NextGen UI for Concur
Request – End User
Transition Guide

Last Revised: August 4, 2022

Applies to:

☑ Professional/Premium edition
  □ Expense
  □ Travel
  ☑ Request
  □ Invoice

☑ Standard edition
  □ Expense
  □ Travel
  ☑ Request
  □ Invoice
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<thead>
<tr>
<th>Date</th>
<th>Revision Notes/Comments</th>
</tr>
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<tr>
<td>August 4, 2022</td>
<td>Made the following updates to the <em>Agency Proposals</em> section:</td>
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<tr>
<td></td>
<td>- In the <em>NextGen UI – Trip Segments</em> section, added the following information about air and train segments:</td>
</tr>
<tr>
<td></td>
<td>For air and train segments, please make sure the <strong>Date</strong> field has <em>Departure time</em> selected. If you change the value to <em>Arrival time</em>, your travel agent will still consider the date and time entered in the <strong>Date</strong> field as the departure date and time.</td>
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<td></td>
<td>- In the <em>NextGen UI – Proposal comparison screen</em> section, added some best practice information about existing transportation and lodging expenses.</td>
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<tr>
<td>July 13, 2022</td>
<td>Made the following updates to the <em>Agency Proposals</em> section:</td>
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<tr>
<td></td>
<td>- Updated the section description.</td>
</tr>
<tr>
<td></td>
<td>- Added trip segment information and images for the existing UI and NextGen UI</td>
</tr>
<tr>
<td></td>
<td>- Updated the note about the <strong>Container PNR</strong> field.</td>
</tr>
<tr>
<td>May 20, 2022</td>
<td>In the <em>Agency Proposals</em> section, updated the note about which Agency Proposals configurations are supported in the NextGen UI:</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> The NextGen UI for Concur Request only supports the generic Agency Proposals configuration and the Agency Proposals via v4 API. The NextGen UI will not support the Only American Express Business Travel (AEBT) or Only Carlson Wagonlit Travel (CWT) Agency Proposal configurations.</td>
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<tr>
<td>May 11, 2022</td>
<td>Added the following note to the <em>Cash Advance &gt; NextGen UI</em> section:</td>
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|              | **NOTE:** Currently in the NextGen UI, fields configured to copy down from the Request Header to the Cash Advance form are not copying down to the corresponding fields, and the field values are not appearing on the cash advance details page.
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<tr>
<td>March 23, 2022</td>
<td>Made the following updates:</td>
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<td></td>
<td>• Updated the allocation summary dialog image in the <em>Allocations &gt; View Allocations</em> section.</td>
</tr>
<tr>
<td></td>
<td>• Updated the information and images for creating a new cash advance in the <em>Cash Advance &gt; NextGen UI</em> section.</td>
</tr>
<tr>
<td></td>
<td>• In the <em>Agency Proposals &gt; NextGen UI</em> section, updated the images of the Agency Proposal page, and replaced the &quot;To request additional proposals for the travel request from the travel agency, click the Get Another Proposal button.&quot; sentence with the following:</td>
</tr>
<tr>
<td></td>
<td>If no itinerary meets your trip needs, you can request another proposal from your travel agency. To do so, select a proposal, then modify the details of your transportation and/or lodging expenses, and then re-submit the request.</td>
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<tr>
<td></td>
<td>• In the <em>Cancel Requests</em> section, replaced &quot;back to Not Submitted&quot; with &quot;to Cancelled&quot; in the following sentence:</td>
</tr>
<tr>
<td></td>
<td>Clicking <strong>OK</strong> changes the request status to Cancelled.</td>
</tr>
<tr>
<td></td>
<td>• In the <em>Recall Requests</em> section, replaced &quot;back to Not Submitted&quot; with &quot;to Returned&quot; in the following sentence:</td>
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<tr>
<td></td>
<td>Clicking <strong>Yes</strong> changes the request status to Returned.</td>
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<tr>
<td>January 24, 2022</td>
<td>Added the following note to the <em>Event Requests &gt; NextGen UI</em> section:</td>
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<tr>
<td></td>
<td><strong>NOTE:</strong> When searching for event participants in Concur Request, the search results currently have a limit of 100 event participants, so the search results will be limited to the first 100 event participants returned by the search.</td>
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<td>January 6, 2022</td>
<td>Made the following updates:</td>
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<td></td>
<td>• Updated the copyright year</td>
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<td></td>
<td>• In the Segments and Multi-Leg Flights and Rail Trips sections, updated image to show the renamed &quot;Departure time&quot; selection that replaced the &quot;Depart at&quot; selection for segments</td>
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<td></td>
<td>• Added the Recently Used Feature for List Fields section under the New Request and New Expenses and Segments – The Basics section</td>
</tr>
<tr>
<td></td>
<td>• In the Attendees section, updated the image of the attendee list in the Choose from Your Favorites and Choose from an Attendee Group sections to include the Remove button. Also updated information about duplicate attendees in the Import Attendees section, and added the Alerts for Attendee Exceptions section</td>
</tr>
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<td></td>
<td>• Added a note about the Request Details &gt; Allocation Summary selection to the Allocations &gt; View Allocations section</td>
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<tr>
<td></td>
<td>• Updated images of the CASH ADVANCES section in the Cash Advance section to show the CASH ADVANCES section located below the Request Details and other menus</td>
</tr>
<tr>
<td></td>
<td>• Added the Auto-Generated Expected Expenses for Cash Advances section under the Cash Advance section</td>
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<tr>
<td></td>
<td>• Added the Process Requests section</td>
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<td></td>
<td>• Added the Expense Reports Associated with Requests section</td>
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<td></td>
<td>• Added information about the Container PNR field to the Agency Proposals section</td>
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<td></td>
<td>• Added the Central Reconciliation for Invoices section</td>
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<td></td>
<td>• Added the Risk Management section</td>
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<td></td>
<td>• Added the Event Requests section</td>
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<td></td>
<td>• Replaced the Confirm dialog image with the Cancel Request dialog image and added information about the Cancel Request dialog in the Cancel Requests section</td>
</tr>
<tr>
<td>March 10, 2021</td>
<td>Updated the copyright date, and clarified text and added a note regarding the attendee import in the Attendees &gt; NextGen UI &gt; IMPORT ATTENDEES section. It is recommended that no more than 500 attendees be included in a single import.</td>
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<tr>
<td>August 17, 2020</td>
<td>Added the Import Attendees section and replaced the Request Administration menu selection references with Request Admin. The menu selection was renamed to Request Admin.</td>
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<td>June 2, 2020</td>
<td>Made the following updates:</td>
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<tr>
<td></td>
<td>- Removed references to approvers from the <em>Affected Users</em> section</td>
</tr>
<tr>
<td></td>
<td>- Updated images throughout the guide to show latest UI</td>
</tr>
<tr>
<td></td>
<td>- Added the <em>Navigating Between Expected Expenses and Segments</em> section</td>
</tr>
<tr>
<td></td>
<td>- Added information about the attachments icon to the <em>Attachments</em> section</td>
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<tr>
<td></td>
<td>- In the <em>Allocations</em> sections, added information about allocating individual expected</td>
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<tr>
<td></td>
<td>expenses from the expected expense details page, added the <em>View Allocations</em> section,</td>
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<tr>
<td></td>
<td>and updated images.</td>
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<tr>
<td></td>
<td>- Updated <em>Manage Requests</em> page images for requests that do not have an Active status</td>
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<tr>
<td></td>
<td>to show the request ID link.</td>
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<tr>
<td></td>
<td>- Added a note about the message that appears if the amount of a segment or expected</td>
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<tr>
<td></td>
<td>expense associated with a cash advance changes to the <em>Cash Advance</em> section</td>
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<tr>
<td></td>
<td>- Added information about the resubmitted icon to the *Approvals &gt; Sending a Request</td>
</tr>
<tr>
<td></td>
<td>Back to Submitter* section</td>
</tr>
<tr>
<td></td>
<td>- Updated the <em>Edit Request Header</em> page image in the *Travel Integration: Book then</td>
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<tr>
<td></td>
<td>Approve and <em>Edit Requests</em> sections</td>
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<tr>
<td></td>
<td>- Added information about the <em>Create Expense Report</em> button to the *Travel Integration:</td>
</tr>
<tr>
<td></td>
<td>Approve then Book* section</td>
</tr>
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<td></td>
<td>- Now that the Enforce Online/Offline Policy feature is available in the NextGen UI</td>
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<tr>
<td></td>
<td>for Concur Request, removed the following note from the *Travel Integration: Booking</td>
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<td>Switch* section:</td>
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<td></td>
<td><strong>NOTE:</strong> The Enforce Online/Offline Policy feature is not supported in the NextGen</td>
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<tr>
<td></td>
<td>UI for Concur Request at this time.</td>
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<tr>
<td></td>
<td>- Added information about the Enforce Online/Offline Policy feature.</td>
</tr>
<tr>
<td></td>
<td>- Added information about clicking a request's name on the <em>Expected Expenses</em> page to</td>
</tr>
<tr>
<td></td>
<td>open the <em>Edit Request Header</em> page in the <em>Edit Requests</em> section.</td>
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<tr>
<td></td>
<td>- Added note about the NextGen UI for Concur Request only supporting the generic Agency</td>
</tr>
<tr>
<td></td>
<td>Proposals configuration to the <em>Agency Proposals</em> section.</td>
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<td></td>
<td>- Added the <em>Budget Integration</em> section.</td>
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<tr>
<td>May 27, 2020</td>
<td>Replaced term &quot;NextGen Request&quot; with &quot;NextGen UI&quot; or &quot;the NextGen UI for Concur Request&quot;</td>
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<tr>
<td></td>
<td>for accurate product branding.</td>
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<tr>
<td></td>
<td>Also made a number of updates to the <em>Attendees</em> section to reflect the current</td>
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<td></td>
<td>Attendees functionality in the NextGen UI for Concur Request.</td>
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<tr>
<td>February 13, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
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<td>Date</td>
<td>Revision Notes/Comments</td>
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<td>---------------</td>
<td>----------------------------------------------------------------------------------------</td>
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<tr>
<td>November 22, 2019</td>
<td>Added the following sections:</td>
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<tr>
<td></td>
<td>• Attendees</td>
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<td></td>
<td>• Cash Advance</td>
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<td></td>
<td>• Approvals</td>
</tr>
<tr>
<td></td>
<td>• Travel Integration: Approve then Book</td>
</tr>
<tr>
<td></td>
<td>• Travel Integration: Booking Switch</td>
</tr>
<tr>
<td></td>
<td>• Vendor Fields</td>
</tr>
<tr>
<td></td>
<td>Removed the New Feature in NextGen Request &gt; Agency Booking Fees section. This section will be added back into a future version of the guide when the functionality becomes available.</td>
</tr>
<tr>
<td>May 10, 2019</td>
<td>Initial publication</td>
</tr>
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</table>
NextGen UI for Concur Request – End Users

Section 1: Overview

SAP is pleased to announce the Next Generation User Interface (NextGen UI) for Concur Request – a new interface for Concur Request end users. The NextGen UI for Concur Request provides an intuitive, integrated, efficient experience. The following pages describe the enhancements.

In this Guide

In this guide, the current user interface is called the existing UI. The Next Generation user interface for Concur Request is called NextGen UI.

