Shared: Custom Fields

Setup Guide for Concur Standard Edition

Last Revised: February 28, 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
February 28, 2023	Added a note on page 4 that custom fields that drive account codes are limited to 10 list items.
May 21, 2022	Added information about vendor custom fields.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated instructions for **Product Settings** page
September 18, 2021	Added note re: existing list items are now included in the downloaded template if fewer than 1000 exist.
February 25, 2021	Renamed the Authorization Request check box to Request on the guide's title page; updated the copyright year; cover date not updated
August 3, 2020	Update the Delete Fields procedure to reflect change to warning message.
June 5, 2020	Updated to reflect **Custom Fields** page redesign.
January 15, 2020	Updated the copyright; no other changes; cover date not updated
October 8, 2019	Updated one instance of "payment request" to "invoice". (No date change.)
June 8, 2019	Renamed the “Cost Tracking Setup Guide” to the “Custom Fields Setup Guide”. Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
February 12, 2019	Updated the copyright; no other changes; cover date not updated
December 5, 2018	Minor edits.
November 27, 2018	Updated to include the new **Manage Custom Fields** and **Add New Fields** pages and workflow.
August 24, 2018	Clarified hidden field descriptions.
July 30, 2018	Updated guide to include new **Edit List** page.
June 19, 2018	Removed information about QuickBooks Connector and Financial Integration, as content is now consolidated in the *Shared: QuickBooks Connector Setup Guide* and *Shared: QuickBooks Integration Using Concur Financial Integration Service Setup Guide*.

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Date	Notes/Comments/Changes
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 26, 2018	Added a note regarding best practices for custom fields. It is best to ***not*** allow personal, sensitive, or uniquely identifying information in custom fields.
January 13, 2018	Updated QuickBooks Connector information. Added: • Configuration > Configure Data to Track > QuickBooks Connector Clients Only > Connector with QuickBooks Online Creates Fields Automatically Updated: • Configuration > Configure Data Entry Details > QuickBooks and QuickBooks Connector Clients Only Configuration > Configure List Items > QuickBooks and QuickBooks Connector Clients Only
November 4, 2017	• Updated guide to include new **Product Settings** page, which replaces the Setup Wizard.
March 18, 2017	Updated with menu option name change to access Setup Wizard.
December 15, 2016	Changed copyright and cover; no other content changes.
March 18, 2016	Updated graphics to reflect new editable field indicators; no other content changes.
November 20, 2015	Updated graphics to reflect updated step names and instructional text where applicable.
October 16, 2015	Updated graphics to reflect newly styled step numbers.
August 14, 2015	Added clarification regarding the use of the **Is Billable** field. The **Is Billable** field requires a *customer* field mapping.
July 20, 2015	Added information about the QuickBooks List column.
June 12, 2015	Added information about Request.
April 10, 2015	Made general content updates.
January 22, 2015	Removed information about two user interfaces; no other content changes
January 16, 2015	Updated the screen shots to the enhanced UI; no other content changes
September 16, 2014	Added information about two user interfaces; no other content changes
May 16, 2014	New document. (This content originated from the *Expense Setup Guide for Concur Standard*.)

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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.

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Custom Fields

Section 1: Overview

After reviewing expense, invoice, user, and vendor pages, you might find that some data you need to track is missing from the default layouts. You can add a custom field to these pages to capture the required data. For example, if you track your costs by project, you can add a custom **Project** field to the desired pages in SAP Concur solutions.

Section 2: Custom Fields

On the **Custom Fields** page, you can delete custom fields, define the order in which custom fields display for users, save changes to custom fields, select the custom field that drives alternate account codes for Concur Expense or Concur Invoice, and search for custom and commonly used default fields.

From the **Custom Fields** page, you can access the following sub-pages:

- **Add New Field**: Enables you to add custom list, multi-level list, free-from text, and checkbox fields.
- **Edit List**: Enables you to maintain custom list and multi-level list fields
- **View Field**: Provides a preview of checkbox and free-form text fields
- **Manage Visibility** (Advanced View): Enables you to configure the visibility of your custom fields

When you add a custom field, the field is added to SAP Concur pages , including the user page (employee user profile in Concur), the Concur Invoice new vendor and vendor details pages, and several pages in Concur Expense, Concur Request, and Concur Invoice. You can configure whether the field is visible on the user, Concur Expense, Concur Invoice, and Concur Request pages and whether the field is read-only, required, or optional.

NOTE: Custom fields on the Concur Invoice vendor pages are not configurable. They are visible and optional.

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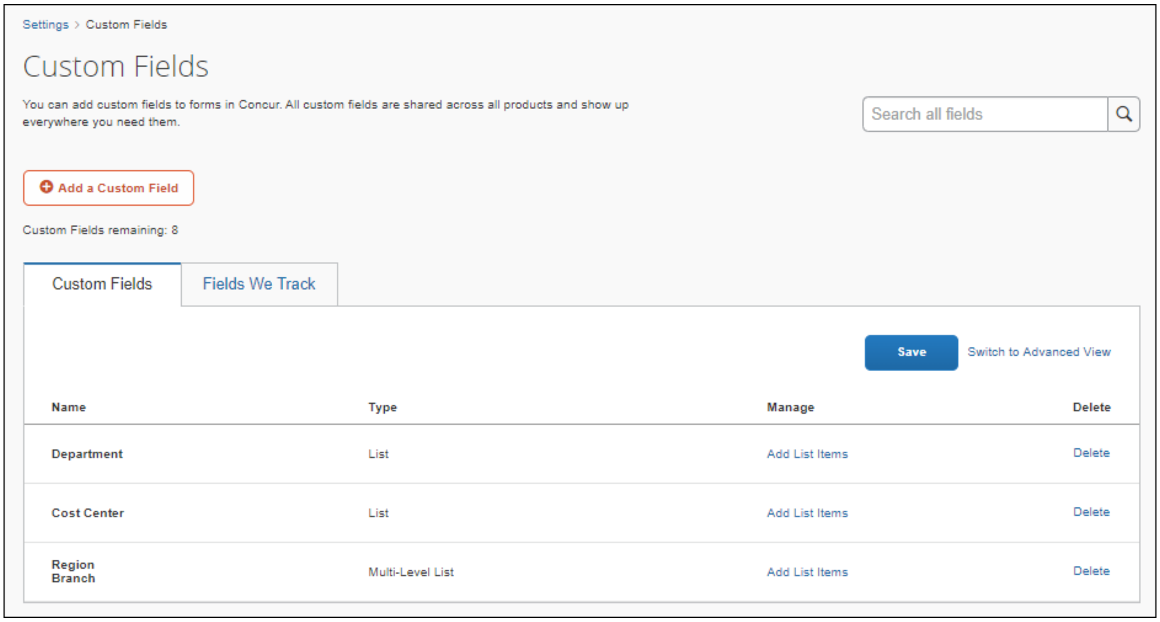
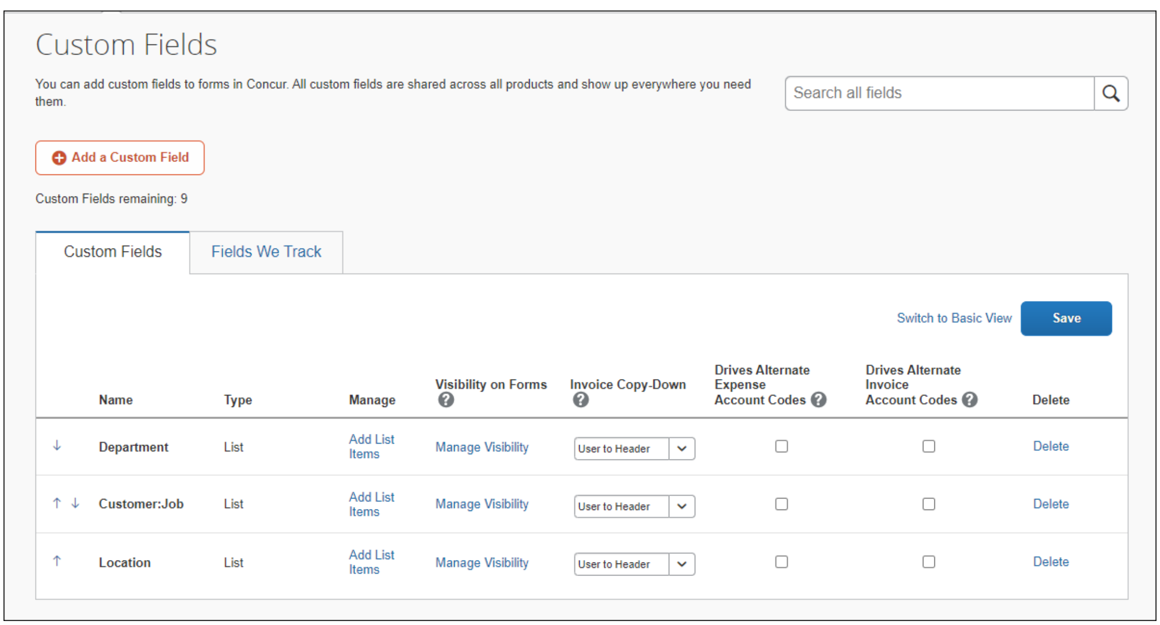
Basic and Advanced Views

The **Custom Fields** page can be displayed in **Basic View** or **Advanced View**.

Basic View



Advanced View



NOTE: The columns on the **Custom Fields** page in advanced view differ depending on your configuration.

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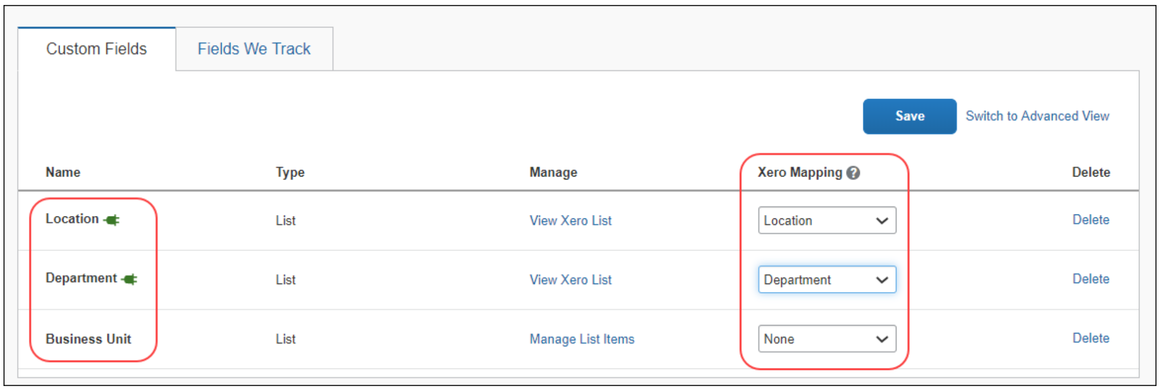
Configuration-Dependent Columns

Integrated Accounting Software Mapping

If your SAP Concur entity is integrated with accounting software such as QuickBooks, Sage Intacct, or Xero Accounting, an additional "mapping" column is included on the **Custom Fields** page and fields that are mapped to the accounting software will be designated by a green connection icon ( ).



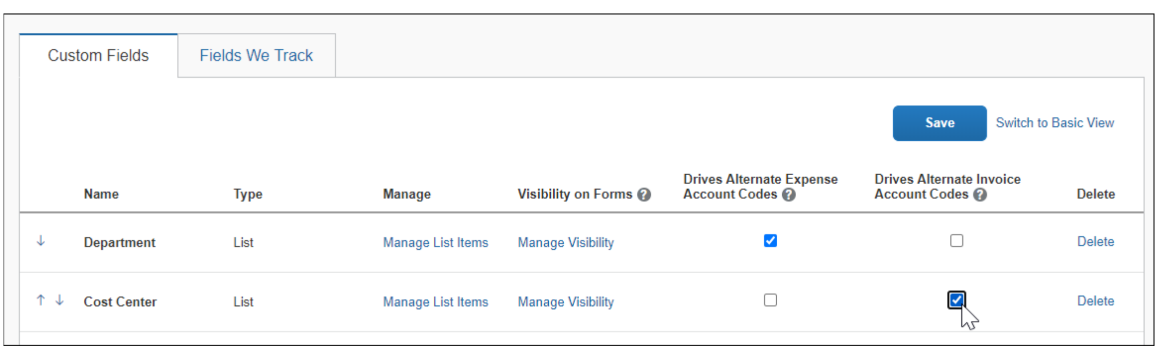
The mapping column can be used to choose which fields are linked to your accounting software.

QuickBooks Clients Only

If you are using QuickBooks Financial Integration, you can create custom list fields to map to the **Class** and **Customer** fields in QuickBooks (and a **Location** field if using QuickBooks Online).

Alternate Account Codes

If you use alternate account codes, the option to choose which custom field drives alternate account codes appears on the **Custom Fields** page in **Advanced View**. You can choose one custom field to drive alternate account codes for Concur Expense and one custom field to drive alternate account codes for Concur Invoice.



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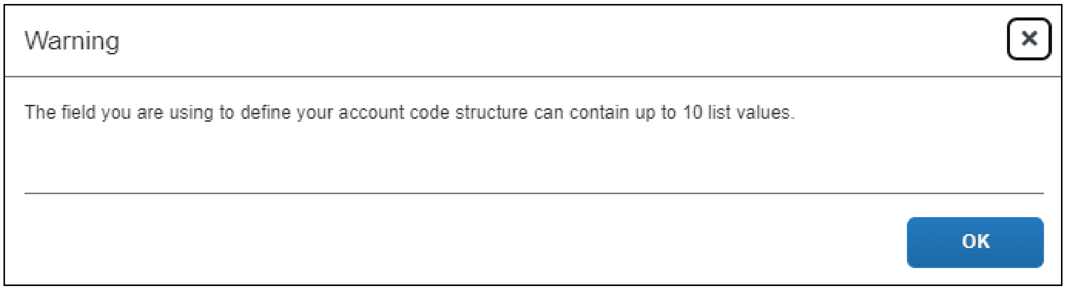
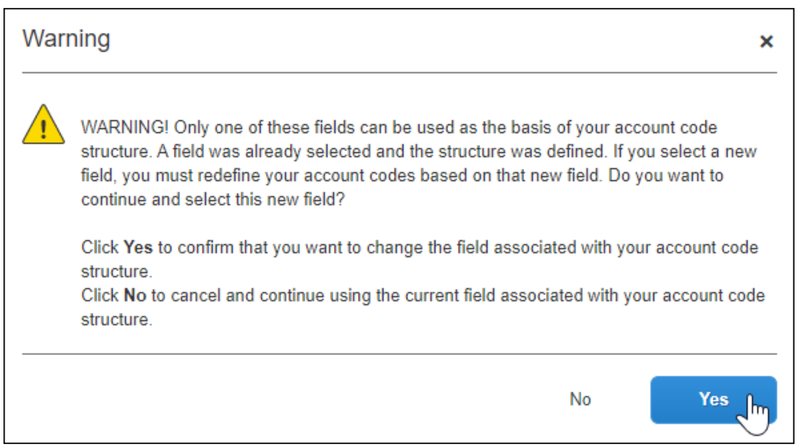
NOTE: The custom field you designate to drive alternate expense or invoice account codes can have a maximum of ten list items. If you attempt to select a field with more than ten lest items, the following message is returned:

"The field you are using to define your account code structure can contain up to 10 list values"



If you change which custom field drives alternate account codes, you must redefine your account codes based on the new selection.

