

Concur Request QuickStart Guide



SAP Concur
Technologies
Version 2.0

Jan 21, 2022

Document Revision History

Date	Description	Version	Author
12/20/2019	Concur Request QuickStart Guide	1.0	SAP Concur
01/21/2022	Updated for Stony Brook University	2.0	SAP Concur

Proprietary Statement

These documents contain proprietary information and data that is the exclusive property of SAP Concur Technologies, Inc., Bellevue, Washington, and its affiliated companies (collectively, "SAP Concur"). If you are an active SAP Concur client, you do not need written consent to modify this document for your internal business needs. If you are *not* an active SAP Concur client, no part of this document can be used, reproduced, transmitted, stored in a retrievable system, translated into any language, or otherwise used in any form or by any means, electronic or mechanical, for any purpose, without the prior written consent of SAP Concur Technologies, Inc.

Information contained in these documents applies to the following products in effect at the time of this document's publication, including but not limited to:

- Travel & Expense
- Invoice
- Expense
- Travel
- Request
- Risk Messaging
- SAP Concur for Mobile

The above products and the information contained in these documents are subject to change without notice. Accordingly, SAP Concur disclaims any warranties, express or implied, with respect to the information contained in these documents, and assumes no liability for damages incurred directly or indirectly from any error, omission, or discrepancy between the above products and the information contained in these documents.

© 2004 – 2020 SAP Concur. All rights reserved.

SAP Concur® is a trademark of SAP Concur Technologies, Inc. All other company and product names are the property of their respective owners.

Published by SAP Concur Technologies, Inc.
601 108th Avenue, NE, Suite 1000
Bellevue, WA 98004

Table of Contents

Document Revision History	2
Proprietary Statement	3
Table of Contents	4
Creating a Request	5
Adding Allowances to a Request.....	9
Submitting a Request.....	11
Correcting and Resubmitting a Request	13
Adding a Request to an Expense Report.....	15
Approving Requests.....	17
Closing a Request	22