Affected Users

The NextGen UI for Concur Request affects end-user pages and processes. It does not affect:

- Pages and processes used by processors, even if the request being viewed by the processor was created by a Concur Request user in the NextGen UI
- Profile
- Tools or configuration pages

Screen Samples and Features

Remember, Concur Request features are configurable by your company so the fields, layout, options, etc. shown in this guide may differ from those chosen by your company.
Section 2: Manage Requests Page

When you click the Requests tab, the Manage Requests page appears.

The Manage Requests page has been simplified, and there are a number of changes to the page:

- Request Tiles
- View List
- Request Lists
- Create New Request
- Delete, Copy, Close/Inactivate Buttons
Request Tiles

When viewing active requests on the Manage Requests page, requests are now displayed as individual tiles.

Existing UI

In the existing UI, your active requests are displayed in a list.

NOTE: In the existing UI, you can copy and delete selected requests from this page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.
**NextGen UI**

In the NextGen UI for Concur Request, each active request is displayed as an individual tile. The tiles are sorted by date of creation.
Each tile includes the following information:

- Request name
- Status
- Request date
- Total
- Alert indicator (if request contains any alerts)
- Request's workflow status, such as Submitted and Pending Approval (if applicable)
- Approver's name (if applicable)
- Tile banner color indicates request status
View List

The **Manage Requests** page in the NextGen UI for Concur Request still has a **View** list for viewing requests by status and for viewing all requests. The **View** list has the same selections, but the selection names have been updated to be more concise.

**Existing UI**

In the existing UI, the **View** list looks like this.
**NextGen UI**

In the NextGen UI for Concur Request, the **View** list still defaults to *Active Requests*, but you can easily view other requests.

From the **View** list, select one of the request statuses or *All Requests*. 
For example, if you select *Not Submitted*, the unsubmitted requests appear.

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Status</th>
<th>Request Dates</th>
<th>Requested</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip to Paris ID: 39PG</td>
<td>Not Submitted</td>
<td>12/24/2018 - 12/28/2018</td>
<td>$3,350.00</td>
<td>$3,350.00</td>
</tr>
<tr>
<td>Client Sales Meeting ID: 39PA</td>
<td>Not Submitted</td>
<td>03/28/2018 - 03/29/2018</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

To sort, click the column headings.

To return to the active requests, select *Active Requests* in the **View** list.
Create New Request

To simplify the process for creating a new request, in the NextGen UI for Concur Request, the Create New menu above the Manage Requests page is removed and there is now a Create New Request tile and button on the page.

Existing UI

In the existing UI, users can create a new request by clicking New Request from the Create New menu.
NextGen UI

In the NextGen UI for Concur Request, when Active Reports is selected from the View list on the Manage Requests page, there is a Create New Request tile at the top of the page.

![Image of the NextGen UI for Concur Request with a Create New Request tile highlighted.]

When Not Submitted, Pending Approval, Approved, Cancelled, Closed, or All Requests is selected in the View list, there is a Create New Request button at the top of the page.

![Image of the NextGen UI for Concur Request with a Create New Request button highlighted.]

Clicking the **Create New Request** tile or **Create New Request** button opens the **Create New Request** page.

For more information about creating requests in the NextGen UI for Concur Request, refer to the **New Request and New Expenses – The Basics** section in this guide.

![Create New Request form](image)

### Delete, Copy, Close/Inactivate Buttons

In the existing UI, you can copy, delete, close, and inactivate selected requests from the **Manage Requests** page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.

For more information about copying, deleting, closing, and inactivating requests in the NextGen UI for Concur Request, refer to the **Edit Requests, Copy Requests, Delete Requests and Expected Expenses**, and **Close/Inactivate Requests** sections in this guide.
**Existing UI**

In the existing UI, the **Delete Request**, **Copy Request**, and **Close/Inactivate Request** buttons are located at the top of the **Manage Requests** page.

![Existing UI screenshot](image)

**NextGen UI**

In the NextGen UI for Concur Request, requests can be deleted by clicking the delete icon, located next to the request name and amount.

![NextGen UI screenshot](image)

Depending on the request's current status, a request can be copied by clicking the **Copy Request** link or by clicking **Copy Request** from the **More Actions** list.

![NextGen UI screenshot](image)
In an approved request, a request can be copied, closed, inactivated, or recalled from the **More Actions** list.

![More Actions and More Options](image)

**Section 3: New Request and New Expenses and Segments – The Basics**

Just as before, typically when you create a new request, you start with the general request-specific page (the **Request Header** tab) and then move to the **Segments** tab to add the applicable travel segments. Though this basic process has not changed, the pages are more streamlined and easier to manage. In virtually all cases, when working with requests:

- The fields are larger and easier to navigate.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.
New Request

**Existing UI**

In the existing UI, the **Request Header** tab on the **Request** page looks like this.
**NextGen UI**

In the NextGen UI for Concur Request, the header page is called **Create New Request**. The fields are larger and easier to navigate.

![Create New Request Form](image)

**NOTE:** The fields that appear on this page are configurable by your company, so your **Create New Request** page may be different from the one shown here.

Complete the fields and click the **Create** button to move to the next page.

**Expected Expenses**

In the existing UI, the **Expenses** tab is located after the **Segments** tab on the **Request** page. In the NextGen UI for Concur Request, after filling out the request header information on the **Create New Request** page and clicking the **Create** button, users are prompted to create the expected expenses and/or segments for the request on the same page, the **Expected Expenses** page.

In the existing UI, having a separate tab for adding expected expenses and a separate tab for adding segments could be a confusing process flow. Having expected expenses and segments on the same page ensures all segments will have an entry in the **Expected Expenses** list that represents the segment's fare.
**Existing UI**

In the existing UI, if the Expected Expenses feature is enabled for your company, expected expenses are entered on the **Expenses** tab.

![Existing UI](image)

**NextGen UI**

In the NextGen UI for Concur Request, if the Expected Expenses feature is enabled for your company, after clicking the **Create** button on the **Create New Request** page, the **Expected Expenses** page opens. The **Expected Expenses** page is cleaner and has fewer "sections" – making the page easier to navigate.

![NextGen UI](image)
CREATE AN EXPECTED EXPENSE – TYPICAL PROCESS

To get started, click the Add button to view the list of expense types and segment types, and then select the applicable expense type.

NOTE: In the search box at the top of the list, you can enter all or part of an expense type or segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.

Clicking an expense type opens the expected expense details page for the selected expense type.

NOTE: The fields that appear on this page are configurable by your company, so yours may be different from the one shown here.
Complete the fields and click **Save.** The expected expense is added to the **Expected Expenses** list.
Segments

How segments appear in a request has significantly changed between the existing UI and the NextGen UI for Concur Request. While the functionality of segments is the same, how they are created and displayed for a request in the NextGen UI is different.

Existing UI

In the existing UI, segments are created for a request on the Request page by clicking a segment type icon and entering the segment information on the Segments tab.

NextGen UI

In the NextGen UI for Concur Request, the steps for adding a segment to a request is the same as adding an expected expense on the Expected Expenses page, but instead of selecting an expense type in the Add list, you select the applicable segment type from the Add list.

**NOTE:** When adding expected expenses and segments, the Expense Type list includes the names of both the expense types and the segment types set up for Concur Request. If an expense type has the same name as a segment type, it may appear as if there are duplicate items in the list, when in fact, the list is displaying both the name of the expense type and the name of the segment type.
CREATE A SEGMENT – TYPICAL PROCESS

To get started, click the Add button to view the list of expense types and segment types, and then select the applicable segment type.

**NOTE:** In the search box at the top of the list, you can enter all or part of a segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.
Clicking a segment type opens the page for the selected segment type.

![New Expense: Air Ticket](image)

**NOTE:** The fields that appear on this page are configurable by your company, so yours may be different from the one shown here.

Complete the fields and click **Save**. The segment type is added to the **Expected Expenses** list.
Navigating Between Expected Expenses and Segments

If a request contains multiple expected expenses and/or segments, on the expected expense or segment details page, left and right navigation arrows are displayed to the left of each expected expense or segment name in the request. The navigation arrows allow you to quickly navigate between the expected expenses and/or segments in the request without having to return to the **Expected Expenses** page.

For the first expected expense or segment in the request, the left navigation arrow will be disabled. For the last expected expense or segment in the request, the right navigation arrow will be disabled.

Attachments

The process for adding attachments, such as an image or PDF, to a request is the same in the NextGen UI for Concur Request.

Existing UI

In the existing UI, attachments are added to the request by clicking **Attach Documents** in the **Attachments** list on the **Request** page.
NextGen UI

In the NextGen UI for Concur Request, attachments are added to the request by clicking Attach Documents in the Attachments menu on the Expected Expenses page.

Clicking Attach Documents opens the Document Upload and Attach dialog.

Click Upload and Attach to add an attachment to the request.
After adding an attachment to a request, the attachments icon, ![attachment icon], is displayed next to the **Attachments** menu to indicate that the request has attachments.

You can view, delete, or add additional attachments from the **Attachments** menu.

**Recently Used Feature for List Fields**

List fields on the Concur Request forms display the most recently used selections when filling out a list field. When you click in a list field, the most recently used selections are displayed under **Recently Used** at the top of the list of selections.

The Recently Used feature is available for list and connected list fields configured in Forms and Fields (Administration > Request > Forms and Fields) and all location list fields. The Recently Used feature is available for these fields on the request header, segment, and expected expense forms.

The Recently Used feature is not currently available for country/region, currency, policy, or vendor list fields.
The most recently used selections for a list field are displayed under **Recently Used** in a list field’s list of selections.

If no selections have been made for a list field before, the **Recently Used** list is not displayed at the top of the list field's list of selections.
Section 4: Additional Menus on the Request

The following menus appear on the request:

- **Request Details:** The Request Details menu is a new menu in the NextGen UI for Concur Request. The menu contains selections for editing the request header, accessing the request timeline, otherwise known as the approval flow in the existing UI, audit trail, allocation summary, and other selections, such as Cash Advance.

  For more information about the request timeline, refer to the Approval Flow/Request Timeline section in this guide.

  For more information about the audit trail, refer to the Audit Trail section in this guide.

  For more information about allocations, refer to the Allocations section in this guide.

  For more information about cash advances, refer to the Cash Advance section in this guide.
• **Print or Print/Share:** On the Print and Print/Share menu, the options should be the same as your current menu. The Print/Email menu in the existing UI is named Print/Share in the NextGen UI for Concur Request.
• **Attachments:** On the **Attachments** menu, the options should be the same as your current menu. The **View Documents in a new window** selection in the existing UI is named **View Documents** in the NextGen UI for Concur Request.

![NextGen UI for Concur Request](image)

**NOTE:** The options in these lists are configurable by your company so yours may be different from what is shown here.

### Section 5: Attendees

For some types of expenses, such as business meals or entertainment, users may be required to identify all attendees associated with the expected expense. The Concur Request user can include attendee information in order to obtain preapproval of travel costs as well as the associated attendees.

Like the existing UI, in the NextGen UI for Concur Request, the Attendees feature is available only for expected expenses – not for segments.

