**Quick Reference Card – Travel Request Options**

**Concur – Travel Request Options**

**Process:** In Concur, it may be necessary to **recall** and revise a request, **cancel** an approved request because the trip will not occur, or **delete** a request that has been started but not submitted through workflow. Additionally, a request can be **copied** for travelers who make routine business trips to the same location. When a request has been used to create the expense report and no longer needs to remain open for future expenses, the request should be **closed/inactivated**.

**Procedures**

From the Concur main login screen, choose Requests.

![Concur Main Screen](image.png)

Depending on the action needed, follow the directions for one of the options below:

- Close/inactivate a request
- Cancel a request
- Recall a request
- Copy a request
- Delete a request

For instructions on how to create a travel request, refer to the “Concur – Create a Travel Request” quick reference guide.

**Close/Inactivate a Request** – Use this option when the trip is over and all of the expenses related to the request have been submitted on an expense report.

- On the Manage Requests screen, click on the request for which the expense report has been completed and submitted.

![Manage Requests Screen](image.png)
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- Click on the Close/Inactivate Request button.

- Click Yes to confirm closing/inactivating the request.

- To see any closed/inactivated requests, click on the View button on the Manage Requests Screen and choose Closed/Inactivated Requests.
A list of closed/inactivated requests will appear for review.

- Click on the request to view the request details.

Cancel a Request – Use this option when the business trip will not take place and there will be no expense report submitted for the approved request.

- On the Manage Requests screen, click on the request for which the expense report will not be submitted.
• When the request appears, click on the Cancel Request button at the top of the screen.

• The Cancel Request box will appear. Enter a Comment to explain the reason the request is being canceled and click OK.

• The status of the request has changed to “Cancelled”.

• Click on Manage Requests to close the request.
To see any cancelled requests, click on the View button on the Manage Requests Screen and choose Cancelled Requests.

A list of cancelled requests will appear for review.

Click on the request to view the request details.
Recall a Request – If a request has not been fully approved, the request can be recalled so that revisions can be made.

- On the Manage Requests screen, click on the request which requires revisions.

- When the request appears, click on the Recall button at the top of the screen.

- Confirm that the request should be recalled.

- The request is now available to make any necessary changes and the status of the request has changed to “Sent Back to User”.
• Make any necessary revisions and click on the Submit Request button at the top of the screen.

• The request is now ready for the workflow approval process and will have the status “Submitted and Pending Approval”.

Copy a Request – Use this option if specific aspects of a request such as the destination and some of the expenses will be the same for another request.

• From the Manage Requests screen, click on the box to the left of the request that will be copied and choose the Copy Request button.
• Change the Request name and starting date for the new request.

• Review the information on the Request Header to be sure it is correct. Note the trip end date will calculate based on the number of days in the original trip. Change the date if necessary.

• If the end date has been changed, the following message will appear. Choose the answer that best fits the new travel request.
• Make any changes to the segments of the travel request as necessary by clicking the Modify button at the bottom of each segment.

  o Choose the Save button when a revision has been made to the segment.
  o Choose the Delete button if the segment should not be on the travel request.

• Click on the Expenses Tab to review the expenses on the travel request.
  o Choose New Expense to add an expense to the request. Complete all required fields and click Save.
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- Click on the box to the left of the expense and complete one of the actions below.
  - Revise the existing expense in the expense fields to the right. Save the changes.
  - Choose the Delete button to remove the expense from the request.

- When all expense types have been reviewed and updated on the travel request, click on Submit Request to begin the workflow approval process.
Delete a Request – Use this option if the request has been started but not submitted and the request is no longer needed.

- The request can be deleted using one of the following options:
  - From the Manage Requests screen, click on the box to the left of the request that has a status of “not submitted” and then click Delete Request button at the top of the screen.
  - When in the Request, click on the Delete Request button at the top of the request. Notice the status of the request is “not submitted”.

- The system will ask for confirmation of the request deletion. Click Yes to continue or No to return to the request.
Notice there is no view option for Deleted Requests. Because the request was never submitted, it will not appear on any reports in the request view options.

- The request is an estimation of the expenses for a business trip. Therefore, it is likely that the expense amounts or expense types on a request will not be a one-to-one match with an expense report. The “approved amount” and “remaining amount” of a request do not need to match before the request can be closed/inactivated.

- Once a request has been closed/inactivated, it is no longer available to create an expense report based on the expenses on the request. Be sure there will be no more expense reports submitted for the travel request before closing/inactivating the report.

Questions
- Questions Contact Customer Service:
  - Email – concurexpense@uky.edu