



How to edit a request or reconciliation in Concur



Travel requests, reimbursement requests, and p-card reconciliations can be edited anytime before the final approval. For example, if a travel request is submitted and approved by the first approver, it can still be recalled and edited.

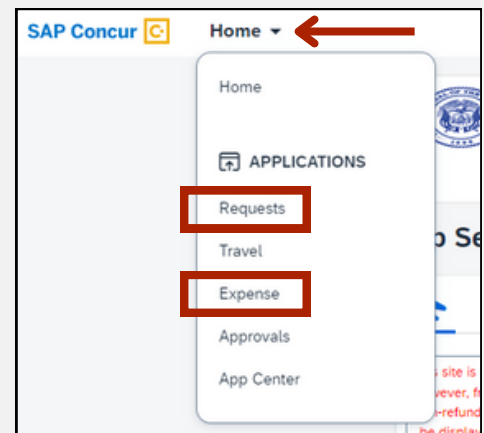
Once a request or reconciliation is approved by the final approver, it can't be recalled and edited.

Open your request or reconciliation

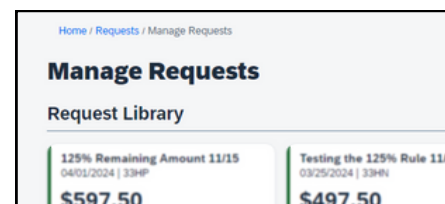
Click **Home** in the upper left.

To edit a travel request, select **Requests** from the drop-down menu.

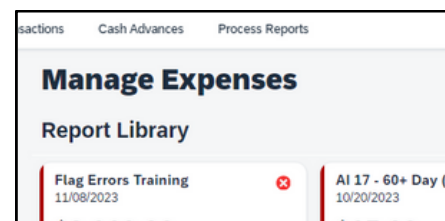
To edit a reimbursement requests or p-card reconciliations, select **Expense** from the drop-down menu.

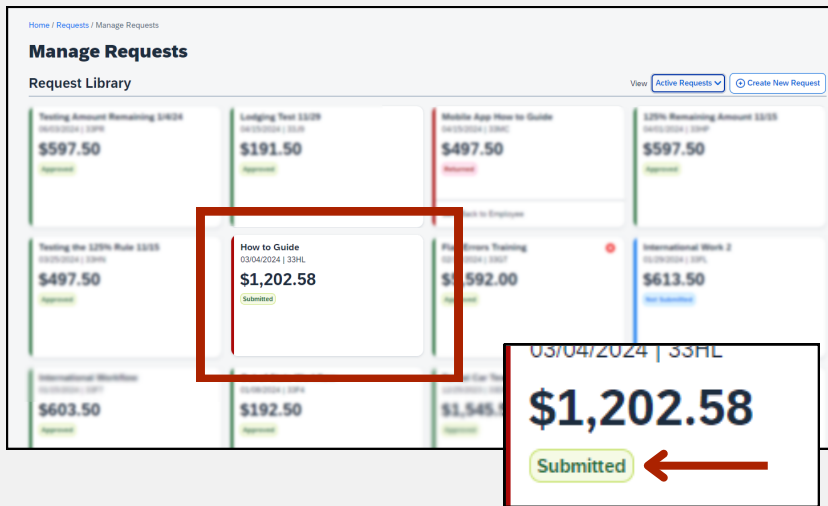


If you selected **Requests**, you'll see the Manage Requests screen.



If you selected **Expense**, you'll see the Manage Expenses screen.

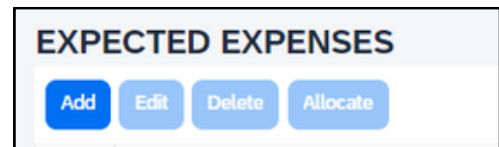




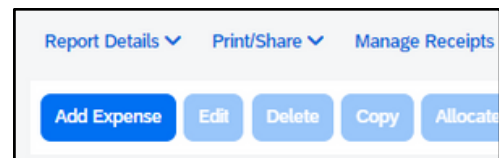
Select which request or reconciliation you want to edit.

In this example, we'll select a travel request that was already submitted.

If you're editing a travel request, you'll see the Expected Expenses screen.