In the NextGen UI for Concur Request, attendees are no longer managed on the request's **Expenses** tab. Attendees are managed on a separate page, the **Attendees** page, providing more workspace for attendees and making the experience cleaner and less confusing.
**Existing UI**

In the existing UI, the **Attendees** section looks like this on the request's **Expenses** tab.

![Existing UI screenshot](image)

**NextGen UI**

In the NextGen UI for Concur Request, attendees are added and managed on the **Attendees** page.

You can access the **Attendees** page by clicking the **Attendees** link on the **New Expense**, expected expense details, and **Expected Expenses** pages. The **Attendees** link only appears for expense types that your company has defined as requiring attendees.
Add Attendees – Typical Process

Complete the expected expense and then click the Attendees link on the New Expense page.

**NOTE:** Just like the existing UI, the Attendees link appears only for the expense types that your company has defined as requiring attendees.

The Attendees page appears.

From the Attendees page you can add and remove attendees from the expected expense, and you can create reusable groups of attendees.
You can sort the attendees on the **Attendees** page by clicking the sort arrow next to the **Attendee Name** column.

![Attendees section with sort arrow highlighted]

To add an attendee to an expected expense, click the **Add** button.

![Attendees section with Add button highlighted]

**NOTE:** The attendee options are configurable by your company so yours may be different from what is shown here.
The **Add Attendees** dialog appears. All of the options for adding attendees to the expected expense are available in this dialog.

You can choose from recent attendees, add a new attendee, or choose from attendee groups or favorites.
NOTE: To prevent duplicate attendees from being added to an expected expense, attendees who are already added to the expected expense are read-only with italicized text and cannot be selected (checked) from the attendee list.
**CHOOSE FROM RECENTLY USED ATTENDEES**

A good place to start is with the **Recent Attendees** tab. Select the check box for the desired attendee(s) and then click the **Add to List** button. The selected attendees will be added to the expected expense.

At the bottom of the **Recent Attendees** tab is the **Search All Attendee History** link. Click the link to see all attendees you have ever used - regardless of whether they are in your Favorite Attendees list.
**CHOOSE FROM YOUR FAVORITES**

To search for an attendee that you have designated as a favorite (in Profile) but who is not available on the **Recent Attendees** page, click **Attendee Groups**. The first group is Favorites. Click **Favorites**. The **Favorites** dialog appears.

Select the check box for the desired attendee(s) and then click the **Add to List** button.
**CHOOSE FROM AN ATTENDEE GROUP**

To search for an attendee in an attendee group or add all attendees from a group, click **Attendee Groups**. The other attendee groups are listed below the Favorites attendee group.

To add all the attendees from a group, select the check box next to the attendee group, and then click **Add to List**.
To add one or more attendees from a group, click the attendee group name. The attendee group dialog appears with the name of the group at the top of the dialog.

Select the check box for the desired attendee(s) and then click the Add to List button.
Attendee groups can be created from Favorite Attendees in Profile or from the **Attendees** page. To create an attendee group from the **Attendees** page, select some or all of the attendees currently assigned to the expected expense, and then click the **Create Group** button.

In the **Create Group** dialog, enter the attendee group name, and then click **Save**.
SEARCH FOR OTHER ATTENDEES

In the following example, assume that you want to add an attendee who is not available on the **Recent Attendees** tab or in Favorites. The first step is to search for the desired attendee.

Click the **Attendees** tab to search for an attendee.

![Add Attendees](image)

**NOTE:** The **Attendees** tab can display two types of search, the simple search or the advanced search.

In the Professional edition of Concur Request, the attendee type configuration determines whether the simple search, advanced search, or both are displayed for the selected attendee type.

In the Standard edition of Concur Request, the simple search is displayed by default, and you can click the **More Search Options** link to display the advanced search.

You can type characters in the search field to search for an attendee and the results will appear in the list.

![Add Attendees](image)
You can click **More Search Options** to enter additional criteria using the advanced search fields.

![Add Attendees](image)

**NOTE:** When you are performing a search using the advanced attendee search options, and the attendee type is associated with the SYSEMP Attendee Type Code, such as Employee, you need to fill out the **First Name** and/or **Last Name** fields on the search dialog.

Also, for this attendee type you will see the **Include inactive employees** check box. Select (enable) this check box if you want to include inactive employees in your attendee search results.

The **Fewer Search Options** link takes you back to the simple search fields. You can click **Reset** to clear any previous search criteria.
If you are performing a simple search, select the appropriate attendee type, begin entering the attendee's name, and then click the attendee's name to add it to the expected expense.

If you are performing an advanced search, select the appropriate attendee type, and enter the search term(s) (for example, the first few letters of the attendee's last name), and then click the **Search** button.
When you are performing an advanced search, after clicking **Search**, the search results appear on the **Attendees** tab with the search criteria displayed at the top of the search results.

Select the check box for the desired attendee and then click the **Add to List** button.

![Add Attendees](image)

**NOTE:** If you do not find the desired attendee in the results, you can click the **Modify Search** link to modify your search criteria and try again.
**CREATE NEW ATTENDEE**

If you want to create a new attendee manually (and if you are allowed to by your company's configuration), click the **Attendees** tab, and then click the **Create New Attendee** link.

The **Create New Attendee** link is available in the following places on the **Attendees** tab:
Complete the **Create New Attendee** dialog and then click the **Create Attendee** button.

![Create New Attendee dialog](image)
When done, all attendees appear on the **Attendees** page.

![Attendees Table](image)

Click **Save** to add the attendees to the expected expense and return to the expected expense page.

If you click **Cancel**, a message appears. If you then click **Continue Without Saving**, then the newly added or updated attendees on this page will not be saved to the expected expense.

On the expected expense page, the number in the **Attendees** link is updated to match the number of attendees associated with the expected expense.

![Expense Page](image)
**IMPORT ATTENDEES**

In the Professional Edition of NextGen UI for Concur Request, you can use the personal attendee import to add attendees to an expected expense. In order to use the personal attendee import, the personal attendee import must be configured for your organization in Concur Expense.

The personal attendee import benefits users who must list a large number of attendees for events such as seminars or department functions. The attendee import uses a Microsoft Excel spreadsheet to import attendees. It is recommended that no more than 500 attendees be included in a single import.

**NOTE:** Concur Request supports up to 500 attendees per expected expense. This limit is due to a combination of configuration elements for the expected expense detail form, the attendee type, and related attendee form. Because of the constraints of these configuration elements, expected expenses with more than 500 attendees may or may not function correctly. SAP cannot guarantee that any list of attendees greater than 500 will import successfully to Concur Request. Attempting to import more than 500 attendees could result in issues opening the request or an individual expected expense.

Your company may allow you to use the import. When Concur Request is configured to use the attendee import feature, the **Import Attendees** tab is displayed in the **Add Attendees** dialog.
To import attendees into an expected expense:

1. Complete the expected expense and then click the **Attendees** link on the **New Expense** page.

To add an attendee to an existing expected expense, on the expected expense details page, click the **Attendees** link.

The **Attendees** page appears.

**NOTE:** The **Attendees** link appears only for the expense types that your company has defined as requiring attendees.

2. Click **Add**.

Clicking **Add** opens **Add Attendees** dialog. If your company allows you to import attendees, the **Import Attendees** tab is available.

3. Click the **Import Attendees** tab.

Attendees are imported using a Microsoft Excel spreadsheet created using the attendee spreadsheet template, which is formatted with the attendee fields.

**NOTE:** The attendee import only supports the Excel `.xls` file format.
4. If you have already downloaded and populated the attendee import template Excel spreadsheet, click **Upload Spreadsheet**.

Select the Excel spreadsheet, and then click **Open**.

5. If you need to create an Excel spreadsheet using the attendee import template, click **Download the template**.

Clicking **Download the template** downloads the AttendeeImportTemplate.xls attendee import template file.
- Save the AttendeeImportTemplate.xls file to your computer or network.
- Open the AttendeeImportTemplate.xls file in Microsoft Excel.
- Enter the attendee records (up to and not over 500 attendees).
- Save your changes to the attendee import spreadsheet.
- Click **Browse**.
- On the **Import Attendees** tab, click **Upload Spreadsheet**.
- Select the attendee import spreadsheet, and then click **Open**.

6. Once the attendee import spreadsheet is successfully uploaded, click **Next**.

When an Excel spreadsheet is successfully uploaded, a tile containing the spreadsheet file name and a green circle with a check mark appears on the **Import Attendees** tab.
Clicking **Next** opens the **Import Attendees** dialog with the attendee information from the Excel spreadsheet displayed.

7. Review the information for accuracy.

   If the information is correct, click **Next**.

   If the information is not correct, click **Cancel**, correct the attendee information in the Excel spreadsheet, and then import the updated spreadsheet.
When you click **Next**, SAP Concur checks for required fields. If it finds missing required fields, a message appears, indicating that the listed attendee(s) cannot be imported.
Click the red circle in the **Alerts** column for an attendee to view the reason for the attendee error.

8. If you want to correct the attendees with errors, click **Cancel**, correct the attendee information in the Excel spreadsheet, and then import the updated spreadsheet.

If you want to continue, click **Next**.

In the next step, the system checks for possible duplicate attendees by comparing the attendees on the worksheet to attendees already in the system. If the import identifies possible duplicate attendees, a list of possible duplicate attendees is displayed in the **Import Attendees** section of the dialog. Duplicate attendees in the attendee import are resolved one attendee at a time.
9. Select an attendee in the **Import Attendees** list, and then click the **View Duplicates** button.

The **Duplicate Attendees** dialog opens. The possible duplicate attendees associated with the selected attendee are displayed.
10. Either select the attendee in the **Imported Attendee** list to continue importing the attendee as a new attendee or select one of the existing attendees in the **Duplicates** list, and then click the **Use Selected Attendee** button.
After selecting the **Use Selected Attendee** button, if there are additional possible duplicate attendees in the attendee import, you are returned to the list of possible duplicate attendees, and the **Added** and **Duplicate** totals are updated.

![Image of Import Attendees screen with duplicate attendees list]

11. Repeat the process for the remaining duplicate attendees that you want to resolve, and then click **Next**.

If you click **Next** without resolving the remaining duplicate attendees, the remaining attendees in the import that have been identified as possible duplicates will not be imported.

When you click **Next**, the **Skip Duplicate Attendees?** message appears.

![Image of Skip Duplicate Attendees dialog box]

Click the **Skip Duplicate Attendees** button to continue.
After clicking **Next** or **Skip Duplicate Attendees**, the final dialog appears, showing the number of attendees imported, number of attendees skipped, the number of attendees that could not be imported, and the number of duplicate attendees resolved.

![Import Attendees dialog](image)

12. Click **Close**.

   The attendees are imported into the expected expense.
**Manage Duplicate Attendees**

When you attempt to add a new attendee and click *Create Attendee* (as described above) in the NextGen UI, Concur Request immediately searches for duplicates. If Concur Request finds a duplicate attendee, you are prompted to use the existing attendee or to add the new attendee if, in fact, they are not the same person.

![Duplicate Attendees Found](image)

**Attendees in the Expected Expenses List**

When there are attendees associated with an expected expense, the *Attendees* link is displayed below the expense type name in the *Expected Expenses* list.

![Business Lunch $200.00](image)
Clicking the **Attendees** link opens a summary of the attendee information. Clicking the **View Attendees** link opens the **Attendees** page.

