Request

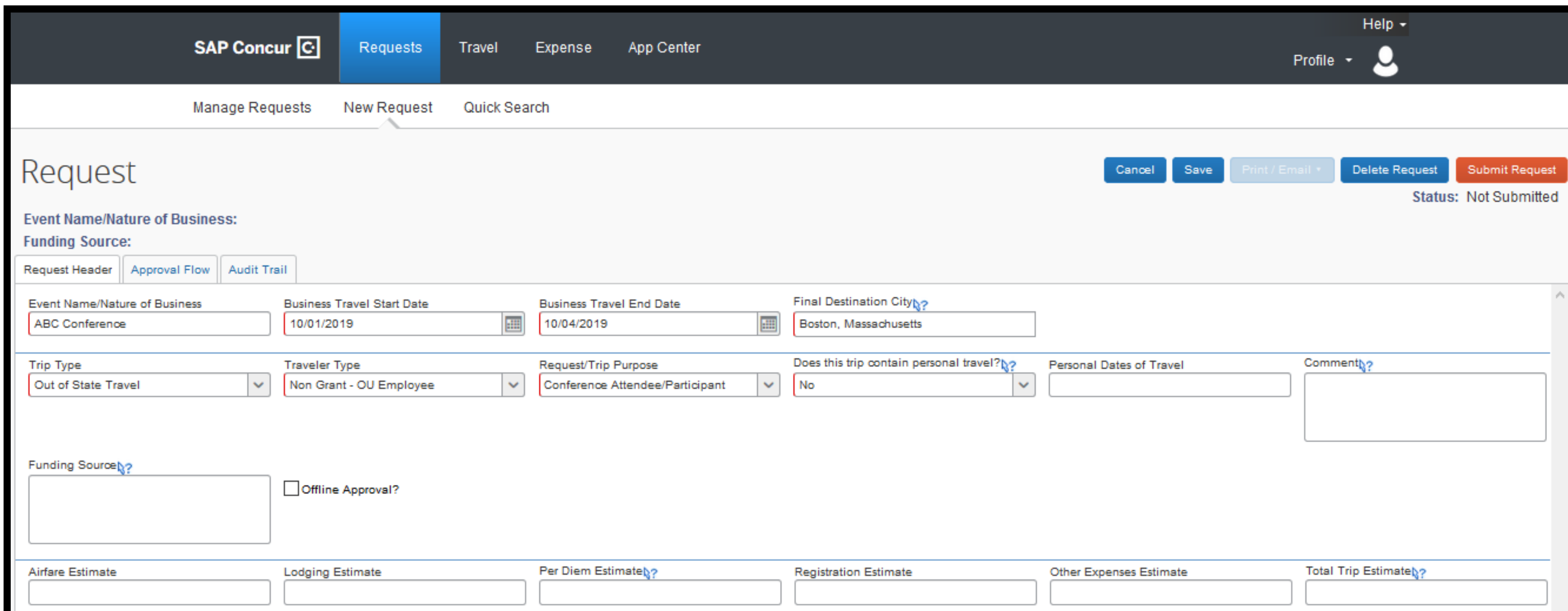
This guide will take you through the steps for submitting a **Request**. Per OU Travel Policy, **Requests** must be approved by someone of Higher Institutional Authority before Out of State or International travel occurs.

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.



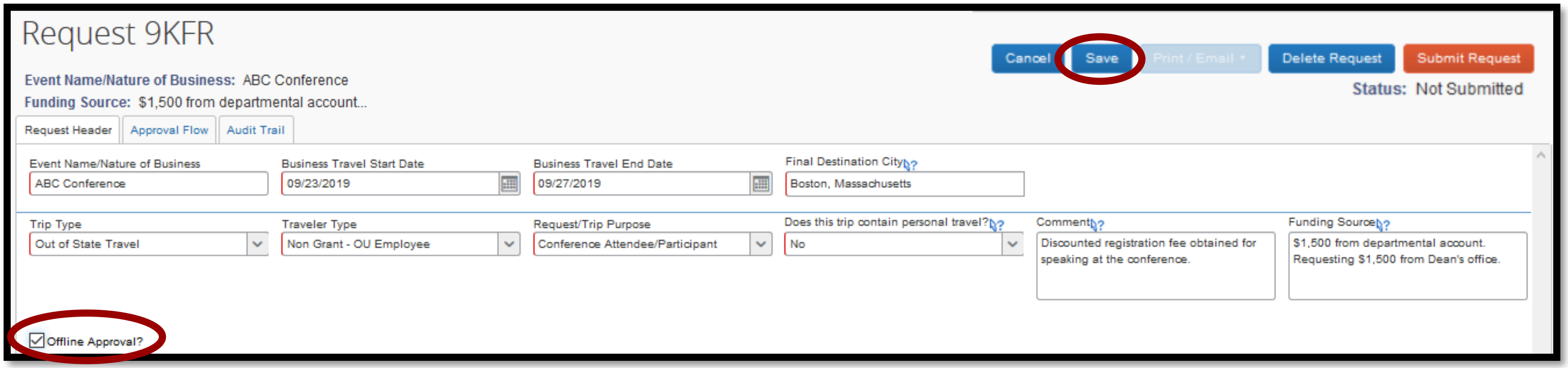
Workflow Approval

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.

