

Request

This guide will take you through the steps for submitting a **Request**. Per OU Travel Policy, **Requests** must be approved by someone of Higher Institutional Authority before Out of State or International travel occurs.

Accessing Concur

1. Go to **Travel.ou.edu** and login with your 4x4.

Requests

2. Click **Requests** from the main menu.
3. If you have previous **Requests**, they will be displayed and will show the status of each **Request**.
4. To create a new **Request**, click **New Request** from the top of the screen.
5. Note that only the fields with a red bar are required and the other fields are optional.
6. Enter the **Event Name/Nature of Business**, **Business Travel Start Date**, **Business Travel End Date**, **Final Destination City**, **Trip Type**, **Traveler Type** and **Request/Trip Purpose**.
7. In the field of **Does this trip contain personal travel?**, either select **Yes** or **No**.
8. If choosing **Yes**, enter in the dates of personal travel in the **Personal Dates of Travel** field.
9. If additional information for the **Request** needs to be provided, enter that in the **Comment** field.
10. If additional information regarding the funding source for the trip needs to be listed, enter this information in the **Funding Source** field.
11. If expense estimates for your trip are needed, enter these amounts in the **Airfare Estimate**, **Lodging Estimate**, **Per Diem Estimate**, **Registration Estimate** or **Other Expenses Estimate** fields. Please note that if specific segment estimates are given, they will not auto calculate in the **Total Trip Estimate** field and must be manually calculated.
12. If only a total estimate for the trip is needed, enter that total amount in the **Total Trip Estimate** field.

The screenshot displays the SAP Concur 'Request' form. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', and 'App Center'. The 'Requests' tab is active. Below the navigation, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main form area is titled 'Request' and includes a status indicator 'Status: Not Submitted' and buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The form fields are organized into sections: 'Event Name/Nature of Business' (ABC Conference), 'Business Travel Start Date' (10/01/2019), 'Business Travel End Date' (10/04/2019), and 'Final Destination City' (Boston, Massachusetts). The 'Trip Type' is 'Out of State Travel', 'Traveler Type' is 'Non Grant - OU Employee', and 'Request/Trip Purpose' is 'Conference Attendee/Participant'. The 'Does this trip contain personal travel?' field is set to 'No'. There are also fields for 'Personal Dates of Travel' and 'Comment'. The 'Funding Source' field is empty, and there is a checkbox for 'Offline Approval?'. At the bottom, there are input fields for 'Airfare Estimate', 'Lodging Estimate', 'Per Diem Estimate', 'Registration Estimate', 'Other Expenses Estimate', and 'Total Trip Estimate'.

Request

Workflow Approval

13. If you are going to submit the **Request** and obtain approval through the workflow process, click on the **Approval Flow** tab at the top of the **Request** to see who the **Request** will be routed to. By default, your travel supervisor from PeopleSoft HR will populate as the Manager.

The screenshot shows the 'Request 9KFR' page. At the top right, there are buttons for 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. The 'Submit Request' button is circled in red. Below the buttons, the status is 'Status: Not Submitted'. The main content area has tabs for 'Request Header', 'Approval Flow', and 'Audit Trail'. The 'Approval Flow' tab is selected and circled in red. Below the tabs, there is a 'Manager Approval:' section with a dropdown menu showing 'Approver, OU Default'.

- 14.
15. Click **Submit Request** to submit the **Request** for approval.

Offline Approval

16. If you are going to attach evidence of approval offline, click the **Offline Approval?** box on the **Request** Header.

The screenshot shows the 'Request 9KFR' page with the 'Request Header' tab selected. At the top right, there are buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The 'Save' button is circled in red. The status is 'Status: Not Submitted'. The main content area has tabs for 'Request Header', 'Approval Flow', and 'Audit Trail'. Below the tabs, there are several input fields: 'Event Name/Nature of Business' (ABC Conference), 'Business Travel Start Date' (09/23/2019), 'Business Travel End Date' (09/27/2019), and 'Final Destination City' (Boston, Massachusetts). Below these are more fields: 'Trip Type' (Out of State Travel), 'Traveler Type' (Non Grant - OU Employee), 'Request/Trip Purpose' (Conference Attendee/Participant), 'Does this trip contain personal travel?' (No), 'Comment' (Discounted registration fee obtained for speaking at the conference.), and 'Funding Source' (\$1,500 from departmental account. Requesting \$1,500 from Dean's office.). At the bottom left, there is a checkbox labeled 'Offline Approval?' which is checked and circled in red.

- 17.
18. Click **Save**.
19. You will be prompted to attach evidence of prior approval.

