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**Eastern Washington University**

SAP Concur Request Quick Guide

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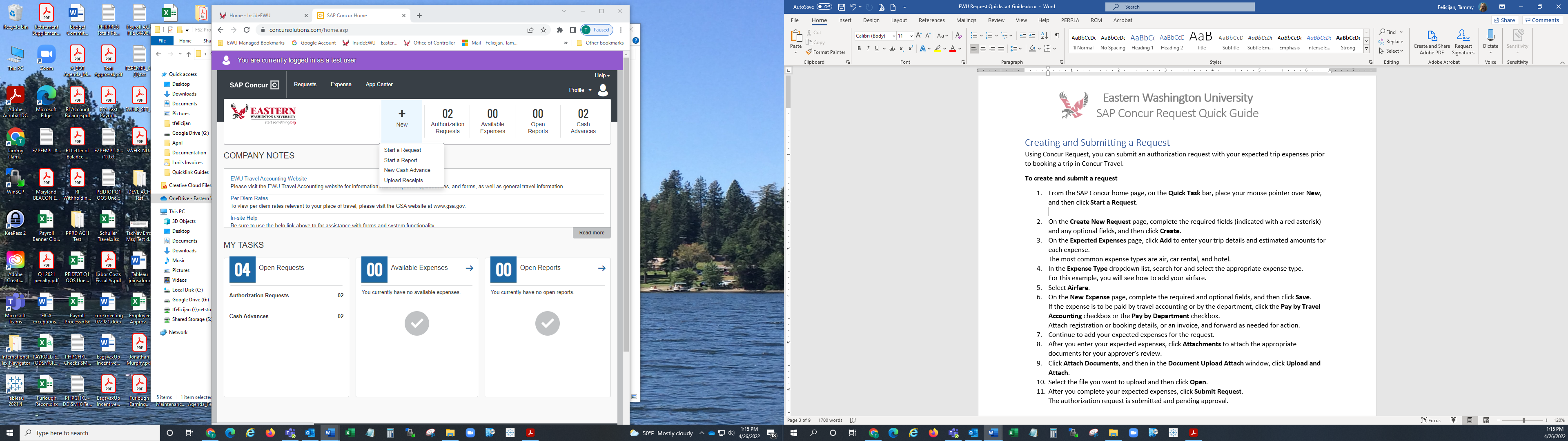
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# Creating and Submitting a Request

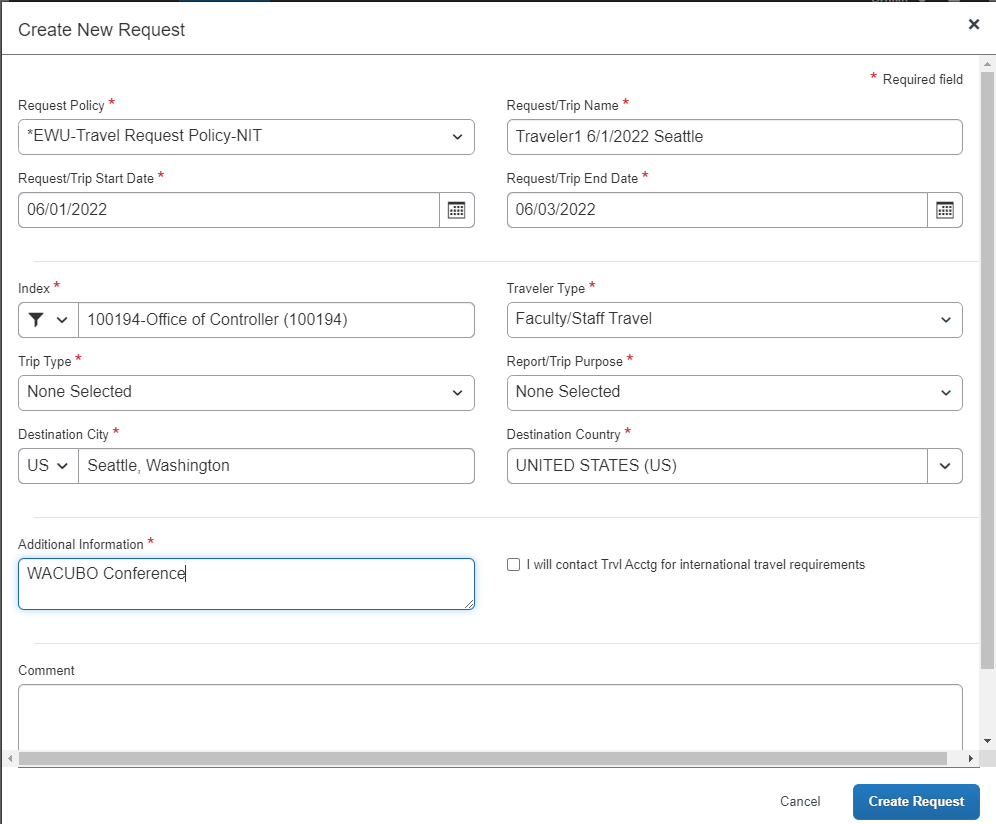
Using Concur Request, you can submit an authorization request with your expected trip expenses prior to booking a trip in Concur Travel.

**To create and submit 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**.

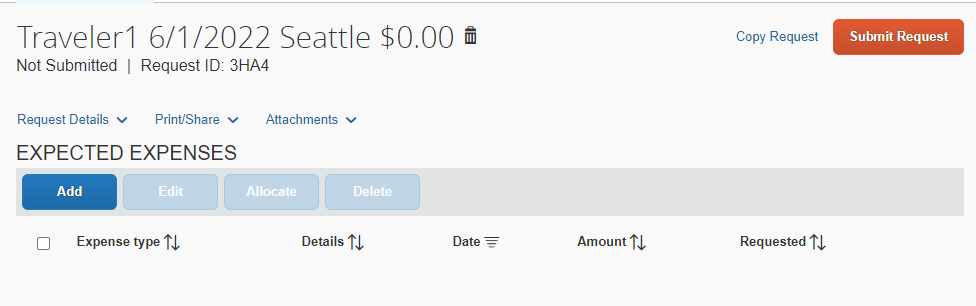


1. On the **Create New Request** page, complete the required fields (indicated with a red asterisk) and any optional fields, and then click **Create**.



1. On the **Expected Expenses** page, click **Add** to enter your trip details and estimated amounts for each expense.

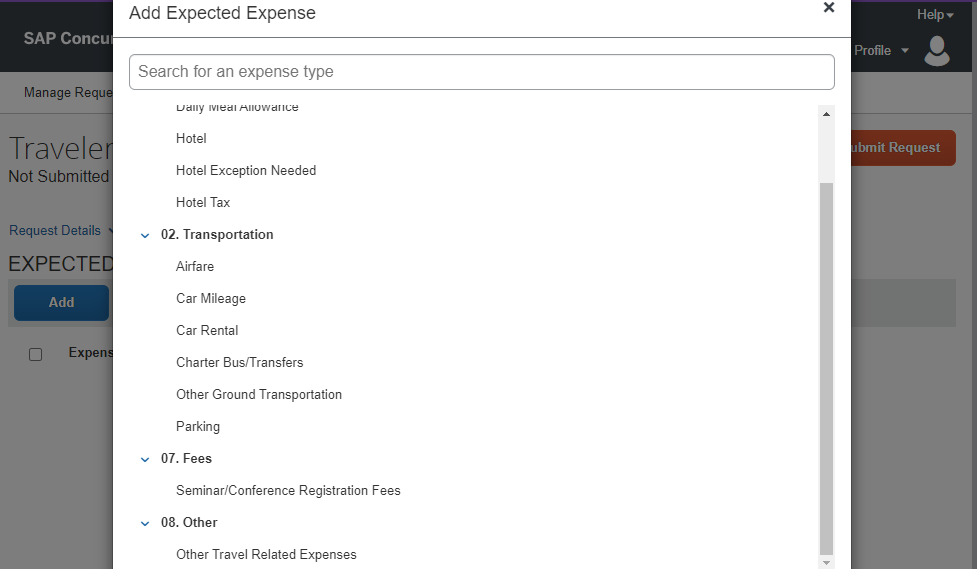
The most common expense types are airfare, car rental, and hotel.