After you select the new custom field, a warning is displayed. Click **Yes** to acknowledge the warning or click **No** to cancel the change.



Invoice Copy-Down

If your SAP Concur solution includes Concur Invoice, the **Invoice Copy-Down** field is included on the **Custom Fields** page in advanced view. The **Invoice Copy-Down** field enables you to configure the copy-down source for custom fields on invoices. Custom fields can be configured to copy from the user profile to the Invoice Header or from the vendor record to the Invoice Header.

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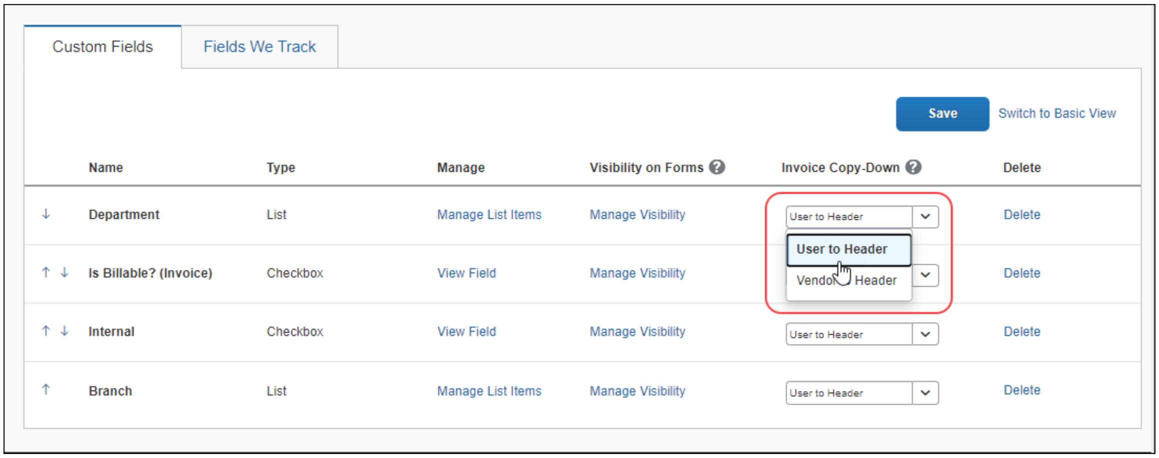
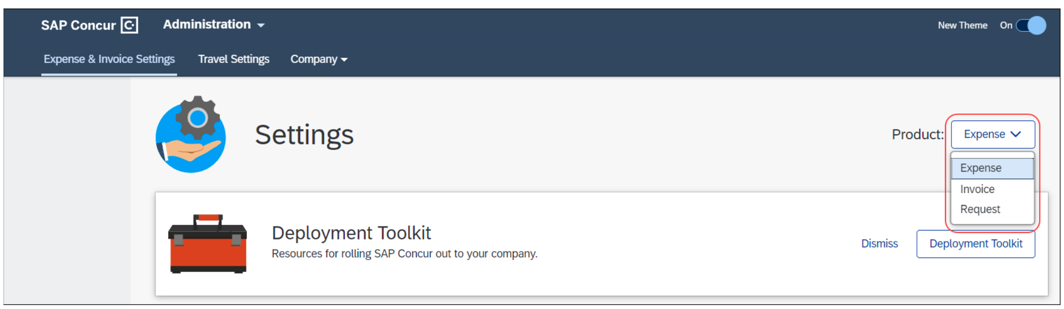


Access the Custom Fields Page

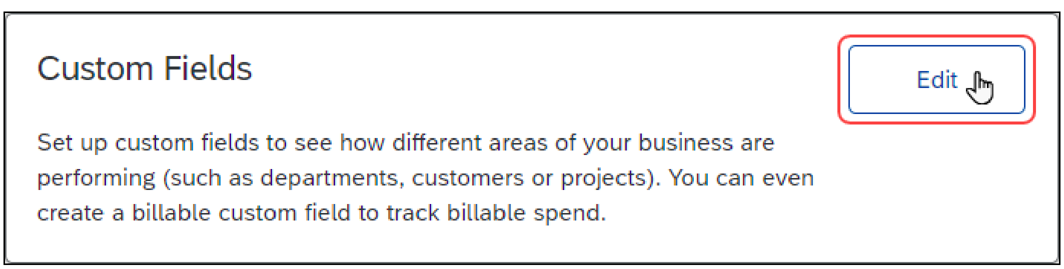
To access the Custom Fields page:

1. Click **Administration > Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**.

2. In the **Product** list, click *Expense* or *Invoice* or *Request*.



3. In the **Capturing Spend** section, on the **Custom Fields** tile, click **Edit**.



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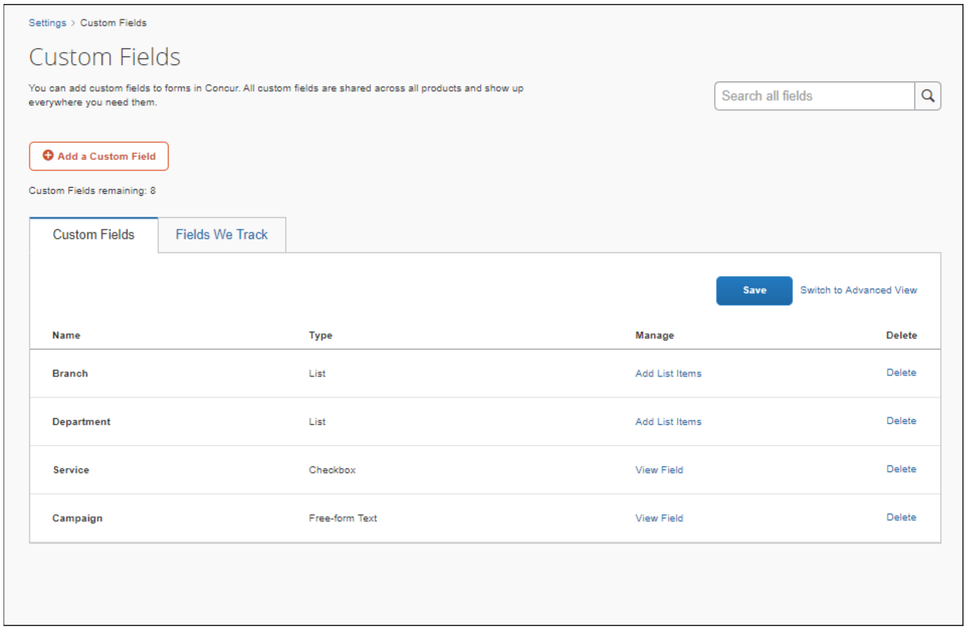
The **Custom Fields** page appears.



Section 3: Configure Custom Fields

After reviewing the default expense, invoice, request, user and vendor pages, you might find that some data you need to track is missing. On the **Add New Field** page, you can add a custom field to these pages to capture the data you need. You can create up to 12 custom fields.

Typically, employees enter values for custom fields in their expense reports or invoices. The custom field data can be part of your accounting extract or financial posting from SAP Concur solutions to your accounting system.

By default, when you add a custom field, it is added to all available pages as *Optional*. You can configure whether a custom field is visible and whether it can or must be filled by the user on the **Manage Visibility** page.

NOTE: Custom fields on the Concur Invoice vendor pages are not configurable. They are visible and optional.

The custom fields that you create appear on the following pages:

Expense:

- **Expense Information** page in **Profile Settings**
- Expense report header
- Expense entry page
- Expense entry allocation page

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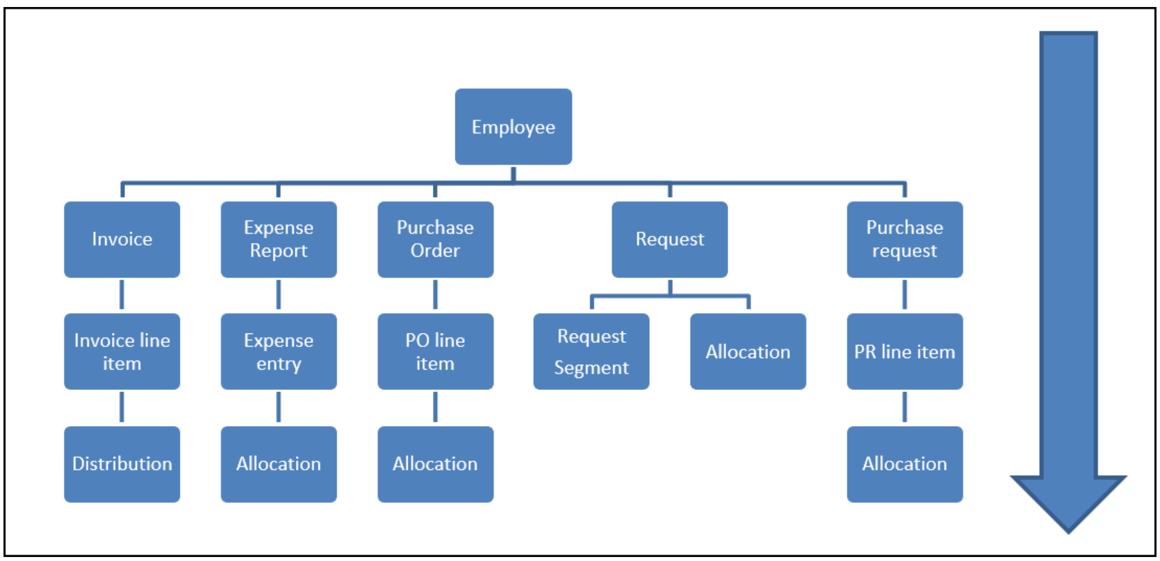
Invoice:

- **Invoice Information** page in **Profile Settings**
- Invoice header
- Invoice line item
- Vendor Manager **New Vendor** page
- Vendor Manager vendor details pages

Request:

- **Request Information** page in **Profile Settings**
- Request header
- Request allocation page

When an employee creates a new expense report or invoice, custom field values copy down from the employee page into the expense report or invoice. This copy down process occurs each time an employee creates a new expense report or invoice.



Similarly, the value from the report or invoice copies down to new expenses or invoice line items. A further level of copy down occurs when expenses or invoice line items are allocated. The copied down values can be changed by the employee unless you prevent it by making the field read-only or hidden on that form.

Examples

The following are examples of custom fields:

- You may want to assign a cost center to each employee and make sure their expenses are tracked against that cost center. To do so, you would create a **Cost Center** custom field, and make it *Read-Only* on the employee and expense pages. Expense submitters will not be able to change the value.

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- You are an advertising agency and you want to track whether expenses are billable. On the **Add New Field** page, click **Checkbox**. In the **Field Name** field, select *Is Billable?*, then click the **Add** button.
- You would like to track your expenses by department. On the **Add New Field** page, click **List**. In the **Field Name** field, type or select *Department*, then click **Add**. On the **Add New Field** confirmation page, click **Add List Items** to access the **Edit List** page to enter your departments.

NOTE: Defining values for list fields helps control the data entered in the fields, ensuring consistent reporting and saving your employees time by avoiding mistyping commonly used list values.

Invoice Copy-Down

If your SAP Concur solution includes Concur Invoice, the **Invoice Copy-Down** field is included on the **Custom Fields** page in **Advanced View**. The **Invoice Copy-Down** field enables you to configure the copy-down source for custom fields on invoices. Custom fields can be configured to copy from the user profile to the Invoice Header or from the vendor record to the Invoice Header.

Add New Fields

The **Add New Field** page allows you to add the following field types:

- List
- Multi-Level List (refer to the *Add Multi-Level Lists* section in this document)
- Free-form Text
- Checkbox

You can add up to 12 custom fields, which can be created by typing in a custom field name or choosing from a list of suggestions. When creating fields, it is a best practice to plan what fields you need before creating the them. Please consider the following:

- How many fields do you need?
- What field types are best for each field?
  - ♦ Lists are more consistent and reportable, but you need to maintain them.
  - ♦ Free-form text fields are useful if there are many values that change often.
- What labels or names best indicate the field's purpose?
  - ♦ Field names or labels should be as clear as possible to provide proper guidance to employees on what to enter in each.
  - ♦ Field names can be a maximum of 64 characters long
- What values do you need to populate list fields?
- What order do you want each list field's values to display?

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- Do you need a multi-level list (composed of two or more levels) to ensure employee's select a value in the parent list before they can select a value in a sub-level or child list?

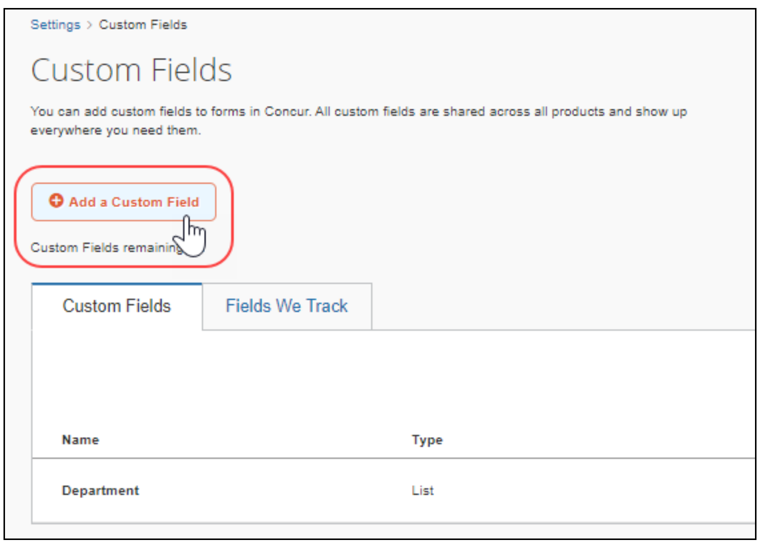
! **WARNING:** Once you have created a field, you cannot change the filed name or type of field. If you want to change the field name or type of field, you must delete the existing field and recreate it.

