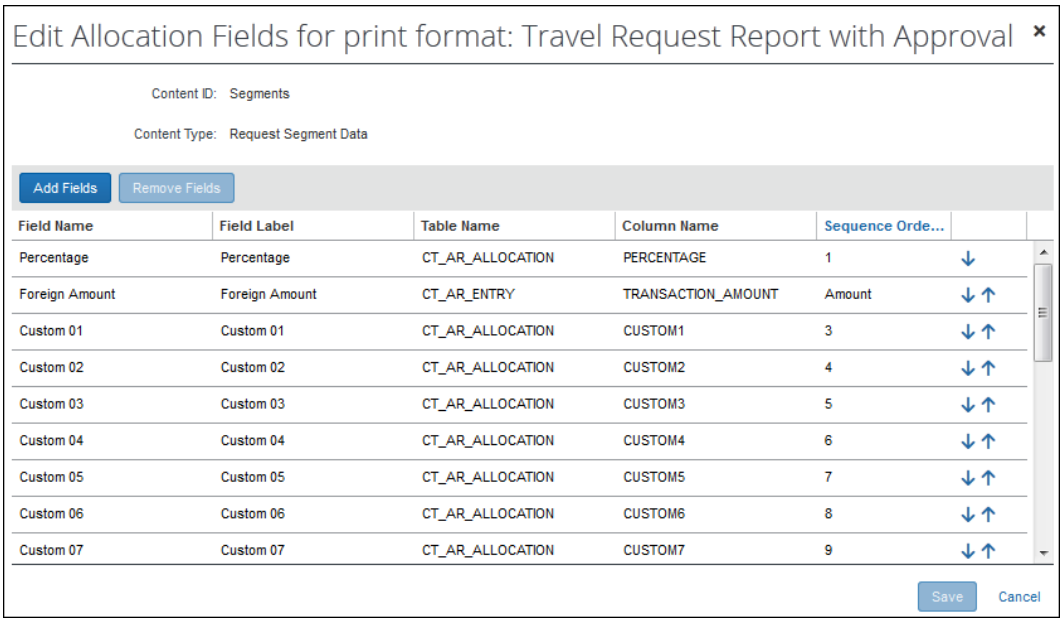
You can add, remove, and reorder allocation fields.

NOTE: The **Modify Allocation Fields** option is – by default – available only for *Segment* content type. You can have the option appear for the *Exception*, *Cash Advance*, and *List* content types using the **Enable customization of allocation details for expenses** field on the **Edit Content for print format** page.

To modify the allocation fields:

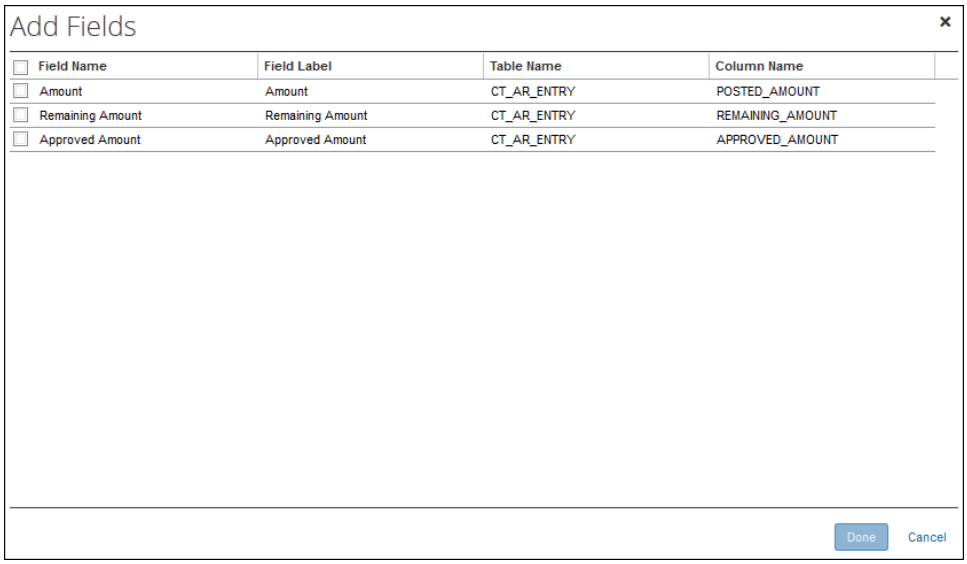
1. Select the desired row on the **Print Format Content** page.