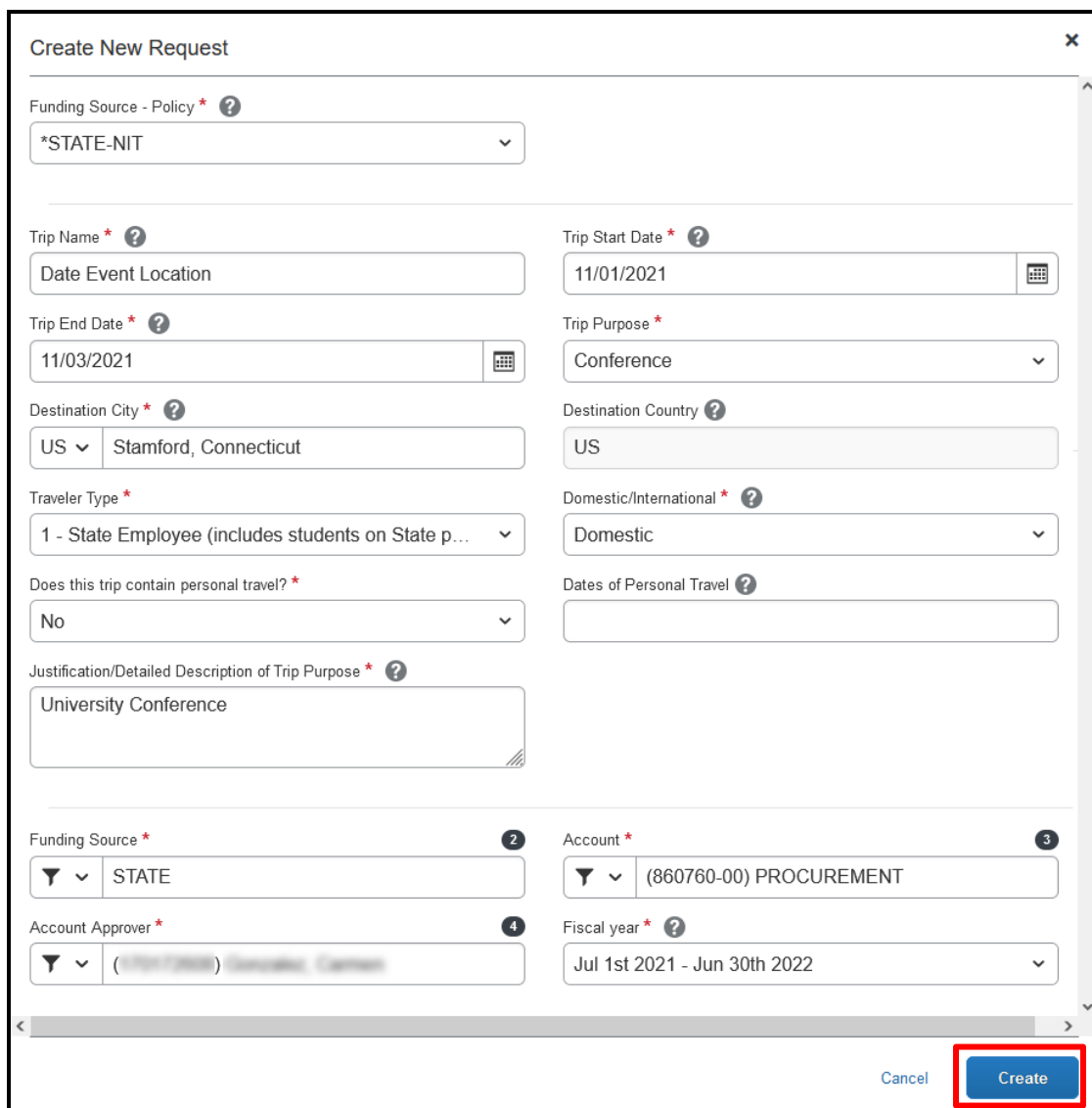
Creating a Request

University policy requires travelers to obtain authorization before expenses for a trip are made. The authorization must be fully approved before the trip starts. Using Concur Request, you can submit an authorization request with the expenses that you anticipate for the trip.

NOTE: A Concur Request is only required for State and RF Non-Sponsored Award domestic travel. For international travel, all travelers must submit a Concur Request,

To create 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**.
2. On the **Create New Request** page, complete the required fields (indicated with a red asterisk), and then click **Create**.



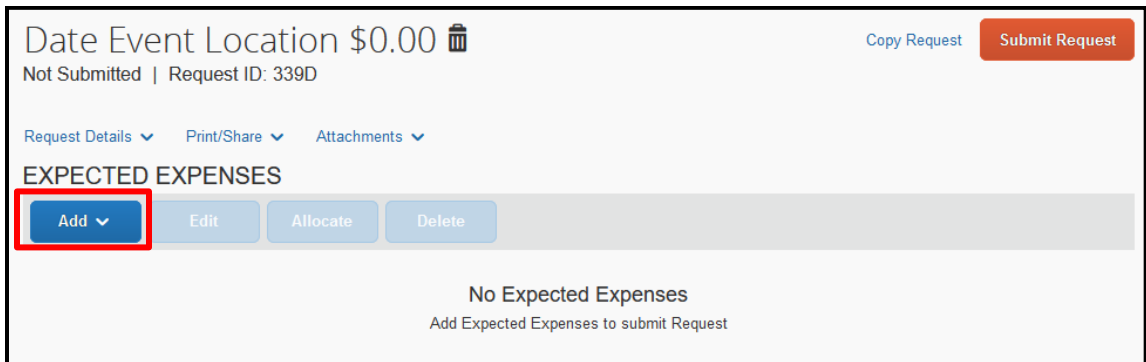
The screenshot shows the 'Create New Request' form with the following fields and values:

- Funding Source - Policy ***: *STATE-NIT
- Trip Name ***: Date Event Location
- Trip Start Date ***: 11/01/2021
- Trip End Date ***: 11/03/2021
- Trip Purpose ***: Conference
- Destination City ***: US, Stamford, Connecticut
- Destination Country ***: US
- Traveler Type ***: 1 - State Employee (includes students on State p...)
- Domestic/International ***: Domestic
- Does this trip contain personal travel? ***: No
- Dates of Personal Travel ***: (empty)
- Justification/Detailed Description of Trip Purpose ***: University Conference
- Funding Source ***: STATE
- Account ***: (860760-00) PROCUREMENT
- Account Approver ***: (99172000) Elizabeth, Cannon
- Fiscal year ***: Jul 1st 2021 - Jun 30th 2022