If you delete a field, the data the field contains will be irreversibly deleted and cannot be recovered. When you delete a field, a warning appears, and you must confirm your understanding that all data associated with the field will also be deleted.

To add a new field:

CREATE A LIST FIELD

1. On the **Custom Fields** page, click **Add a Custom Field** to access the **Add New Field** page.



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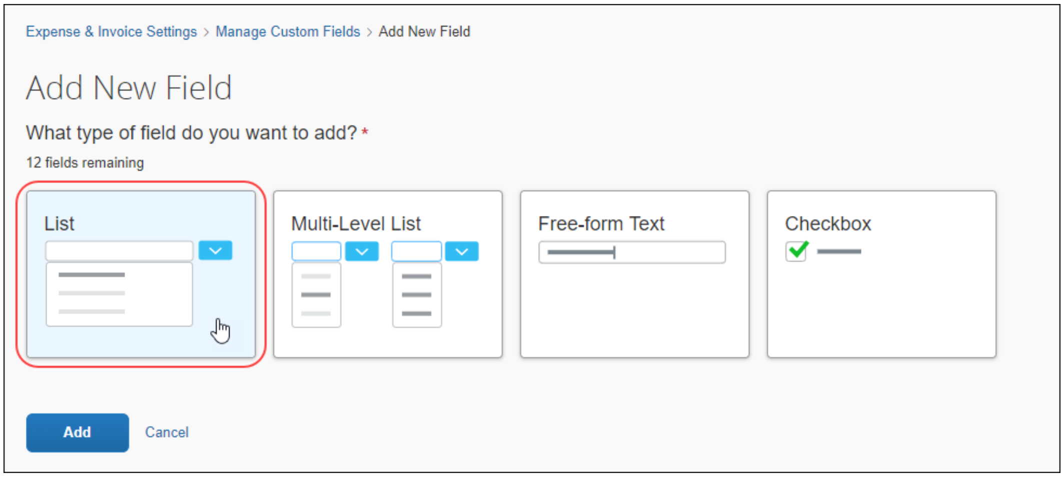
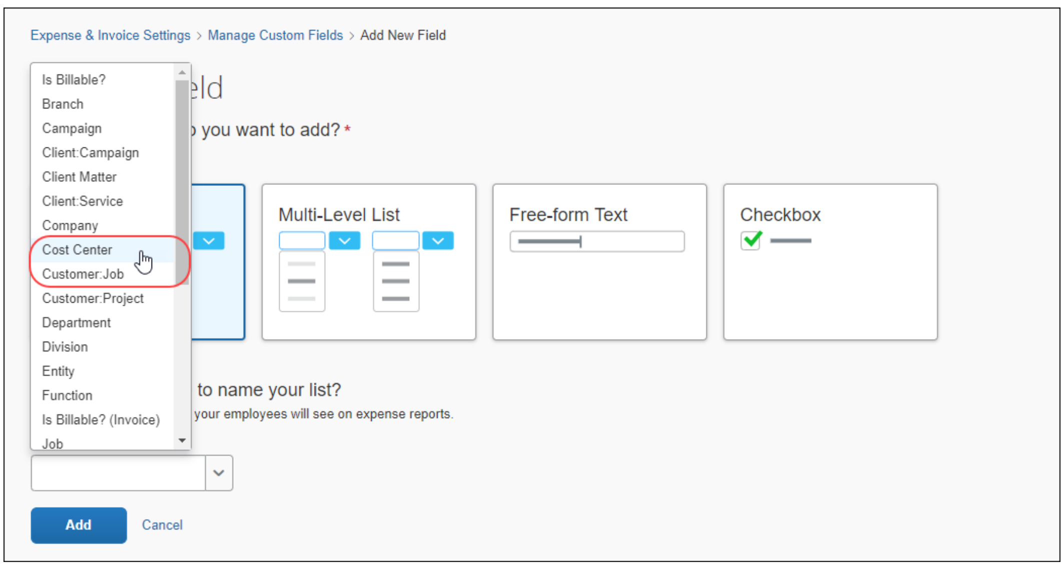
2. Click **List**.



To create a multi-level list, refer to the *Add Multi-Level Lists* procedure in this document.

3. In the **What would you like to name your list section?** section, in the **Field Name** list, select or type a field name to use as a label when the field is displayed.



NOTE: Best practice is to ***not*** allow personal, sensitive, or uniquely identifying information in custom fields.

4. Click **Add**.

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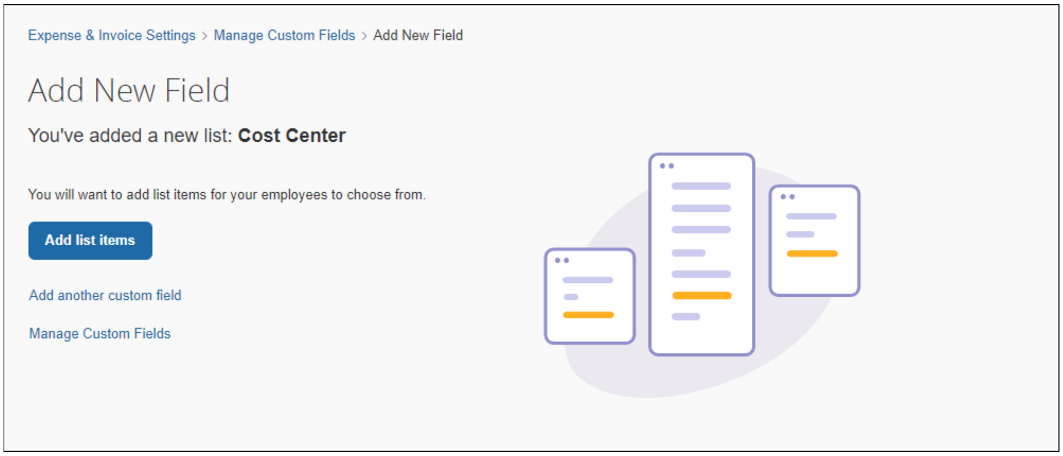
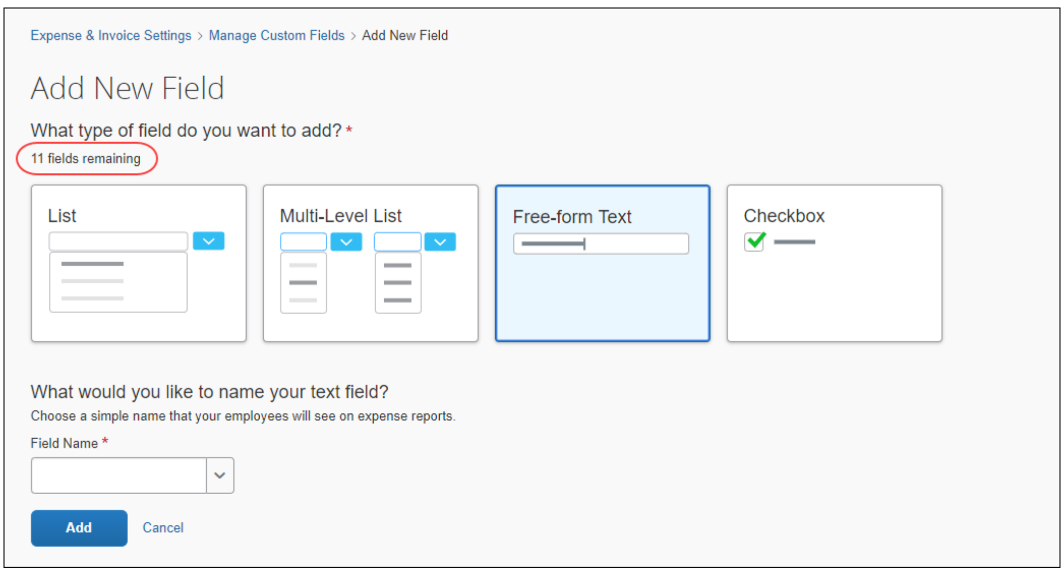
5. A message confirms the addition of the new field.



6. You can now choose to add list values to the field, add another custom field, or return to the **Custom Fields** page.

7. If you choose to add another new field, an on-page message tracks how many available custom fields you have remaining.



8. You can now choose to add another custom field or return to the **Custom Fields** page where you can configure the new custom list field.

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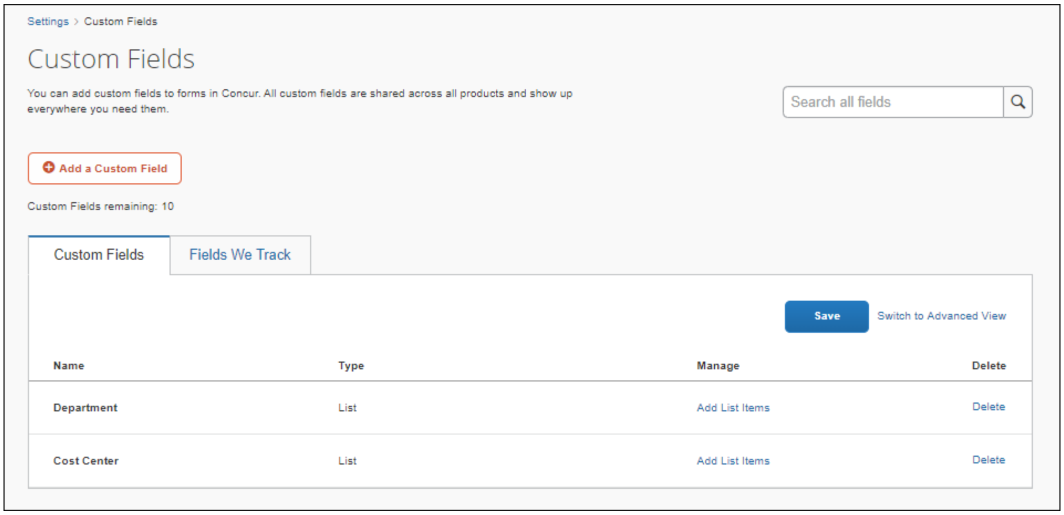
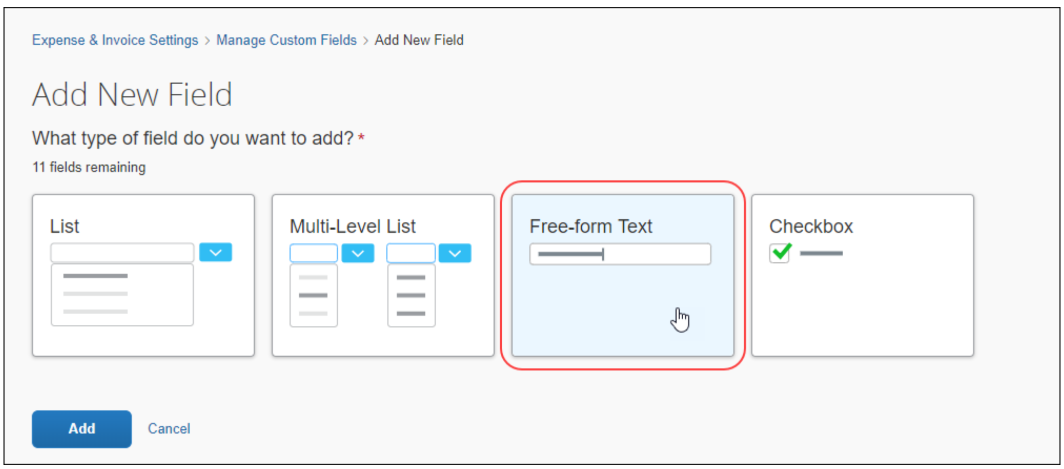


Create a Free-form Text Field

1. On the **Add New Field** page, click **Free-form Text**.



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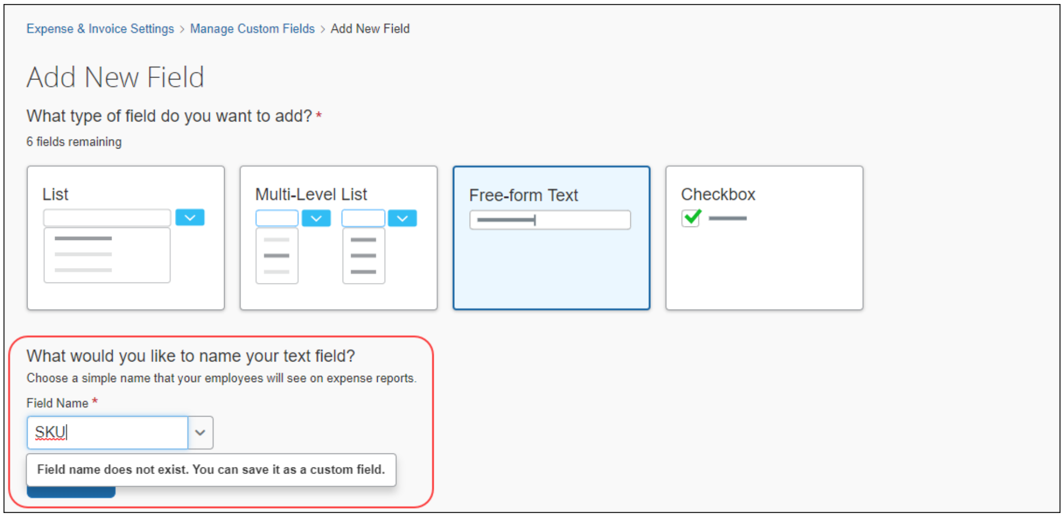
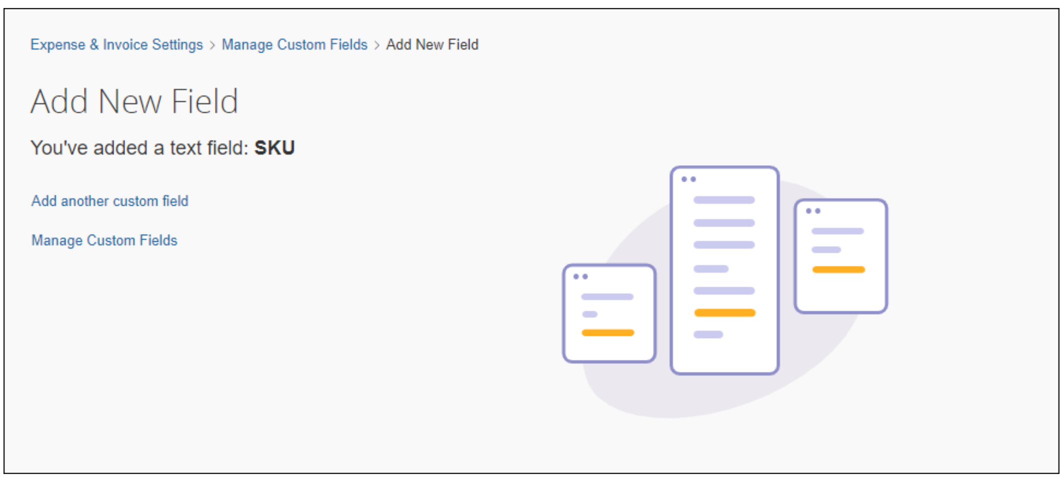
2. In the **What would you like to name your text field?** section, type in the name of the custom field or select a field name from the list.



