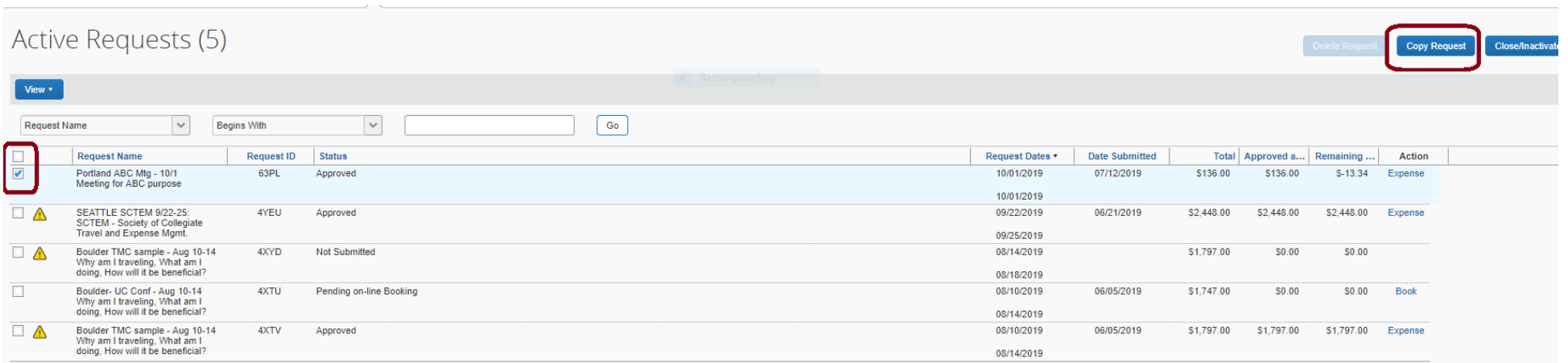


Concur Travel and Expense has a number of time saving features. Today we'll explore the Copy feature for both Requests and Expense reports. Please watch for future time saving tips.

Copy allows you to use the same Request or Expense report over and over for a traveler who regularly takes the same trip. Other uses include **Group Travel**. When entering Request for a large group on the Concur host's profile, consider entering five travelers per request. Using the travelers last name in the Request Name assists the travel office in assigning airfare charges for non-profiled travelers to the correct host's profile for processing. Enter five travelers on the first Request and use the copy feature to enter the next five travelers, and so on.

*****Requests:** You can create one Request and copy it over and over, selecting new dates. You can even save the same anticipated expenses. Go to the top black navigation bar and click on Request. Locate a Request you wish to copy and check the box on the left. The Copy Request button will activate. Click Copy Request:



The screenshot shows the 'Active Requests (5)' interface. At the top right, there are buttons for 'Delete Request', 'Copy Request' (highlighted with a red box), and 'Close/Inactivate'. Below the buttons is a search bar with 'Request Name' and 'Begins With' dropdowns, a text input field, and a 'Go' button. A 'View' dropdown is also present. The main table lists five requests with columns for Request Name, Request ID, Status, Request Dates, Date Submitted, Total, Approved a..., Remaining ..., and Action. The first request, 'Portland ABC Mtg - 10/1 Meeting for ABC purpose', has its selection checkbox checked and is highlighted in blue. The 'Copy Request' button is also highlighted in blue.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input checked="" type="checkbox"/>	Portland ABC Mtg - 10/1 Meeting for ABC purpose	63PL	Approved	10/01/2019 10/01/2019	07/12/2019	\$136.00	\$136.00	\$-13.34	Expense
<input type="checkbox"/>	SEATTLE SCTEM 9/22-25 SCTEM - Society of Collegiate Travel and Expense Mgmt.	4YEU	Approved	09/22/2019 09/25/2019	06/21/2019	\$2,448.00	\$2,448.00	\$2,448.00	Expense
<input type="checkbox"/>	Boulder TMC sample - Aug 10-14 Why am I traveling, What am I doing, How will it be beneficial?	4XYD	Not Submitted	08/14/2019 08/18/2019		\$1,797.00	\$0.00	\$0.00	
<input type="checkbox"/>	Boulder- UC Conf - Aug 10-14 Why am I traveling, What am I doing, How will it be beneficial?	4XTU	Pending on-line Booking	08/10/2019 08/14/2019	06/05/2019	\$1,747.00	\$0.00	\$0.00	Book
<input type="checkbox"/>	Boulder TMC sample - Aug 10-14 Why am I traveling, What am I doing, How will it be beneficial?	4XTV	Approved	08/10/2019 08/14/2019	06/05/2019	\$1,797.00	\$1,797.00	\$1,797.00	Expense

