- CLIENT FAQ -
Request (formerly Travel Request)
October 26 2016

Questions

Request / Concur Request / Authorization Request

Be aware that the Request service is referred to as Authorization Request, Concur Request, or simply Request.

Concur Request – Terminology

1. What is a request?

A request is used to obtain pre-approval for an expense, for example, a trip. For travel pre-approval, it can include travel segments (like airfare, car, etc.), expected expenses (like meals, seminar fees, etc.), and cash advances (for tips, taxi, etc.). Requests allow a company to better manage travel spend.

Requests can also be used to obtain pre-approval for other types of expenses, such as subscriptions, business meals, office equipment, electronics, etc.

Concur Request is highly configurable and can meet the needs of many different types of clients. Concur Request can be:

- Implemented as a stand-alone service

- Integrated with Concur Travel

- Integrated with Concur Expense
  – or –

- Integrated with both Concur Travel and Concur Expense

2. **For travel-related pre-approvals, what does *Self-booked* and *Agency-booked* mean? How are they different?**

   Definitions:
   - **Self-booked:** The trip is booked entirely by the user in Concur Travel.
   - **Agency-booked:** The trip is booked entirely by the travel agency after receiving email notification from Concur.
   - **Mixed:** Some segments are booked by the user; some segments are booked by the travel agency.

   Note the following:
   - *Self-booked* segments occur only when Concur Request is integrated with Concur Travel.
   - *Agency-booked* segments occur when Concur Request is implemented as a stand-alone service or is integrated with Concur Expense. Agency-booked segments ***may*** occur when Concur Request is integrated with Concur Travel or is integrated with Concur Expense and Concur Travel.

3. **What does *TMC* mean?**

   Travel Management Company / Travel Agency

Concur Request – General Information

1. **How is Concur Request different from the trip pre-approval feature in Concur Travel?**

   It is similar to Concur Travel's trip pre-approval feature in that it requires a traveler to obtain approval before a trip can be booked. Unlike Concur Travel's pre-approval feature, Concur Request also includes:
   - Multiple and intricate (if desired) approval workflows, rules, fields, and forms
   - Specialized approvers based on the request amount or rule violation level
   - Attached images (for receipts, scheduled events, or descriptions) for approvers to review
   - Cost allocation (to divide the cost of the trip among cost centers or projects)
   - Cash advances (for tips, taxi, travel allowances, etc.)
   - Email sent to the travel agency for pre-booking, booking, and cancellation
   - Email reminders and confirmations for the traveler and approver
   - Customizable segments that are included in the trip but are not necessarily related to travel (like events and meetings)

   Note that customized workflows are no longer implemented in Concur Travel and will rely on Concur Request workflow capabilities.

2. How is Concur Request different from the legacy Authorization Request feature in Concur Expense?

The major difference is that Concur Request is specifically designed for the deeper details and intricacies of a wide variety of pre-approvals – while the Authorization Request feature in Expense was shallower in detail.

Concur Request also provides more options. Request has more sophisticated workflow options than the legacy Authorization Request feature and can be configured to send an email to the travel agency when the traveler creates the request (for pre-booking) and another email on approval of the request (for final booking). Also, the traveler can attach images for the approver, can allocate the request, and can include cash advances and expected expenses.

3. Is Concur Request a free service?

No. Request is a "for purchase" offering.

4. Can any client use Concur Request?

Concur Request is available to clients with integrated Travel & Expense, Expense-only, or Travel-only as an additional purchase. Request can also be implemented as a stand-alone service.

5. Which user roles are available in Request?

The available user roles are:
- Request User
- Request Approver
- Request Authorized Approver

The available administrator roles are:
- Request Administrator (processor)
- Request Auditor (processor with read-only permissions)
- TMC Agent (travel agent/processor)
- Request Event Manager (used in conjunction with the Request Proxy Logon role for the Event Request feature)
- Request Proxy Logon
- Request Configuration Administrator
- Request Configuration Administrator (restricted)

Roles can be assigned in User Permissions on the **Request** tab (Administration > Company Admin), Permissions Admin, or via the employee import.

6. Are authorized approvers allowed in Concur Request?

Yes.

7. Are cost object approvers allowed in Concur Request?

Yes.

8. How are request approvers assigned?

A user becomes an approver when they are assigned the Request Approver role, which can be assigned via the user import or by the User Admin.

Depending on the configuration – like Expense – users may have designated default approvers or users they may be able to select their own approvers.