![Attendees Image]

**Alerts for Attendee Exceptions**

When there are exceptions associated with an attendee, such as attendee limits, an alert is displayed for the attendee and the corresponding expected expense or segment. Attendee exceptions are displayed if you have an audit rule configured for attendee expense amount limits and the limit has been exceeded.

If there are exceptions associated with an attendee, on the **Expected Expenses** page, the alert icon is displayed in the **Alerts** column next to the expected expense or segment in the **Expected Expenses** list.
The exception text is displayed at the top of the page and clicking the alert icon in the **Alerts** column displays the exceptions text, the list of attendees associated with the exception, the entry amount, and the total amount expensed.
On the **Attendees** page, the alert icon is displayed in the **Alerts** column next to the attendee. Clicking the alert icon displays the exception text.

![Attendees screenshot](image1)

In the **Add Attendees** dialog, the alert icon is displayed in the **Alerts** column next to the attendee. Clicking the alert icon displays the exception text.

![Add Attendees screenshot](image2)
In the **Attendee Details** dialog, the exception text is displayed at the top of the dialog.

![Attendee Details dialog](image)

- **Attendee Type**: Business Guest
- **Last Name**: Andre
- **First Name**: Malreau
- **Attendee Title**: AA
- **Middle Initial**: 
- **Company**: concur

*Required field*
Section 6: Allocations

You can allocate a single expected expense or several expected expenses at the same time. For segments, you can allocate segments, but you can only allocate all segments in a request as a group. You cannot allocate individual segments in a request.

NOTE: The allocation options are configurable by your company so your Allocate page may be different from the one below.

Existing UI

In the existing UI, the Allocations for Request page looks like this.
After selecting the segments or expected expenses to allocate and clicking **Allocate Selected Expenses**, the **Allocations for Request** page looks like this.

![Allocations for Request Page](image)

**NextGen UI**

In the NextGen UI for Concur Request, segments and expected expenses are allocated from the **Expected Expenses** page by selecting the applicable segments and/or expected expenses, and then clicking **Allocate**.

![NextGen UI](image)
Allocations are defined on the **Allocate** page.

If you select an individual segment on the **Expected Expenses** page, and then click **Allocate**, all of the segments in the request will automatically be selected for allocation.

**EXAMPLE**

There are two segments in the request, Air Ticket and Hotel Reservation. Only the Air Ticket segment is selected.
When **Allocate** is selected, both the Air Ticket and Hotel Reservation segments are selected on the **Expected Expenses** page, and an alert opens listing the segments in the request that must be allocated together as a group.

Clicking **OK**, opens the **Allocate** page for the selected segments.

**Allocate Expected Expenses and Segments**

To allocate one or more expected expenses or segments, open the request, and on the **Expected Expenses** page, select the expected expenses and/or segments you want to allocate.

When you select one or more expected expenses or segments on the page, the **Allocate** button becomes available. Click **Allocate**.

The **Allocate** page appears.
Note that the amount on the **Allocate** page includes only the amount for the selected expected expenses and/or segments.

On the "blank" **Allocate** page, a default allocation appears. It is a reminder to you that any amount that you do not allocate is automatically charged to your default allocation, for example, to your own department.

If you have allocations configured and enabled for individual expected expenses in Concur Request, you can also allocate individual expected expenses from the expected expense details page by clicking the **Allocate** link. Clicking the **Allocate** link opens the **Allocate** page for the expected expense.
Choose Percent or Amount

At the top of the page, select the Percent or Amount tab, if your configuration allows.

Add a New Allocation

To add a new allocation, click Add. The Add Allocation dialog appears.
On the **New Allocation** tab, select or enter the appropriate information for each field. Click **Add to List**. The allocation is added to the list and the **entire** allocation amount (100%) is added to the newly added allocation.

In this example, assume that Marketing is responsible for the entire cost of the expense.

![Allocation Table](image)

In this example, assume that Marketing is responsible for half and your department is responsible for the remaining half. Adjust the Marketing percentage to 50%; the default row (your cost center) automatically adjusts to assume the remaining 50%.

![Allocation Table](image)

In this example, assume that Marketing is responsible for half and Sales is responsible for the remaining half. None of the expense is to be charged to your cost center.

![Allocation Table](image)

Add as many allocations as desired. Depending on your configuration, you may be able to adjust percentages/amounts.

**Remove an Allocation**

To remove an allocation, select the check box for the desired allocation and click **Remove**.
Add to Favorites

If you have a particular set of allocations that you use a lot, save them as a favorite.

When you click Save as Favorite, the Save as Favorite dialog appears.

In the Favorite Name field, enter a name and click Save.
Use a Favorite

To use an allocation favorite, on the Allocate page, click Add and then click the Favorite Allocations tab in the Add Allocation dialog.

Click the desired favorite and then click Replace Allocations.

The allocation is applied.
**View Allocations**

When you are finished allocating segments and/or expected expenses for a request on the **Allocate** page, after saving the allocations and closing the **Allocate** page, on the **Expected Expenses** page, the **Allocated** link is displayed in the **Request** column for each allocated segment or expected expense.

Clicking the **Allocated** link opens a summary of the allocation information for the segment or expected expense.
Clicking the **View Allocation** link opens the **Allocate** page for the segment or expected expense.
To view a summary of the allocations for the entire request, on the **Request Details** menu, click **Allocation Summary**.

Clicking **Allocation Summary** opens the **Allocation Summary** dialog.
NOTE: The administrator can choose to have the Allocation Summary dialog display when Request Details > Allocation Summary is clicked, or the administrator can choose to have a specific print report appear when Request Details > Allocation Summary is clicked.

The Allocation View Print Format field on the New Request Policy or Modify Request Policy page (Administration > Request > Request Policies) determines whether the Allocation Summary dialog or a print report is used for the Allocation Summary selection.

Section 7: Cash Advance

Concur Request users can request a cash advance as part of a request. In addition to requesting approval for segments (like air and rail) and expected expenses (like meals), the user can request a cash advance for taxi, tips, incidentals, etc.

Existing UI

In the existing UI, cash advance information is defined for a request on the Request Header tab.

To create a cash advance, in the Cash Advance Amount field, enter the amount of the cash advance, select the cash advance currency, and in the Cash Advance Comment field, enter any comments about the cash advance.
If Concur Request is configured to allow multiple cash advances per request, the **New Cash Advance** button appears in the **Cash Advance** section of the request header. For the first cash advance, the user enters the amount; selects the currency; enters a comment, if desired or required; and then clicks **New Cash Advance**.

Clicking **New Cash Advance** adds another cash advance entry to the **Cash Advance** section.

The cash advance enters its approval workflow only after the request has been approved. Once the request has been approved, the cash advance shows the appropriate status (depending on the workflow) on the **Expense > Cash Advances > Active Cash Advances** page.

**NOTE:** Concur generates the cash advance name, which is comprised of the request name and the currency, such as Sales Training Q3 -USD.
If Concur Request is integrated with Concur Expense, when the request is associated with an expense report, all cash advances on the request are imported into the expense report.

**NextGen UI**

In the NextGen UI for Concur Request, a cash advance is added to a request using the **Request Details > Add Cash Advance** menu selection in the request.

![Image of NextGen UI for Concur Request showing a cash advance being added](image)

Clicking **Add Cash Advance** opens the cash advance details page. Complete the fields on the page.

**NOTE:** Currently in the NextGen UI, fields configured to copy down from the Request Header to the Cash Advance form are not copying down to the corresponding fields, and the field values are not appearing on the cash advance details page.
When you click **Save**, the cash advance information is displayed in the **CASH ADVANCES** section above the **Expected Expenses** list.

![CASH ADVANCES and EXPECTED EXPENSES](image)

If Concur Request is configured to allow multiple cash advances per request, you can click the **Add Cash Advance** menu selection for each cash advance you want to create for the request.

**NOTE:** The **Add Cash Advance** menu selection is not available on the **Request Details** menu once a request is submitted. The **Add Cash Advance** menu selection will also not be available if a cash advance limit is configured, and the limit has been met.

When you add multiple cash advances to a request, the **CASH ADVANCES** section displays the number of cash advances for the request, the total amount of the combined cash requests in the user's currency, and the individual cash advance amounts.
For example, if you created a cash advance for $100 US dollars and add a second cash advance for €25 Euros, when you click **Save** on the cash advance details page, the **CASH ADVANCES** section is updated from 1 cash advance to 2, the **Amount** is updated to show the total of both cash advances - $127.36 US dollars, and both cash advance amounts are listed - $100.00 and EUR 25.00.
To view the cash advance details, click the **CASH ADVANCES** section.
Clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog.

![Cash Advances dialog](image)

Select one of the cash advance entries, and then click **Select**.

Clicking **Select** opens the cash request details.

![Cash request details](image)
NOTE: If the amount for a segment or expected expense that is eligible for cash advances is modified or deleted, even if the amount is manually modified or deleted, the following message is displayed:

You have added or changed the amount of a segment that is managed by Cash Advance. Do you want the Cash Advance amount to be updated? Click Yes to recalculate the Cash Advance amount. Click No to save the changes on the segment only.

Clicking Yes updates the cash advance amount, incorporating any cash advance limit rates, and opens the request details page. When No is selected, the cash advance amount is not updated, and the request details page opens.

Request a Cash Advance – Typical Process

To request a cash advance in Concur Request:

1. On the Expected Expenses page for the request, click the Request Details > Add Cash Advance menu selection. The cash advance details page appears.

2. Enter the cash advance amount, select the applicable currency, and complete the remaining fields on the page as directed by your company. Use the Manage Attachments link to add attachments, if applicable.

   NOTE: The fields that appear on this page are configurable by your company, so your cash advance details page may be different from the one shown here.

3. On the cash advance details page, click Save. The cash advance information is displayed in the CASH ADVANCES section above the Expected Expenses list.
Once the request is submitted and approved, the cash advance appears on the **Cash Advances** page (Expense > Cash Advances > Active Cash Advances) in Concur Expense, and the cash advance's tile indicates the cash advance is submitted.
Once submitted, the cash advance request goes through an approval process and then on to the Cash Advance administrator for issuing. The company then distributes the cash according to its internal process.

![Cash Advance Request Screen](image)

**Add an Attachment to a Cash Advance**

- **To add an attachment to a cash advance**
  1. On the **Expected Expenses** page, click the **CASH ADVANCES** section to open the cash advance details page.

     If the request has multiple cash advances, clicking the **CASH ADVANCES** box opens the **Cash Advances** dialog. Select cash advance you want to add an attachment to, and then click **Select** to open the cash advance details page.

  2. Click the **Manage Attachments** link.

     If this is the first attachment for the cash advance, the **Upload Cash Advance Attachment** dialog opens.
3. Click the **Upload Cash Advance Attachment** box.

4. Navigate to the file you want to attach to the cash advance, and then click **Open**.
The image is added to the cash advance.
If the cash advance already has an attachment, clicking the **Manage Attachments** link opens the current attachment(s). To add an additional attachment, click **Append**.

5. Navigate to the file you want to attach to the cash advance, and then click **Open**.

The image is added to the cash advance.
**Edit a Cash Advance**

- **To edit a cash advance**

  1. On the *Expected Expenses* page, click the **CASH ADVANCES** section to open the cash advance detail.

     If the request has multiple cash advances, clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog. Select cash advance you want to edit, and then click **Select** to open the cash advance detail.