2. Click **Modify Allocation Fields**. The **Edit Allocation Fields for print format** page appears.

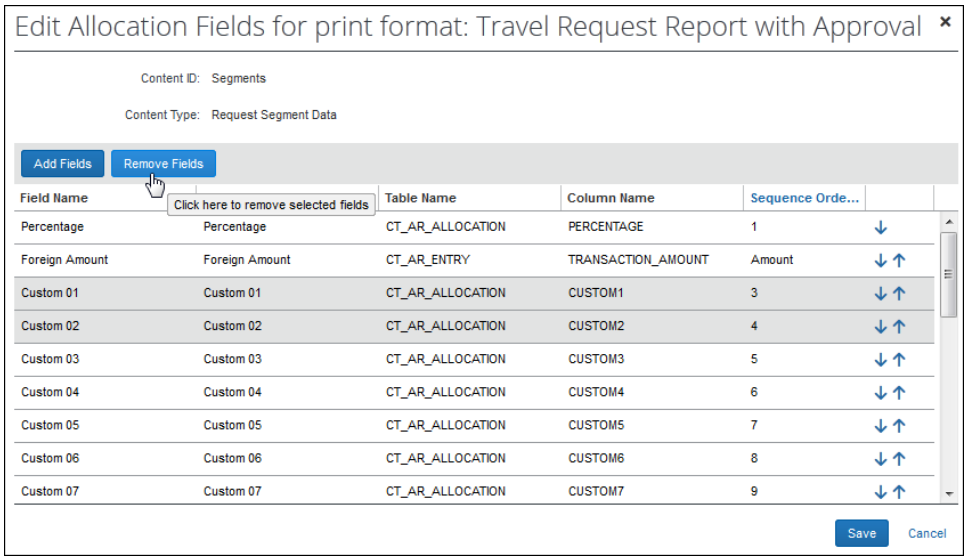


Field Name	Field Label	Table Name	Column Name	Sequence Orde...
Percentage	Percentage	CT_AR_ALLOCATION	PERCENTAGE	1
Foreign Amount	Foreign Amount	CT_AR_ENTRY	TRANSACTION_AMOUNT	Amount
Custom 01	Custom 01	CT_AR_ALLOCATION	CUSTOM1	3
Custom 02	Custom 02	CT_AR_ALLOCATION	CUSTOM2	4
Custom 03	Custom 03	CT_AR_ALLOCATION	CUSTOM3	5
Custom 04	Custom 04	CT_AR_ALLOCATION	CUSTOM4	6
Custom 05	Custom 05	CT_AR_ALLOCATION	CUSTOM5	7
Custom 06	Custom 06	CT_AR_ALLOCATION	CUSTOM6	8
Custom 07	Custom 07	CT_AR_ALLOCATION	CUSTOM7	9

- To add fields, click **Add Fields**. The **Add Fields** window appears. Select one or more fields and click **Done**.



- To remove fields, select the desired field(s) and click **Remove Fields**.

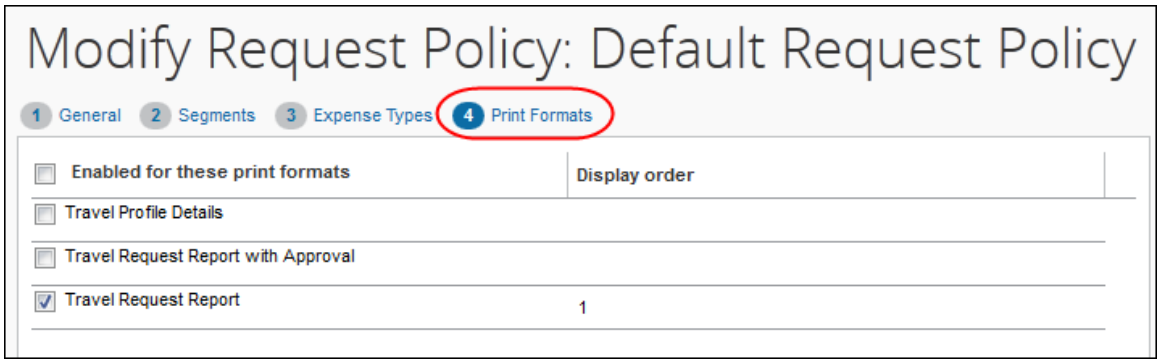


- To reorder fields, use the blue arrows in the right-most column.

3. Click **Save**.

Assigning a Print Format to a Request Policy

Once you have created a new printed format, you can assign it to one or more Concur Request policies.



For more information, refer to the *Concur Request: Policies and Groups Setup Guide*.