1. In the **Expense Type** dropdown list, search for and select the appropriate expense type.

For this example, you will see how to add your conference fees.

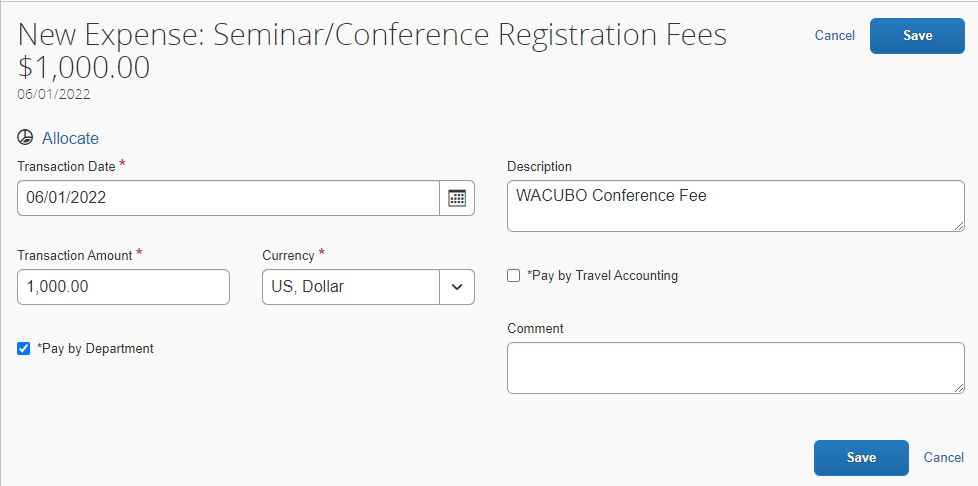
1. Select **Seminar/Conference Registration Fees**.



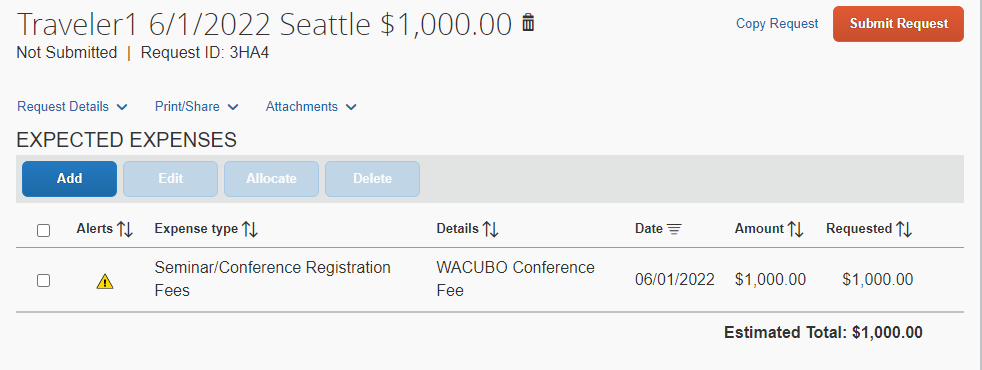
1. On the **New Expense** page, complete the required and optional fields, and then click **Save**.

If the expense is to be paid by travel accounting or by the department, click the **Pay by Travel Accounting** checkbox or the **Pay by Department** checkbox.

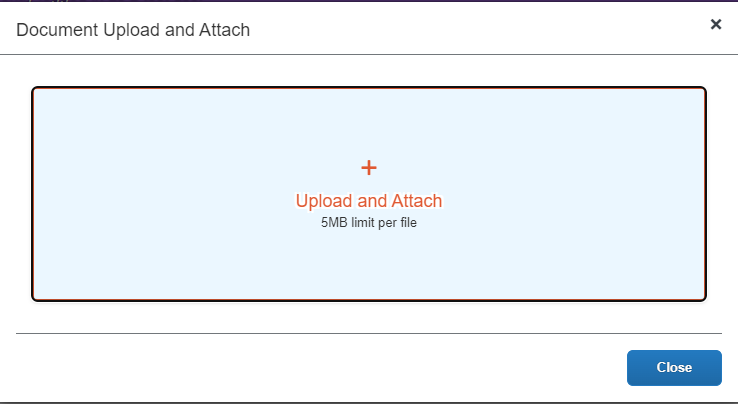
Attach registration or booking details, or an invoice, and forward as needed for action.



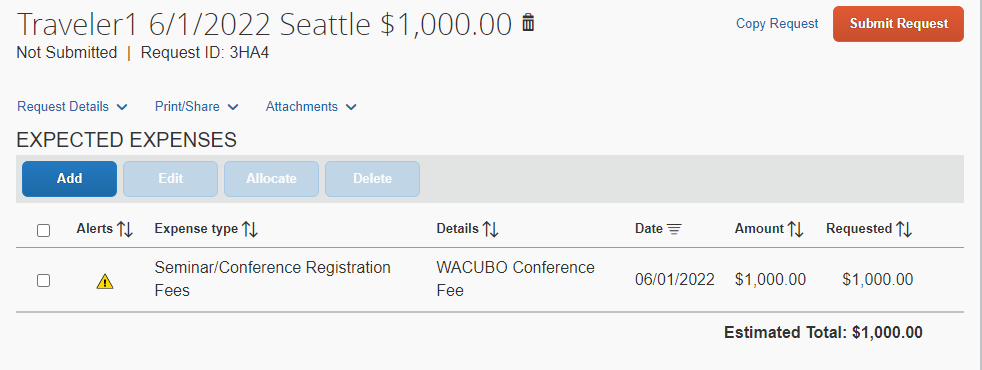
1. Continue to add your expected expenses for the request.
2. After you enter your expected expenses, click **Attachments** to attach the appropriate documents for your approver’s review.



1. Click **Attach Documents**, and then in the **Document Upload and Attach** window, click **Upload and Attach**.



1. Select the file you want to upload and then click **Open**.
2. After you complete your expected expenses, click **Submit Request**.



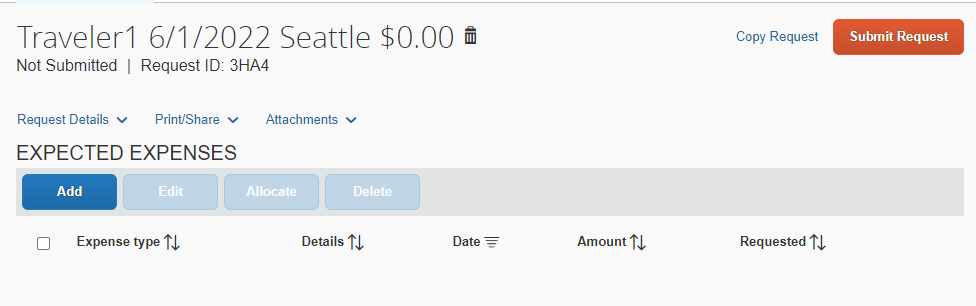
The authorization request is submitted and pending approval.