  2. Make the applicable changes.

  3. Click **Save**.

**Delete a Cash Advance**

- **To delete a cash advance**

  1. On the *Expected Expenses* page, click the **CASH ADVANCES** box to open the cash advance details page.

     If the request has multiple cash advances, clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog. Select cash advance you want to delete, and then click **Select** to open the cash advance details page.

  2. Click the delete icon, 🗑️.

  3. Click **Yes** when asked, *Are you sure you want to delete this cash advance?*.

     The cash advance is deleted and the **Cash Advances** page in Concur Expense opens.

**View the Cash Advance Timeline**

- **To view the cash advance timeline**

  1. On the *Expected Expenses* page, click the **CASH ADVANCES** section to open the cash advance details page.

     If the request has multiple cash advances, clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog. Select cash advance with the timeline you want to view, and then click **Select** to open the cash advance details page.

  2. Click the **Cash Advance Timeline** link.
The **Cash Advance Timeline** dialog opens.

![Cash Advance Timeline](image)

3. When you are done viewing the timeline, click **Close**.

**View the Cash Advance Audit Trail**

1. **To view the cash advance audit trail**

   1. On the **Expected Expenses** page, click the **CASH ADVANCES** section to open the cash advance details page.

      If the request has multiple cash advances, clicking the **CASH ADVANCES** section opens the **Cash Advances** dialog. Select cash advance with the audit trail you want to view, and then click **Select** to open the cash advance details page.

   2. Click the **Audit Trail** link.

      The **Audit Trail** dialog opens.

      ![Audit Trail](image)

      3. When you are done viewing the audit trail, click **Close**.
**Auto-Generated Expected Expenses for Cash Advances**

When an expense type is configured to auto-generate an expected expense for cash advances, if the expense type is selected for a request containing one or more cash advances, an expected expense is automatically created for the total of all cash advances on the request in the NextGen UI for Concur Request.

The **Cash Advance Auto Generated Expense Type** field on the **Modify Request Policy** page (Administration > Request > Request Policies) determines which expense type is used to auto-generate the expected expense.

The auto-generated expected expense is read-only and cannot be deleted from the request, but the expected expense can be allocated.

**NOTE:** Currently, if a user edits or deletes a cash advance for the request, the cash advance total for the expected expense is not automatically updated. This functionality is planned for a future release.

When you select an expense type that is configured to auto-generate an expected expense for cash advances, an expected expense for the total of all cash advances on the request is automatically created for the request.

![Image of the SAP Concur UI for expected expenses](image-url)
When you open the auto-generated expected expense, the **Allocate** button is available, but the expected expense fields are read-only.

![Expense Form]

If you delete the cash advance associated with auto-generated expected expenses for a cash advance, when the cash advance is deleted, the auto-generated expected expenses for the cash advance will also be deleted.

📖 For more information about the Cash Advance Auto Generated Expense Type policy, refer to the *Concur Request: Cash Advance Setup Guide*. 
Section 8: Approvals

The Approvals UI and functionality in the NextGen UI for Concur Request is very similar to the existing UI.

Existing UI

In the existing UI, the Requests tab on the Approvals page looks like this.

![Requests Tab](image_url)
In both the existing UI and the NextGen UI for Concur Request, you can access the Approvals page by clicking the Approvals tab or clicking the Authorizations Requests link under Required Approvals in the My Tasks section of the SAP Concur home page.
You can select the check box for a request and click **Approve** to approve the request or open the request and approve the request from within the request.

Clicking **Requests** at the top of the **Approvals** page opens the **Requests Pending your Approval** page.
Clicking the row for a request opens the **Request Header** tab for the request. You can click **Approve** or **Approve & Forward** to approve the request from within the request.

On the **Requests Pending your Approval** page, you can open the view list to view the approved requests or navigate back to the **Requests Pending your Approval** page.
NextGen UI

In the NextGen UI for Concur Request, the **Requests** tab on the **Approvals** page looks and behaves the same as it does in the existing UI. To open an individual request, click the request link in the **Request Name** or **Request ID** column.

Clicking **Requests** at the top of the **Approvals** page opens the **Requests Pending your Approval** page.
On the **Requests Pending your Approval** page, you can open the view list to view approved requests or navigate back to the **Requests Pending your Approval** page.
Approving a Request

You can approve a request from the Approvals page or from within a request.

To approve a request from the Approvals page, select the check box for the request and then click Approve.

To approve a request from within a request, open the Expected Expenses page, and then click Approve.

To open the Expected Expenses page for a request from the Approvals page, click the request link in the Request Name or Request ID column.
To open the **Expected Expenses** page for a request from the **Requests Pending your Approval** page, click the request link in the **Request Name** column.

![Request Details](image)

**Approving and Forwarding a Request**

In the existing UI, you can approve and forward a request to another approver using the **Approve & Forward** button in a request. In the NextGen UI for Concur Request, you use the **More Actions > Edit Approval Flow** selection.

- **To approve and forward a request to another approver**

  1. Open the request from the **Approvals** or **Requests Pending your Approval** page.

  2. Click **More Actions > Edit Approval Flow**.

![Approval Options](image)
3. In the **Edit Approval Flow** dialog, click **Add Step**.

![Edit Approval Flow dialog](image)

4. In the **User-Added Approver** field, start typing the approver's name to search for the additional approver, and then click their name to populate the field.

![Edit Approval Flow dialog](image)

5. Click **Save**.
6. Click **Approve**.

![Image of a request approval page]

The request is approved and forwarded to the next approver.

**Sending a Request Back to Submitter**

In the existing UI, you can send a request back to the subdivider using the **Send Back Request** button in a request. In the NextGen UI for Concur Request, you use the **More Actions** > **Send Back to Employee** selection.

- **To send a request back to the request submitter**
  1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
  2. Click **More Actions** > **Send Back to Employee**.

![Image of a request page showing the Send Back to Employee option]
3. In the **Send Back to Employee** dialog, click enter the reason you are sending the request back, and then click **Send Back**.

![Send Back to Employee Dialog](image)

The request is sent back to the request submitter.

After sending back a request to the submitter, when the request submitter resubmits the request, the resubmitted icon, ![resubmitted icon](image), is displayed for the request on the **Approvals > Approvals Home** page.

![Resubmitted Request](image)
Section 9: Approval Flow/Request Timeline

The Approval Flow feature in the existing UI has a new name, Request Timeline, and new location in the NextGen UI for Concur Request. The Request Timeline option shows approval workflow and comments for the request.

Existing UI

In the existing UI, you can view a request’s approval workflow from the Approval Flow tab on the Request page.
NextGen UI

In the NextGen UI for Concur Request, you can view a request's approval workflow and comments from the Request Timeline page. To access the Request Timeline page, on the Request Details menu, click Request Timeline.

The Request Timeline page displays the approval workflow for the request, a summary of the approval activity for the request, and any comments added to the request.

This is the Request Timeline page for an unsubmitted request.
This is the **Request Timeline** page for a submitted and approved request.

If you do not have a request approver assigned to you or have permissions to change the request approver, click the **Edit** link on the **Request Timeline** page to add or edit the request approver.

Clicking the **Edit** link opens the **Edit Approval Flow** dialog.
You can add comments to the request by clicking the Add Comment link on the Request Timeline page. Clicking the Add Comment link opens the Add Comment dialog.

Enter a comment and click **Save**.

Saved comments are displayed in the **Request Summary** section of the Request Timeline page.
Section 10: Process Requests

When a user is assigned a processor role, the Process Requests option appears on the Requests sub-menu. The processor role assigned to a user determines which request functionality is available to the user on the processor page. Concur Request processors use the processor page to view, print, and manage requests.

The Process Requests UI and functionality in the NextGen UI for Concur Request is very similar to the existing UI.

Existing UI

In the existing UI, the Process Requests option on the Requests sub-menu and the Requests Ready for Processing page look like this.

![Requests Ready for Processing](image-url)
NextGen UI

There are no changes to the processor page with the list of requests in Process Requests. The page is exactly the same between the existing UI and the NextGen UI for Concur Request. When you open a request in Process Requests you will see the pages are updated for the NextGen UI.
The following are some examples of requests in the Process Requests feature in the NextGen UI.

Example of a request with allocations in Process Requests:
Example of a request with cash advances in Process Requests:

![Image of a request with cash advances](image1)

Example of a request ready for approval in Process Requests:

![Image of a request ready for approval](image2)
Example of editing a request’s approval flow in Process Requests:

Example of printing a request in Process Requests:
Section 11: Printed Report/Email Page

The printed report page for requests has a new look and feel, but is essentially the same between the existing UI and the NextGen UI for Concur Request with just a small number of changes.

Existing UI

In the existing UI, the buttons for saving the report as a PDF, emailing the report, printing the report, or closing the report are located at the top of the printed report page.

![Printed Report Page](image-url)
## Segments

### Air Ticket
- **Foreign Amount**: $1,000.00
- **10/05/2015** Seattle Tacoma Intl (Airport - SEA), Seattle (US) – La Guardia (Airport - LGA), New York (US) Depart At: 11:00 AM
- Allocations: 100.00% ($1,000.00)

### Hotel Reservation
- **Foreign Amount**: $2,200.00
- **10/05/2015** New York Manhattan (US) – 10/17/2015
- Check-in Date: 1/15/15, Check-out Date: 1/17/15
- Allocations: 100.00% ($2,200.00)

## Expenses

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Expense Type</th>
<th>Entry Description</th>
<th>Foreign Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/05/2015</td>
<td>Airfare</td>
<td></td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>10/05/2015</td>
<td>Lodging</td>
<td></td>
<td>$2,200.00</td>
<td>$2,200.00</td>
</tr>
<tr>
<td>10/05/2015</td>
<td>Taxi</td>
<td></td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>10/06/2015</td>
<td>Meals</td>
<td></td>
<td>$250.00</td>
<td>$250.00</td>
</tr>
</tbody>
</table>

*Printed on 01/29/2015 02:47 PM*
NextGen UI

In the NextGen UI for Concur Request, 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. In the existing UI, the button for saving the report as a PDF file is named PDF. In NextGen UI, the PDF button is renamed to **Save as PDF**.

Each section of the printed report page is now enclosed in an individual box to help improve the readability of the report by making each section visually distinct.
### Copy of Request Printed Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Amount in currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/16/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/12/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/14/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/15/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/10/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/13/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/16/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
<tr>
<td>3/11/2019</td>
<td>46.00 USD</td>
<td>63.65 AUD</td>
</tr>
</tbody>
</table>

**Total Posted Amount:** **3,915.93 AUD**

Printed on 4/23/2019 12:48 PM
Section 12: Audit Trail

You can view the request and expected expense-level activity for a request in the request's audit trail. The audit trail has a new location in the NextGen UI for Concur Request.

Existing UI

In the existing UI, you can view a request's audit trail from the Audit Trail tab on the Request page.
**NextGen UI**

In the NextGen UI for Concur Request, you can view a request's audit trail from the **Audit Trail** page. To access the **Audit Trail** page, on the **Request Details** menu, click **Audit Trail**.