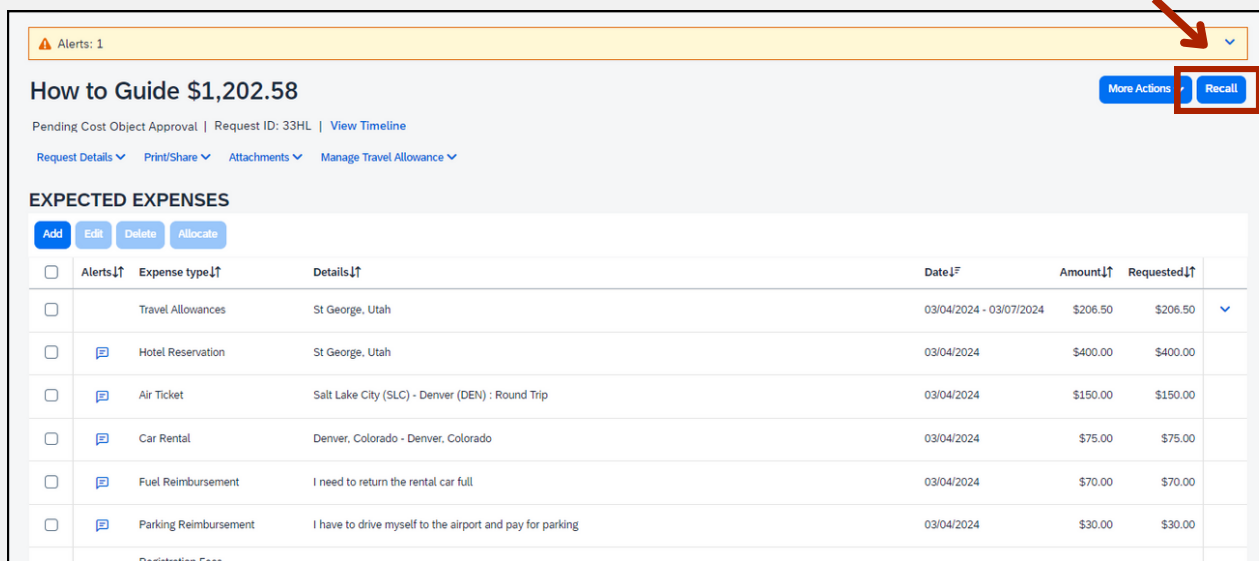


If you're editing a reimbursement request or p-card reconciliation, you'll see the Add Expense screen.



If you're editing a request that was already submitted, click the blue button **Recall** in the upper right.

Recall





Clicking **Recall** will un-submit the request so you can make changes. Once you make changes and submit it again, the approval process will start over and the request will be sent back to the first approver.

If you haven't submitted your request yet, you won't see a recall button because you only need to recall a request that was already submitted.

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How to edit the header



For travel requests, Concur uses the word “request.” For reimbursement requests or p-card reconciliations, Concur uses the word “report.”

For this example, we’re editing a travel request, so all the images will show the word “request.”

From the expense screen, click the blue text **Request Details**.


<input type="checkbox"/>	Alerts ↑	Expense type ↑	Details ↑	Date ↑	Amount ↑	Requested ↑	
<input type="checkbox"/>		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	▼
<input type="checkbox"/>		Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
<input type="checkbox"/>		Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	
<input type="checkbox"/>		Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00	
<input type="checkbox"/>		Fuel Reimbursement	I need to return the rental car full	03/04/2024	\$70.00	\$70.00	
<input type="checkbox"/>		Parking Reimbursement	I have to drive myself to the airport and pay for parking	03/04/2024	\$30.00	\$30.00	
<input type="checkbox"/>		Registration Fees Attendees (1)	I need to attend this conference to better understand my job.	03/04/2024	\$200.00	\$200.00	
<input type="checkbox"/>		Personal Car Mileage	Ogden, UT, USA - Salt Lake City International Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA	03/04/2024	\$36.08	\$36.08	
<input type="checkbox"/>		Friends & Family Allowance	I have a friend I am going to stay with for one night	03/04/2024	\$25.00	\$25.00	

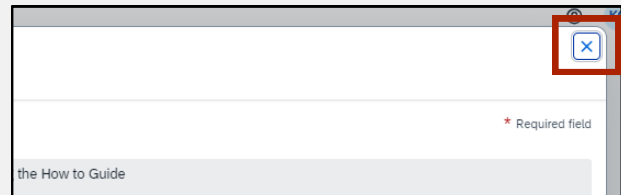
Select **Edit Request Header** from the drop-down menu

- Request
- Edit Request Header**
- Request Timeline
- Audit Trail
- Linked Add-ons
- Add Cash Advance

You're at the request header! You can now change information in the fields. When you're done, click the blue button **Save**.



If you click the blue **X**  in the upper-right corner, the request header will close without saving.



After saving the request header, you're taken back to the expense screen.