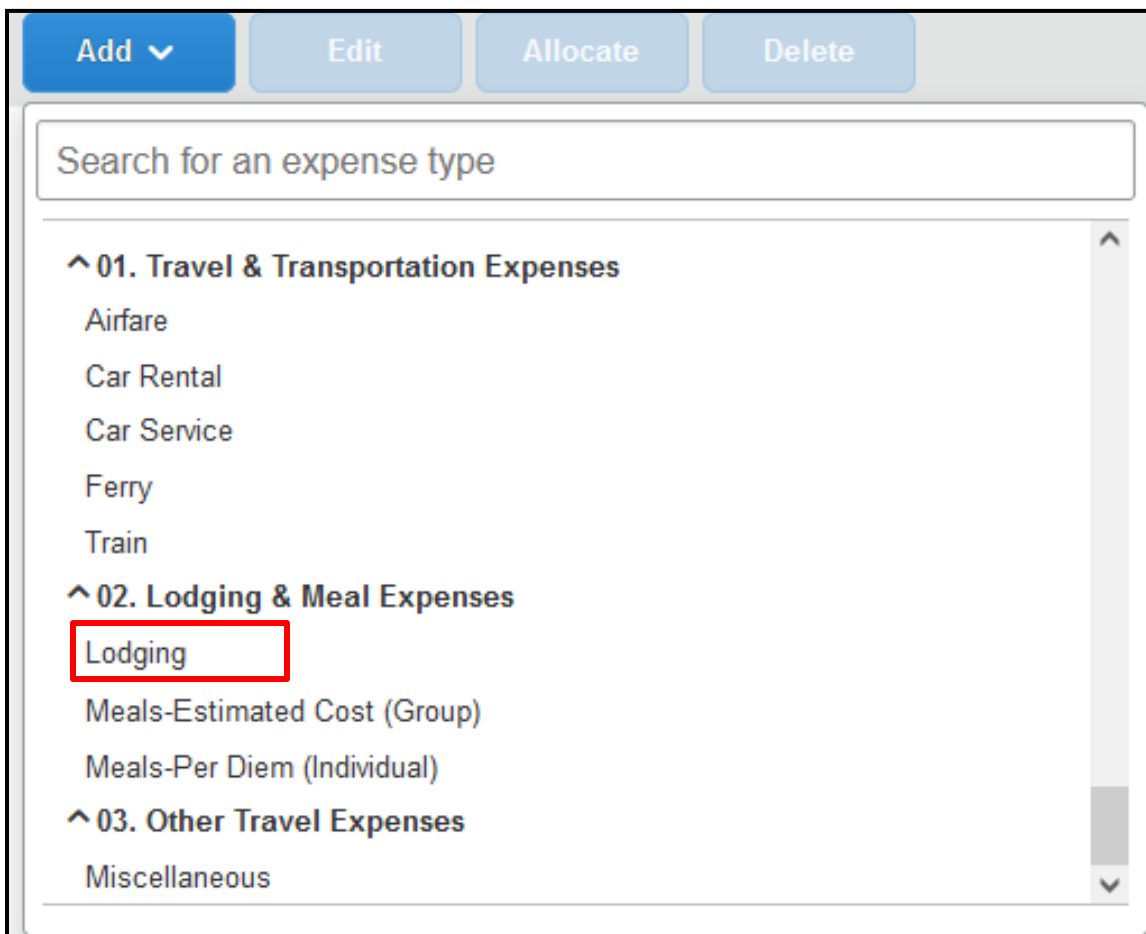
At the bottom right, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red box.

3. Click **Add** to enter your trip details and estimated amounts for each expense.

The most common expense types are **Airfare**, **Lodging**, and **Meals – Per Diem**.



4. In the **Expense Type** list, search for and select the appropriate expense type.
In this example, you will see how to add your hotel expenses.
5. Select **Lodging** from the list.




6. On the **New Expense** page, complete the required fields. Most of the fields will be pre-populated but you must enter the **Estimated Cost** and state whether or not the **nightly lodging rate exceeds the allowed per diem**.

NOTE: Links to the allowed domestic and foreign nightly lodging rates are provided on the page. Please copy/paste the link to a new browser window to view the rates.