The **Audit Trail** page displays the request name and amount and details the request-level and expected expense-level activity for the request. Segment-level activity is displayed in the **Expected Expense Level** section of the page.
Section 13: Multi-Leg Flights and Rail Trips

The NextGen UI for Concur Request supports multi-leg flights and rail trips. The NextGen UI has the same multi-leg functionality as the existing UI with one new addition. In the NextGen UI for Concur Request, the destination in the **To** field of the previous leg is now auto-populated in the **From** field of the next leg of the flight or rail trip.

Existing UI

In the existing UI, you have to manually enter the previous leg's destination in the **From** field for the next leg of a flight or rail trip.
NextGen UI

In the NextGen UI for Concur Request, the destination from the To field of the previous leg is automatically populated in the From field of the next leg of the flight or rail trip.

Section 14: Expense Reports Associated with Requests

In the NextGen UI for Concur Request, when expense reports are associated with an approved request, you can access the expense reports from within the request.

NOTE: In order to access expense reports associated with a request from within a request, Concur Request and Concur Expense must be activated and integrated.
When an expense report is associated with a request, the **REPORTS** section is displayed below the **Request Details** menu on the **Expected Expenses** page.

The **REPORTS** section displays the total number of expense reports associated with the request, the total amount of the combined expense report amounts, and the individual expense report amounts.

If only one expense report is associated with the request, clicking the **REPORTS** section opens the expense report in Concur Expense.

If more than one expense report is associated with the request, clicking the **REPORTS** section opens the **REPORTS** page. The **REPORTS** page displays the list of expense reports associated with the request.

To view an expense report in Concur Expense, click the expense report name or ID in the **Report Name** column.

Clicking the cross icon on the **REPORTS** page, returns the user to the **Expected Expenses** page.
Section 15: Confirmation Agreement

If confirmation agreements are configured for request policies, when a user clicks **Submit Request** the Submit Confirmation Agreement assigned to the selected request policy appears.

When the request approver clicks **Approve**, the Approval Confirmation Agreement assigned to the selected request policy appears.

Existing UI

In the existing UI, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Submit** to complete the request submission.

![Submit Confirmation Agreement](image)

When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.

![Approval Confirmation Agreement](image)
NextGen UI

In the NextGen UI for Concur Request, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Continue** to complete the request submission.

![Submit Request](image)

When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.

![Approval Confirmation](image)
Section 16: Travel Integration: Book then Approve

The NextGen UI for Concur Request supports the Book then Approve process flow where users start the travel request process by booking their travel arrangements in Travel first and then Concur automatically generates a travel request based on what the user booked in Travel.

Existing UI

Here is an example of a request created using the Book then Approve process flow in the existing UI.

After confirming the travel arrangements in Travel, the Request Header tab opens in Concur Request.
The trip's segment information is displayed on the **Segments** tab.
The trip’s expected expenses are listed on the **Expenses** tab.

![Expenses Tab](image1)

The approval flow for the travel request is displayed on the **Approval Flow** tab.

![Approval Flow Tab](image2)
The audit trail for the travel request is displayed on the **Audit Trail** tab.

**NextGen UI**

Here is an example of a request created using the Book then Approve process flow in the NextGen UI for Concur Request.

After confirming the travel arrangements in Travel, the **Edit Request Header** page opens in Concur Request.

**NOTE:** This is the only point in the Book then Approve process that the request policy associated with the request can be defined or modified for the request. Once **Save** is clicked on the **Edit Request Header** page, the policy assignment for the request cannot be changed.

If you close your browser before viewing the request created for the trip you booked, the next time you open the request, the **Edit Request Header** page will open so that you can select the applicable request policy for the request.
Make any needed updates on the **Edit Request Header** page, and then click **Save**. Clicking **Save** opens the **Expected Expenses** page.
To view the details for the request's expected expenses or segments, on the **Expected Expenses** page, select the check box for the expected expense or segment in the **Expected Expenses** list, and then click **Edit**.

Clicking **Edit** opens the details page for the expected expense or segment.

![Expected Expenses Page](image-url)
To view the approval flow for the travel request, on the **Expected Expenses** page, click **Request Details > Request Timeline** to open the **Request Timeline** page.

If an approver has not been assigned to the approval workflow, when you click **Submit Request** on the **Expected Expenses** page, the **Edit Approval Flow** dialog opens. You can select the applicable approver and then click **Submit** to submit the request.
To view the audit trail for the travel request, on the **Expected Expenses** page, click **Request Details > Audit Trail** to open the **Audit Trail** page.

Audit Trail

Ibis budget Lyon Centre Confluence (book | $1,000.45

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Updated By</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/22/2019 9:47 AM</td>
<td>System, Concur</td>
<td>Segments update</td>
<td>Self-booked segments have been updated</td>
</tr>
<tr>
<td>04/22/2019 9:40 AM</td>
<td>System, Concur</td>
<td>Segments update</td>
<td>Self-booked segments have been updated</td>
</tr>
<tr>
<td>04/22/2019 9:40 AM</td>
<td>System, Concur</td>
<td>Segments update</td>
<td>Self-booked segments have been updated</td>
</tr>
</tbody>
</table>

**Expected Expense Level**

No Data.
There is no data to display.

To view a summary of the request details associated with the Concur Travel itinerary, on the **Expected Expenses** page, click **Request Details > View request** to open the **Request Details** page.

Request Details

<table>
<thead>
<tr>
<th>Item Name:</th>
<th>Trip from Santa Fe to Lyon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Description</td>
<td>Client outside visit</td>
</tr>
<tr>
<td>Meeting Name</td>
<td></td>
</tr>
<tr>
<td>Submitted By:</td>
<td>Terry Brown</td>
</tr>
<tr>
<td>Submitted on:</td>
<td>Monday, April 22, 2019</td>
</tr>
<tr>
<td>Approval Status/Hist:</td>
<td>Administrator Approval Required</td>
</tr>
<tr>
<td>History/Notes:</td>
<td>Request created on Monday, April 22, 2019</td>
</tr>
</tbody>
</table>

**Flight segment Air Segment added on Monday, April 22, 2019 at 11:58 AM Indiana time.**

Flight segment has been reserved. The traveler must approve the trip, or the traveler must collateral the trip required to cancel the reservation.

Trip Withdrawn on Monday, April 22, 2019 at 11:58 AM Indiana Time by: Terry T Brown

**Contact**

Sabre

Daytime Phone: 662-228843
After Hours Message
After hours call Emergency:
why can't i submit this expense?
If you want to view the Concur Travel itinerary associated with the request, there are three ways to access the **Itinerary Details** page from within a request:

- On the **Expected Expenses** page, click **Request Details > Travel Itinerary details**
- On the **Request Details** page (**Request Details > View request**), click the **View Itinerary** button
- On the segment details page, click the **Itinerary Details** link

**Section 17: Travel Integration: Approve then Book**

The NextGen UI for Concur Request supports the Approve then Book process flow where users start the travel request process by creating a travel request in Concur Request, and once the travel request is approved, users book their travel arrangements in Concur Travel.

**Existing UI**

Here is an example of a request created using the Approve then Book process flow in the existing UI.

When using the Approve then Book process flow, after creating, submitting, and approving a request, the request status is Approved – Pending Booking, and the **Book with Concur Travel** button is displayed at the top of the request’s **Segments** tab.
On the **Active Requests** page, the **Book** link is also displayed for the request in the **Action** column.

![Active Requests](image)

Clicking the **Book with Concur Travel** button or the **Book** link opens the itinerary for the request in Concur Travel. The user fills in any required fields to finish booking the trip in Concur Travel. The trip is automatically approved.

After the trip is booked, on the **Active Requests** page, the **Expense** link is displayed in the **Action** column.

![Active Requests](image)
In the request, the **Create Expense Report** button is displayed at the top of the request and the itinerary information is displayed at the top of the **Segments** tab.

Clicking the **Expense** link or **Create Expense Report** button creates an expense report for the request.

**NextGen UI**

Here is an example of a request created using the Approve then Book process flow in the NextGen UI for Concur Request.

When using the Approve then Book process flow, after creating, submitting, and approving a request, the request status is Approved – Pending Booking, and the **Book Travel** button is displayed on the **Expected Expenses** page.
On the **Manage Requests** page with *Active Requests* selected from the **View** list, the request tile indicates the request is ready to book.

![Image of Manage Requests page]

Clicking the **Book Travel** button opens the itinerary for the request in Concur Travel. The user fills in any required fields to finish booking the trip in Concur Travel. The trip is automatically approved.

After trip is booked, the request status is updated to Approved and the **Create Expense Report** button is displayed on the **Expected Expenses** page.
Here is the Active Requests page.

Here is the Create Expense Report button on the Expected Expenses page.
To view the itinerary details, on the Request Details menu, click Travel Itinerary details.
Clicking **Travel Itinerary details** opens the **Travel Itinerary** page.

![Travel Itinerary](image)

**TRIP OVERVIEW**

- Trip Name: Leadership Conference - Atlanta
- Start Date: March 10, 2020
- End Date: March 13, 2020
- Created: October 18, 2019, Terry Brown (Modified: October 18, 2019)
- Description: leadership conference
- Comments to Agent: DEMO. TEST TRIP. DO NOT BOOK. DO NOT CANCEL UNTIL AFTER Oct 18 6PM
- Agency Record Locator: FHHN9Q
- Reservation for: Terry T Brown
- Total Estimated Cost: $444.62 USD
- Activate Trip to see your plans and stay one step ahead while travelling.

**RESERVATIONS**

**Tuesday, March 10, 2020**

- **Budget Car Rental at: Tallahassee US (TLH)**
  - Pick-up at: 628 North Monroe St TALLAHASSEE, FL 32301 US
  - Phone: 850-915-9500
  - **Confirmation: 179184121551**
  - **Status: Confirmed**
  - **Pick Up:** 08:00 AM on Mar 10
  - **Return:** 05:00 PM on Mar 13
  - **Number of Cars:** 1
  - **Rate Code:** 05

- **Agency Name:** Sabre
- **Daytime Phone:** 660228640
To create an expense report for the request, on the Expected Expenses page, click the Create Expense Report button.
If the NextGen UI for Concur Expense is enabled, when you click the Create Expense Report button in the NextGen UI for Concur Request, the expense report is generated from the request and the expense report is automatically opened in Concur Expense.

If the NextGen UI for Concur Expense is not enabled, when you click the Create Expense Report button, the Expense report has been created message appears. Click Close to close the message.

Section 18: Travel Integration: Booking Switch

The booking switch is available in the NextGen UI for Concur Request when Concur Request is integrated with Concur Travel and your company is using the Starting in Travel process flow.

The booking switch determines if a trip is self-booked or agency booked.

The booking switch is enabled in the NextGen UI for Concur Request the same way it is enabled in the existing UI in Travel System Admin (Administration > Travel > Travel System Admin).
NOTE: The Enable Request Integration check box must also be selected; Concur Travel integration is required in order to use the booking switch feature.

The Booking Switch is accessed and managed in the NextGen UI for Concur Request in the same place it is accessed in the existing UI in Request Administration (Administration > Request > Request Admin > Booking Switch).

The steps for adding, modifying, copying, activating, deactivating, and removing criteria sets for the booking switch are the same for the NextGen UI and the existing UI.