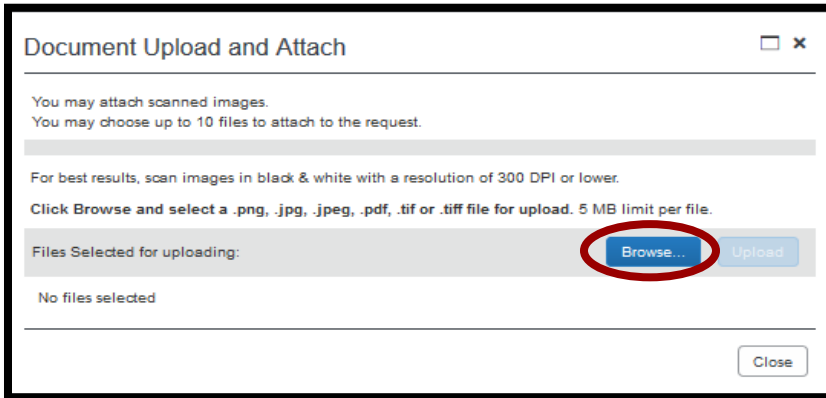
The screenshot shows the 'Request Header' tab with a red exclamation mark icon. Below the tabs, there is a message box with a red exclamation mark icon and the text: 'Action Required: Please attach evidence of prior to travel.'

- 20.
21. Click on the **Attachments** button and select **Attach Documents**.

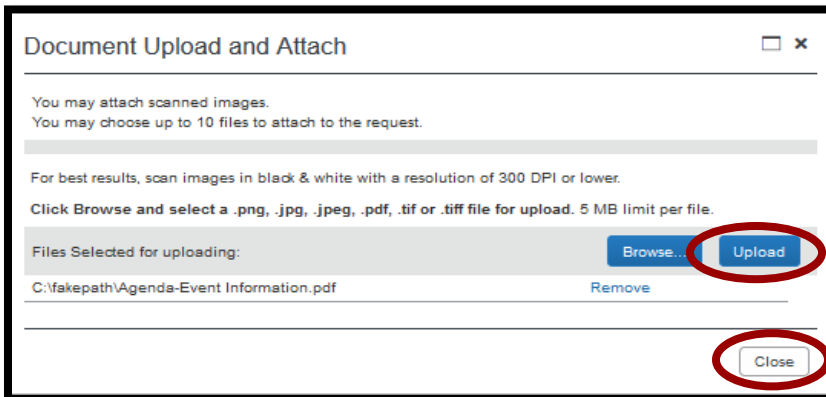
Request



22.
23. Locate the file evidencing the approval by clicking on **Browse**.



24.
25. Once the correct file has been selected, click **Upload** and then **Close** out of the pop-up box.



26.
27. Click **Submit Request** to finalize the **Request**.

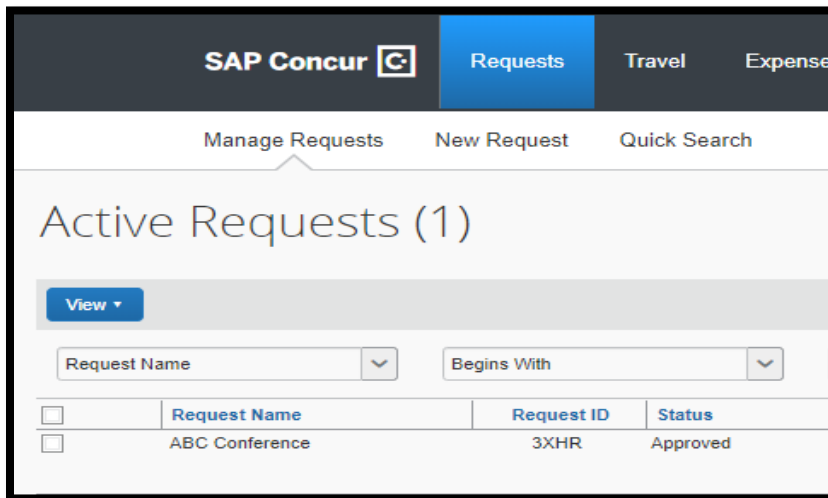


28.

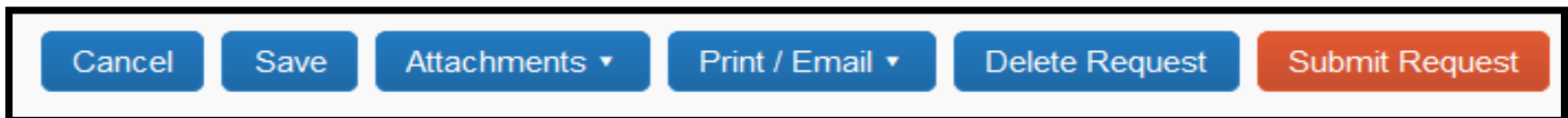
Request

Manage Requests

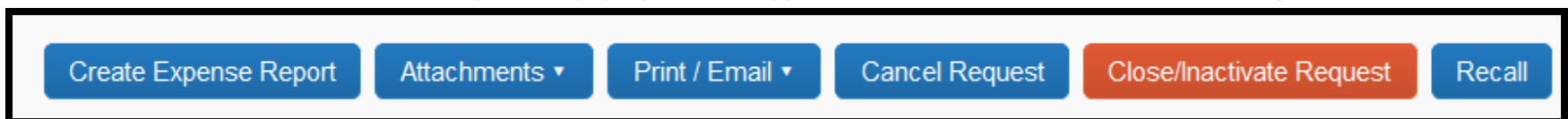
29. To review previously submitted **Requests**, click on **Requests** from the main menu and previously entered **Requests** will appear.