3. Click **Add**.
4. A message confirms the addition of the new text field.



5. You can now choose to add another custom field or return to the **Custom Fields** page.

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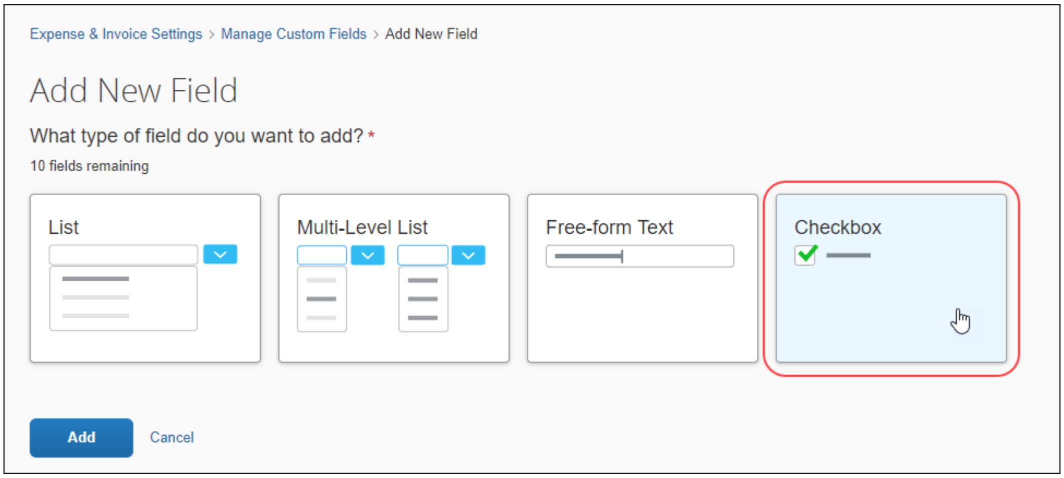
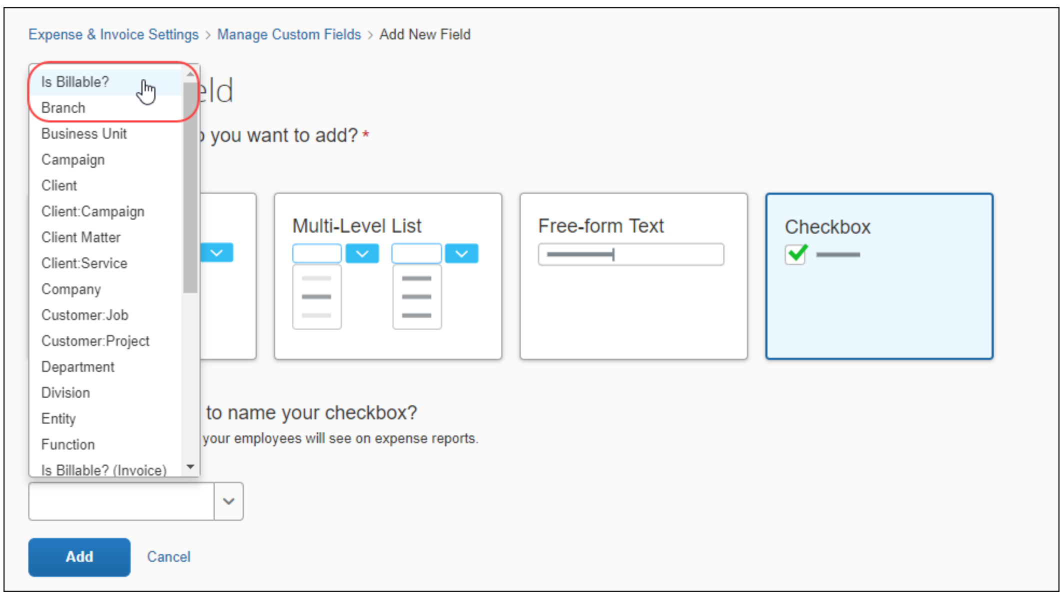
Create a Check Box

1. On the **Add New Field** page, click **Checkbox**.



2. In the **What would you like to name your checkbox?** section, type in the name of the custom field or select a field name from the list.



3. Click **Add**.

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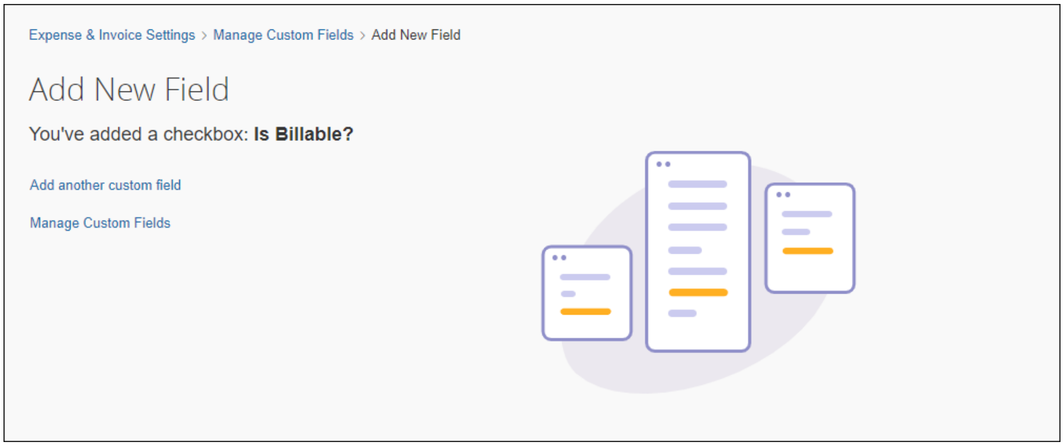
4. A message confirms the addition of the new check box.



5. You can now choose to add another custom field or return to the **Custom Fields** page.

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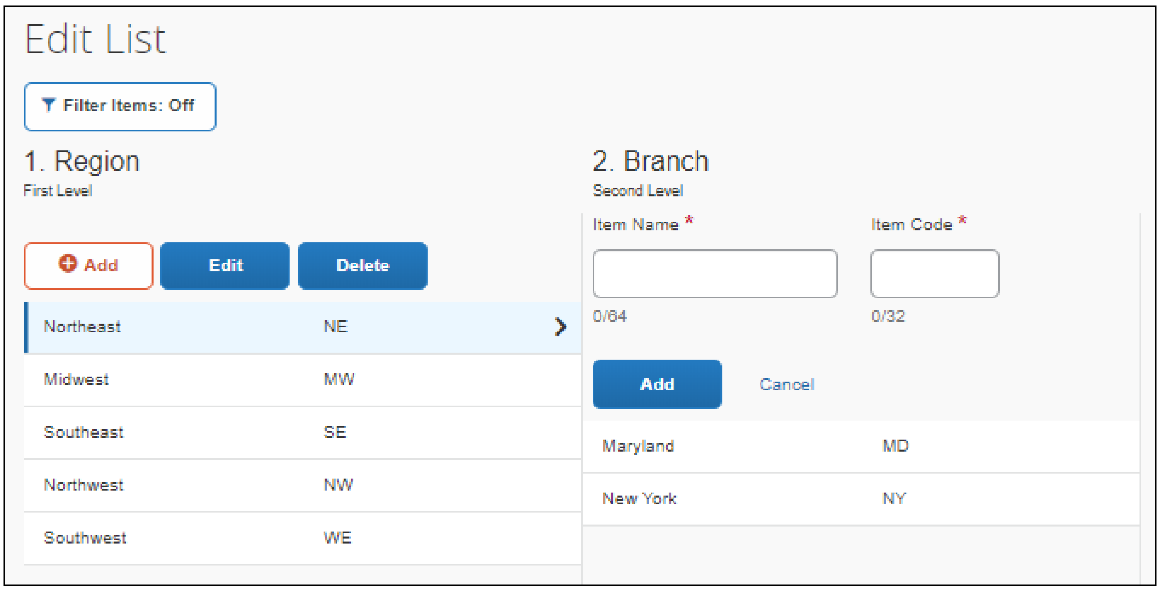
Add Multi-Level Lists

A multi-level list is a set of up to five list fields that depend on each other. The list item selected in the first list field determines which items are available in the second list field, and so on. Multi-level lists are configured on the **Edit List** page. Multi-level lists display on the **Custom Fields** page in sequential order with an arrow pointing up to the parent list level.

EXAMPLE

You want your employees to enter region and city information for their expenses. You need the available branch to vary based on the region the users select. On the **Add New Field** page, you will create a multi-level list with **Region** as the first or parent list and **Branch** as a child list or sub-level list. Click **Add** to link the lists in multi-level, hierarchy form. The fields will display on pages with the **Region** field displaying first, and the **Branch** field displaying next. When creating expense reports, users will not be able to select from the **Branch** list without first selecting from the **Region** list.



NOTE: Multi-level lists are not compatible with QuickBooks IIF or QuickBooks Connector.

NOTE: Multi-level list items appear in the transaction file as columns, one for each field.

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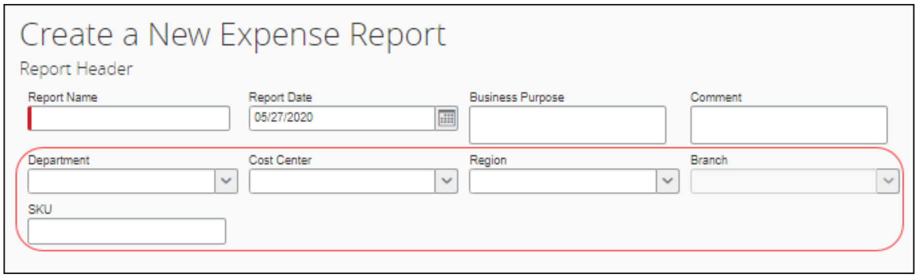
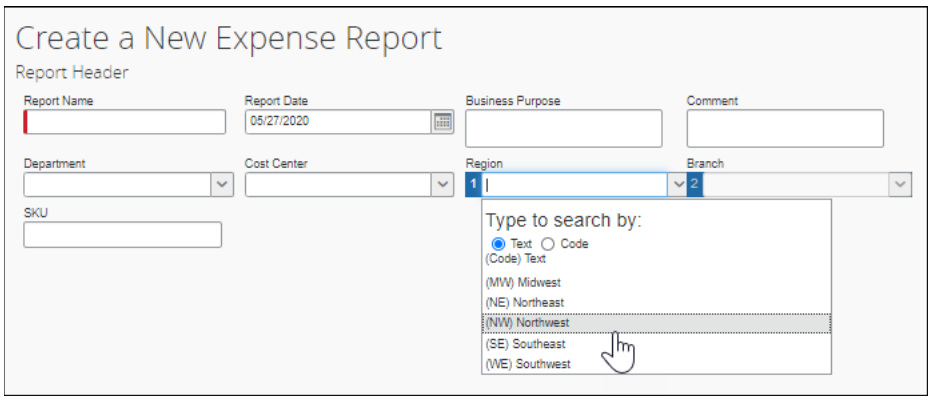
End-User Experience

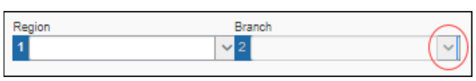
By default, custom fields are included on the page when a user creates an expense report, an invoice, requests a new vendor, updates vendor details, or updates their employee profile.



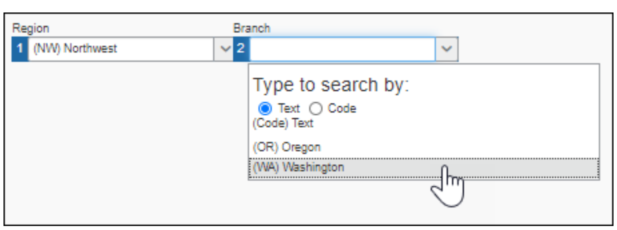
When a user selects the first field in a multi-list hierarchy of fields, the fields are numbered to indicate the order in which field data must be selected or entered.



Users cannot select a value for a subsequent field until the previous field is populated. The list selection arrow is grayed out.



After a selection is made in a multi-list field, the next field in the hierarchy becomes available and it is populated with the list items associated with the previous selection.



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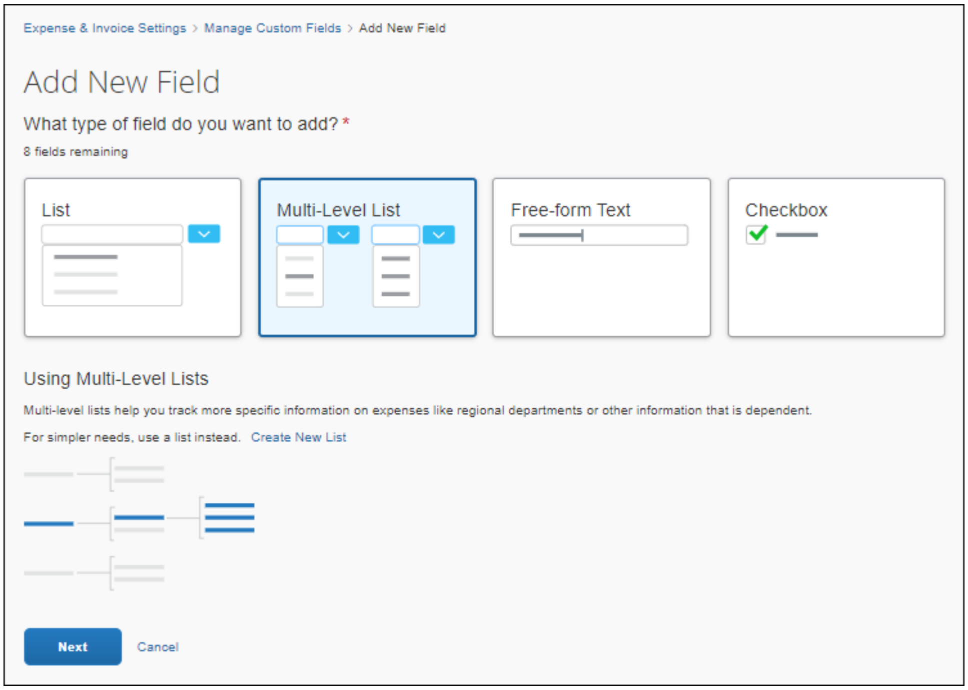
Create Multi-Level Lists

To create a multi-level list:

1. On the **Add New Field** page, click **Multi-Level List**.



2. In the **Using Multi-Level Lists** section, read the on-page information and view the multi-level list diagram.

NOTE: If you do not need a multi-level list, you can click **Create New List** to make a single level list field.

