

Concur Request User Guide

CONTENTS

Request Help	2
Request Overview	2
Create a New Request	2
View Requests	4
Copy a Travel Request	5
Edit a Request	6
Delete a Request	6
Allocation Favorites	6
Print Requests	7
Request a Cash Advance	7
Cancel a Cash Advance	7
Apply a Request to a Report	8
Approver Actions for Requests	8
Concur Request and Global Travel Registry	9

Request Help

[Request Online Help](#) is available at any time while working within Concur by clicking “Help” in the upper right-hand corner and using navigation on the left-hand side or a search bar to locate the documentation. The following information are excerpts from this Online Help resource.

Request Overview

The Concur Request feature is designed to facilitate advance approval of travel and expenses related to business travel. Though the process can be customized by each company, a typical process is:

1. The user creates a request (for example, for a trip), which includes the departure and arrival dates, the reason for the trip, and the details of the different segments, such as air, car rental, and hotel, and the details of expected expenses.
2. The user submits the request. The request is routed to the user's request approvers.
3. The approver can:
 - Approve the request
 - Approve the request and forward it to another approver
 - Send the request back to the user with a comment to perhaps change and resubmit the request or to decline the request

If the request is approved, the user will later associate the approved request with the expense report that contains the actual trip expenses – as proof that the expenses were pre-approved.

Create a New Request

To create a new request:

1. Either:
 - On the Quick Task Bar, click New > Start a Request. - or –
 - On the menu, click Requests >Create New (on the sub-menu) > New Request.

The Request page appears, with the Request Header tab selected.

2. On the header, complete all required fields and the optional fields - including cash advance.
3. Click Save.
 - o The request ID, request name, and trip description appear at the top.
 - o The Segments tab becomes available.
4. On the Segments tab:
 - o Select the desired segment icon, if applicable. Hover the mouse pointer over any icon to read its "hover" text.
 - o Complete the segment fields. Note the following about segment fields:
 - Amount field: Enter the total amount for the trip. Specifically, for car rental and hotel, enter the total amount - not the daily rate.
 - Comment/Detail fields: Not required, but available in case the traveler would like to indicate more information regarding this item.
 - o Click Save. Note the following:
 - As you save segments, the running total appears in the top right corner of the request (below the Submit Request button).
 - If any of the segments are entered in a currency other than your reimbursement currency, then:
 - a) The total reflects the conversion to your reimbursement currency.
 - b) The system uses the current exchange rate.
 - c) The conversion is calculated when the segment is saved, and it is recalculated if the segment is reopened and saved.
 - o Click another segment icon, complete the fields, and click Save until all desired segments have been added.
5. On the Expenses tab:
 - o Notice that segment information entered shows in the list of expenses. To modify these, return to the segments tab and click "Modify" below any of the segments necessary.
 - o Select the appropriate expense type.
 - o Enter the estimated amount. Click Save.

Note: Users can estimate and include other expected trip-related expenses, such as taxi and meals, with their requests. With these expenses included in the request, an approver can make a more informed approval decision based on the entire cost of the trip – the segments (air, car, etc.) and the other trip-related expenses (taxi, employee meals, parking, mileage, etc.).

Request 36NK

Attachments
Print / Email
Delete Request
Submit Request

Request/Trip Name: NACUBO Conference - Chicago
 Trip Description: Attend yearly NACUBO conference ...

Status: Not Submitted
Amount: \$1,311.45

Request Header
Segments
Expenses
Approval Flow
Audit Trail

+ New Expense
Delete

Date	Expense Type	Amount	Requested
<input type="checkbox"/>	04/15/2019 Hotel	\$1,000.00	\$1,000.00
<input type="checkbox"/>	04/15/2019 Airfare	\$311.45 MXN 6,000.00	\$311.45
TOTAL AMOUNT		\$1,311.45	\$1,311.45