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

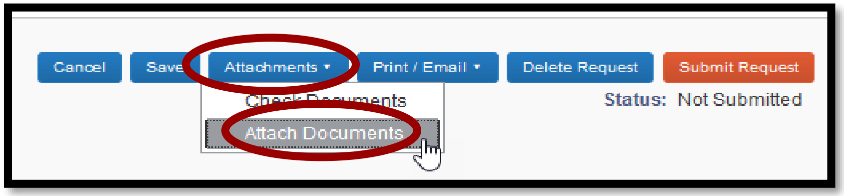
Offline Approval

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



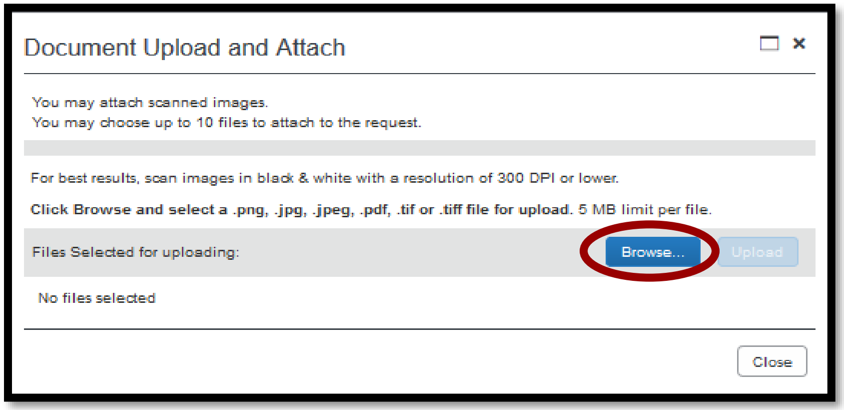
17.
18. Click **Save**.
19. You will be prompted to attach evidence of prior approval.

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



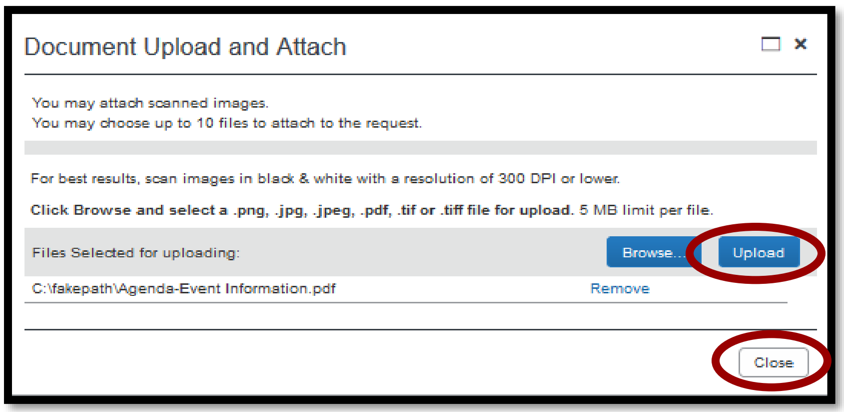
22.

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



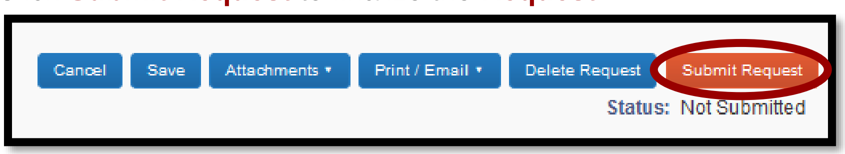
24.

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



26.

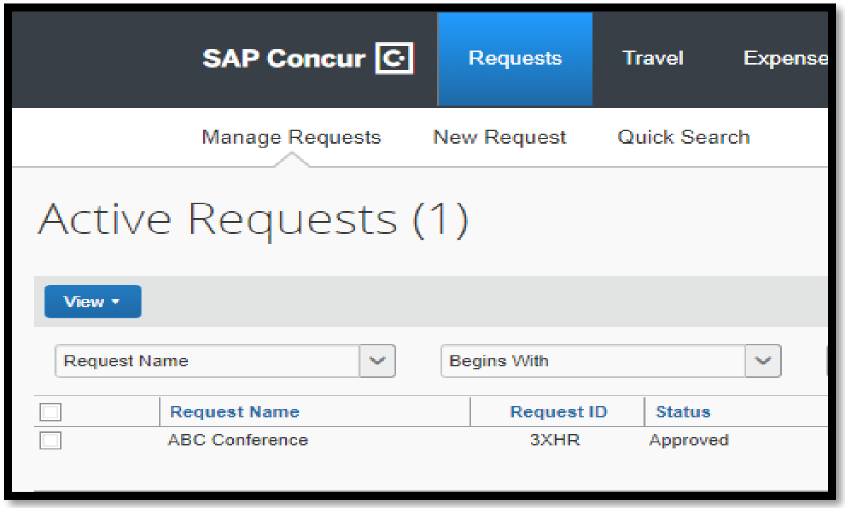
27. Click **Submit Request** to finalize the **Request**.