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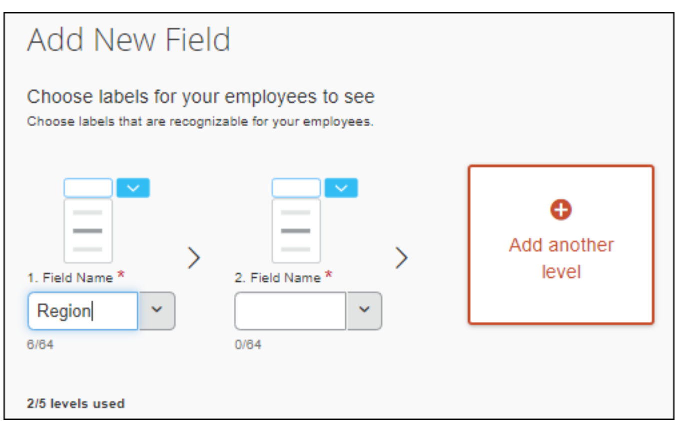
3. Click **Next**.

4. In the first **Field Name** field, type or select a field label for the parent list.



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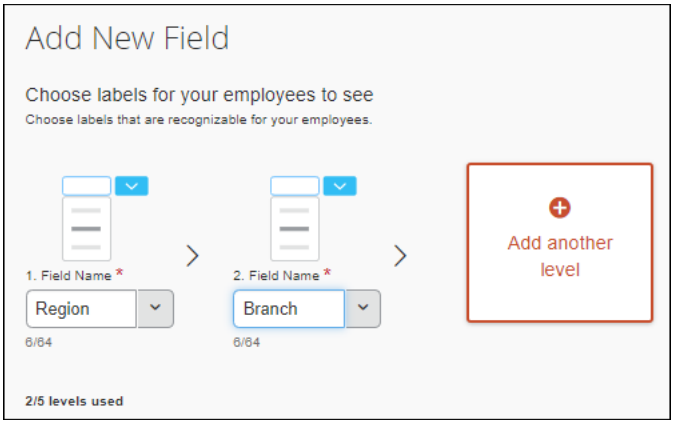
5. In the second **Field Name** field, type or select a field label for the sub-level list.



6. If you need to add more list levels, click **Add another level**. You can add up to five list levels.

7. Click **Remove** to remove a list level.

8. Once you have created the desired structure, click **Add**.

! **WARNING:** If you want to change or rename the levels later, you will have to delete the multi-level list field and create a new one.

If you delete a field, the data the field contains will be irreversibly deleted and cannot be recovered. When you delete a field, a warning appears, and you must confirm your understanding that all data associated with the field will also be deleted.

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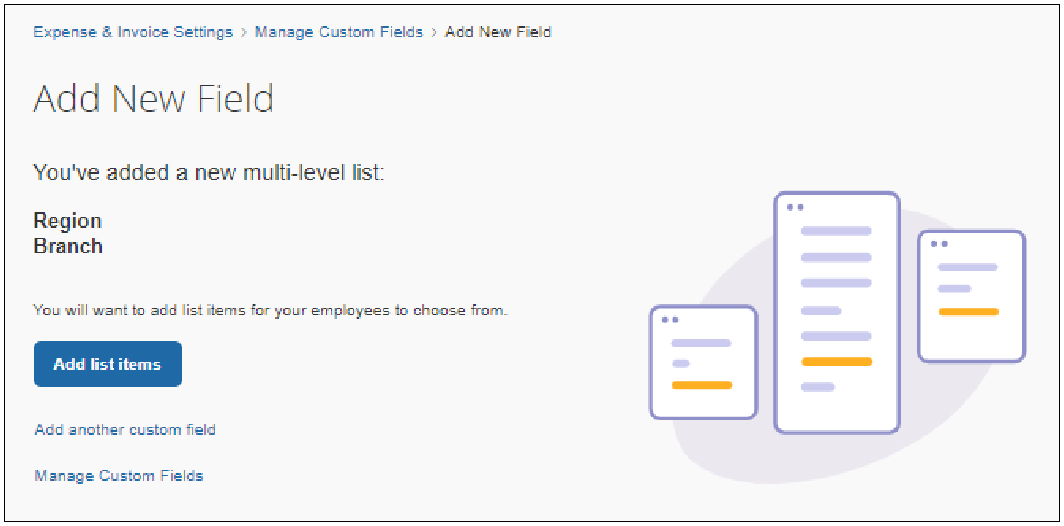
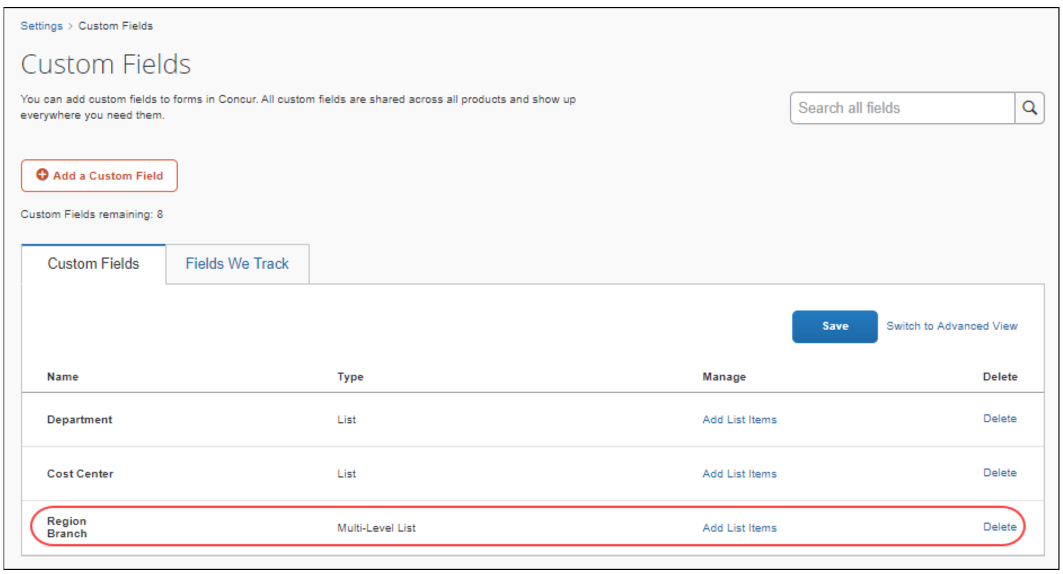
9. Click **Add list items** to add list selections for the new fields.



The new multi-level list fields appear in a single row on the **Custom Fields** page.



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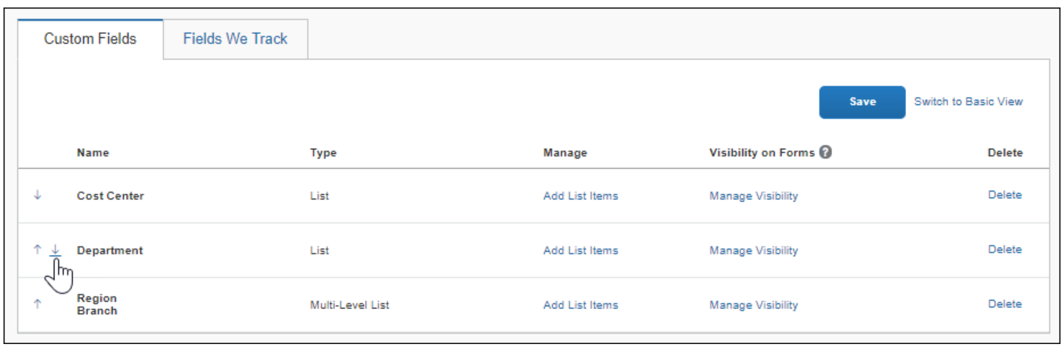
Move Fields

After you create the necessary custom fields, you can change the order in which they display on the **Custom Fields** page by switching to **Advanced View**.

To move fields:

1. On the **Custom Fields** page, click **Switch to Advanced View**.

2. Click on the up or down arrow to the left of the field you want to move.



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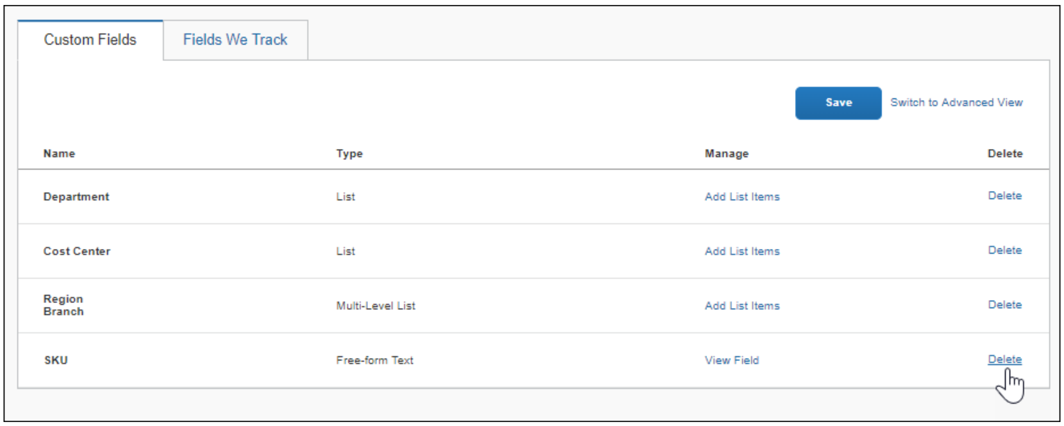
Delete Fields

If you delete a field, the data the field contains will be irreversibly deleted and cannot be recovered. When you delete a field, a warning appears, and you must confirm your understanding that all data associated with the field will be deleted before the field can be deleted.

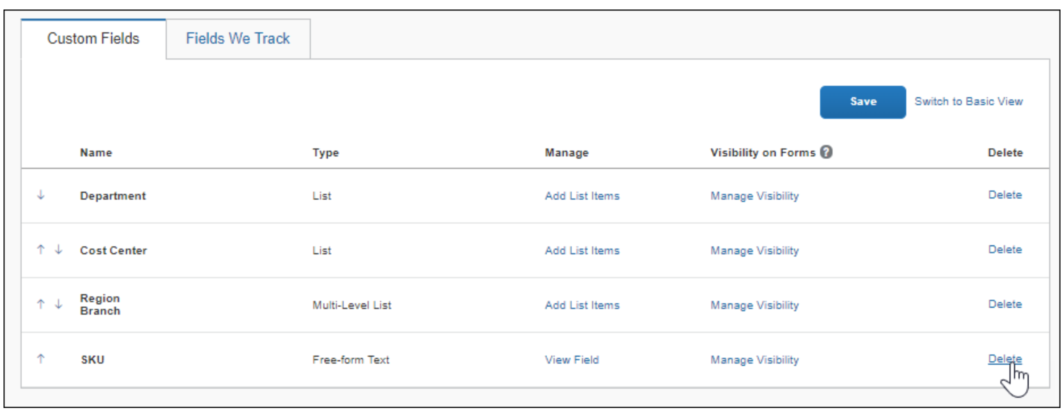
To delete a field:

1. On the **Custom Fields** page, in either **Basic** View or **Advanced** View, click **Delete** in the row for the field you want to delete.

Basic View



Advanced View



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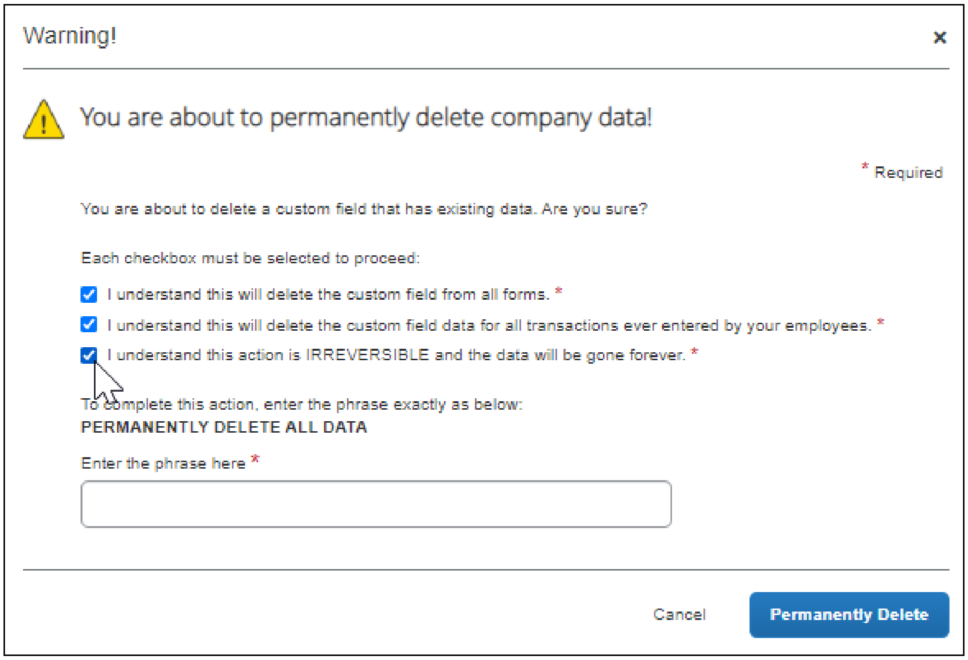
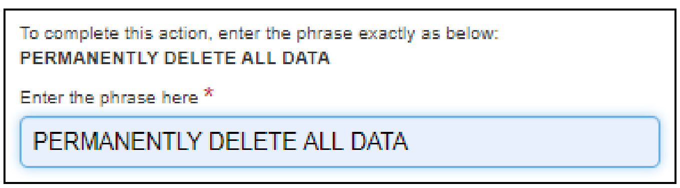
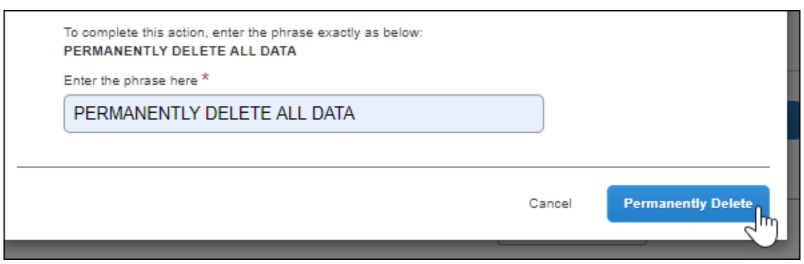
2. Read the warning messages and check each box to confirm that you understand your data will be permanently deleted and cannot be recovered.



