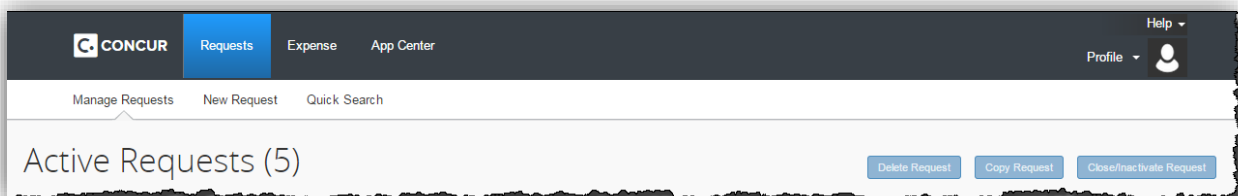




How to Close or Inactivate a Request

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
- Click on the **Requests** tab



- 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 View options in combination with the three query options to reduce the data being displayed

View and Query Options

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approve...	Remaini...	Action
<input type="checkbox"/>	Annual Cert 4/7 to 9 Annual Certification for XYZ	3MMD	Submitted & Pending Approval - Austin, Leslie	04/07/2015	03/03/2015	\$340.00	\$0.00	\$0.00	
<input type="checkbox"/>	YTZ Certification 4/1 to 7	3MM9	Approved	04/01/2015	02/20/2015	\$725.00	\$725.00	\$725.00	Expense
<input type="checkbox"/>	YYY Trip 3/14 to 18 Purpose	3MM6	Sent Back to Employee - Arnold, Sherry B.	04/07/2015	03/14/2015	\$827.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	BBY Conference 3/1 to 7 Annual Certification	3MLY	Submitted & Pending Approval - Austin, Leslie	03/18/2015	03/30/2015	\$625.00	\$0.00	\$0.00	
<input type="checkbox"/>	XYZ Conference 2/15 to 18 Annual Zingger COnference	3MLX	Approved	03/07/2015	02/02/2015	\$700.00	\$700.00	\$-80.00	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 \$700 but the actual expenses submitted on the Expense Report were \$80.00 more than the approved amount. If the actual expenses were less than the approved amount the amount in the Remaining column would be a *positive number*. If the approved

Request will not be used due to cancellation of the trip, all three columns will be the same.

Request Dates ▾	Date Submitted	Total	Approve...	Remaini...	Action
02/15/2015	02/02/2015	\$700.00	\$700.00	\$-80.00	Expense
02/18/2015					

- Click on **Close/Inactivate Request**

The screenshot shows the 'Active Requests (5)' page in the CONCUR system. At the top right, there are buttons for 'Delete Request', 'Copy Request', and 'Close/Inactivate Request', with the latter being highlighted by a red box. Below these buttons is a search bar and a table of requests. One request, 'XYZ Conference: 2/15 to 18 Annual Zingger COnference', is circled in red. This request has a status of 'Approved' and a 'Total' of \$700.00.

Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approve...	Remaini...	Action
Annual Cert 4/7 to 9 Annual Certification for XYZ	3MMD	Submitted & Pending Approval - Austin, Leslie	04/07/2015	03/03/2015	\$340.00	\$0.00	\$0.00	
YTZ Certification 4/1 to 7 osehnrif.ossnf	3MM9	Approved	04/09/2015	02/20/2015	\$725.00	\$725.00	\$725.00	Expense
YYY Trip 3/14 to 18 Purpose	3MM6	Sent Back to Employee - Arnold, Sherry B.	04/07/2015	03/14/2015	\$827.00	\$0.00	\$0.00	
BBY Conference 3/1 to 7 Annual Certification	3MLY	Submitted & Pending Approval - Austin, Leslie	03/01/2015	03/30/2015	\$625.00	\$0.00	\$0.00	
XYZ Conference: 2/15 to 18 Annual Zingger COnference	3MLX	Approved	02/15/2015	02/02/2015	\$700.00	\$700.00	\$-80.00	Expense

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

The screenshot shows a 'Confirm' dialog box with a question mark icon. The text reads: '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.' At the bottom right, there are two buttons: 'Yes' and 'No', with the 'Yes' button highlighted by a red box.

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

CONCUR Requests Expense App Center Help Profile

Manage Requests New Request Quick Search

Active Requests (4)

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"/>	Annual Cert 4/7 to 9 Annual Certification for XYZ	3MMD	Submitted & Pending Approval - Austin, Leslie	04/07/2015	03/03/2015	\$340.00	\$0.00	\$0.00	
<input type="checkbox"/>	YTZ Certification 4/1 to 7 osehnrif,osnrl	3MM9	Approved	04/09/2015	04/01/2015	\$725.00	\$725.00	\$725.00	Expense
<input type="checkbox"/>	YYY Trip 3/14 to 18 PUurpose	3MM6	Sent Back to Employee - Arnold, Sherry B.	04/07/2015	03/14/2015	\$827.00	\$0.00	\$0.00	
<input type="checkbox"/>	BBY Conference 3/1 to 7 Amul Certification	3MLY	Submitted & Pending Approval - Austin, Leslie Comment: Why is the rental car so high? Please adjust or advise then resubmit.	03/18/2015	03/01/2015	\$625.00	\$0.00	\$0.00	