New Expense: Lodging Cancel Save

* Required field


Check-In

Arrival Date * 


City *


Detail


Check-Out


Departure Date * 


Internal Comment


Does nightly lodging rate exceed allowed per diem? * 




Justification for over the max lodging 

GSA Link For Domestic Rates: 

GSA Link For Foreign Rates: 

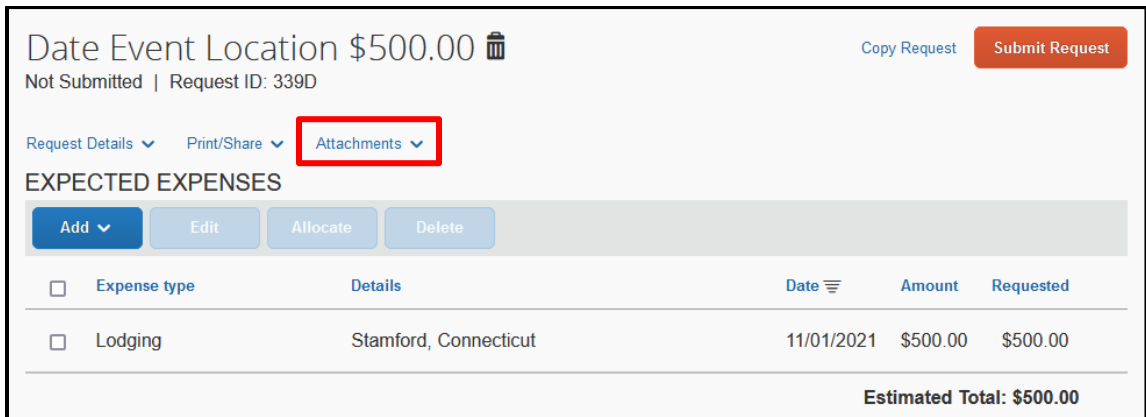
Estimated Cost * 

Currency * 

7. Click **Save**.
8. Continue to add your anticipated expenses to the request.

IF you have a travel related document that policy requires you to append to your request, perform the following additional steps:

1. Click **Attachments** to attach the appropriate documents for your approver's review.

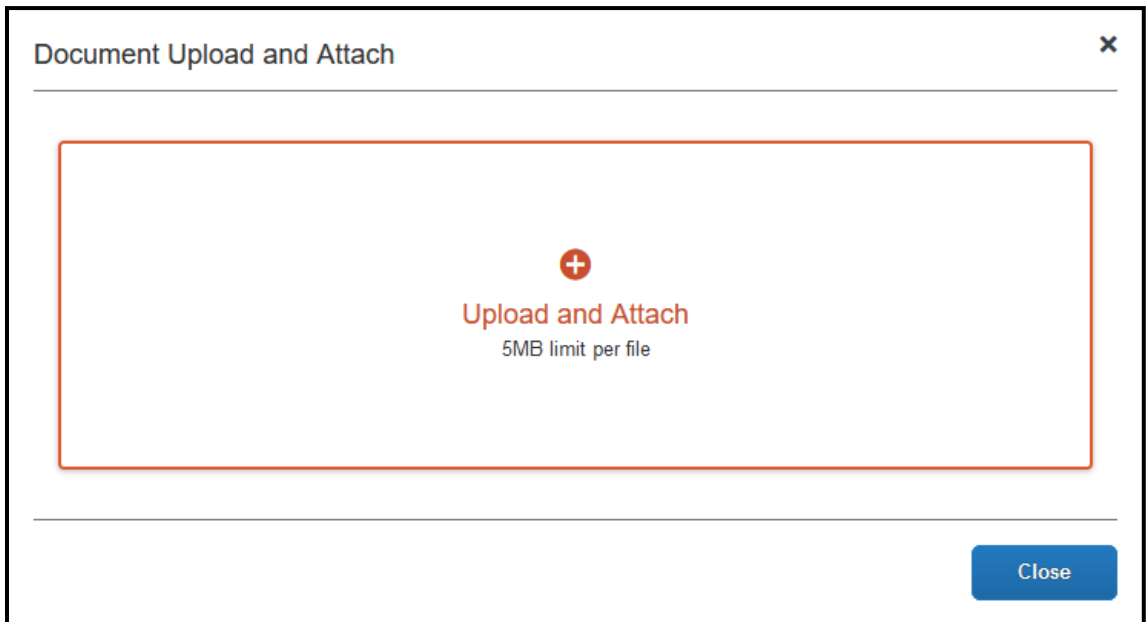


The screenshot shows the SAP Concur request details page for a request titled "Date Event Location" with a total amount of \$500.00. The request is in a "Not Submitted" state with Request ID: 339D. At the top right, there are "Copy Request" and "Submit Request" buttons. Below the header, there are navigation options: "Request Details", "Print/Share", and "Attachments" (which is highlighted with a red box). Underneath, the "EXPECTED EXPENSES" section is visible, featuring buttons for "Add", "Edit", "Allocate", and "Delete". A table lists the expenses, with one entry for "Lodging" in Stamford, Connecticut, dated 11/01/2021, for an amount of \$500.00. The estimated total is \$500.00.

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Lodging	Stamford, Connecticut	11/01/2021	\$500.00	\$500.00

Estimated Total: \$500.00

2. In the **Document Upload Attach** window, click **Upload and Attach**.



The screenshot shows a "Document Upload and Attach" window. The window title is "Document Upload and Attach" with a close button (X) in the top right corner. The main content area is a large rectangle with a red border, containing a red plus sign icon and the text "Upload and Attach" followed by "5MB limit per file". At the bottom right of the window, there is a blue "Close" button.

3. Search for and select the file you want to upload on your device.
4. Click **Open**.

The selected file is now attached to your request.

Adding Allowances to a Request

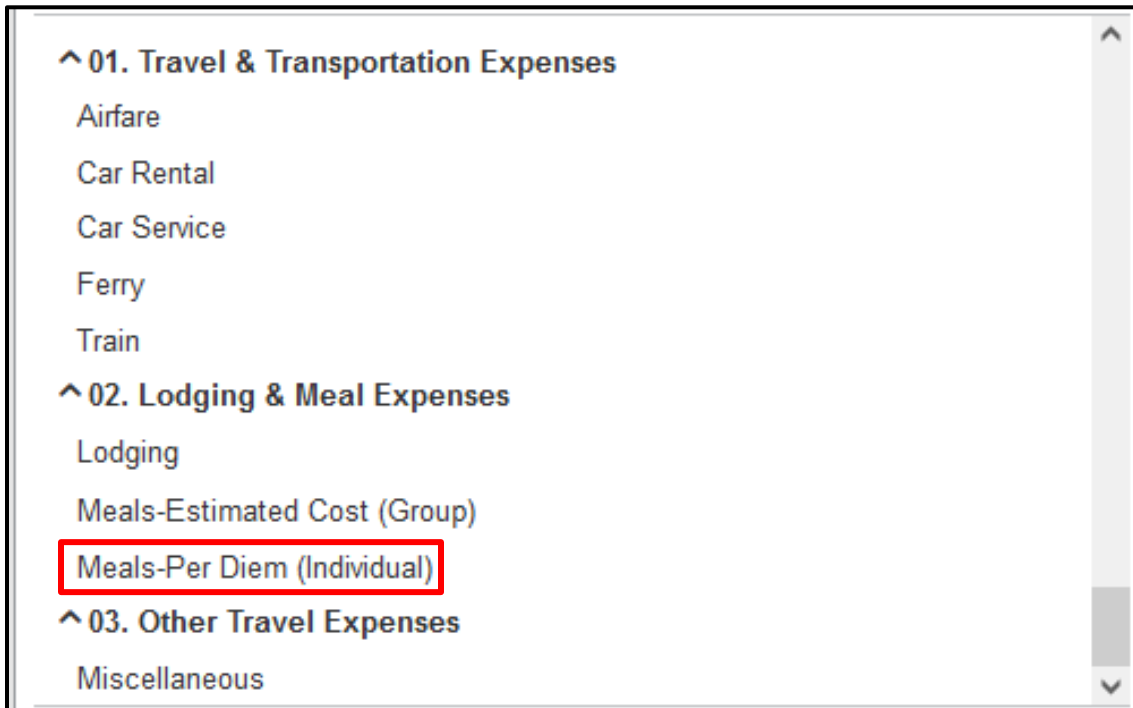
You can add expenses to your request to help estimate the total cost of your trip for pre-set travel allowances for lodging and/or meals.