3. Enter the phrase “PERMANENTLY DELETE ALL DATA” exactly as it appears in the text field.



4. Click **Permanently Delete**.



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Section 4: Edit List Items

On the **Edit List** page, you can enter list items that will appear in the fields. Only fields selected and configured as lists display on this page. Adding list items prevents users from entering invalid or misspelled values in the field.

EXAMPLE

Your employees often forget to enter the project name in the correct format on their expense reports. The administrator can enter the project names in a list field, either by typing them in or importing a spreadsheet. Users can only select valid project names when filling out the **Project** field. If the **Project** field is also set as *Required*, users must select a valid project name from the list before submitting the report.

Lists can also be populated by importing a spreadsheet. Each list item must have both an item name and an item code.

Add List Items

Before you create a list-type field, it is a best practice to plan what list items will be included in the list and the order you want them to display.

If you use alternate account codes, you must create the list items for the account code driver field manually.

To add a list item:

1. On the **Add New Field** or **Custom Fields** page, click **Add List Items**.
2. On the **Edit List** page, click **Add** at the parent level to add the list values.

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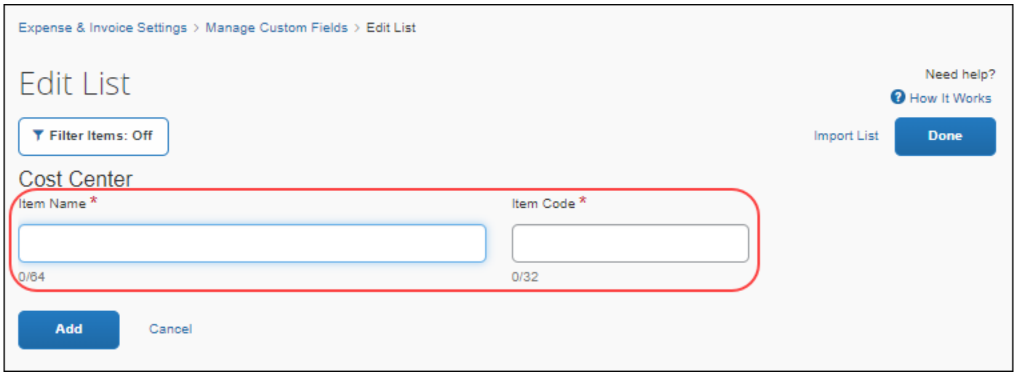
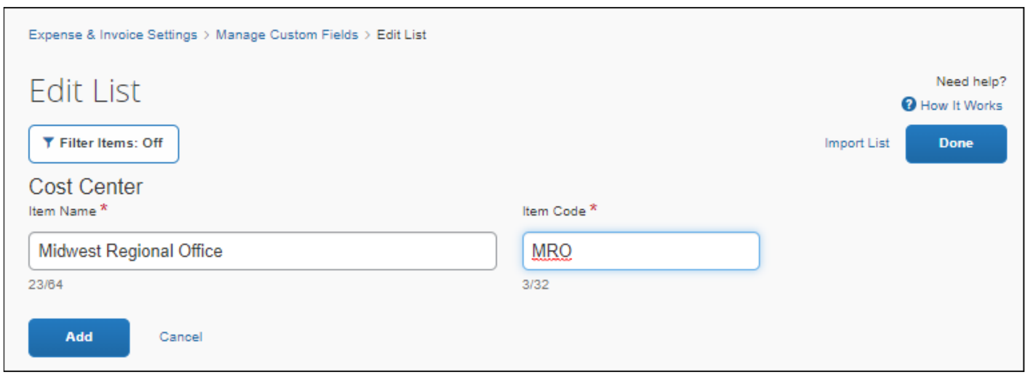
The **Item Name** and **Item Code** fields appear.



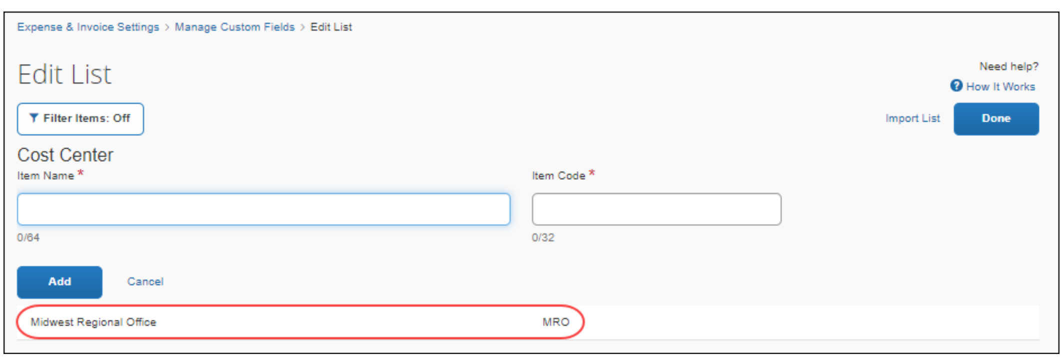
NOTE: Each list item must have both an item name and an item code. If your list does not use codes, type the item name value in the **Item Code** field.

---

3. Enter the item name and item code in the **Item Name** and **Item Code** fields.



4. Click **Add** to save the list values. The list item information appears. An on-page validation confirms the action.



5. Repeat these steps for each list item you need to add.

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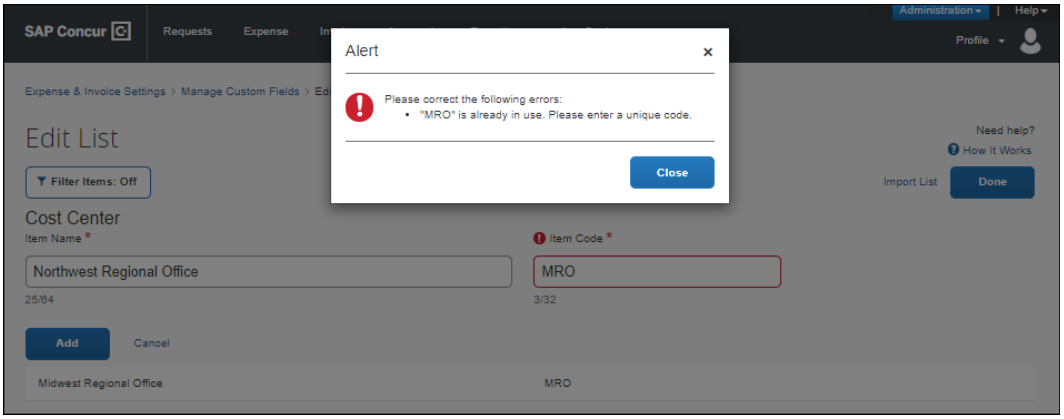
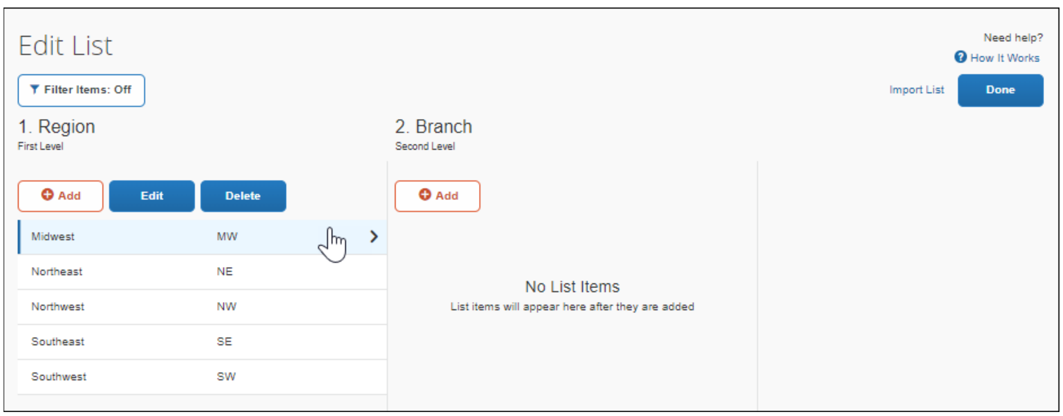
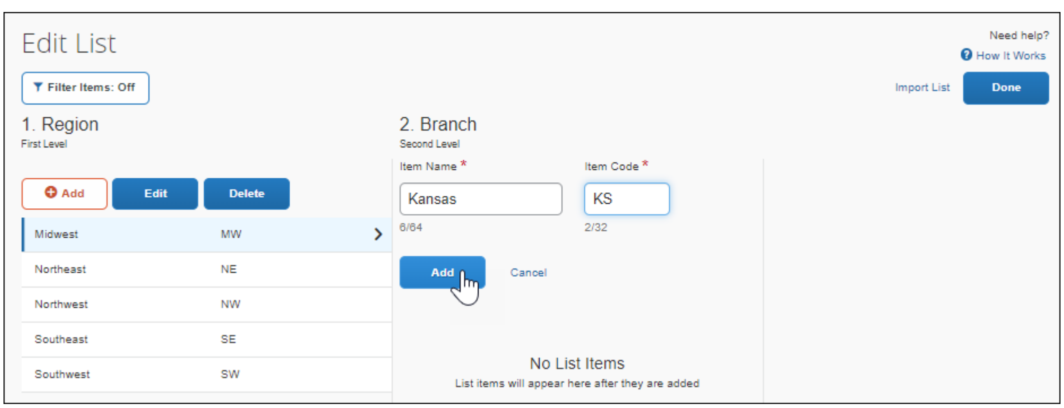
The system displays an alert if an error or conflict occurs. For example, a alert appears if an item name or code is already in use.



6. If you are adding an item to a sub-level list in a multi-level list, select the parent item on the left to enable the sub-level list to which you want to add a list item.



7. Click **Add** to display the **Item Name** and **Item Code** fields.



8. Add the desired list item (**Item Name**) and corresponding item code.

9. Click **Add**.

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10. Repeat for each list item.

11. Click **Done** to return to the **Manage Custom Fields** page.

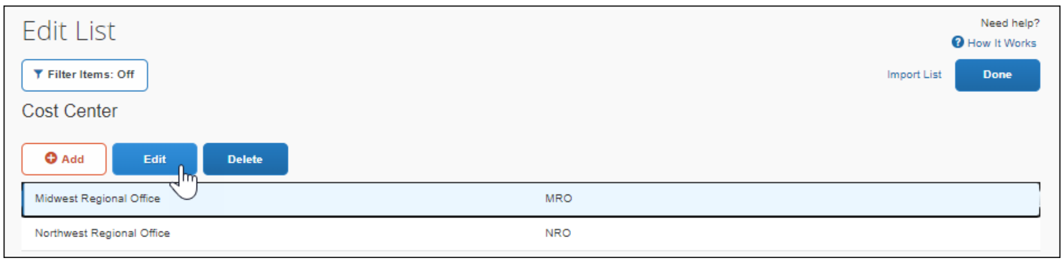
Edit List Items

To edit a list item:

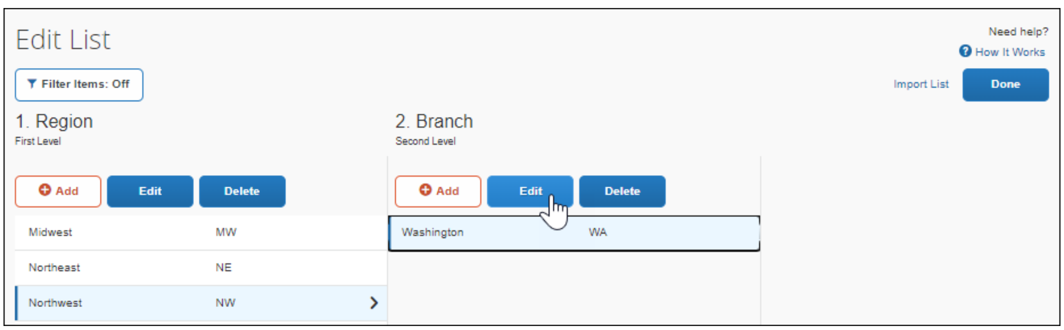
1. On the **Custom Fields** page, click **Manage List Items**.

2. On the **Edit List** page, click the desired list item, and then click **Edit**.

   Single-level List



   Multi-level List



3. Type in the new information.

4. Click **Save**.

Filter Items on the Edit List Page

To filter list items on the Edit List page:

1. Click **Filter Items** to display the **Filtering** field(s).

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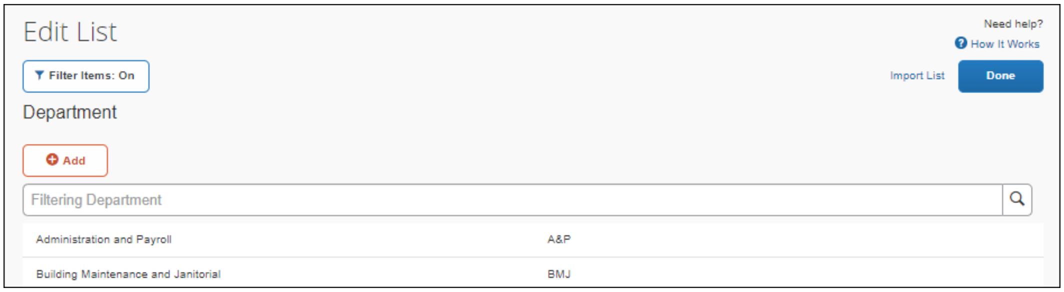
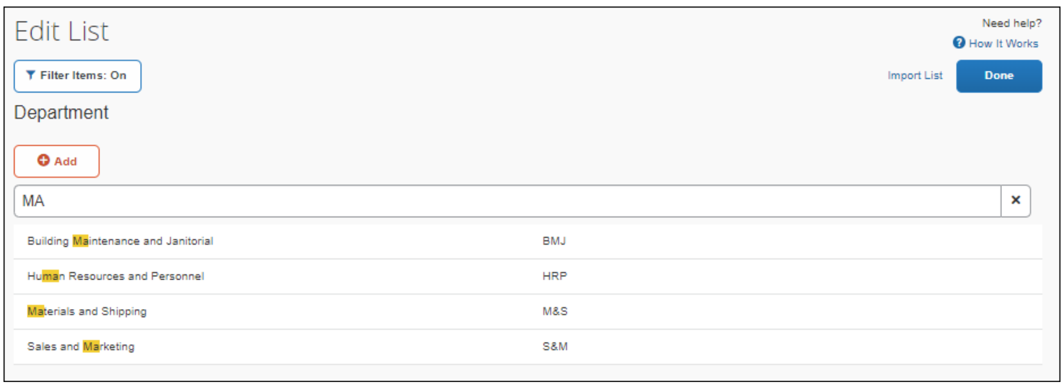


2. In the **Filtering** field, for the list level you want to search, type all or part of the list item name or code you want to display.