Expense Type

Parking
Transaction Date

Description

Transaction Amount

0.00

USD

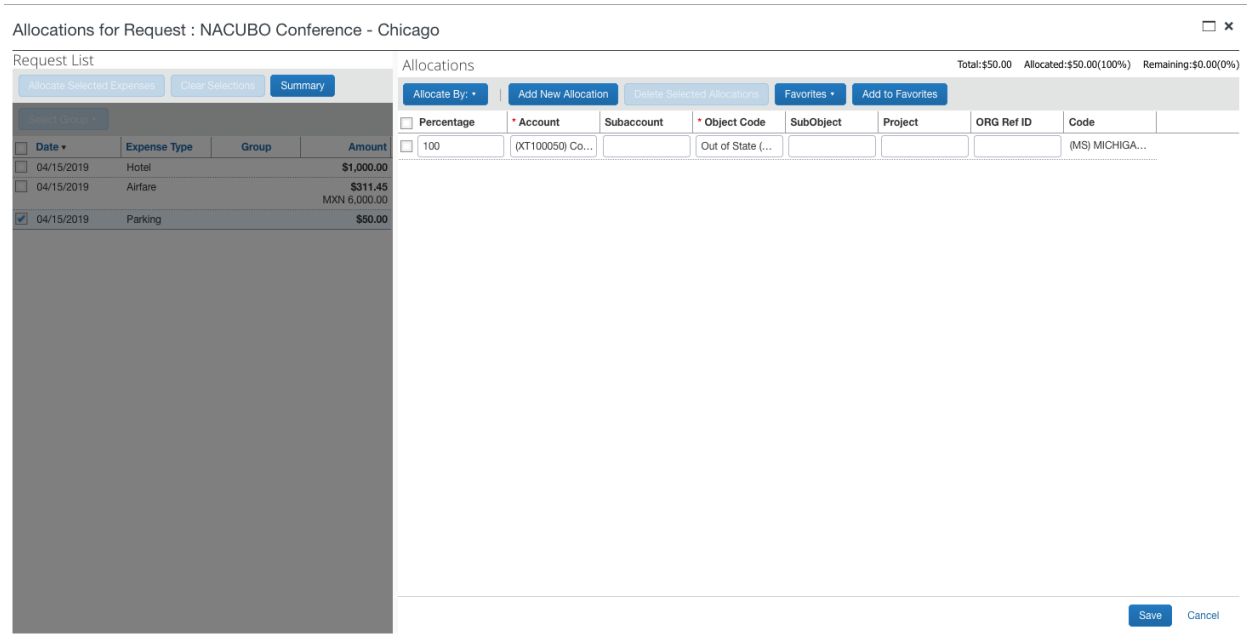
Comment

Save
Allocate
Cancel

6. To allocate, click the Allocate button for any of the segments or any of the expected expenses. Select multiple expenses or segments to allocate by selecting the checkboxes to the left of the expense items and clicking Allocate.

Note: Segments must be allocated as a group (sharing the same allocation) and expected expenses may be allocated individually.

- In the Allocations for Request window, allocate the request by percentage or amount.
- When done, click Save.



Allocations for Request : NACUBO Conference - Chicago

Request List

Date	Expense Type	Group	Amount
<input type="checkbox"/>	04/15/2019	Hotel	\$1,000.00
<input type="checkbox"/>	04/15/2019	Airfare	\$311.45 MXN 6,000.00
<input checked="" type="checkbox"/>	04/15/2019	Parking	\$50.00

Allocations

Total:\$50.00 Allocated:\$50.00(100%) Remaining:\$0.00(0%)

Percentage	Account	Subaccount	Object Code	SubObject	Project	ORG Ref ID	Code
<input type="checkbox"/>	100	(XT100050) Co...	Out of State (...)				(MS) MICHIGA...

Save Cancel

7. Attach images using the Attachments feature at the top right of the screen, if desired.
8. Click Submit Request.
 - The request is submitted to two approval levels
 - Organization/Default level approver
 - Cost Object/Fiscal Officer level approver based on account numbers used

View Requests

To view a request, either:

- Click the Open Requests tile in the My Tasks area on the home page. - or -
- On the menu, click Requests. The Manage Requests page appears.
 - The request list appears with Active Requests.
 - Click a request to view and edit (if applicable).