To add allowances to a request

1. From the open request, click **Add**.

The fixed allowance expense types are **Lodging** and **Meals-Per Diem (Individual)**. These expense types are configured to calculate an amount based on the arrival city and duration of your trip.

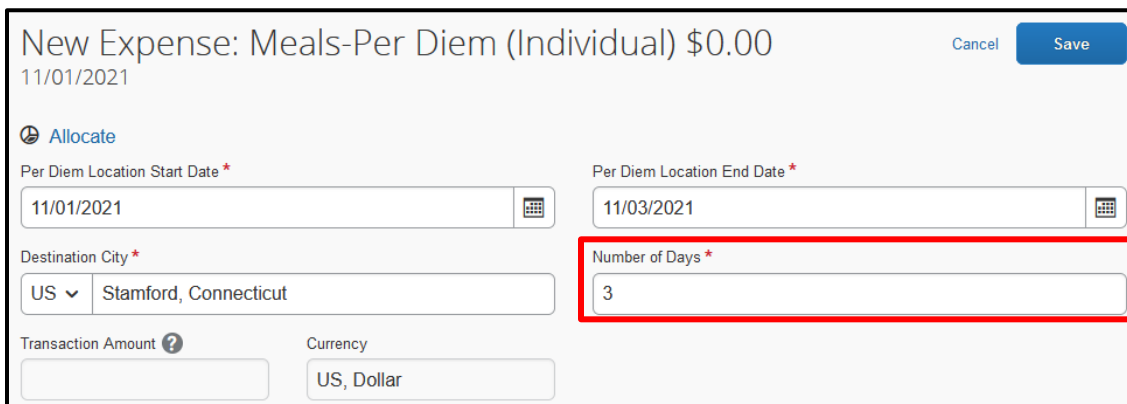
2. In this example, click the **Meals-Per Diem (Individual)** expense type.



A screenshot of a scrollable menu for selecting expense types. The menu is organized into three main categories, each with a caret icon (^):

- 01. Travel & Transportation Expenses**
 - Airfare
 - Car Rental
 - Car Service
 - Ferry
 - Train
- 02. Lodging & Meal Expenses**
 - Lodging
 - Meals-Estimated Cost (Group)
 - Meals-Per Diem (Individual)** (highlighted with a red box)
- 03. Other Travel Expenses**
 - Miscellaneous

3. The **Destination City**, **Start Date**, and **End Date** are populated based on your previous entries. Enter the **Number of Days**.



A screenshot of the 'New Expense' form for 'Meals-Per Diem (Individual)'. The form title is 'New Expense: Meals-Per Diem (Individual) \$0.00' with a date of '11/01/2021'. There are 'Cancel' and 'Save' buttons in the top right. An 'Allocate' icon is in the top left. The form contains several input fields:

- Per Diem Location Start Date ***: 11/01/2021
- Per Diem Location End Date ***: 11/03/2021
- Destination City ***: US (dropdown), Stamford, Connecticut
- Number of Days ***: 3 (highlighted with a red box)
- Transaction Amount ?**: (empty field)
- Currency**: US, Dollar

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

4. Click **Save**.

The expense with the calculated **Amount** is displayed.

Date Event Location **\$707.00**

Sent Back to User | Request ID: 339D | [View Timeline](#)

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Add ▾
Edit
Allocate
Delete

<input type="checkbox"/> Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Lodging	Stamford, Connecticut	11/01/2021	\$500.00	\$500.00
<input type="checkbox"/> Meals-Per Diem (Individual)	Stamford, Connecticut	11/01/2021	\$207.00	\$207.00