******** Change the name of the new Request, example: from Portland ABC Mtg 10/1 to Portland ABC Mtg – Nov. 1, select new dates from the calendar widget, keep expenses or uncheck the box (**Expected Expenses**) to create a new expense list. If the original Request has **Segments** (air, hotel, car), there is an option to copy those to the new report. The feature should be used cautiously as it may generate a booking once the request is approved:

Copy Request

Rectangular Snip



The selected request with appropriate request entries will be copied.

Existing Request:

We have provided a default name. Change the name if desired.

Request Name:

Last Date of Source Request:

New Request:

You can change the start date of the new request.

If you provide a date below, the request start date or the earliest request entry on the new request will be given that date and dates for all other request entries will be adjusted based on that. Otherwise, the start date will be defined as Last date of source request +1.

Starting date for New Request: 

Expected Expenses

OK

Cancel

*** Results:

Active Requests (6)

Rectangular Snip

View ▾

Request Name ▾ Begins With ▾ Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates
<input type="checkbox"/>	Portland ABC Mtg - 11/1 Meeting for ABC purpose	63PM	Not Submitted	11/01/2019 11/01/2019
<input type="checkbox"/>	Portland ABC Mtg - 10/1 Meeting for ABC purpose	63PL	Not Submitted	10/01/2019 10/01/2019
<input type="checkbox"/>	SEATTLE COSTUME CO	63PL	Not Submitted	10/01/2019 10/01/2019

*** Expense Reports:

Copy an existing expense report for the traveler who regularly takes the same trip. You can also use the copy feature for Groups. Using the Group Request noted above, you can create an expense report for each traveler. Create the first expense report and then copy the Expense report multiple times changing the report name, vendor ID number, and expense details on each report.

In the top black navigation bar, click on Expense. Click on Report Library to find the previously submitted Expense Report. Use the blue "View" button if the report is more than 90 days old:

SAP Concur Requests Travel **Expense** Approvals Reporting ▾ App Center Locate Administration ▾ | Help ▾ Profile ▾

Manage Expenses View Transactions View Cash Advances Process Reports

Manage Expenses

ACTIVE REPORTS

Report Library →

← Manage Expenses
Reports for last 90 Days

View ▾ Create & Edit ▾ Import Expenses

- Unsubmitted Reports
- Active Reports
- Recent Reports
- Pending Reports
- Approved Reports
- Processed Reports
- Paid Reports
- Payment Confirmed Reports
- All Reports
- Reports for this Month
- Reports for last Month
- Reports for this Quarter
- Reports for last Quarter

Report Name
Portland ABC Mtg - 10/1 Meeting for ABC purpose more entry level exceptions.
Denver 10/1-4 test please upload website screenshot to show c more entry level exceptions.
RELOCATION TEST relocation test
R/M CHECK W/ TVL OFFICE Relocation test on GUEST pc e entered to pay your guest. Enter all letters
Boulder TMC sample - Aug Why am I traveling. What am

*** Click the checkbox on the left and Copy Report button in the upper right.

← Manage Expenses
Reports for last 90 Days

View ▾ Create & Edit ▾ Import Expenses

Delete Report Copy Report

	Report Type	Report Name	Report ID	Comments	Status	Payment Status	Report Date	Total	Requested Amount
<input checked="" type="checkbox"/>	Expense Type	Portland ABC Mtg - 10/1 Meeting for ABC purpose	1886E63698FC49918DE9		Submitted & Pending Approval - Milleit, Brooke A.	Not Paid	07/12/2019	\$149.34	\$149.34

⚠ This report has one or more entry level exceptions.

*** Rename the new report, select the new date. The same expenses will carry over to the new report and can be changed or deleted. Add more expenses if necessary.

Copy Report ✕

The selected report with appropriate expense entries will be copied.

Existing Report:

We have provided a default name. Change the name if desired.

Report Name:

Earliest Date of Expense Entries on Source Report:

New Report:

You can change the start date of the expense entries on the new report.

If you provide a date below, the earliest expense entry on the new report will be given that date and dates for all other expense entries will be adjusted based on that. Otherwise, each expense entry will be given the original expense entry date plus one day.

Starting Date for Expense Entries on New Report: