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<th>Concur Request QuickStart Guide</th>
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- Expense
- Travel
- Request
- Risk Messaging
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Creating a Request

University policy requires travelers to obtain authorization before expenses for a trip are made. The authorization must be fully approved before the trip starts. Using Concur Request, you can submit an authorization request with the expenses that you anticipate for the trip.

NOTE: A Concur Request is only required for State and RF Non-Sponsored Award domestic travel. For international travel, all travelers must submit a Concur Request.

To create a request

1. From the SAP Concur home page, on the Quick Task bar, place your mouse pointer over New, and then click Start a Request.
2. On the Create New Request page, complete the required fields (indicated with a red asterisk), and then click Create.
3. Click Add to enter your trip details and estimated amounts for each expense.
The most common expense types are **Airfare**, **Lodging**, and **Meals – Per Diem**.

4. In the **Expense Type** list, search for and select the appropriate expense type. In this example, you will see how to add your hotel expenses.

5. Select **Lodging** from the list.

6. On the **New Expense** page, complete the required fields. Most of the fields will be pre-populated but you must enter the **Estimated Cost** and state whether or not the **nightly lodging rate exceeds the allowed per diem**.
NOTE: Links to the allowed domestic and foreign nightly lodging rates are provided on the page. Please copy/paste the link to a new browser window to view the rates.

7. Click Save.

8. Continue to add your anticipated expenses to the request.
IF you have a travel related document that policy requires you to append to your request, perform the following additional steps:

1. Click **Attachments** to attach the appropriate documents for your approver’s review.

2. In the **Document Upload Attach** window, click **Upload and Attach**.

3. Search for and select the file you want to upload on your device.

4. Click **Open**.
   
   The selected file is now attached to your request.
Adding Allowances to a Request

You can add expenses to your request to help estimate the total cost of your trip for pre-set travel allowances for lodging and/or meals.

To add allowances to a request

1. From the open request, click Add.

   The fixed allowance expense types are **Lodging** and **Meals-Per Diem (Individual)**. These expense types are configured to calculate an amount based on the arrival city and duration of your trip.

2. In this example, click the **Meals-Per Diem (Individual)** expense type.

3. The **Destination City**, **Start Date**, and **End Date** are populated based on your previous entries. Enter the **Number of Days**.
NOTE: The Transaction Amount field is read-only and is automatically populated based on the duration of your trip and the fixed rate calculation for the arrival city.

4. Click Save.
The expense with the calculated Amount is displayed.
Submitting a Request

After entering all of your projected expenses, you will submit the request for review and approval by management.

To submit a request

1. In the open request, click **Submit Request**.

2. Read the User Electronic Agreement, then click **Accept & Continue**.

Your request is submitted and waiting for approval.
Correcting and Resubmitting a Request

If there is an issue with the request, your manager will return it to you for correction. You will be notified if your request has been rejected.

To correct and resubmit a request

1. On the SAP Concur home page, click the Requests tab.
2. Click on the tile for the returned expense.
3. Click View Timeline.
4. Review the audit trail and the comment from your manager explaining the reason why the request was rejected and the corrective steps you should take.
5. Make the requested corrections.
6. Click **Submit Request** to re-send it to your manager for review.
Adding a Request to an Expense Report

You can add an approved request and its expected expenses to a new expense report.

**To add a request to an expense report**

1. From the SAP Concur home page, click the **Requests** tab.

2. On the **Manage Requests** page, select the appropriate approved request.

   The request and all associated expenses appear.

3. To create the expense report from the request, click **Create Expense Report**.

4. To view the expense report, from the SAP Concur home page, click the **Expense** menu.
5. Click on the tile to open the report with the imported expenses.

6. In the expense report, you should:
   - Review the expenses to ensure they are accurate
   - Correct any exceptions (indicated by either yellow triangles or red circles). Red exceptions must be corrected or you will not be allowed to submit the report.
   - Attach any required receipts
   - Add any additional travel expenses that were not captured in the request

**NOTE:** Requests created from an expense report will display an alert that prompts you to complete any required fields that weren’t imported from the request.
Approving Requests

As an approver you are responsible for reviewing and approving requests before your employees incur the expenses.

To approve a request

1. From the SAP Concur home page, in the My Tasks section, click Required Approvals.

On the Approvals home page, the view defaults to Requests Pending your Approval.

2. Click the View dropdown menu, and then select Requests Pending your Approval.

You can also view requests that you have approved by months, quarters, years, or all approved requests.

3. Click the name of the request that you wish to review.

NOTE: As an approver you are required to review the details of the expected expenses and any attached documents before you approve the request.
4. Review the expenses and any supporting documents.

5. After reviewing the request, determine which action to take next. Your choices are:
   - Send Back to Employee
   - Approve
   - Approve & Forward
   - Edit Approval Flow
To send the request back to the employee

1. IF there are errors in the request or it violates policy in some way, click More Actions and then select Send Back to Employee.

   When sending a request back to an employee, you are required to enter a comment, which explains the reason for returning the request and the corrective actions the employee should take.

2. In the Send Back to Employee window, enter the Comment, then click Send Back.

To approve the request

1. IF there are no errors or policy violations and no other managers need to review the request, click Approve.

   The employee will be notified that the request has been approved and it will no longer appear in your approval queue.
To approve and forward the request to an additional approver

1. IF there are no policy violations but the request requires the approval of additional managers, click More Actions and then select Approve & Forward.
   
   NOTE: Approve & Forward is most often used when the cost of a request is shared by multiple teams or departments with separate budgets.

2. In the Edit Approval Flow window, Add a Step as needed, then search for and select the approver in the User-Added Approver field.

3. When you are done adding your approval steps, click Save. to approve and forward the request on to the next step and approver you added to the workflow.
To edit the approval flow

1. IF there are no policy violations but the request requires the approval of several other managers, click More Actions, and then select Edit Approval Flow.

2. In the Edit Approval Flow window, click Add Step to add an additional approval step for this request, or several steps, as needed.

3. In the User-Added Approver field, search for and select the approvers that you want to add to the workflow.

4. When you are done adding approval steps and approvers, click Save.

5. Click Approve.
Closing a Request

After you submit all your expenses related to a request, you can close the request. After you close a request, you can no longer associate it with an expense report.

**NOTE:** If you close a request that is associated with an unsubmitted expense report, the request is disassociated from the expense report. The authorized amounts are removed, and the request balance is reduced to zero.

1. From the SAP Concur home page, click **Requests** on the menu bar.

2. Select the tile for the request that you want to close.

3. Click **More** then select **Close/Inactivate Request**.

4. Click **OK** to permanently close/deactivate the request.
5. To view closed requests, on the Active Requests page, click the View dropdown arrow, and then select Closed/Inactivated Requests.

A list of your closed requests is displayed. You cannot attach a closed request to an expense report.