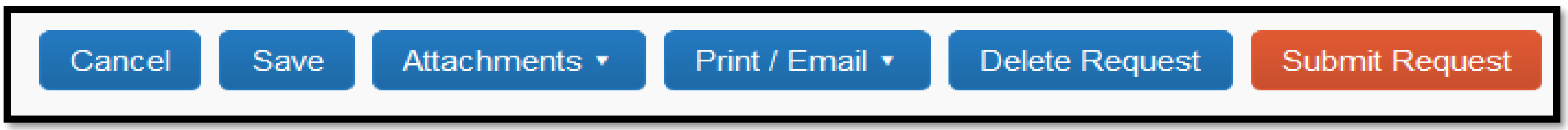
28.

Manage Requests

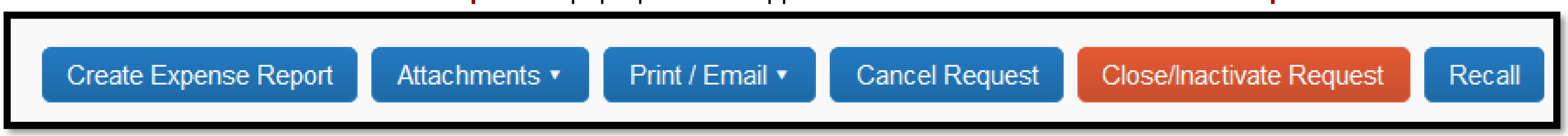
29. To review previously submitted **Requests**, click on **Requests** from the main menu and previously entered **Requests** will appear.



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



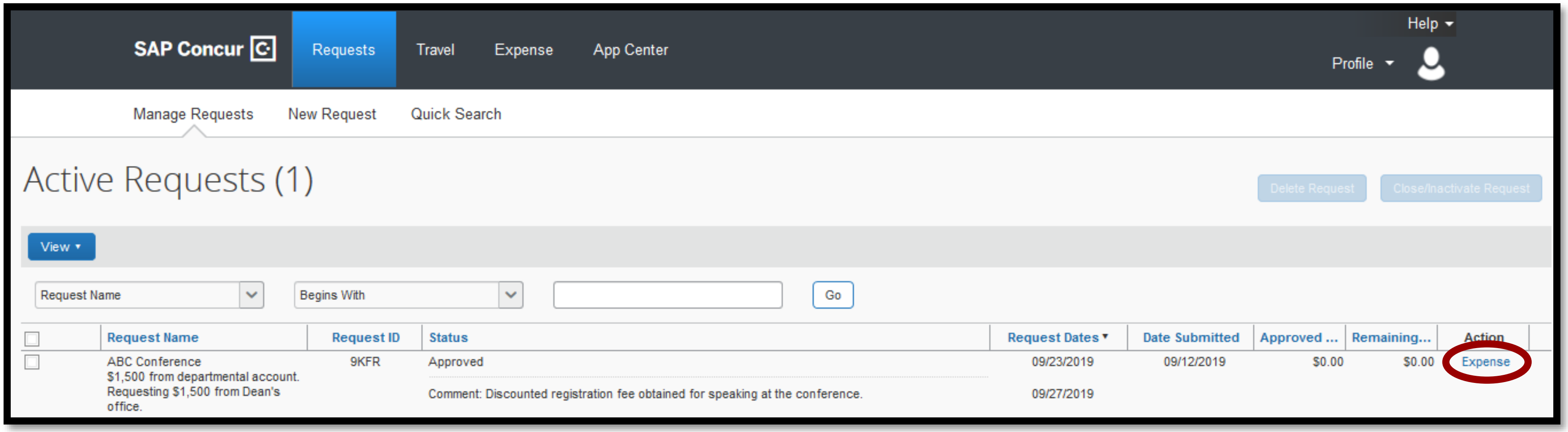
38.
39. For previously approved **Requests**, select the **Create Expense Report** button to create an expense report related to the **Request**.
40. Select **Cancel Request** to cancel the **Request** if it is no longer applicable, such as in the case of a duplicate **Request**. A pop-up box will appear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



43.

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.



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