Concur
Expense Request Tutorial

1) To open the "Requests" menu, click on the "Requests" link.

"Manage Requests" is the default menu where you can create new requests or track open requests.

   a. To open a pre-existing request, click on the "Request Name" title.
   b. To open a NEW request, click on the "New Request" link.

Note: All fields marked in RED are "required".

2) The "Request/Trip Name" is the name of the event.

3) To set the "Start Date", click on the calendar icon.

4) To set the "End Date", click on the calendar icon.

5) To set the "Request/Trip Purpose", click on the drop-down menu icon.

6) The "Charge To" field determines the account number to charge for faculty travel, staff travel, Grants International or Travel Course.

   a. For Grants International or Travel Course update the "Charge To".
      i. To set the "Charge To", click on the drop-down menu icon and select the correct value.
   b. To set the "Trip Type", click on the drop-down menu icon.

7) The "Additional Info" field is displayed on the approval page and can be viewed by the approver.

8) The "Comments" field is for personal comments and can only be seen by the request owner.

Remember, all RED fields are required and need a value entered.

   a. You will need to select "None" for empty fields.

9) To view the available budget code options, click on the drop-down menu icons and scroll or type the value

   a. Once you enter a chart field combination, the system will remember it and it will be available to choose next time without entering each field again.

10) To request a Cash Advance, simply enter the amount in the "Cash Advance Amount" field.

11) Next, select the disbursement date in the "Request Disbursement Date" field.

12) Select the "Expenses" tab to complete the expense request section.

13) Select the "Expense Type" from the menu above.

14) Select the "Transaction Date"

15) Enter the "Transaction Amount".

16) Enter any extra information for the expense request in the "Description" field.

17) When you are done, click "Save".

Your saved request will now show in the Expenses menu.

18) Once you are done, click "Submit Request" to move the request forward for approval.

19) To complete the request submission, click "Accept & Submit" on the Final Review message.