# Adding Travel Allowances to a Request

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

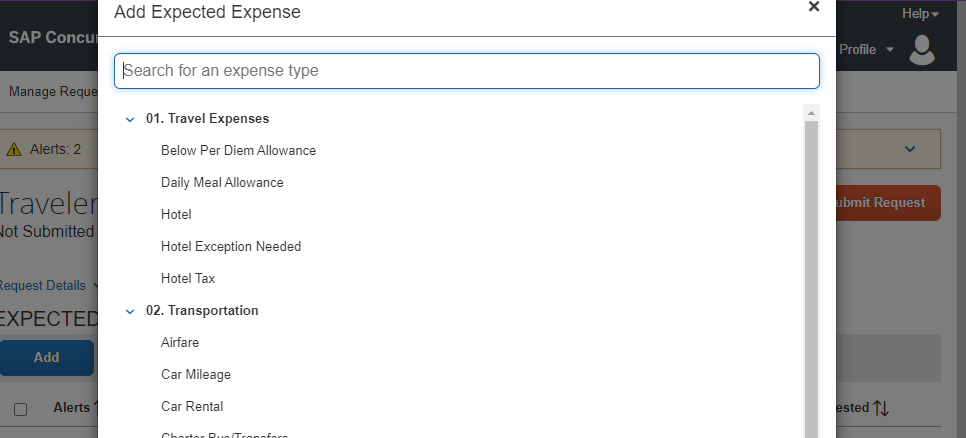
**To add travel allowances to a request**

1. On the **Expected Expenses** page, click **Add** to enter your trip details and estimated amounts for each expense.



In the list of expense types, you will see **Daily Meal Allowance** and **Hotel**. These expense types are configured to calculate a per diem amount based on the arrival city and duration of your trip.

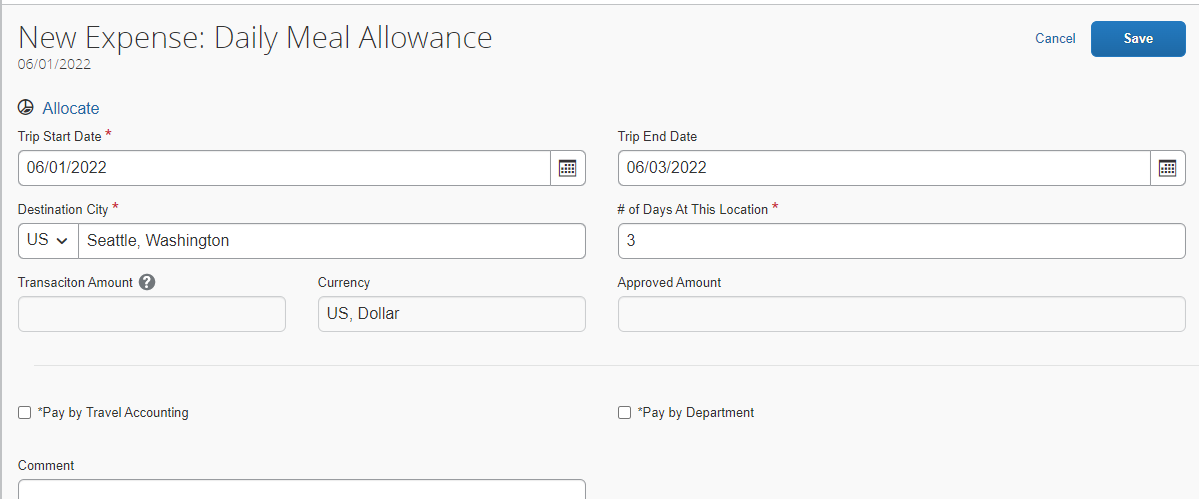
1. For this example, click the **Daily Meal Allowance** expense type.



1. Enter the **Trip Start Date**, **Trip End Date**, **Destination City**, and **# of Days at This Location**.

* NOTE: The **Transaction Amount** field is read-only and is automatically populated based on the city, duration of your trip, and the per diem rate calculation for the arrival city.

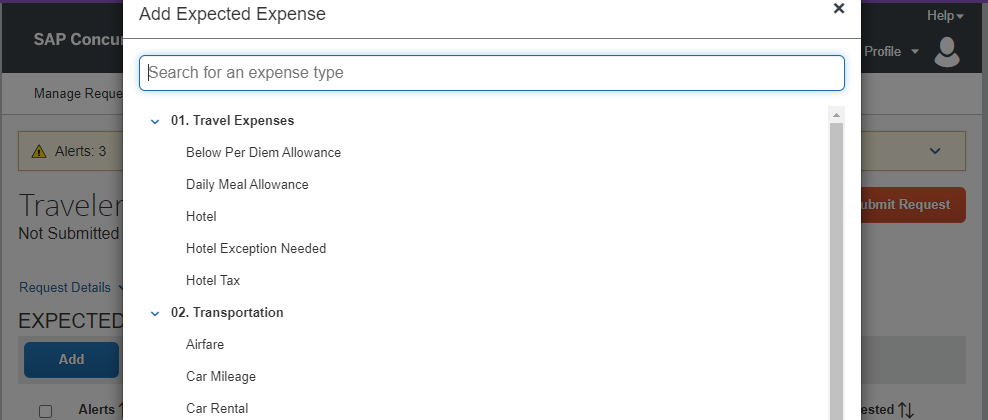
1. Click **Save**.



After saving the expense, the calculated Amount based on the fixed allowance is displayed.

* NOTE: The full amount of daily allowance is set in the report and will require an additional expense line item (**Below Per Diem Allowance**) to subtract meal periods for starting or ending travel status between assigned meal periods or meals that were provided at the event.

1. Click **Add**, and then click **Hotel**.



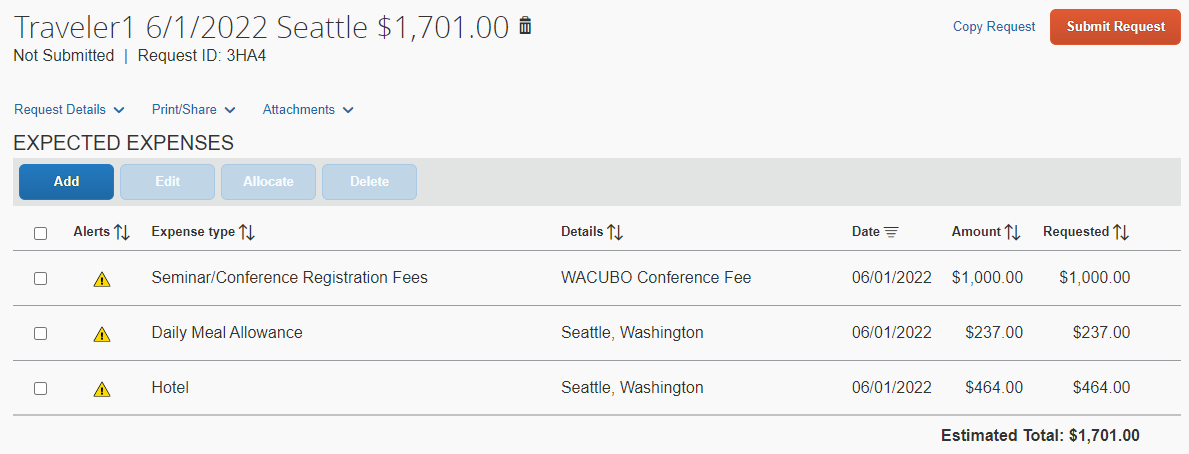
1. Complete the appropriate fields, and then click **Save**.

* NOTE: The total expense is based on the standard lodging rate. If the actual or estimated lodging rate is less than the standard rate, an additional expense line item (**Below Per Diem Allowance**) to subtract the difference may be used.
* If the actual or estimated rate will be greater than the standard rate, an additional expense line item (**Hotel Exception Needed**) may be used to report the difference that is more than the standard rate. A Hotel Exception reason is required.

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1. After entering your expenses, click **Submit Request**.