SAP Concur **Requests** Expense Approvals Reporting App Center Help Profile

Manage Requests Create New Process Requests Quick Search

Active Requests (39)

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	Approved ...	Remaining ...	Action
<input type="checkbox"/>	Seattle Conference Attending a conference to learn more about Concur.	363K	Pending Department Approval - Test, Default Approver	05/03/2019 05/07/2019	02/25/2019	\$1,242.00	\$0.00	\$0.00	
<input type="checkbox"/>	NACUBO Conference - Chicago Attend yearly NACUBO conference in Chicago.	36NK	Not Submitted	04/15/2019 04/18/2019		\$1,361.45	\$0.00	\$0.00	
<input type="checkbox"/>	test adhoc steps= Monica adhoc	34YJ	Approved	04/09/2019 04/11/2019	02/22/2019	\$100.00	\$100.00	\$100.00	Expense
<input type="checkbox"/>	Higher Ed Accounting Forum 19 Attend annual Accounting Forum.	33GM	Sent Back to User - Test, Default Approver	04/07/2019 04/10/2019	02/08/2019	\$1,734.10	\$0.00	\$0.00	
<input type="checkbox"/>	NYC Broadway Tour Audit New York Broadway and off-broadway shows	33CQ	Approved	04/03/2019 04/08/2019	01/07/2019	\$3,198.00	\$3,198.00	\$498.00	Expense

Page 1 of 2 | Displaying 1 - 25 of 39

Copy a Travel Request

If your company uses the Copy Request feature, you can select a request and copy it as a template for the new request. You can then edit the copy as desired.

Make a copy

1. On the Manage Requests page, select the desired request.
2. Click Copy Request. The Copy Request page appears.
3. On this page:
 - By default, the system provides a name for the copy. Change it, if desired.
 - By default, the system sets the start date of the resulting request to be the source request end date plus one day. You can set the start date, if desired.
 - Indicate whether or not to copy expected expenses, segments, and cash advances.
4. Click OK. The system makes the copy and opens it so you can make the desired edits.

Active Requests (39)

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	Approved ...	Remaining ...	Action
<input checked="" type="checkbox"/>	NACUBO Conference - Chicago Attend yearly NACUBO conference in Chicago.	36NK	Not Submitted	04/15/2019 04/18/2019		\$1,361.45	\$0.00	\$0.00	

Request status

Any request can be copied – regardless of status or whether it is open or closed – as long as the client's configuration allows users to create requests.

Information copied

The following information is copied from the source request:

- Segments (if selected on the Copy Request page)
- Expected expenses (if selected on the Copy Request page)
- Allocations

- Latest comment
- Cash advances (if selected on the Copy Request page)
- Other fields, like the Purpose, Start Date (based on the Copy Request page), and custom fields.

Information NOT copied

The following information is not copied from the source request:

- Attachments (images)
- Workflow
- Audit trail
- Any other information related to a policy that is no longer the user's current policy

Delegates and proxies

Delegates (with "submit" rights) and proxies can copy requests.

Edit a Request

To edit a request:

1. To open the request, either:
 - Click the Open Requests tile in the Quick Task Bar on the home page. - or -
 - On the menu, select Requests > Manage Requests (on the sub-menu). The request list appears.
2. Click a request (anywhere on the line; not just the name) to view and edit (if applicable) a request. If the desired request does not appear in the list, choose other views using the View list, if desired.
3. Make the desired changes.
4. Click Save.

Delete a Request

To delete an un-submitted request:

1. Click either:
 - Click the Open Requests tile in the Quick Task Bar on the home page. - or -
 - On the menu, click Requests. The Manage Requests page appears.
2. Select the check box to the left of the desired request.
3. Click Delete Request.

Active Requests (39) Delete Request Copy Request Class/Inactivate Request

View ▾

Request Name ▾ Begins With ▾ Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved ...	Remaining ...	Action
<input checked="" type="checkbox"/>	NACUBO Conference - Chicago Attend yearly NACUBO conference in Chicago.	36NK	Not Submitted	04/15/2019 04/18/2019		\$1,361.45	\$0.00	\$0.00	

Allocation Favorites

You might allocate requests in an identical manner, for example, 50% to Department A and 50% to Department B. The Allocation Favorites feature allows you to save a group of allocations and use it on other requests.