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50
<input type="checkbox"/>	Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00
<input type="checkbox"/>	Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00
<input type="checkbox"/>	Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00

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How to edit an expense

From the expense scene, click anywhere on the expense line to open the data entry screen. For this example, we'll click on **Hotel Reservation**.

How to Guide \$1,202.58

More Actions

Submit Request

Sent Back to Employee | Request ID: 33HL | [View Timeline](#)

[Request Details](#) | [Print/Share](#) | [Attachments](#) | [Manage Travel Allowance](#)

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested	
<input type="checkbox"/>		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	▼
<input checked="" type="checkbox"/>		Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
<input type="checkbox"/>		Air Ticket	lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	
<input type="checkbox"/>		Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00	
<input type="checkbox"/>		Fuel Reimbursement	I need to return the rental car full	03/04/2024	\$70.00	\$70.00	

You'll see the data entry screen for the expense. Change any information you need to. When you're done, click the blue button **Save**: one is in the upper-right corner and the other is in the bottom-left corner.

[Home](#) / [Requests / Manage Requests / How to Guide](#) /

← →

Hotel Reservation \$400.00

Cancel

Save

* Required field

Check-In

Date

03/04/2024

City *

St George, Utah

Detail *

Conference Hotel

Check-Out

Date

03/06/2024

Comment

48/2000

This is where the conference is going to be held

Amount *

400.00

Currency *

US, Dollar

Save

Cancel

After saving the expense, you're taken back to the expense screen.

[Home](#) / [Requests](#) / [Manage Requests](#) / [How to Guide](#)

Alerts: 1

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More Actions Submit Request

Sent Back to Employee | Request ID: 33HL | [View Timeline](#)

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EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested	
<input type="checkbox"/>		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	▼
<input type="checkbox"/>		Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
<input type="checkbox"/>		Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	
<input type="checkbox"/>		Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00	
<input type="checkbox"/>		Fuel Reimbursement	I need to return the rental car full	03/04/2024	\$70.00	\$70.00	

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How to edit the travel allowance

From the expense screen, click the blue text **Manage Travel Allowance**.

The screenshot shows the 'How to Guide' expense screen. At the top, there's a breadcrumb trail: Home / Requests / Manage Requests / How to Guide. Below that, an alert bar says 'Alerts: 1'. The main heading is 'How to Guide \$1,202.58'. Underneath, it says 'Not Submitted | Request ID: 33HL'. There are four tabs: 'Request Details', 'Print/Share', 'Attachments', and 'Manage Travel Allowance'. The 'Manage Travel Allowance' tab is selected and highlighted with a red box and a red arrow. A dropdown menu is open from this tab, showing options: 'Add Travel Allowance', 'Edit Travel Allowance', 'Edit Adjustments', 'Delete Travel Allowance', and 'Reimbursable Allowances Summary'. Below the tabs, there's a section titled 'EXPECTED EXPENSES' with buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A table follows with columns for 'Alerts', 'Expense type', and 'Expense'. The table contains four rows: 'Travel Allowances' (St George, Utah), 'Hotel Reservation' (St George, Utah), 'Air Ticket' (Salt Lake City (SLC) - Denver (DEN) : Round Trip), and 'Car Rental' (Denver, Colorado - Denver, Colorado).

Select **Add Travel Allowance** to add a travel allowance.

Select **Edit Travel Allowance** to edit your start location, destination, and dates.

Select **Edit Adjustments** to edit what days or meals need to be excluded from your request.

A close-up of the 'Manage Travel Allowance' dropdown menu. The menu is open, showing the following options: 'Add Travel Allowance', 'Edit Travel Allowance', 'Edit Adjustments', 'Delete Travel Allowance', and 'Reimbursable Allowances Summary'. The 'Edit Travel Allowance' option is highlighted with a blue bar on the left.

A close-up of the 'Manage Travel Allowance' dropdown menu. The menu is open, showing the following options: 'Add Travel Allowance', 'Edit Travel Allowance', 'Edit Adjustments', and 'Delete Travel Allowance'. The 'Edit Travel Allowance' option is highlighted with a red box.

For this example, we'll select **Edit Travel Allowance**.

You'll see the Itinerary screen. Change any fields you need to and click **Next** in the bottom-right corner.