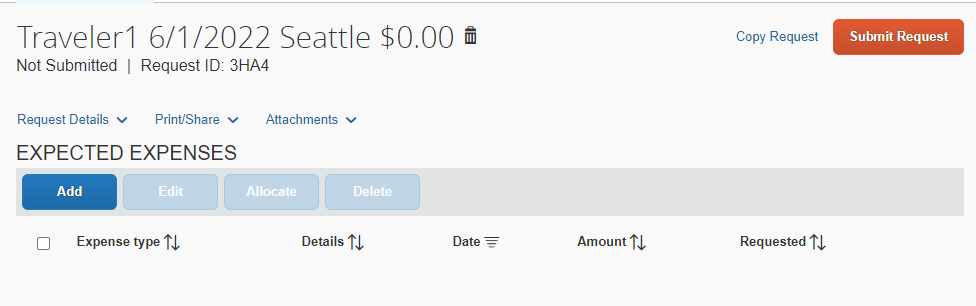
Your request is submitted and waiting for approval.

# Requesting a Cash Advance

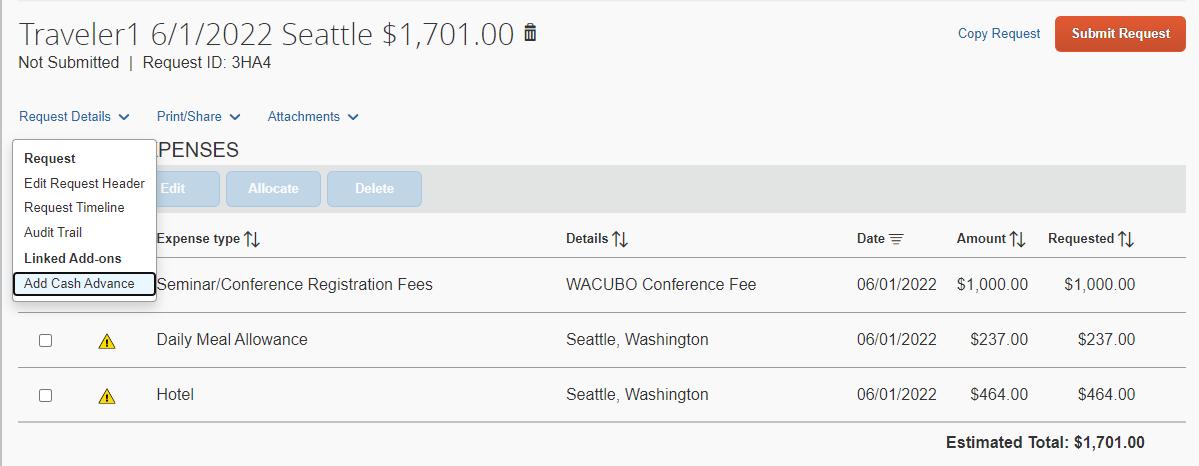
You can request a cash advance for an upcoming business trip. Not all expense types are eligible for cash advances. Only one cash advance per trip is allowed. You must account for your entire cash advance with an expense report upon return.

**To request a cash advance with a request**

1. On the **Expected Expenses** page, click **Add** to enter your trip details and estimated amounts for each expense.



1. Add all expected expenses and click **Save**.
2. Click the **Request Details** dropdown menu, and then click **Add Cash Advances**.



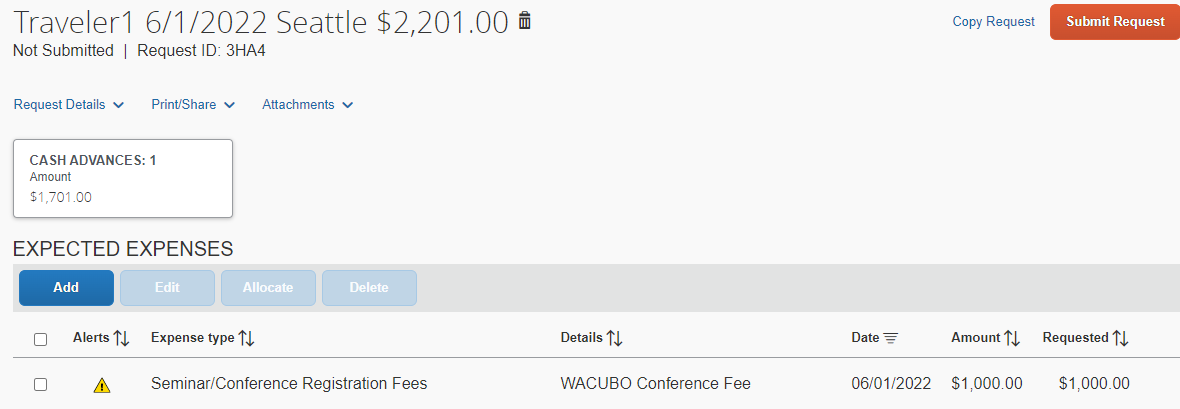
A **Cash Advance** box appears on the request report page and the allowable amount for a cash advance is displayed.

Some expense types are not cash advanceable, reducing the cash advance.

In this example, expense type **Airfare** is not cash advanceable and is not included in the amount.

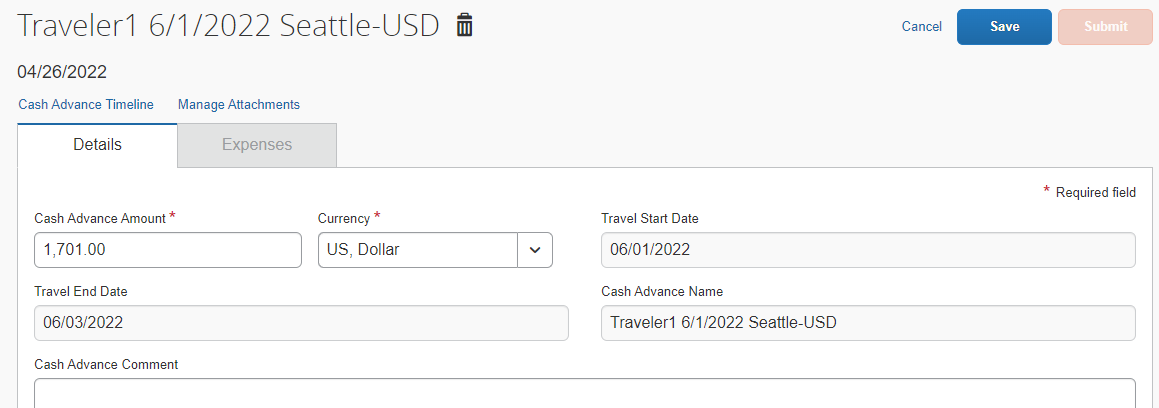


1. Click on the **Cash Advances** box to open the details.



1. Reduce the **Cash Advance Amount** by any expense that was marked **Pay by Travel Accounting** or **Pay by Department** and click **Save**.

In this example, **Seminar/Conference Registration Fees** was marked **Pay by Department**.



Reduce 1,701 by 1,000.

Enter Cash Advance Amount as 701.

1. Attach any required documents and click **Submit Request**.



The request with cash advance is submitted and pending approval.