30. Click on the **Request** and available options will appear, depending on the status of the **Request**.
31. Select the **Cancel** button to cancel from the **Request** screen.
32. Select the **Save** button to save any changes made to the **Request**.
33. Select the **Attachments** button to **View** or **Delete** attachments appended to the **Request**.
34. Select the **Print/Email** button to print or email a summary of the **Request**.
35. Select the **Delete Request** button to delete the **Request**. A pop-up box will appear to confirm the deletion of the **Request**.
36. Select the **Submit Request** button to submit the **Request**.



38. For previously approved **Requests**, select the **Create Expense Report** button to create an expense report related to the **Request**.
39. Select **Cancel Request** to cancel the **Request** if it is no longer applicable, such as in the case of a duplicate **Request**. A pop-up box will appear to confirm cancellation of the **Request**.
40. Select **Close/Inactive Request** if the Request is no longer needed due to the trip being cancelled. A pop-up box will appear to confirm closure of the **Request**.
41. Select the **Recall** button to recall the **Request**. A pop-up box will appear to confirm the recall action of the **Request**.

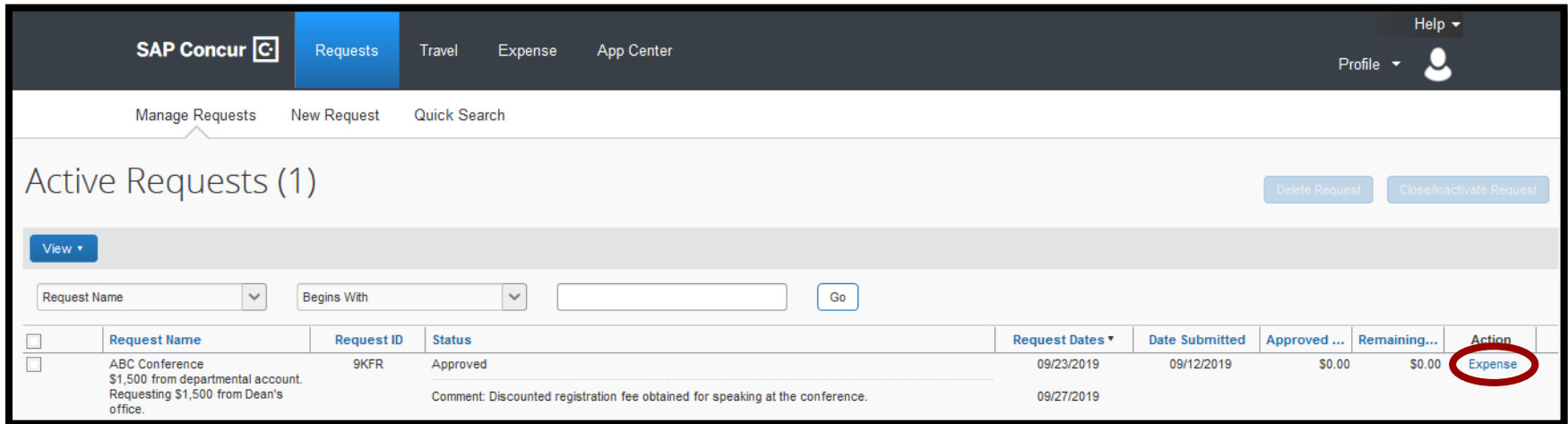


43.

Request

Create an Expense Report

44. An expense report for **Out of State** or **International** travel cannot be created without an approved **Request**. The **Request** must either be approved through workflow or evidence of offline approval must be attached to the **Request**. Once there is an approved **Request**, click on **Requests** from the main menu. Approved **Requests** that have not been expensed to a report will have the option of **Expense** under the Action column. Click the **Expense** hyperlink to create the expense report and see the document on **Expense Reports** for more information.



The screenshot displays the SAP Concur interface for managing requests. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', and 'App Center'. The main content area shows 'Active Requests (1)' with a search bar and a table of request details. The 'Expense' link in the 'Action' column of the first row is circled in red.

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Approved ...	Remaining...	Action
<input type="checkbox"/>	ABC Conference \$1,500 from departmental account. Requesting \$1,500 from Dean's office.	9KFR	Approved <small>Comment: Discounted registration fee obtained for speaking at the conference.</small>	09/23/2019 09/27/2019	09/12/2019	\$0.00	\$0.00	Expense

45.