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.