Create a favorite

To create a favorite:

1. In the Allocations for Request window, enter the allocation information manually.
2. Click Add to Favorites.
3. Enter a name.
4. Click Save. The allocation is added to your allocation favorites.

Use a favorite

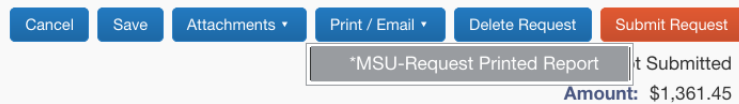
To use a favorite:

1. In the Allocations for Request window, click Favorites.
2. Select the desired favorite. The information populates the fields.

Note: Once the information appears in the allocation fields, you can manually edit the allocation information, if desired.

Print Requests

1. Click either:
 - o Click the Open Requests tile in the Quick Task Bar on the home page. - or -
 - o On the menu, click Requests > Manage Requests (on the sub-menu). The request list appears.
2. Click a request (anywhere on the line; not just the name) to view and edit (if applicable) a request. If the desired request does not appear in the list, choose other views using the View list, if desired.
3. On the request, click Print/Email. Select the Request Printed Report.
4. A new window appears. Options are PDF, Email or Print.



Request a Cash Advance

The cash advance request information fields are located on the request header.

1. Complete the header, including the cash advance information.
2. Complete the request as per instructions noted in “Create a New Request” above.

The cash advance approvals occur as part of the request approvals. Approvers are notified that their approval of the request also indicates approval of the cash advance. Once the request has been approved, the cash advance will await the Cash Advance Administrator to issue it per institutional guidelines. Upon issuance, it will be deposited to your banking information provided to MSU HR.

Cancel a Cash Advance

- If you have not yet submitted the request, you can remove the cash advance simply by clearing the cash advance fields on the request header.
- If you cancel the request but the cash advance has not yet been issued, the cash advance is deleted.

- If you cancel the request but the cash advance has already yet been issued, the cash advance remains; you must account for the cash advance.

Apply a Request to a Report

Once the request has been approved and the expenses have been incurred, the user associates the request with an expense report as proof that the expenses were pre-approved. There are several ways to associate a request with a report:

- Create a new report from an approved request
- Apply a request to an existing report

From an approved request

1. Open the approved request on the Requests > Manage Requests (on the sub-menu) page.
2. Click Create Expense Report. The Create a New Expense Report page appears, with the request already associated.
3. Complete the rest of the report as usual.

Apply to an existing report

1. Open the report and access the Manage Requests area by selecting Report Details > Manage Requests.
2. Click Add.
3. Select the desired requests.
4. Click Add to Report.
5. Click Close. You are returned to your expense report.

Approver Actions for Requests

1. [Request Approval Overview](#) – linked to Concur Help
2. [Request Approval Actions](#) – linked to Concur Help

Approve the request

To approve a request:

1. Open the desired request.
2. Click Approve.

Approve the request and forward to another approver:

1. Open the desired request.
2. Click Approve & Forward.

To send the request back to the user:

1. Open the desired request.
2. Enter comment for the employee explaining why you are returning the request.
3. Click Send Back Request.

Available actions - cash advance

The request approver cannot change any fields in the Cash Advance section. If the approver objects to the amount, the approver can return the request to the user with a comment.

Concur Request and Global Travel Registry

Please remember to register all international travel for official MSU business in MSU's [Global Travel Registry](#) (GTR), also available in Android and IOS apps. Successful registration will activate coverage under [MSU's iSOS travel insurance policy](#) and will facilitate MSU's Office of International Health and Safety (OIHS) efforts to assist you in the event of an emergency while traveling. Note that the GTR and CONCUR technical teams are coordinating to align the two platforms as part of the CONCUR pilot and roll-out; however, we ask you to continue registering directly in the GTR until the alignment is complete. For additional information on international travel, please visit the [OIHS website](#).