# Creating a Group Travel Request

Group Travel has more than one person traveling on the same trip with one request and expense report. It requires the use of a separate travel policy called **\* EWU-Group Travel Request Policy-NIT**. It also includes a few unique expense types specifically created for a group situation. These include:

* + Hotel Group
  + Group Meals/Entertainment
  + Food Products-Grocery/Bulk (Team Snacks)

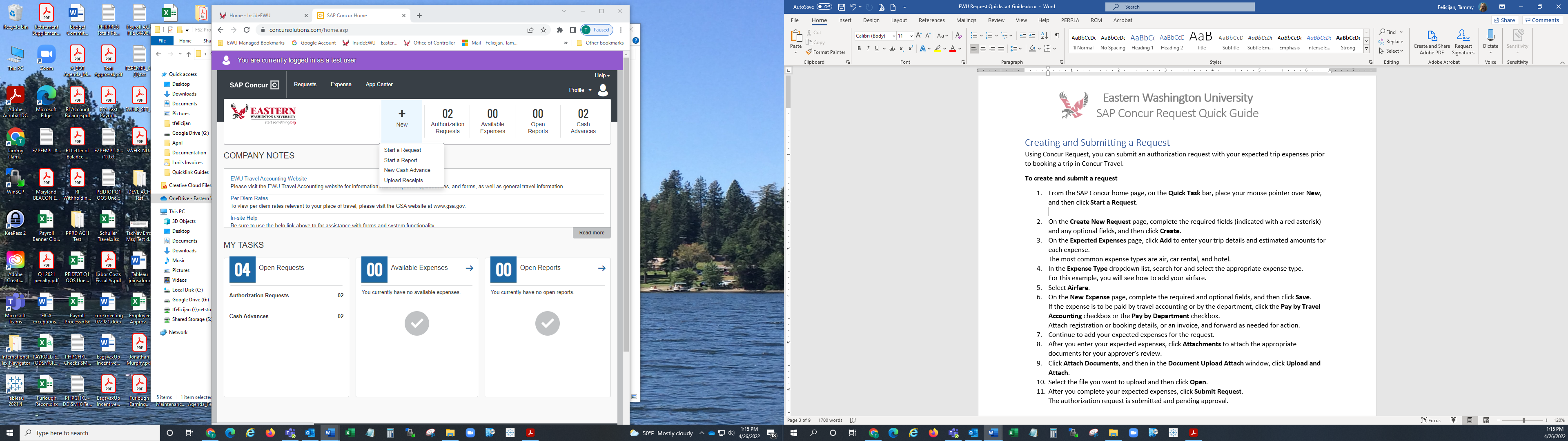
All other expense types are the same.

Group travel does not use the **Travel Allowance** and **Itinerary** function as individual travel does. It is important to select the appropriate travel policy to provide for these unique situations of group travel before navigating through the remaining header fields.

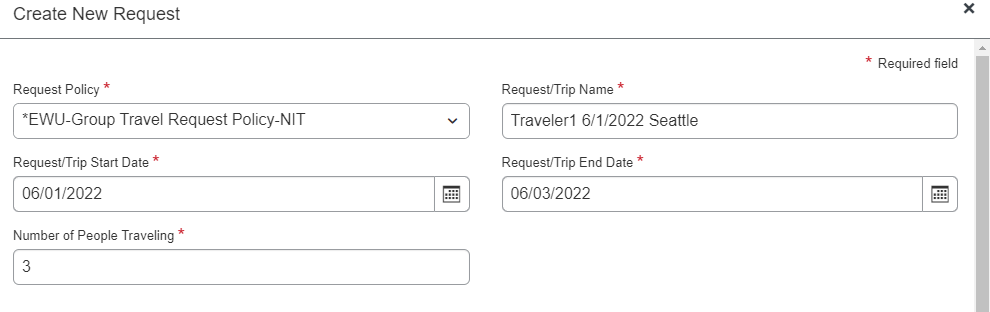
Visit the Travel Accounting site to familiarize yourself with **Travel Requirements for Groups (**<https://inside.ewu.edu/financialservices/office-of-controller/travel-accounting/travel-requirements-for-groups/>).

**To create a group travel request**

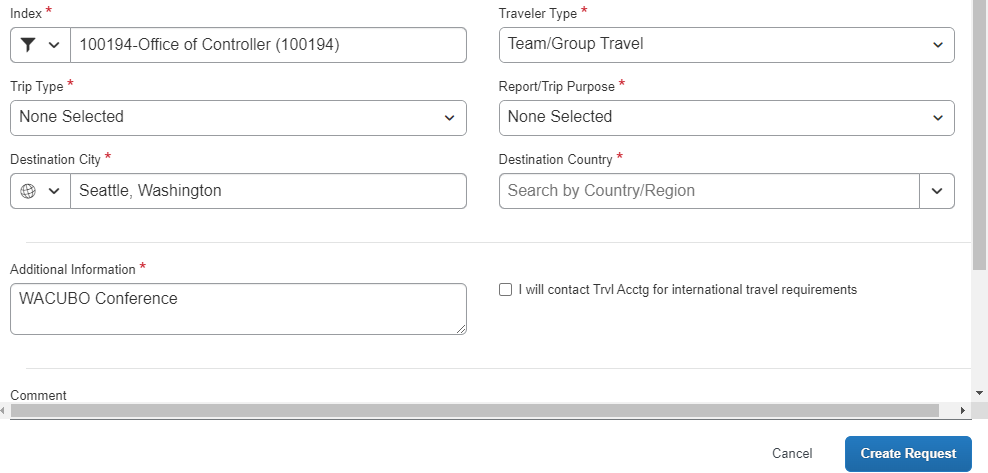
1. From the SAP Concur home page, on the **Quick Task** bar, place your mouse pointer over **New**, and then click **Start a Request**.



1. Click the dropdown arrow for **Request Policy** and select **\*EWU-Group Travel Request Policy-NIT** and enter the **Number of People Traveling**.



1. Change **Traveler Type** to **Team/Group Travel**, fill out the remaining required and optional fields and click **Create Report**.



1. Continue inputing expected expenses as with individual travel requests.

Refer to the **Creating and Submitting a Request** section, and any other needed sections above.

# Printing and Submitting a Request Report

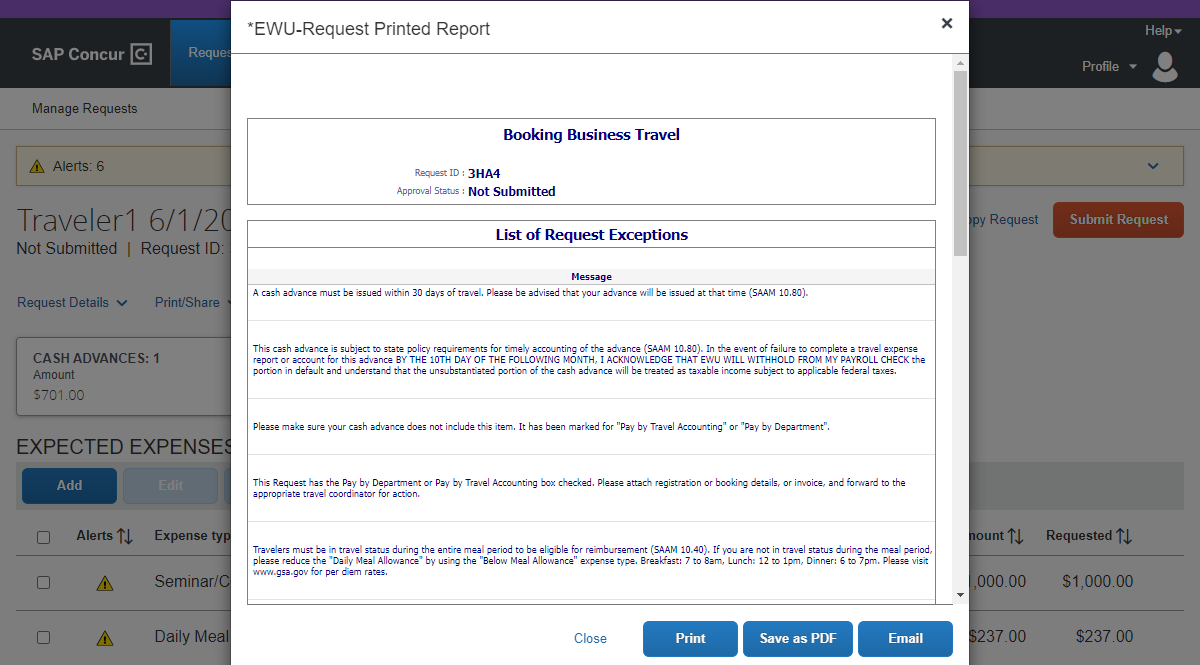
When you complete your request report, you can print it to save a hard copy for your records. It is highly recommended that you save a copy to assist in preparing your expense report upon return.