9. Are delegates and proxies allowed in Request?

Yes. Concur Request has delegates and proxies.
- If integrated with Concur Expense, the Expense delegate feature actually includes the Concur Request delegates. A delegate can be an Expense delegate, a Request delegate, or both.
- If not integrated with Expense, the delegate can be selected in Profile and User Administration.

10. What is an event request?

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

Using the Event Request feature, the assistant creates one "master" request that contains the names of the employees and all of 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.

11. For travel-related requests, is it possible to make the Amount field optional or to allow a user to enter a zero in the Amount field?

Yes. The **Amount** field (on a segment form) can be optional or hidden. If the field is required, the user can always enter zero.

NOTE: There is a field on the request header that contains the running total of the request. It is a system field, which cannot be hidden.

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12. For travel-related requests, can we add custom fields to segments?

Yes. However, custom fields apply to *agency-booked* segments, not *self-booked* segments. The travel data in self-booked segments comes from Concur Travel, which has different data requirements than Concur Request. So, the Travel data may not be able to populate the custom fields. Also, when self-booked segments are updated in Concur Travel, they are completely deleted from the request and inserted again so it would not be possible to retain the custom field information.

13. For travel-related requests, an airfare or hotel segment does not always require agency visibility. How would that be configured?

For each segment that may or may not require agent visibility, add the **Is Agency Booked** field and make it editable by the employee. This will allow the employee (traveler) to change the agency visibility for each segment.

14. For travel-related requests, I know that I can configure segments to be managed or not managed by the agency at the policy level. Can I do the same at the segment level?

As noted above – for each segment that may or may not require agent visibility, add the **Is Agency Booked** field and make it editable for the employee. This will allow the employee (traveler) to change the agency visibility for each segment.

15. For travel-related requests, can I submit a request with no segments?

Yes. An audit rule is set to check whether there are segments or expected expenses to prevent submission. This audit rule can be disabled.

It is also possible to remove all segments and all expected expenses from a Request policy so the policy can be used to manage cash advances only.

16. If integrated with Travel, does the TMC have access to user profile information (passport number, passport issue date, expiration date…)?

Emails sent to the TMC can include a printed report, which can be configured to display user profile information related to the passport and the driver's license.

NOTE: The TMC Agent role (processor) does not have access to user profiles.

17. Can we configure allocations using connected lists?

Yes.

18. Is the Concur Request data available in Concur Analysis & Intelligence?

Yes. Standard reports are available for Request.

19. Can we write audit rules on the estimated amount – that is, the user-requested amount instead of the actual expense amounts?

Audit rules can be defined on estimated amount fields at the request header level and at the request entry level.

Audit rule comparison of approved request amounts to the actual expense amounts in Expense can be configured using the *Exceeds Request Amount* and *Exceeds Entry Request Amount* variables.

  For more information, refer to the *Expense: Audit Rules Setup Guide*.

20. What is the exact numbering pattern for the Request ID? Is it unique and sequential per client?

The Request ID is a sequence unique per client/entity. It is alphanumeric but does not contain the following characters: 0,O, I, 1, 2, Z, 5, S, 8, B.

It starts on 4 digits, and can reach a maximum of 20 characters.

21. Is Concur Request available on Concur for Mobile?

On some – but not all – of the mobile devices, the request approver can approve or send back. Request users are able to create and submit requests on Mobile. Only basic configurations are supported for the moment: Standard Request header fields and 5 segments: Air, Rail, Car Rental, Hotel, and Miscellaneous.

Only the manual request creation is possible, the Travel&Request integration is not available on Mobile.

The Request creation on Mobile can be activated in HMC settings. If it is set to no, then the users will only see their existing requests, but won't be able to create requests.

This option will be moved to the Request site settings in the future, to make it available to clients administrators.

22. Supporting up to 2 modifiable Header custom fields will arrive soon. When can I delete a request?

Whether or not a user can delete a request depends on several factors:
- Implementation and where the request is in the workflow:
  - **Stand-alone or integrated with Expense:** A user can delete any *unsubmitted* request.
  - **Integrated with Concur Travel:** If the request contains segments booked by the user in Concur Travel (self-booked), then the request cannot be deleted - even if it is unsubmitted.
- Fields in use:
  - A request cannot be deleted if it is extended on another request, using the **Extension of** field at the header level.

- Type of request:

  - ♦ **Event request/main event request:** The event manager can delete the main event request either before the attendee event requests are generated or if the event manager can successfully remove all of the event attendees.

Option: A request that has been sent back to the user can be *cancelled*, if the cancellation feature is enabled for the company.