The Enforce Online/Offline Policy feature associated with the booking switch is also available in the NextGen UI for Concur Request.

When the Enforce Online/Offline Policy feature is enabled in Site Settings (Administration > Request > Request Admin > Site Settings), the feature can enforce a requirement to book air, rail, hotel, and/or car trip segments online in Concur Travel. If the feature is enabled, the following message is displayed when a user attempts to submit a request with segments that are required to be booked in Concur Travel:

*According to your company policy, your trip should be booked online. You will now be redirected to Travel in order to book your trip.*

Depending on your Enforce Online/Offline policy feature configuration, the OK button or the **OK and Submit Anyway** buttons are displayed below the message. Clicking **OK** opens Concur Travel. Clicking **Submit Anyway**, submits the request without requiring the user to book the segment(s) in Concur Travel.
Both the booking switch and the enforcement feature use the criteria defined in the booking switch.

Section 19: Agency Proposals

When agency proposals are configured for your organization, you can submit travel requests to a travel agency and have the travel agency provide up to three proposed trips for the request. Once a proposed trip is selected and the request is approved, the travel agency can book the selected proposal for the request.

The NextGen UI for Concur Request has the same agency proposals functionality as the existing UI but provides a better user experience by simplifying the number of fields required for the travel agency within the trip segments. Changes are detailed in this section.

**NOTE:** This feature is only available in the Professional Edition of Concur Request in the existing UI and the NextGen UI.

**NOTE:** The NextGen UI for Concur Request only supports the generic Agency Proposals configuration and the Agency Proposals via v4 API. The NextGen UI will not support the Only American Express Business Travel (AEBT) or Only Carlson Wagonlit Travel (CWT) Agency Proposal configurations.

**Existing UI – Trip Segments**

In the existing UI, when creating the desired trip segments (Airfare, Car Rental, Hotel, and Train), you are asked to populate a number of free-text fields and/or drop-down lists.

**AIR SEGMENT**
**TRAIN SEGMENT**

![Train Ticket Interface](image)

**HOTEL SEGMENT**

![Hotel Reservation Interface](image)
NextGen UI – Trip Segments

In the NexGen UI, the trip segment forms have been simplified to enhance your experience with the solution. The most important fields are still available. If you have specific requirements that you need to communicate to your travel agent, you can specify your requirements in the corresponding Comment field for your travel agent to take into account when creating the proposals which will be sent back to you.

Air segment
**TRAIN SEGMENT**

New Expense: Railway Ticket

View Service Locations For
- SNCF

Round Trip | One Way | Multi City

- Required field

From *
- Required field

To *
- Required field

Date *
- Required field

Depart at *

Class *

Comment :

Amount

Currency *

For air and train segments, please make sure the **Date** field has *Departure time* selected. If you change the value to *Arrival time*, your travel agent will still consider the date and time entered in the **Date** field as the departure date and time.

**HOTEL SEGMENT**

New Expense: Hotel Reservation

Check-In

Date *

Arr *

City *

Check-Out

Date *

Arr *

Comment :

Amount

Currency *

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CAR RENTAL SEGMENT

New Expense: Car Rental

Pick-up
City *

Date

At

Pick up Location Detail

Drop-off
City *

Date

At

Drop Off Location Detail

Class *

None Selected

Comment

Amount

Currency *

Cancellation
Save

NextGen UI for Concur Request – End User Transition Guide
Last Revised: August 4, 2022
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**Existing UI – Proposal comparison screen**

In the existing UI, you receive an email indicating a travel agent has sent you one or more proposed trips for the travel request you submitted. Clicking the link in the email opens the travel request in Concur Request.

On the **Proposal comparison screen** page, you can view the proposed trip information against the original request. To select a proposed trip, you click the **Select** button below the proposal you want to choose.

![Proposal comparison screen](image)

**NextGen UI - Proposal comparison screen**

Like the existing UI, in the NextGen UI for Concur Request, you receive an email indicating a travel agent has sent you one or more proposed trips for the travel request you submitted. Clicking the link in the email opens the travel request in Concur Request.
When a travel agent has sent you one or more proposals for the travel request you submitted, the **View Proposed Itineraries** link is displayed at the top of the page for the request.

Clicking the **View Proposed Itineraries** link opens the **Agency Proposal** page, where you can view the itinerary proposal information against the original request. To select a proposal, you click the proposal you want to choose and then click the **Select Itinerary** button.

If no itinerary meets your trip needs, you can request another proposal from your travel agency. To do so, select a proposal, then modify the details of your transportation and/or lodging expenses, and then re-submit the request.

It is best practice not to delete an existing transportation and/or lodging expense in a selected proposal, but instead, just add a comment for your travel agent. Adding a
comment will assist your travel agent in providing you with other trip proposals that best meet your trip needs.

**NOTE:** If the Container PNR field is populated by the TMC, the Container PNR field is displayed at the top of the Agency Proposal page. PNR stands for Passenger Name Record. The Container PNR field will only be visible if your travel agency uses the agency proposal features via Compleat.

If the Container PNR field is not populated, the Container PNR field will not be displayed on the Agency Proposal page. The Container PNR field is visible to the request submitter and approver.

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### Section 20: Central Reconciliation for Invoices

The Central Reconciliation (CR) feature allows a user to quickly match, review, and approve the CR invoices generated by a company Lodge card. These invoices can be against preapproved request expenses for the travel, or card expenses such as mobile or gas incurred by the user associated with this Lodge card.

**NOTE:** The Central Reconciliation feature must be enabled and configured for Concur Request in order to access the CR invoices functionality in the NextGen UI for Concur Request.
Existing UI

In the existing UI, when a CR invoice is associated with a reconciled request, the CR invoices are listed on the **Invoices** tab for the request.

![Existing UI screenshot]

NextGen UI

In the NextGen UI, when a CR invoice is associated with a reconciled request, the **INVOICES** section is displayed below the **Request Details** menu on the **Expected Expenses** page.

![NextGen UI screenshot]

The CR processor can click the **INVOICES** section to view the **Invoices** page for the CR invoices.
The **Invoices** page displays the list of CR invoices associated with the reconciled request. Clicking × on the **Invoices** page, returns the user to the **Expected Expenses** page.

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000000014112</td>
<td></td>
<td>09/03/2008</td>
<td>$13.65</td>
</tr>
<tr>
<td>00000000014113</td>
<td></td>
<td>09/03/2008</td>
<td>$12.17</td>
</tr>
<tr>
<td>00000000014114</td>
<td></td>
<td>09/03/2008</td>
<td>$194.19</td>
</tr>
<tr>
<td>0073134347874</td>
<td></td>
<td>09/03/2008</td>
<td>$1205.73</td>
</tr>
<tr>
<td>0041941364068</td>
<td></td>
<td>12/03/2014</td>
<td>$191.59</td>
</tr>
</tbody>
</table>

Total: $1,879.33

**Section 21: Vendor Fields**

Both the **Vendor** and **Vendor Name** fields can be added to the request entry and segment form(s) in the NextGen UI for Concur Request. The **Vendor** and **Vendor Name** fields are managed for forms from **Forms and Fields (Administration > Request > Request Admin).**

**Existing UI**

In the existing UI, the **Vendor** and/or **Vendor Name** fields can be added to the request segment or request entry forms for segments and/or expected expenses.

The **Vendor** field is associated with a single-level vendor list and is generally used for Air, Hotel, Car Rental, etc. – where the client has a defined list of vendors.
The **Vendor Name** field is a simple text field. When the **Vendor Name** field is added to a segment form or to the request entry form, the user can type in a vendor name.

The client can add either field or both fields to a form.

**How it works:**

- If only the **Vendor** field is on the form, then:
  - The **Vendor** field is a list.
  - The user can only select from the list. The user can type text in the field to filter the list values, but if the user types texts that does not correspond to an existing value in the list, that text will not be saved for the field.

- If only the **Vendor Name** field is on the form, then:
  - The **Vendor Name** field is a free text field.
  - The user types the vendor name in the field; there is no list.

- If both **Vendor** and **Vendor Name** are on the form, then:
  - Only the **Vendor** field (list) appears; the **Vendor Name** field is hidden.
  - The **Vendor** field is a list and free text field.
    - The user can select from the list.
    - If the desired vendor is not in the list, the user can type in the field. (The typed information is actually saved to the hidden **Vendor Name** field.)
**NextGen UI**

If both the **Vendor** list and **Vendor Name** field are enabled on a form, only the **Vendor** field is displayed, and the **Vendor** field will be both a list and a free text field.

Here is an example of a segment form with just the **Vendor** list enabled. Vendors are added to the form by selecting the applicable vendor from the **Vendor** list. You can type text in the **Vendor** field to filter the list values, but if you type text that does not correspond to an existing value in the list, that text will not be saved for the field.
Here is an example of a segment form with just the **Vendor Name** field enabled. Vendors are added to the form by manually entering the vendor name in the **Vendor Name** field.
Here is an example of a segment form with both the **Vendor** list and **Vendor Name** field enabled. Vendors are added to the form by either selecting the applicable vendor from the vendor list or manually entering the vendor name in the **Vendor** field.

Just like the existing UI, when both fields are enabled, only the **Vendor** list is displayed, and the **Vendor Name** field is hidden. In this scenario, if the desired vendor is not in the list, the user can manually enter the vendor name in the field, and the manually entered vendor name is saved to the hidden **Vendor Name** field.
If you enter a vendor name, Concur Request will search the **Vendor** list for the name. Even if no match is found for the vendor name, the name you enter in the field is saved.
The vendor name is saved for the expected expense, but it is not added to list of vendors available on the **Vendor** list. It is saved to the hidden **Vendor Name** list.

**Section 22: Risk Management**

Risk Management is a free service within Concur Request that allows clients to manage duty-of-care (risk, travel warnings, reminders) for their employees.

**NOTE:** Risk Management must be configured and enabled to view and manage the Risk Management functionality in Concur Request.
Existing UI

In the existing UI, when the user creates a trip that involves travel to a country that is defined as a risk, risk-related information appears for the user on the Request Header tab.

The user clicks the Travel Advisory tab to view the travel advisory and consent information.

The user clicks the link in the Risk Level column, reads the travel advisory, and then clicks the check box in the Traveler Consent column.
When the user clicks **Save**, the user's consent information appears in the **Traveler Consent** column.

![Request 334D](image)

**NextGen UI**

When Risk Management is enabled and a country associated with a travel advisory is selected in the request header and/or segments, the **Travel Advisory** menu selection becomes available on the **Request Details** menu under **Linked Add-ons**.
Also, the *Missing required field: Traveller Consent* alert is displayed at the top of the request.

Clicking the **View** link in the alert opens the **Travel Advisory** dialog for the selected country. You can also open the **Travel Advisory** dialog for the selected country by clicking the **Travel risk advisory** link in the **Travel Advisory** dialog.
Here is an example of the **Travel Advisory** dialog for the United States:

Clicking the **Travel Advisory** menu selection in the **Request Details** menu opens the **Travel Advisory** dialog.

If you consent, in the **Traveller Consent** column, click the check box for the country. After you select the check box, your name and date will appear in the **Traveller Consent** column for the country.