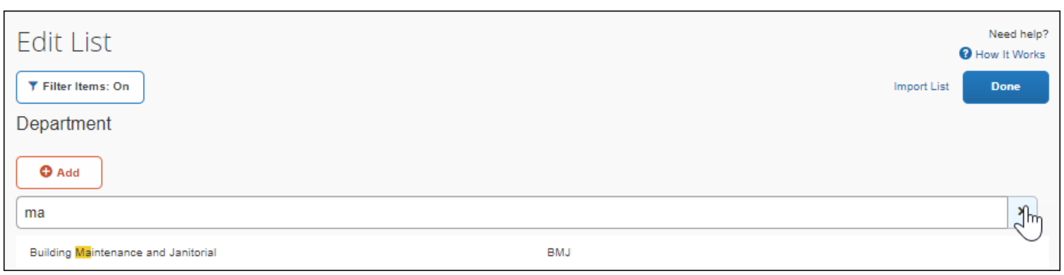
NOTE: You do not need to use wildcards when you filter by part of a name or code.

---

3. Press **Enter**. The search results appear with the search term highlighted.



4. Click **X** to clear the search results.



Delete List Items

To delete a list item:

1. On the **Edit List** page, click the desired list item.
2. Click **Delete**.

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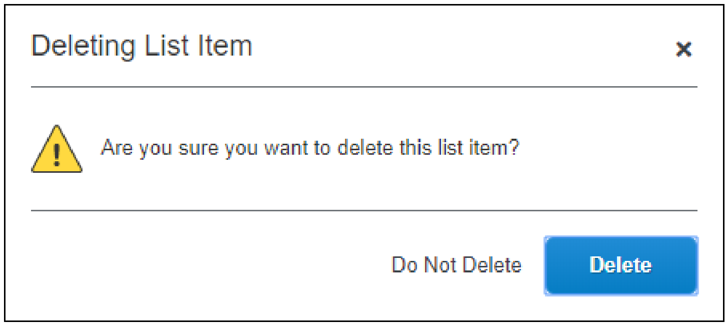

3. In the message box, click **Delete**.

Import List Items

The **List Import** process has the following steps:

1. Download the list data spreadsheet.
2. Populate the list data spreadsheet.
3. Upload the list data spreadsheet.
4. View the initial field validation results.
5. View the import results.

Download the List Import Spreadsheet

The administrator can download the Concur List Import Template for the list data import.

NOTE: On entities with fewer than 1000 preexisting list items, the existing list items are included in the downloaded template.

To download the list data spreadsheet:

1. On the **Custom Fields** page, click **Add List Items** or **Manage List Items**.
2. On the **Edit List** page, click the **Import List** link. The **List Import** page appears.

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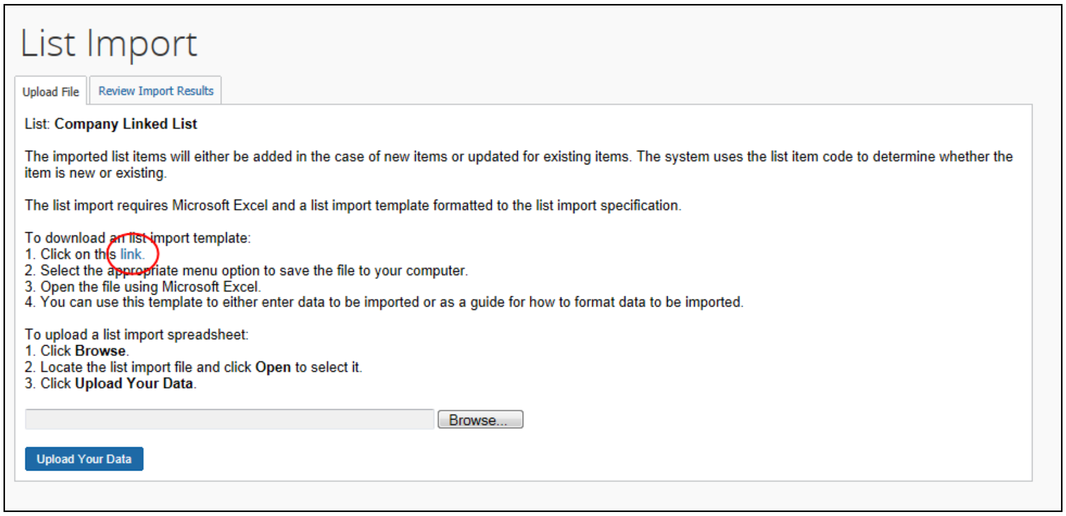
3. On the **Upload File** tab, click the word **link** to download the Concur List Import Template (*ConcurListImportTemplate.xls*).



4. Depending on which browser you are using, the file might be downloaded to the default download location for your browser or you might be prompted to choose a download location.

Populate the Spreadsheet

Data can be entered directly in the template spreadsheet to import, or the template can be used as a guide for creating a list import spreadsheet.

Single-Level Lists and Multi-Level Lists

The spreadsheet for a single level list requires the item name and item code for each list item you want to add or delete through the import. These are the same values you would enter if you were creating the list items manually within **Custom Fields** in Product Settings.

The spreadsheet for a multi-level list requires the item name for the list item you want to add or delete, the item code for that list item, and the item code(s) for any list items that precede the added/deleted list item in the list hierarchy.

SINGLE-LEVEL LIST EXAMPLE

For a single-level list named **Client**, the downloaded spreadsheet contains 3 columns and 2 rows.

	A	B	C
1	DELETE	NAME	LEVEL_01_CODE
2	Delete?	**Item Name**	**Item Code**
3			
4			
5			
6			
7			

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The first column, **DELETE**, can be used to delete existing list items by entering a ‘Y’ in the **DELETE** column followed by the item name and code for the list item you want to delete.

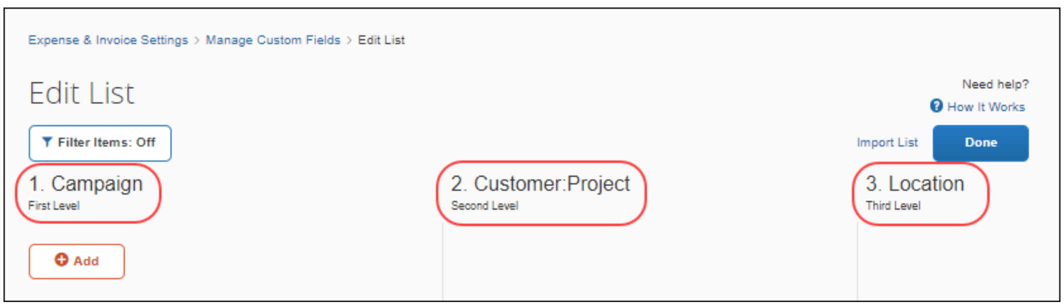
The second and third columns can be used to add list items by leaving the **Delete** column blank and entering the item name and code for the list items you want to add.

EXAMPLE

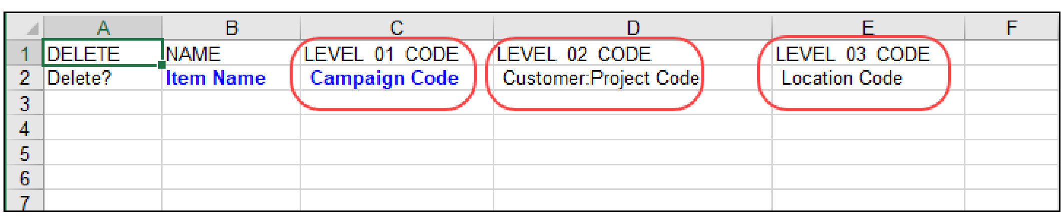
For a multi-level list, the downloaded spreadsheet contains the **DELETE** column, the item name column, and columns for each level in the list hierarchy. For example, the spreadsheet for a multi-level list with 3 levels will contain the **DELETE** column, the **NAME** (Item Name) column, and three Item Code columns: **LEVEL 01 CODE**, **LEVEL 02 CODE**, and **LEVEL 03 CODE**.

The name of the list that corresponds to each level in the hierarchy appears in the second row of the downloaded spreadsheet.

Three-Level Multi-List in Custom Fields



Downloaded Spreasheet for Three-Level Multi-List



	A	B	C	D	E	F
1	DELETE	NAME	LEVEL 01 CODE	LEVEL 02 CODE	LEVEL 03 CODE	
2	Delete?	Item Name	Campaign Code	Customer:Project Code	Location Code	
3						
4						
5						
6						
7						

List Import Formatting Requirements

The Concur List Import Spreadsheet has the following formatting requirements:

- Do not delete the values in the spreadsheet header rows.
- All cells in the spreadsheet must have a format of Text or Number before being uploaded. The cells' format settings default to General.

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NOTE: If you use the Replace feature in Excel, be aware that it may not maintain the required cell formatting. Testing has shown that cells formatted as text become general format after using Replace. If the cells are not formatted as text, the import will fail.

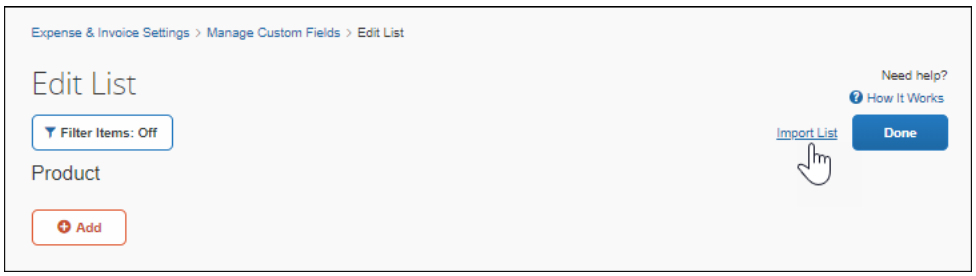
If you use this feature, always verify the cell formatting when you are done. If necessary, select the appropriate cells and change the formatting.

Upload the List Import Spreadsheet

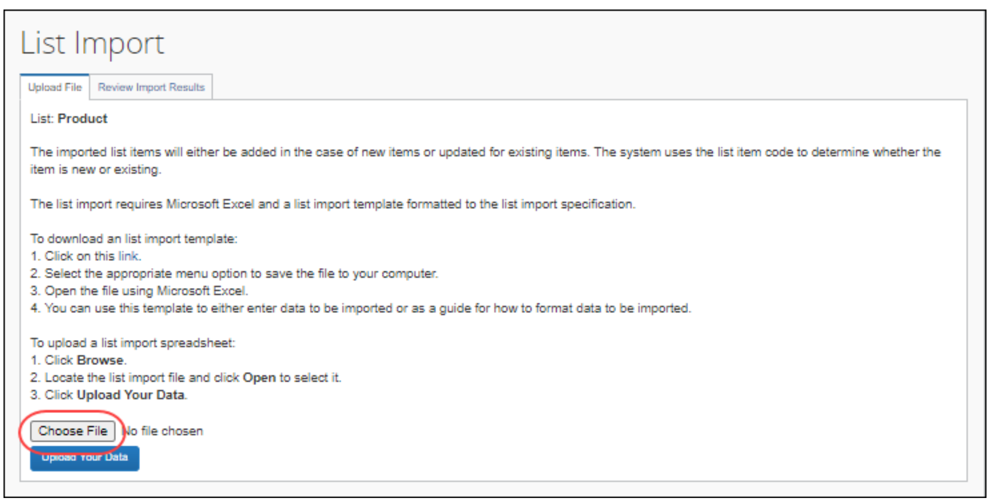
The list import spreadsheet is uploaded in the **List Import** window.

To upload the list data spreadsheet:

1. On the **Edit List** page, click **Import List**.



2. In the **List Import** window, click **Choose File**.



3. Select the file you want to upload and select the list import spreadsheet, and then click **Open**.

4. In the **List Import** window, click **Upload Your Data**.

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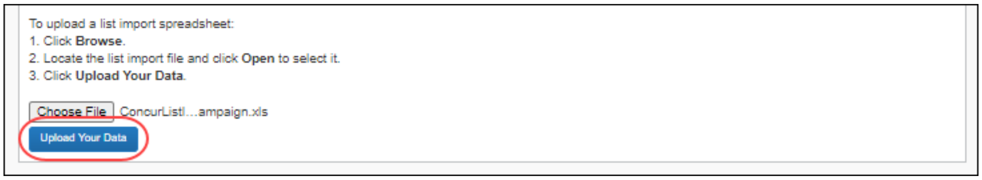
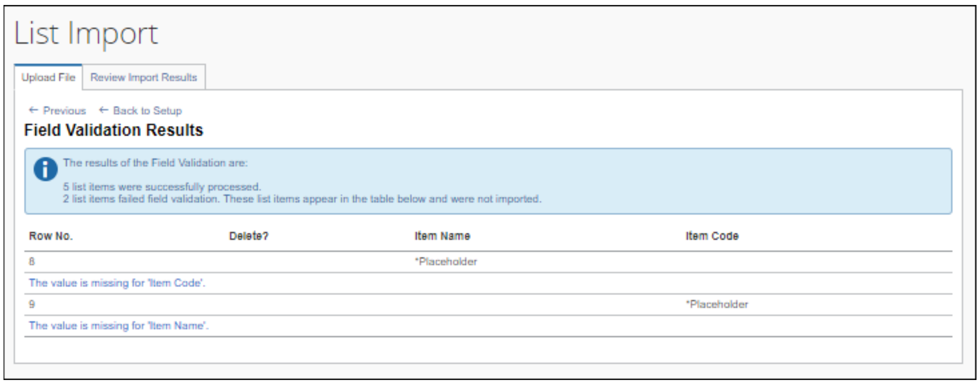


FIELD VALIDATION RESULTS

After the upload file is processed, the **Field Validation Results** page appears. If any list items failed the import, the **Field Validation Results** page list which rows in the table failed to import and provides information about why the import failed.



NOTE: You can correct the errors in the file you uploaded and reupload the file. The previous imported list items do not need to be removed.

On the **List** Import page, click **Previous** to return to the **List Import** page, or click **Back to Setup** to return to the **Edit List** page.

View the Import Results

Once the administrator clicks **Upload Your Data**, the eligible records are queued for import. The system processes these as soon as possible. It may take the system a few minutes to process queued records. Provided there are no further errors in processing the records, the system proceeds with the import.

The administrator can use the **Review Import Results** tab to view the status of the import as well as the import details, including any errors generated. Once the administrator selects the date, the page displays the status of all imports on that date, the number of records processed, and the number of records rejected. This list is sorted in descending order by time, starting when the administrator initially imported the file.