Concur Request Integrated with Concur Travel

1. **Can we integrate Concur Request with Concur Travel?**

   Yes. If Concur Request is integrated with Concur Travel, there are two possible methods the clients can configure for users to enter requests and book travel. The two methods can be used separately, or together, depending on client configuration.

   Approve then Book (starting in Request):
   - **Step 1: Creating the request:** The user completes the request.

     There are many options available in the configuration of a request. The client can configure Request for the pre-approval of travel, cash advance, and/or general purchases. For example, a request that is designed for the pre-approval of travel will include fields about the mode of travel, the departure/arrival dates, hotel, etc. Cash advance requests will include fields for the amount and the type of currency. General requests will contain fields for the various expenses, such as subscriptions, seminar fees, etc.

     The client decides how much or how little to include in any specific request.
   - **Step 2: Submitting the request:** The user submits the request, which is routed to the user's request approver.
   - **Step 3: Approving the request:** The approver reviews and approves the request.
   - **Step 4: Booking the Trip in Travel:** The user views the approved request, and clicks the **Book** link or button. The user is sent to the **Travel Request Itinerary** page, listing their itinerary with any required fields highlighted. After filling out required fields, the user is sent to the Travel search results page. The user goes through the Travel booking wizard for each segment in the request. The itinerary does not require any additional approvals, and is immediately booked and sent for ticketing.

   Book then Approve (starting in Travel):
   - **Step 1: Book in Concur Travel**: Using the **Trip Search** panel (also known as the Travel Wizard), the user enters the trip information in the booking wizard. At the end of the booking, the user is directed to Request. The trip will be on hold until the request is approved.

| **NOTE:** | This step may differ if the client is using the Booking Switch feature. |

- **Step 2: Concur creates the request**: Concur automatically creates a request for the trip, based on the trip information.
- **Step 3: Submitting the request:** The user submits the request, which is routed to the user's request approver.
- **Step 4: Approving the request:** The approver reviews and approves the request. Once the request is approved, the trip is sent for ticketing.
- **Step 5: Finishing up:** The company uses its own internal processes to pay for the trip, manage the images, and provide the cash advance, etc.

    📖   For more information, refer to the *Authorization Request: Overview Guide*.

2. **Can we use Concur Travel but <u>not</u> integrate with Concur Request?**

   Yes.

3. **Can we use Concur Travel but not integrate with Concur Request for part of the business and integrate in other parts of the business?**

   Yes. This requires separate travel configurations for the different parts of the business.

4. **What is the relationship between request delegates and travel arrangers?**

   When Concur Request is integrated with Concur Travel, the user may start the request process in Request (**Approve then Book** process) or by using the Travel Wizard (**Book then Approve** process). In order to successfully complete these tasks, the user must be both a Request user and a Travel user.

   As per normal procedure, the user can designate a request delegate to complete his/her Request tasks. If so, that same person should also be designated as a travel arranger so he/she can properly book travel on behalf of the user.

   | **NOTE:** | There is a site setting that allows Travel / Request delegate synchronization, which ensures that the request delegates and travel arrangers are the same person. |

5. **What happens if fares increase between the time the trip is created and when the request is approved?**

   The request segments are automatically updated.

6. **Can I cancel a trip? What happens?**

   That depends on whether your company uses the Cancel feature. The Recall feature is also available. Contact your Concur administrator to see if these features have been configured for your company.

   - When cancelling a request *before* approval, a cancellation message is sent to Travel but no acknowledgement is required.
   - When cancelling a request *after* approval, a cancellation message is sent to Travel. If not acknowledged by Travel, a cancellation email notification is then sent to the TMC if configured.

7. **What happens if I make changes in Concur Travel – after a trip is booked but before the request is approved?**

   When Concur Travel is integrated with Concur Request, trip changes are only available if the request is sent back or recalled by the employee.

   For *self-booked* trips, if the user makes changes to the trip in Travel (such as changing the dates, locations, or prices of a segment), those changes may be reflected in the request. If segments are removed in Travel, those segments are removed from the request.

8. **What happens if a Request approver does not approve the request in time?**

   Concur Request segments will reflect Concur Travel's trip. If the trip is automatically deleted in Concur Travel, segments will be blanked in the request.

   Please note that email reminders based on the Limit-approval date can be configured in Request.

9. **What happens if I make changes in Concur Travel after the request is approved?**

   The "Post approval trip update" is now available in Request. If the post-ticketed changes feature is activated in Travel, then the user will be able to recall an approved request and change their booking.