**NOTE:** The travel advisory for the selected country must be read before selecting the **Traveller Consent** check box for the country.
If you attempt to select the **Traveller Consent** check box for the country before reading the travel advisory for the country, the following message appears:

**Warning**

Please review the country information

**NOTE:** Request approvers can also view the travel advisory for the selected country or countries and can view the traveler consent information in the **Travel Advisory** dialog.

One difference between the Risk Management functionality in the existing UI and the NextGen UI for Concur Request is that in the NextGen UI, the risk level fields are not displayed by the **Main Destination City** and **Main Destination Country** fields on the **Edit Request Header** page, and the risk level fields are not displayed by the **From**, **To**, or other location fields on the expected expense details and segment details pages.

**EXISTING UI EXAMPLE:**

On the **Request Header** tab, the **Main Destination Risk Level** and **Highest Location Risk Level** fields are located by the **Main Destination City** and **Main Destination Country** fields.
**NextGen UI Example:**

Like the existing UI, the **Main Destination City** and **Main Destination Country** fields are displayed on the **Edit Request Header** page, but in the NextGen UI for Concur Request, the **Main Destination Risk Level** and **Highest Location Risk Level** fields are not displayed on the **Edit Request Header** page.

![Edit Request Header](image)

**Section 23: Event Requests**

With the Event Request feature, you can create one request for an event, referred to as an event request, that contains the names of the employees participating in the event and all of the common information for the event, such as flight, hotel, and conference fees.

From an event request, you can create a copy of the request for each employee associated with the event request. Each employee can then use their copy of the event request as a starting point for their request for the event.

**NOTE:** In order to create and manage event requests, the Event Request feature must be enabled, and event managers must be assigned to the Request Event Manager role and the Request Proxy Logon role.
Existing UI

In the existing UI, when the Event Request feature is enabled, users assigned to the Request Event Manager role and the Request Proxy Logon role will see the New Event Request selection on the Create New menu in Concur Request.

When the event manager clicks Requests > Create New > New Event Request, the Request Header tab opens.

The event manager enters the request header information for the event request and adds the event attendees in the Attendees section. On the Segments and Expenses tabs, the event manager creates all the expected expenses and/or segments that are common to each of the event attendees.
The event manager then returns to the **Request Header** tab, and then clicks the **Generate & Notify** button to create a copy of the event request for each event attendee.

After clicking the **Generate & Notify** button, the event attendee amounts appear, along with the unique Request ID and request status for each attendee event request.
The main event request appears in the event manager's list of requests.

An attendee's event request appears in the attendee's request list.
When an attendee event request is opened, the request includes both the main event request ID and the attendee event request ID.

NextGen UI

When the Event Request feature is enabled, users assigned to the Request Event Manager role and the Request Proxy Logon role will see the **Create New Event Request** tile on the **Manage Requests** page for creating new event requests.
Clicking the **Create New Event Request** tile opens the **Create a New Event Request** page.

![Create a New Event Request Page](image)

When you create an event request, **Event Request ID** is displayed next to the event request ID, and the **Participants** link is displayed on the **Expected Expenses** page.

On the **Expected Expenses** page, the event manager creates all the expected expenses and/or segments that are common to each of the event participants.

To add participants to the event request, click the **Participants** link.

![Expected Expenses Page](image)
Clicking the **Participants** link opens the **Add Participants** page.

In the **Participant** list, begin typing the event participant's name, when the participant appears in the list, select the participant to add the participant to the event request.

**NOTE:** When searching for event participants in Concur Request, the search results currently have a limit of 100 event participants, so the search results will be limited to the first 100 event participants returned by the search.

Click **Save** to save the participants for the event request.
On the **Expected Expenses** page, the **Participants** link is updated to show the number of participants added to the event request. In this example, there are two participants.

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

![Image of the expected expenses page with a request for TVR-13105 $123.00, not submitted, and an option to create a request and notify participants.]

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

![Image of the add participants page with a list of participants and their details, including Event A1 User and Event A2 User, each with a Request ID of 3JTT and 3JTW, respectively, and a Request Amount of $123.00 and $123.00, respectively.]

Participant Total: $246.00
On the **Expected Expenses** page, you can click the **Event Request Total** amount to view the **Participant Total** for the event request. It is the same amount displayed in the **Participant Total** field on the **Add Participants** page.

You can click the **Participant Total** amount link to open the **Add Participants** page.

When viewing the request tiles for active requests on the **Manage Requests** page, **Event:** is displayed in front of an event request's name to help you quickly identify event requests.
When viewing a list of requests on the Manage Requests page, Event is displayed in the Request Type column to help you quickly identify event requests in the request list.

Section 24: Budget Integration

If your organization uses the Budget feature, just like in the existing UI, request approvers can review and track budget spending within Concur Request from the Approvals page in the NextGen UI.

- To view budget information in Concur Request

1. On the Approvals page, click Requests.

2. Open a request, and then click the View Budget link.
Section 25: Edit Requests

Edit the Request Header

With the request open, on the Request Details menu, click Edit Request Header.
Clicking *Edit Request Header* opens the *Edit Request Header* page.

You can also click the request’s name at the top of the *Expected Expenses* page to open the *Edit Request Header* page. Placing your pointer over the request name turns the name into a link.

On the *Edit Request Header* page, make your changes and click *Save*.

**NOTE:** The request policy associated with a request cannot be edited after the request policy assigned to the request is saved during the initial request creation process.
Edit an Expected Expense or Segment

With the request open, select the expected expense or segment you want to edit and then click **Edit**.

Clicking **Edit** opens the expected expense or segment details page. Make your edits and click **Save**.

**NOTE:** The **Conversion Rate** field and **Amounts in [currency]** fields appear as soon as a user chooses a currency that is different from the one defined in on the **Request Information** page in Profile.
Section 26: Copy Requests

Copy a Request

With the request open, click the Copy Request link or the Copy Request button, or click More Actions, and then click Copy Request.

NOTE: The request's current status and the other actions available to the request determine whether the Copy Request link, the Copy Request button, or the More Actions menu with the Copy Request selection is displayed for the request.
The Copy Request dialog appears.

![Copy Request Dialog](image)

Complete the fields and then click Create New Request.

In the NextGen UI for Concur Request, the information that is copied, and the information that is not copied when copying a request, is the same as in the existing UI.

**Information Copied**

The following information is copied from the source request:

- Segments (if the Expenses check box is selected (enabled) on the Copy Request page): All agency-booked segments are copied. If the request contains self-booked segments, those segments become agency-booked; they are no longer self-booked.
- Expected expenses (if the Expenses check box is selected (enabled) on the Copy Request page)
- Attendees
- Allocations
- Latest comment
- Cash advances (if the Cash Advance check box is selected (enabled) on the Copy Request page)
- Other fields, like the Purpose, Start Date (based on the Copy Request page), custom fields, Travel Agency (the system first uses the agency from the source request; if not available, the system searches the Employee profile), etc.

**Information NOT Copied**

The following information is not copied from the source request:

- Attachments (images)
- Workflow
- Audit trail
- Any other information related to a policy that is no longer the user's current policy

**Section 27: Delete Requests, Expected Expenses, and Segments**

**Delete a Request**

With the request open, click the delete icon, ![delete icon], located next to the request name and amount.

![Copy of Trip to Paris $1,416.44](image)

- **Room Rate**
  - Hotel room rate is 98 euros per night for 5 nights
  - Date: 06/10/2020
  - Amount: 491.00
  - Requested: $555.82

- **Railway Ticket**
  - Paris, FRANCE - Orleans, FRANCE: Round Trip
  - Date: 06/05/2020
  - Amount: 35.00
  - Requested: $39.62

- **Air Ticket**
  - Seattle (SEA) - Paris (CDG): Round Trip
  - Date: 06/05/2020
  - Amount: 821.00
  - Requested: $821.00

**Estimated Total: $1,416.44**

Foreign currency converted
This message appears.

![Confirm dialog box]

Click **Yes**. The request and its expected expenses are permanently deleted and cannot be recovered.

**Delete an Expected Expense or Segment**

Expected expenses and segments can be deleted from either the **Expected Expenses** page or the expected expense details page.

On the **Expected Expenses** page, select the desired expected expense(s) and then click **Delete**.

![Expected Expenses page]

Estimated Total: $1,416.44
Foreign currency converted
This message appears. Click **Delete from Request**.

![Confirm Delete](image)

The selected expected expenses and/or segments are permanently deleted and cannot be recovered.

On the expected expense details page, click the delete icon, ![delete icon], located next to the expected expense or segment name and amount.

![Room Rate EUR 491.00](image)

This message appears. Click **Delete from Request**.

![Confirm Delete](image)

The expected expense or segment is permanently deleted and cannot be recovered.
Section 28: Close/Inactivate Requests

If your organization allows requests to be closed or inactivated and a request is eligible to be closed or inactivated, the Close/Inactivate Request button is displayed on the Expected Expenses page.

This action removes the request from the user’s list of requests. For example, a user may want to remove a cancelled or zero-balance request. The user can also close a request that still has a balance. For example, assume the request was approved for $800 for airfare but the airfare expense was actually $760. The user likely will not use the balance so the user can close the request.

With the request open, click More Actions, and then click Close/Inactivate Request.

This message appears.

Click OK. Clicking OK reduces the balance to zero and removes the request from the list.
Section 29: Cancel Requests

If your organization allows requests to be cancelled after submitting a request for approval, the Cancel Request button or the Cancel Request selection on the More Actions menu is available on the Expected Expenses page.

**NOTE:** The request's current status and the other actions available to the request determine whether the Cancel Request button, or the More Actions menu with the Cancel Request selection is displayed for the request.

With the request open, click the Cancel Request button, or click More Actions, and then click Cancel Request.

The Cancel Request dialog appears.

In the Comment field, enter the reason for cancelling the request and then click OK. Clicking OK changes the request status to Cancelled.
Section 30: Recall Requests

If your organization allows requests to be recalled after submitting a request for approval and/or after a request has been approved, and the request meets the criteria for being recalled, the Recall button or the Recall selection on the More Actions menu is available on the Expected Expenses page.

NOTE: The request's current status and the other actions available to the request determine whether the Recall button, or the More Actions menu with the Recall Request selection is displayed for the request.

With the request open, click the Recall button, or click More Actions, and then click Recall.

This message appears.

Click Yes. Clicking Yes changes the request status to Returned.
**BEFORE APPROVAL**

A user can recall a request after it is submitted but before it is approved. If the workflow allows or requires more than one approver, then the user can recall the request until it is *final* approved.

**AFTER APPROVAL**

Users can recall a request after it has been approved.

For example, assume that the user's request for sales training was approved and then the date of the sales training class changed. The user can recall the request, make the desired changes, and submit again. The request will then go through the approval workflow.

The user can recall a request if *all* of these are **true**:

- The Workflow setting allowing this feature is enabled.
- The request status is *Approved*.
- Both the start **and** end dates are in the future.

**NOTE:** A "blank" date is considered to be "in the past" so the recall option is unavailable.

- There is no expense report (or an invoice from the SAP Concur Central Reconciliation service) associated with the request.

Then, the user can change dates, segments, amounts, etc.

**NOTE:** The user cannot change a cash advance.

For clients using the workflow setting, the user has until the Start Date of the request to resubmit the request.

The user clicks **Submit Request**. The request goes through the current workflow.