The **Review Import Results** window displays any errors that may have occurred during the import.

To view import results:

1. Click **Review Import Results**.

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2. In the **Date** field, type the desired date.

3. Click **Search**.

The window displays all files imported on the specified date, and 10 days prior.

The **Review Import Results** window allows administrators to view details about processed records from a file. Here the administrator can view details about:

- **Records with Errors**: The window displays the row number in the spreadsheet with the error that prevented the record from being imported. The **Description** and **Action To Take** columns provide the information necessary to correct the issue. These records must be corrected in this file and then re-uploaded.
- **Records with Warnings**: The window displays the row number in the spreadsheet where the system successfully imported the record. If there is an issue, the administrator should investigate. The **Description** and **Action To Take** columns provide the warning information. The administrator should consider the warning and decide whether the issue warrants further investigation. The administrator can review the import information using the List Management user interface and make any necessary modifications. Alternatively, the administrator can review the list record directly in the spreadsheet file, make any necessary edits there, and then re-upload the corrected file.
- **Records without Warnings or Errors**: The window displays the row number in the spreadsheet where the system successfully imported the record.

View the Import Details

To view import details:

1. In the **Review Import Results** window, under **Details**, click an icon associated with the list template in the desired row.

2. The page refreshes, displaying all records with errors.

3. Select the type of issue to display. The details can be filtered to show records imported without errors or warnings, records with warnings, records with errors, or all records.

4. Review the **Description** and **Action To Take** columns for details about any records with errors.

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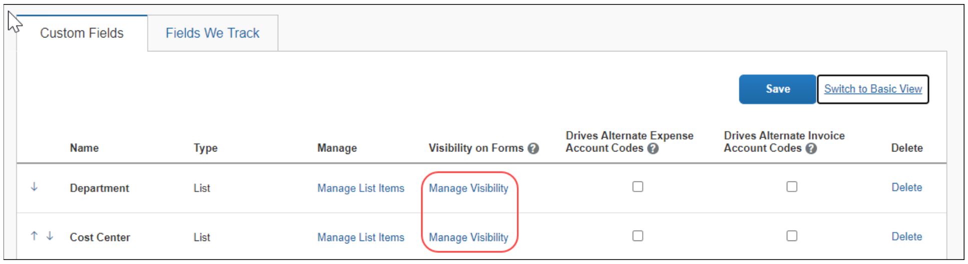
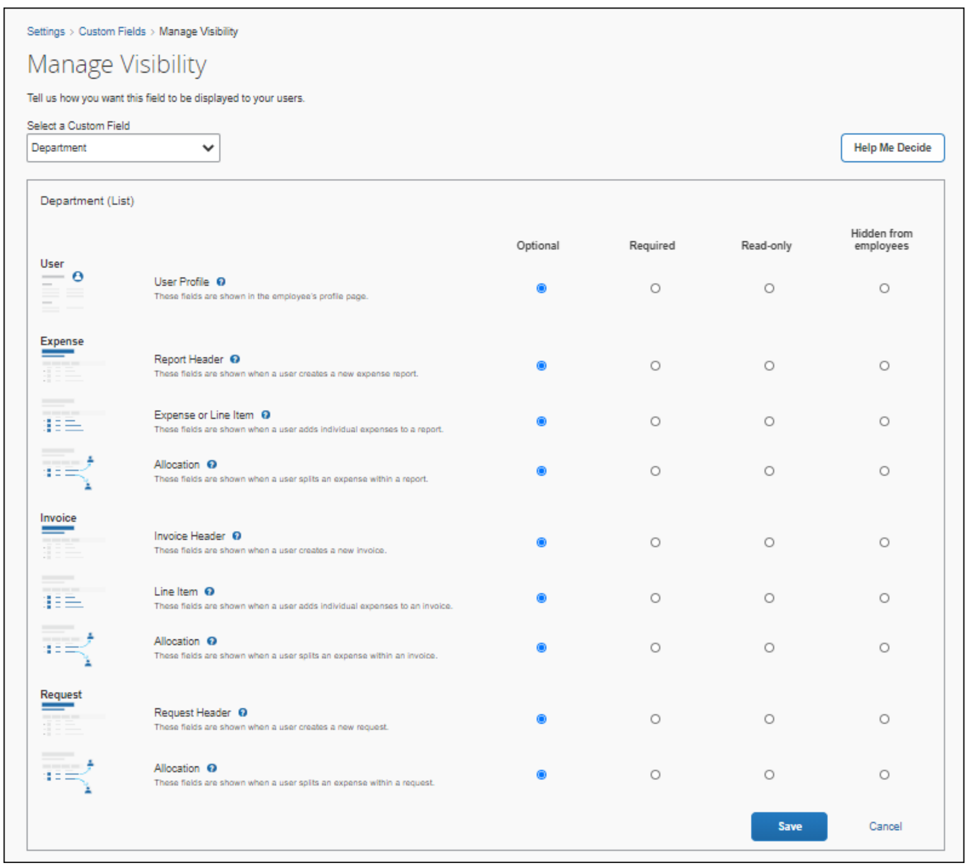
Section 5: Manage Visibility

The **Manage Visibility** page is only accessible in **Advanced View**.



On the **Manage Visibility** page, you can configure which pages your custom fields appear on and define whether visible fields are required, optional, or read-only.

NOTE: Custom fields on the Concur Invoice vendor pages are not configurable. They are visible and optional.



Default Visibility Settings

When you create a new custom field, it is set to **Optional** by default. A field set to **Optional** is visible on the page and the user can add data to or interact with the

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field, but the field is not required, and the page can be saved without entering data or interacting with the field.

Depending on which SAP Concur products you are using, by default, custom fields will appear on the following pages:

Expense:

- **Expense Information** page in **Profile Settings**
- Expense report header
- Expense report line item
- Expense report allocation

Invoice:

- **Invoice Information** page in **Profile Settings**
- Invoice header
- Invoice line item
- Vendor Manager **New Vendor** page
- Vendor Manager vendor details pages

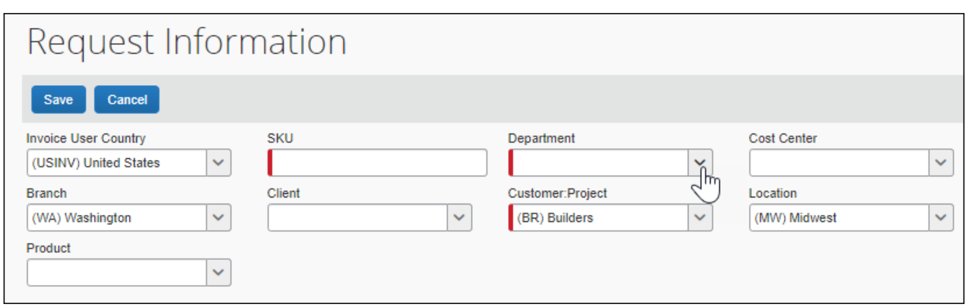
Request:

- **Request Information** page in **Profile Settings**
- Request header
- Request allocation

Visibility Settings

On the **Manage Visibility** page, you can set a custom fields visibility and behavior on each available page to one of the following:

- **Optional**: The field is visible on the page and the user can populate it, but it is not required and the page can be saved whether or not the user populates the field.
- **Required**: The field is visible on the page and the page cannot be saved if the field is not populated. Required fields display with a red bar on the left side of the field.



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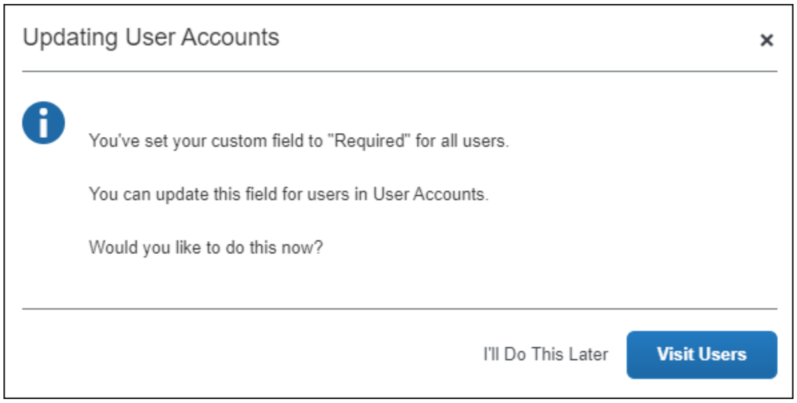
When you set a field to **Required**, the following prompt appears:



If you click **Visit Users**, the **Users** page opens.

- **Read-only**: The field is visible on the page, but users cannot change the contents or state of the field.
- **Hidden from employees**: The field does not appear on the page.

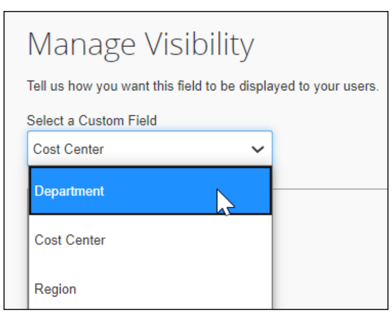
NOTE: If a field is hidden on all pages, it is only visible to administrators in the **User Information** section on the **Users** page in Product Settings.

Help Me Decide

The **Manage Visibility** page includes a **Help Me Decide** feature. This feature helps you set the visibility levels for your custom fields.

To use the Help Me Decide feature:

1. In **Advanced View**, click on **Manage Visibility**.
2. On the **Manage Visibility** page, select the custom field you want assistance with in the **Select a Custom Field** list.



3. Click **Help me Decide**.

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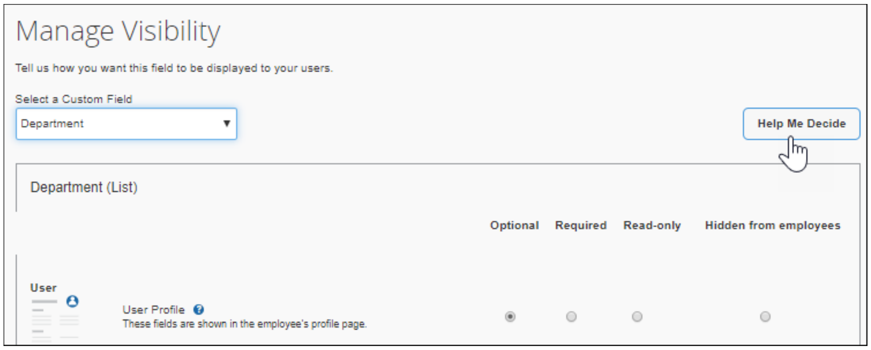
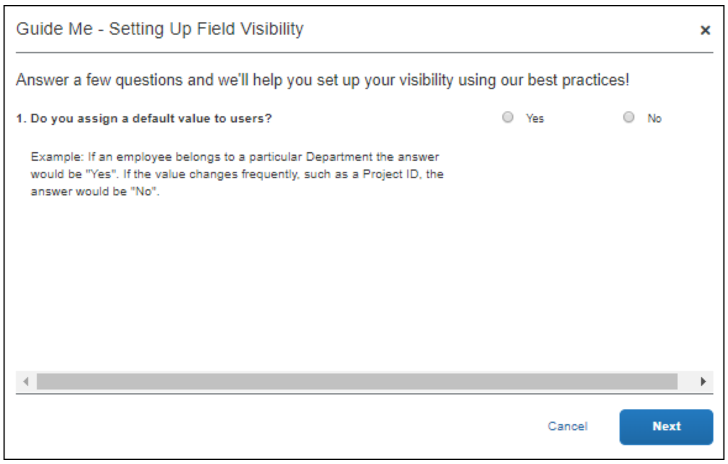
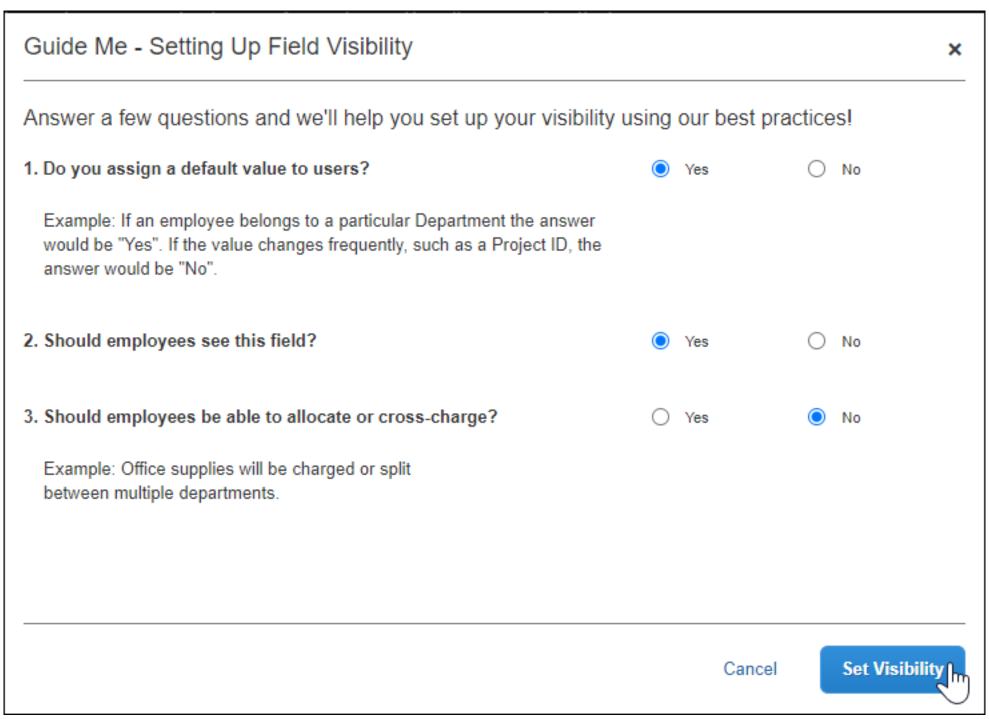


The **Guide Me – Setting Up Field Visibility** page appears.



4. Answer the questions that appear and then click **Set Visibility**.



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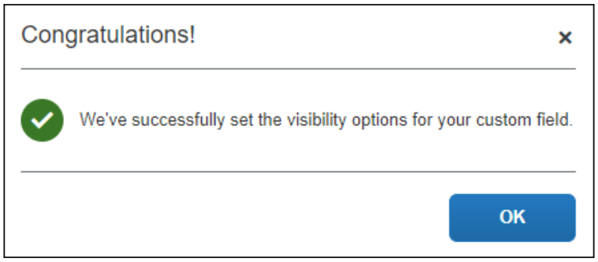
A confirmation message appears.



5. Click **OK**.

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