**To preview and print the request report**

1. On the request report page, click **Print/Share**, and then select **EWU-Request Printed Report**.

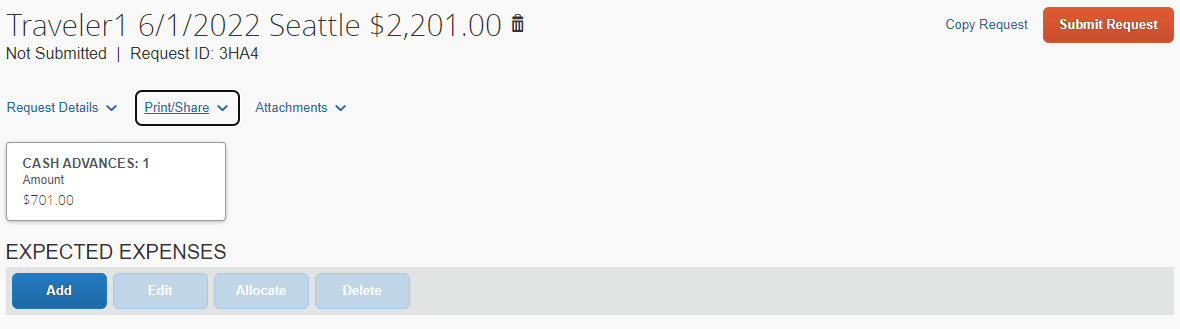


1. On the **Detailed Report** screen, review the details, and then click **Print**, **Save as PDF**, or **Email**.



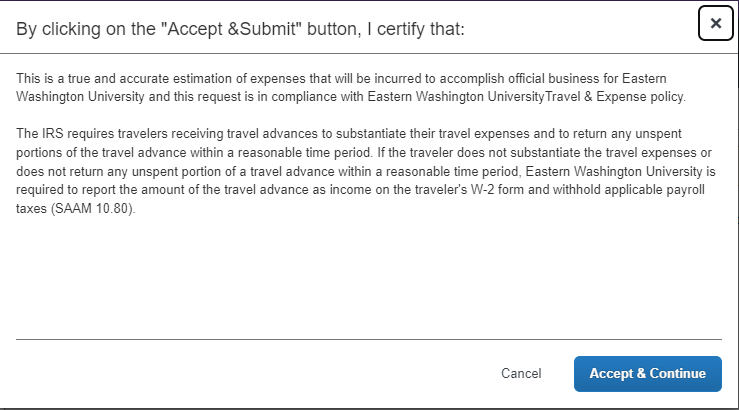
**To submit your request report**

1. On the request report page, click **Submit Report**.

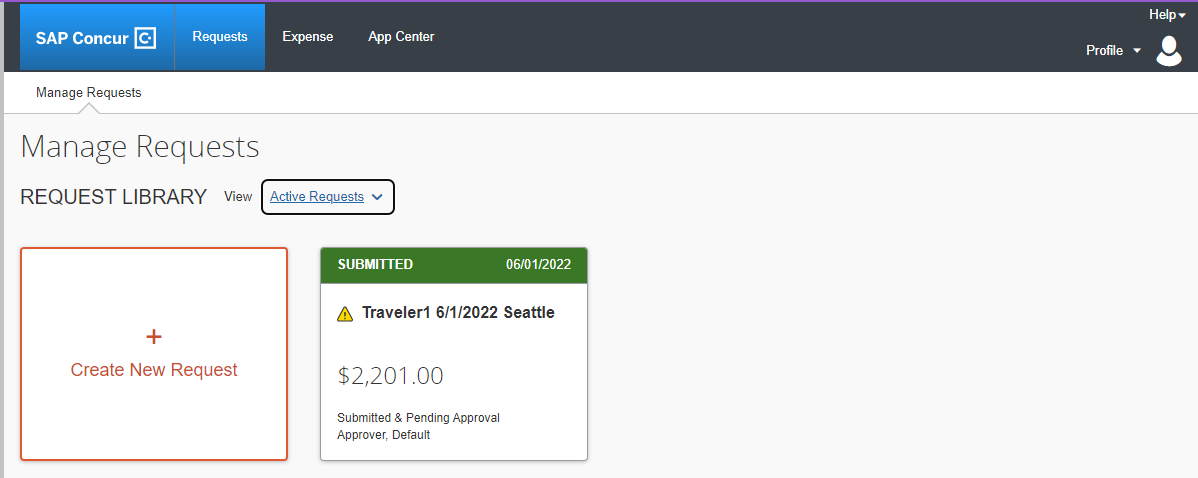


A **Certification** window appears, which requires you to attest that the request complies with EWU policy, and that if cash advance funds are not returned in a reasonable amount of time, the remaining funds will be reported and taxed as income.

1. Review the statement and then click **Accept & Continue**.



Your request is submitted and waiting for approval.

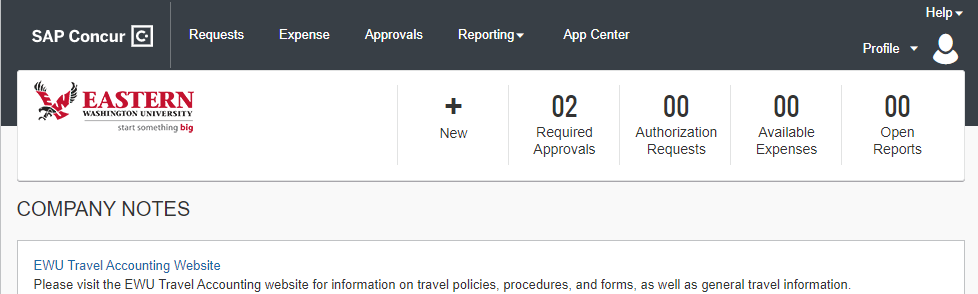


# Approving Requests

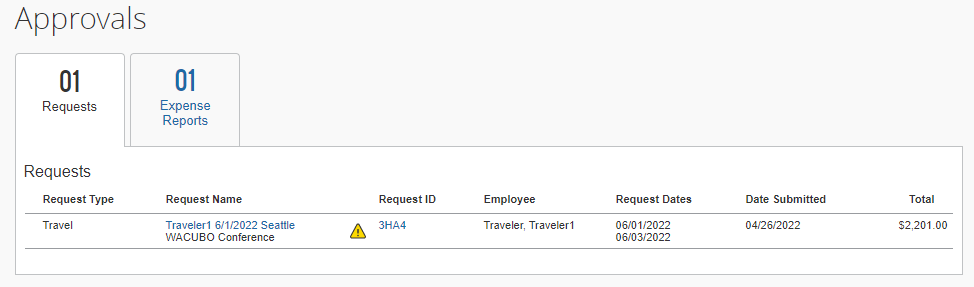
As a request approver you can review and approve a travel request before an employee incurs travel expenses.