Estimated Total: \$707.00

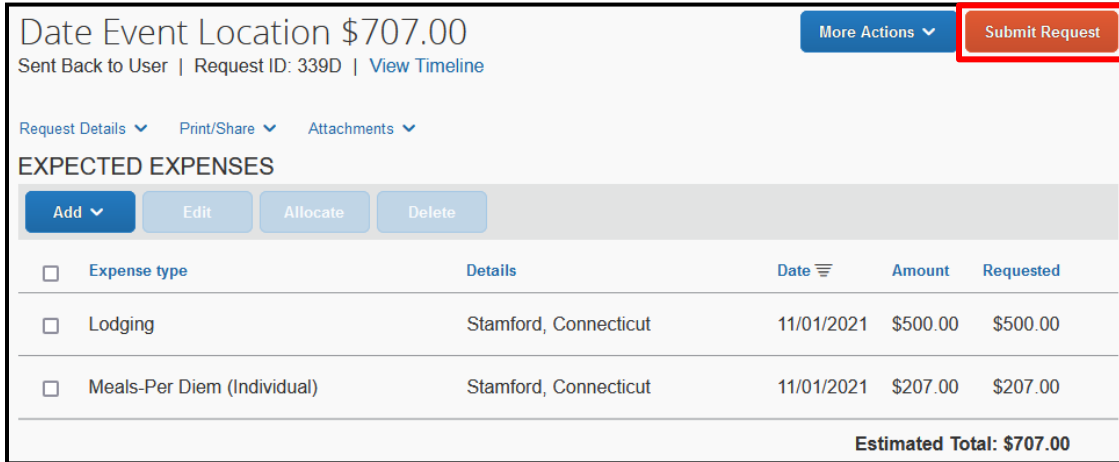
More Actions ▾
Submit Request

Submitting a Request

After entering all of your projected expenses, you will submit the request for review and approval by management.

To submit a request

1. In the open request, click **Submit Request**.



Date Event Location \$707.00 More Actions Submit Request

Sent Back to User | Request ID: 339D | [View Timeline](#)

Request Details | Print/Share | Attachments

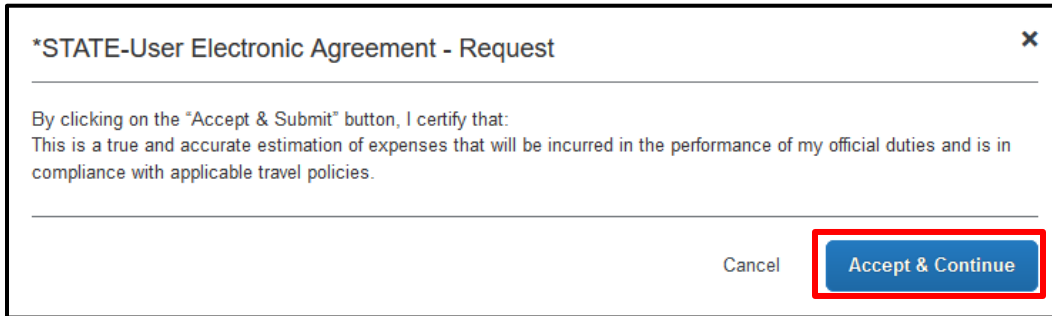
EXPECTED EXPENSES

Add Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Lodging	Stamford, Connecticut	11/01/2021	\$500.00	\$500.00
<input type="checkbox"/>	Meals-Per Diem (Individual)	Stamford, Connecticut	11/01/2021	\$207.00	\$207.00