Travel Allowance

Itinerary

Itinerary Name *
Testing TA Error

☐ Detailed Itinerary [?](#) ☐ Without overnight [?](#)

Start Location *
Salt Lake City, Utah

Start Date *
10/09/2023

Start Time *
8:00 AM

+ Add Destination

Arrival Location *
Phoenix, Arizona

+ Add Destination

End Location *
Salt Lake City, Utah

End Date *
10/11/2023

End Time *
5:00 PM

Next

Next: Adjust your travel allowance

Cancel **Next**

Cash Daily Allowance (Incidentals) Phoenix, Arizona 10/10/2023 \$5.00

Next you'll see the Adjustments screen. Check or uncheck any boxes you need to and click **Save** in the bottom-right corner.

Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: [Adjustments](#) [Show Filters](#)

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Use 300 Percent Rule	Allowance Limit ?	Reimbursement Amount ?
All Days Dates: 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Mon, 10/09/2023 Phoenix, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$156.00	\$51.75
Tue, 10/10/2023 Phoenix, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$156.00	\$69.00
Wed, 10/11/2023 Phoenix, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$51.75
Total: \$312.00							Total: \$172.50	

Save

Cancel **Save**

Cash Daily Allowance Phoenix, Arizona 10/10/2023 \$64.00

After saving the travel allowance, you're taken back to the expense screen.

Alerts: 1

How to Guide \$1,202.58

More Actions

Submit Request

Sent Back to Employee | Request ID: 33HL | [View Timeline](#)

Request Details

Print/Share

Attachments

Manage Travel Allowance

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/>	Alerts↑↑	Expense type↑↑	Details↑↑	Date↓↑	Amount↑↑	Requested↑↑	
<input type="checkbox"/>		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	▼
<input type="checkbox"/>		Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
<input type="checkbox"/>		Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	
<input type="checkbox"/>		Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00	
<input type="checkbox"/>		Fuel Reimbursement	I need to return the rental car full	03/04/2024	\$70.00	\$70.00	
<input type="checkbox"/>		Parking Reimbursement	I have to drive myself to the airport and pay for parking	03/04/2024	\$30.00	\$30.00	
<input type="checkbox"/>		Registration Fees <i>Attendees (1)</i>	I need to attend this conference to better understand my job.	03/04/2024	\$200.00	\$200.00	

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Submit the request or reconciliation

When you've changed everything you need to, you can submit the request by clicking the blue button **Submit Request** from the expenses screen.

Submit Request

How to Guide \$1,202.58 More Actions ▾ Submit Request

Sent Back to Employee | Request ID: 33HL | [View Timeline](#)

[Request Details ▾](#) [Print/Share ▾](#) [Attachments ▾](#) [Manage Travel Allowance ▾](#)

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓	
<input type="checkbox"/>		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	▾
<input type="checkbox"/>		Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
<input type="checkbox"/>		Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	

The request now appears in the Manage Requests or Manage Expenses screen. It shows that it has been submitted and is pending cost object approval, which means it has been sent to the budget officer for approval.

Transactions Cash Advances Process Reports

<div>Returned</div> <div>Sent Back to Employee</div>	<div>Returned</div> <div>Sent Back to Employee</div>	<div>Returned</div> <div>Sent Back to Employee Concur Administrator</div>	<div>Returned</div> <div>Sent Back to Employee</div>	<div>Returned</div> <div>Sent Back to Employee</div>
<div>Demo Pcard 10/02/2023</div> <div>\$363.46</div> <div>Returned</div> <div>Sent Back to Employee</div>	<div>International Workflow 2 01/29/2024</div> <div>\$628.02</div> <div>Not Submitted</div>	<div>Pcard Test 12/6/2023 12/06/2023</div> <div>\$79.06</div> <div>Not Submitted</div>	<div>Icons Test 11/30/2023</div> <div>\$397.50</div> <div>Not Submitted</div>	<div>Pcard Icons Test 11/30/2023</div> <div>\$85.00</div> <div>Not Submitted</div>
<div>Past 60 Days International W... 10/27/2023</div> <div>\$586.00</div> <div>Not Submitted</div>	<div>Same Day Travel 10/24/2023</div> <div>\$44.25</div> <div>Not Submitted</div>	<div>60 Day Flag International 09/29/2023</div> <div>\$563.50</div> <div>Not Submitted</div>	<div>Testing TA Error 09/29/2023</div>	<div>Demo Pcard Travel 09/28/2023</div>
<div>Personal Car Mileage 09/26/2023</div> <div>\$5,820.53</div> <div>Not Submitted</div>	<div>How to Guide 12/15/2023</div> <div>\$1,202.58</div> <div>Due Employee: \$0.00</div> <div>Submitted</div> <div>Pending Cost Object Approval</div>			

How to Guide
12/15/2023

\$1,202.58

Due Employee:
\$0.00

Submitted

Pending Cost Object Approval