**To approve a request**

1. From the SAP Concur home page, on the **Quick Task** bar, click **Required Approvals**.

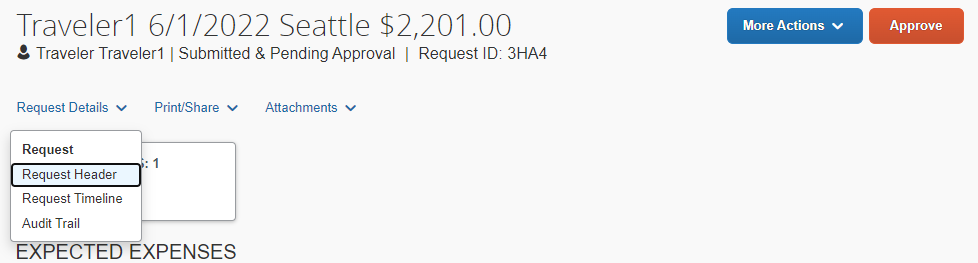


1. On the **Requests** tab, click the request name that you want to review.



As an approver you review the details of the expected expenses and any attached documents before you approve the request.

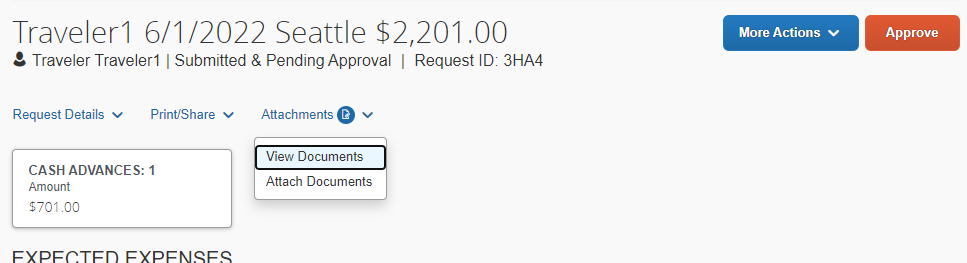
1. Click the **Request Details** dropdown menu to review **the Request Header** and **Timeline**, **Audit Trail**, and **Allocation Summary** details.



You can view existing **Comments** on the request and add additional comments as needed. If you made any changes, click **Save**.

If documents are attached to this request, an icon is displayed next to the **Attachments** menu.

1. To view the attachment, click the **Attachments** dropdown menu, and then click **View Documents**.



1. After you are finished viewing the documents, close the window.
2. Review the remaining request details and click **Approve**.

**To send a request back to a user**

In the following example, you will see how to send the request back to the employee.

1. Click the **More Actions** dropdown menu, and then select **Send Back to Employee**.

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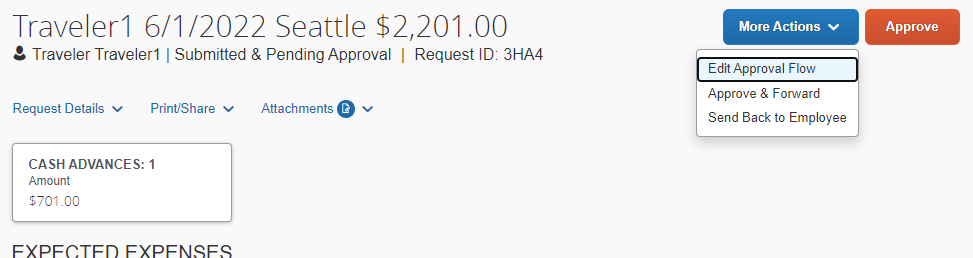
When sending a request back to an employee, you are required to enter a comment, which explains the reason for returning the request.

1. In **the Send Back to Employee** window, enter the **Comment**, and then click **Send Back**.

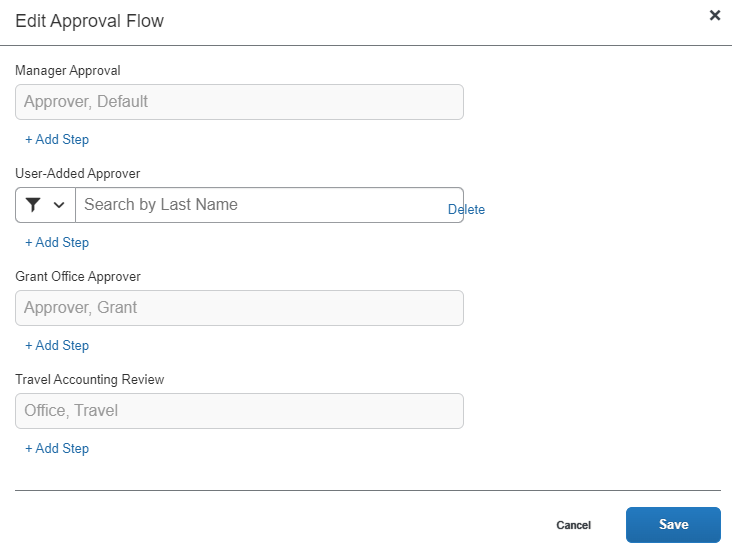
**To add an additional approver**

As an approver, you can add additional review steps for a request. For example, you might need to forward the report to additional approvers if the request contains allocations to an index that is not within your approval authorization.

1. Click the **More Actions** dropdown menu, and then select **Edit Approval Flow**.

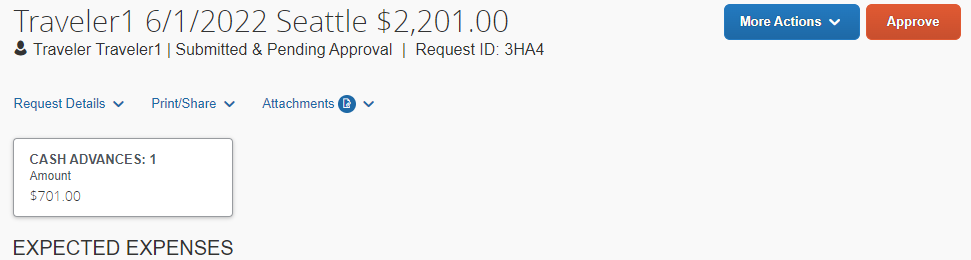


1. In the **Edit Approval Flow** window, click **Add Step** to add an additional approval step for this request.
2. In the **User-Added Approver** field, search for and select the approver that you want to add to the workflow.



You can add additional approval steps as needed.

1. When you are done adding your approval steps, click **Save**.
2. Click **Approve**.

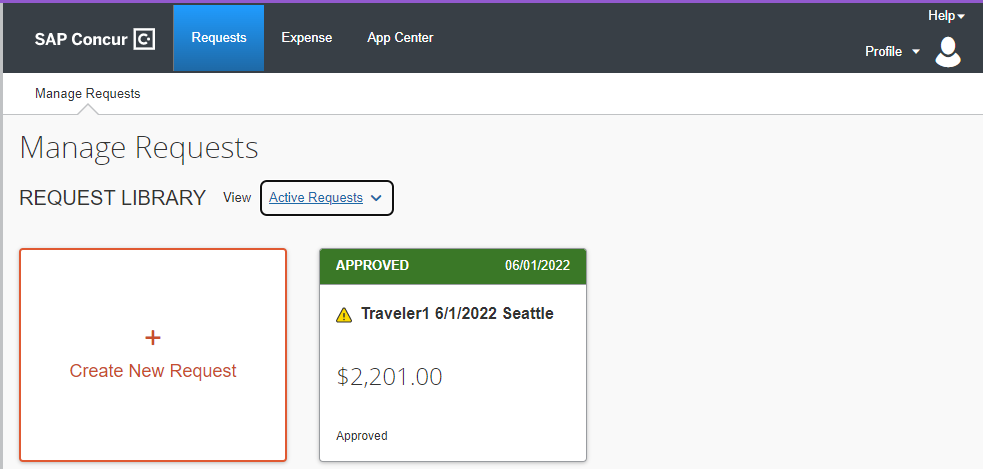


# Adding a Request to an Expense Report

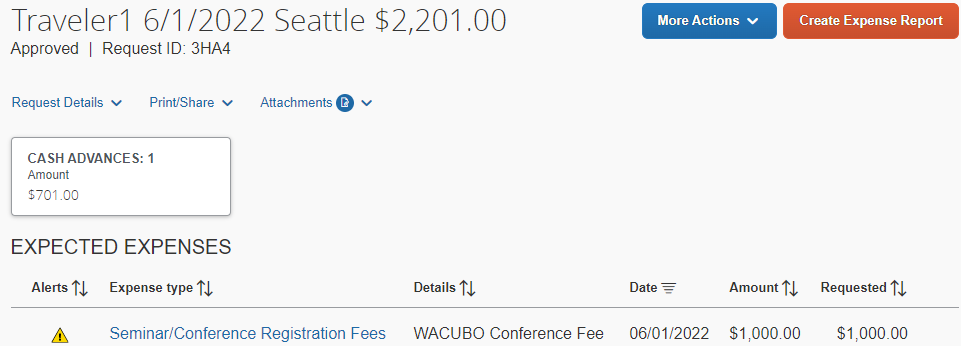
You can add an approved request and its expected expenses to a new expense report.