10. **Can a TMC Agent (processor) initiate a booking for a traveler who called the agency?**

    No. For now, this process is not supported by the Concur Travel / Concur Request integration. The user must use the Travel Wizard to start the booking process.

11. **Depending on the client's configuration, a Travel user can select a different Travel rule class in the Travel Wizard. Is this information part of Booking Switch criteria?**

    No. The Booking Switch does not rely on this information right now. It might be incorporated in a future release.

12. How does the agency know that a PNR has an authorized request tied to it?

We have the ability to automatically write the request number (Request ID) to the PNR through finishing today. As a result, it will **not** be available in Concur Travel **before** finishing.

When a trip is approved and is moved to the agency queue, if configured, the Request ID will be available for trips approved via request approval process.

13. Do the Concur Travel settings still apply when Travel is integrated with Concur Request?

Concur Travel rules still apply to trips when Travel is integrated with Concur Request:

- **Reserve** buttons are displayed accordingly (Red, Yellow, Green, Grey).
- Out-of-policy reasons must be addressed when required.
- These rules have no impact on Concur Travel approval flow as this one is totally disabled.

In addition – depending on your configuration – these rules can drive request creation for approval. For example, with one option:

- If a self-booked trip breaks a "Require Approval" rule, then a request is required – the user is redirected to Concur Request.
- If no "Require Approval" rules are broken, then the trip is sent directly to ticketing. For example, if instant-purchase tickets are purchased, no request is required. Perhaps, short domestic trips would not require a request.

> **NOTE:** Any rules that are broken that use other levels of enforcement (Require Passive Approval, Notify Manager, etc.) will not redirect the user to Concur Request.

The Trip Cancel settings that are defined in the agency configuration still apply. If a trip is cancelled due to these settings, the request segments will be updated to reflect the trip total or partial cancellation (cancelled segments are deleted from the travel request). However, there is no automatic cancellation of the request itself.

Best practice: If the user wants to cancel his/her trip, the user should cancel the request (in Concur Request). The trip will be automatically cancelled in Concur Travel.

14. What is the relationship with Request, Travel, and Concur for Mobile?

Be aware that if Request is integrated with Travel, then the user cannot book travel (air, hotel, etc.) using Concur for Mobile. The user must book all travel using the web version of Concur to ensure the proper interaction between Request and Travel.

Concur Request – NOT Integrated with Concur Travel

1. **What should we enter in the Detail field on the hotel or car rental segment?**

   If Concur Request is *not* integrated with Concur Travel, then the travel agent books the trip. The user uses the **Detail** field to provide location and preference information needed by the travel agency, like:

   - "pick-up at airport" or "automatic transmission, non-smoking"
   - "hotel near the convention center" or "non-smoking room"

2. **How do we enter complex Airfare trips that involve multiple legs/locations?**

   For something other than a one-way or round trip, there are two options. The client can configure Request to allow multi-leg airfare. If that feature is not used, then the user must ensure that the **Comment** fields provide adequate information for the travel agency.

Integrated with Concur Expense

1. **Can I use One Click to have Expense create the header and add the expenses - and then I associate the request?**

   Yes. You can associate a request to an expense report before or after other expenses have been added to the report.

2. **Should we configure a separate Request policy for each Expense policy?**

   That is not necessary. Each Request policy is associated with a default Expense policy. If a user is not allowed to use this default Expense policy, Expense will automatically change it to a policy the user is allowed to use.

3. **If a request is added to an expense report and the request has already been pre-approved, can we skip the Expense workflow or include only the unapproved expenses on a report?**

   It is possible to configure the expense workflow to skip approval when a request is linked to that report. There are future enhancements planned that will allow you to create workflow rules that compare approved request segments with the associated expenses.

4. **Why is it possible to re-attach a used request to an expense report?**

   Some companies require their users to submit monthly expense reports. If the request spans more than one month, the user needs the ability to attach the request to more than one report.

5. Can a user request a cash advance in a request?

Yes. The Cash Advance feature is available in Concur Request. In fact, a request can include more than one cash advance – each in a different currency.

Audit rules can be set to control the total amount of cash advance requested to not exceed the total amount of the travel request.

Best practice: It is recommended to skip the cash advance approver step if it is related to a request since the trip has already been approved.

6. Is it possible to close a request so it is no longer "selectable"?

Yes.

7. Is it possible to use Travel Allowance rates in Expected Expenses?

Yes. Set a calculation formula using Travel Allowance variables at the expense type level in the Request Policy Administration screen.