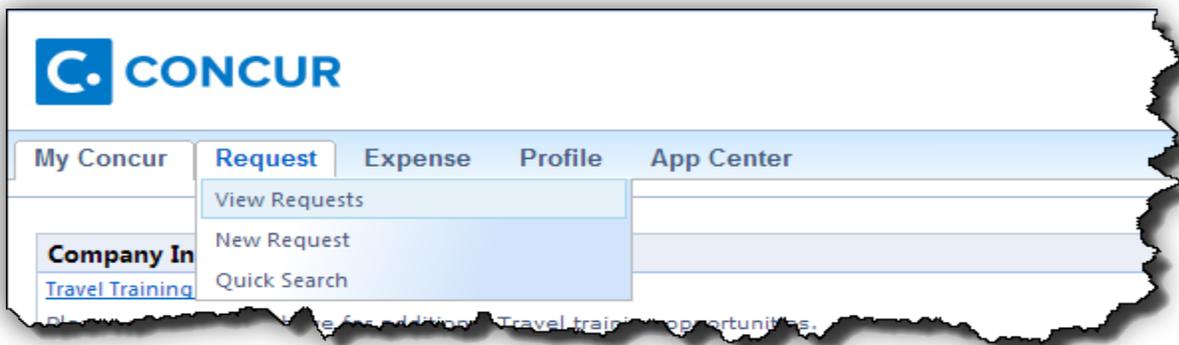




How to Close or Inactivate a Request

After you submit an Expense Report with an attached Request, a plus or minus balance may remain on the Request. You may have had travel approved and then the trip was cancelled. Either way, those requests will continue to show up in *View Requests* and when you add new Requests to an Expense Report Header. With a little housekeeping, you can keep this list uncluttered. Make certain you have submitted all the expenses related to the Request in question on an Expense Report before you perform this function as the Close/Inactivate Request is permanent and cannot be reversed.

- Log into the TTE System
- Hover the cursor on the **Request** tab and select **View Requests**



- Select the Request you want to close or inactivate by clicking on the check box to the left of the *Request Name*. This item will have an amount in the *Remaining* column that is NOT equal to the *Total* and *Approved* amounts.
 - If you have a long list, you may use the three query options to reduce the data being displayed

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remaini...	Action
<input type="checkbox"/>	Conference 7/20-25 Annual XYZ Conference	3MAL	Approved	07/20/2014	06/30/2014	\$925.00	\$925.00	\$925.00	Expense
<input type="checkbox"/>	So GA Site Reviews 7/10 to 15 Notmal Travel	3MAK	Approved	07/25/2014 07/10/2014	06/30/2014	\$150.00	\$150.00	\$150.00	Expense
<input checked="" type="checkbox"/>	Savannah GA Normal Monthly REview	3MAG	Approved	07/15/2014 06/16/2014 06/19/2014	06/06/2014	\$425.00	\$425.00	\$111.00	Expense

- The following is a close up view of the *Total, Approved* and *Remaining* columns from above

NOTE: The Request we have selected here had been approved for \$425 but the actual expenses submitted on the Expense Report were \$111.00 less than the approved amount. If the actual expenses were more than the approved amount the amount in the Remaining column would be a *negative number*. If the approved Request will not be used due to cancellation of the trip, all three columns will be the same.

Date Submitted	Total	Approve...	Remaini...	Action
06/30/2014	\$925.00	\$925.00	\$925.00	Expense
06/30/2014	\$150.00	\$150.00	\$150.00	Expense
06/26/2014	\$425.00	\$425.00	\$111.00	Expense

- Click on **Close/Inactivate Request**

The screenshot shows the 'My Concur' interface with a list of active requests. The 'Close/Inactivate Request' button is highlighted with a red box. The table below shows the details of the requests.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remaini...	Action
Conference 7/20-25 Annual XYZ Conference	3MAL	Approved	07/20/2014	06/30/2014	\$925.00	\$925.00	\$925.00	Expense
So GA Site Reviews 7/10 to 15 Notmal Travel	3MAK	Approved	07/25/2014 07/10/2014	06/30/2014	\$150.00	\$150.00	\$150.00	Expense
Savannah GA Normal Monthly Rview	3MAG	Approved	07/15/2014 06/16/2014 06/19/2014	06/26/2014	\$425.00	\$425.00	\$111.00	Expense

- Click on **Yes** in the Confirmation box

The confirmation dialog box contains the following text:

Confirm

? You are about to permanently close/inactivate the selected request(s). This will release any amounts associated with the requests that are not linked to a submitted report and remove them from the list of available requests to assign to an expense report.

Yes **No**

- The Request will no longer appear in the View Request list and will no longer appear as a Request when attaching Requests to the Expense Report Header.

My Concur Request Expense Profile App Center

View Requests New Request Quick Search

Active Requests (2) Delete Request Copy Request Close/Inactivate Request

View

Request Name Begins With Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remaini...	Action
<input type="checkbox"/>	Conference 7/20-25 Annual XYZ Conference	3MAL	Approved	07/20/2014	06/30/2014	\$925.00	\$925.00	\$925.00	Expense
<input type="checkbox"/>	So GA Site Reviews 7/10 to 15 Normal Travel	3MAX	Approved	07/10/2014 Comment: Travel THur-Fri and Mon-Tue 07/15/2014	06/30/2014	\$150.00	\$150.00	\$150.00	Expense