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

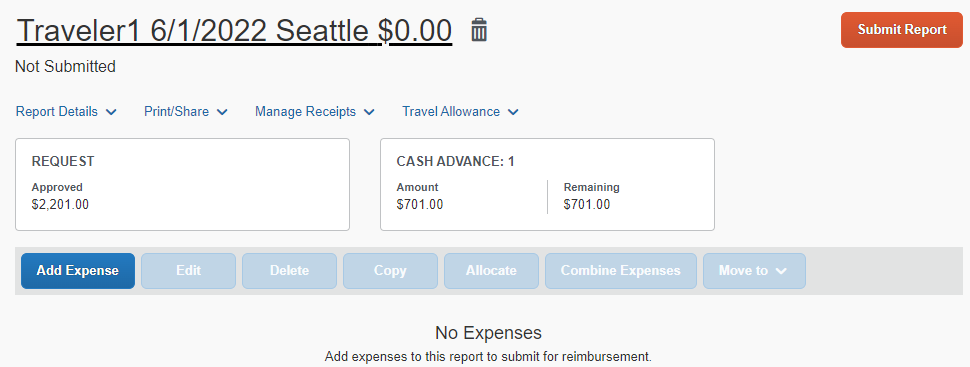
1. From the SAP Concur home page, click the **Requests** menu.
2. Click the request that you want to create your expense report from.



1. To create the expense report with the attached request, click **Create Expense Report**.



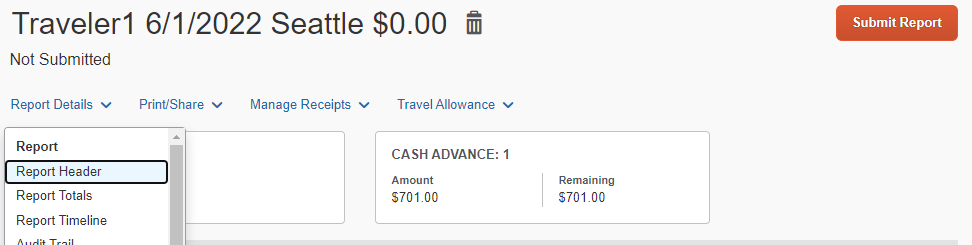
The expense report automatically opens to the expense report page and you can see that the request and any related cash advance is attached.



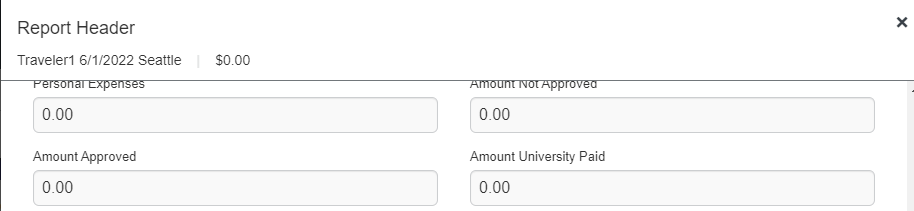
The expense report header is automatically updated based on the request.

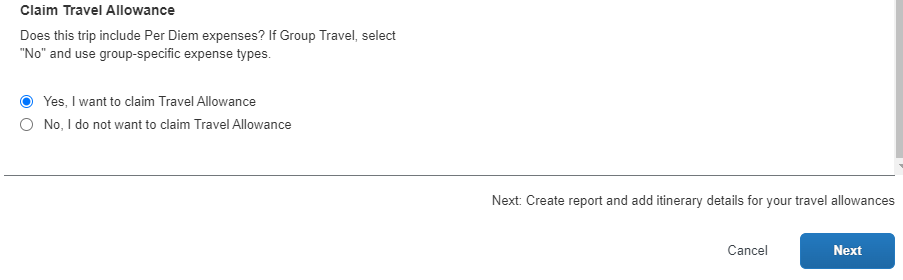
If you need to claim travel allowances, you must update the report header to create a travel itinerary.

1. On the expense report page, click **Report Details** and click **Report Header**.



1. Scroll to the bottom of the report header and click the **Yes, I want to claim Travel Allowance** radio button and click **Next**.





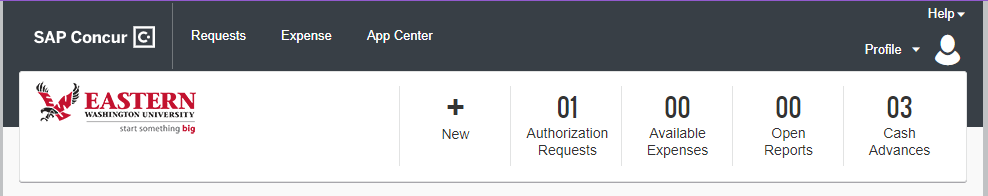
You must add your expenses manually to the expense report. Refer to the **SAP Concur Expense Quick Guide** for detailed steps to add an itinerary and complete your expense report.

# 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.

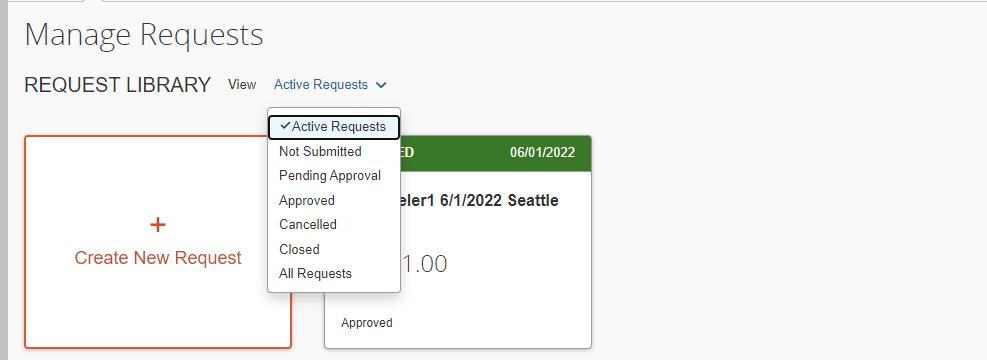
NOTE: If you close a request that is associated with an unsubmitted expense report, the request is disassociated from the expense report. The authorized amounts are removed, and the request balance is reduced to zero.

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



You can close/inactivate a request after it has been approved and the related expenses have been added to a report.

1. Click the **View** dropdown menu, and then select **Approved**.



1. Click the **Request** that you want to close.
2. Click the More Actions dropdown menu, and then click **Close Request**.



1. To view closed requests, on the **Manage Requests** page, click the **View** dropdown menu, and then select **Closed**. Note that you cannot attach a closed request to an expense report.