Estimated Total: \$707.00

2. Read the User Electronic Agreement, then click **Accept & Continue**.

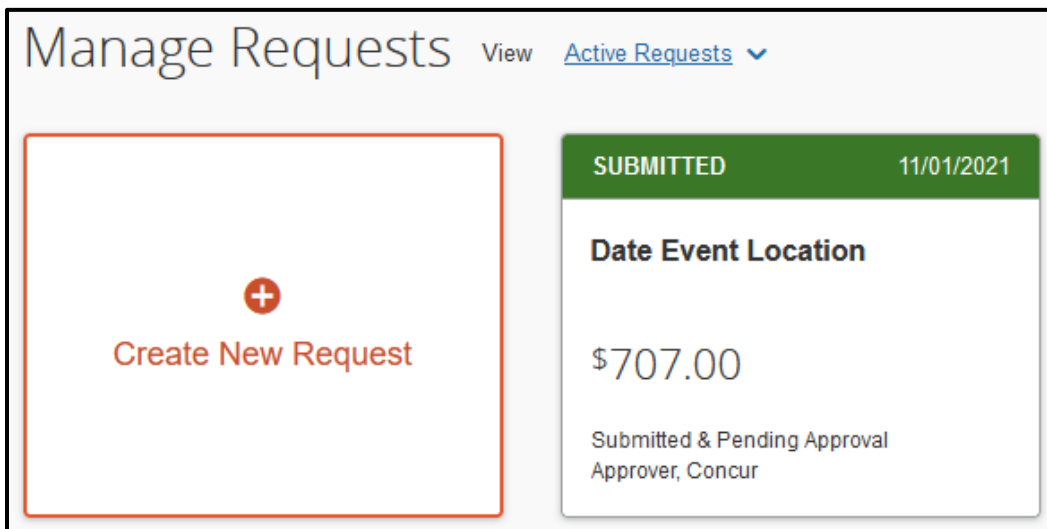


*STATE-User Electronic Agreement - Request ×

By clicking on the "Accept & Submit" button, I certify that:
This is a true and accurate estimation of expenses that will be incurred in the performance of my official duties and is in compliance with applicable travel policies.

Cancel Accept & Continue

Your request is submitted and waiting for approval.



Manage Requests

View [Active Requests](#)

+

Create New Request

SUBMITTED 11/01/2021

Date Event Location

\$707.00

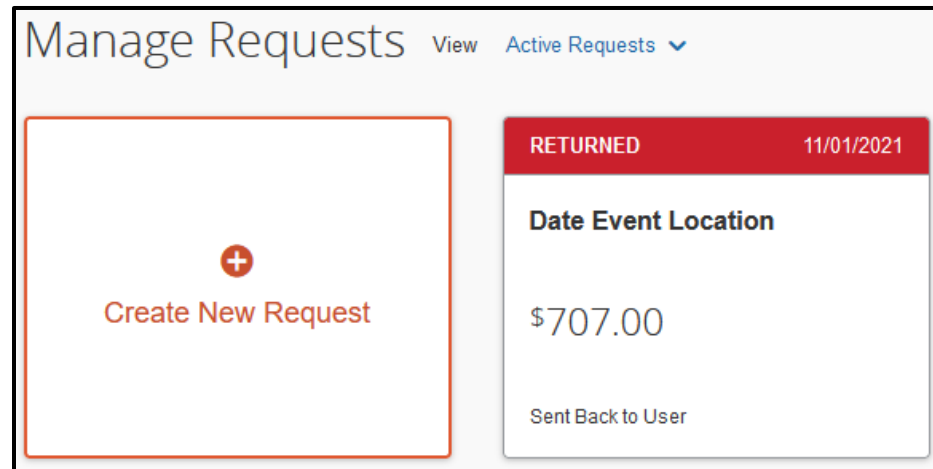
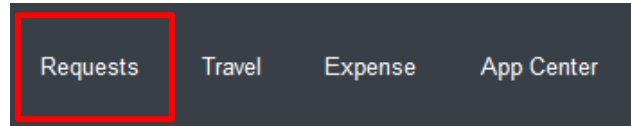
Submitted & Pending Approval
Approver, Concur

Correcting and Resubmitting a Request

If there is an issue with the request, your manager will return it to you for correction. You will be notified if your request has been rejected.

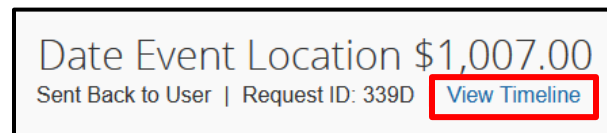
To correct and resubmit a request

1. On the SAP Concur home page, click the **Requests** tab.
2. Click on the tile for the returned



expense.



3. Click **View Timeline**.
4. Review the audit trail and the comment from your manager explaining the reason why the request was rejected and the corrective steps you should take.



Request Timeline ✕

Date Event Location | \$707.00

Approval Flow [Edit](#)

-  Supervisor Approval
Approver, Concur
-  Account Approval

Request Summary

SUBMITTED & PENDING APPROVAL
Never, William 10/08/2021



REQUEST COMMENT
Approver, Concur 10/08/2021
Please add your rental car expense.

SENT BACK TO USER
Approver, Concur 10/08/2021

[Add Comment](#)

[Close](#)

5. Make the requested corrections.
6. Click **Submit Request** to re-send it to your manager for review.

SAP Concur 
Requests [Travel](#) [Expense](#) [App Center](#)
Help 

Manage Requests

Submit Request

Date Event Location \$1,007.00

Sent Back to User | Request ID: 339D | [View Timeline](#)

[Request Details](#) [Print/Share](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#)
[Edit](#)
[Allocate](#)
[Delete](#)

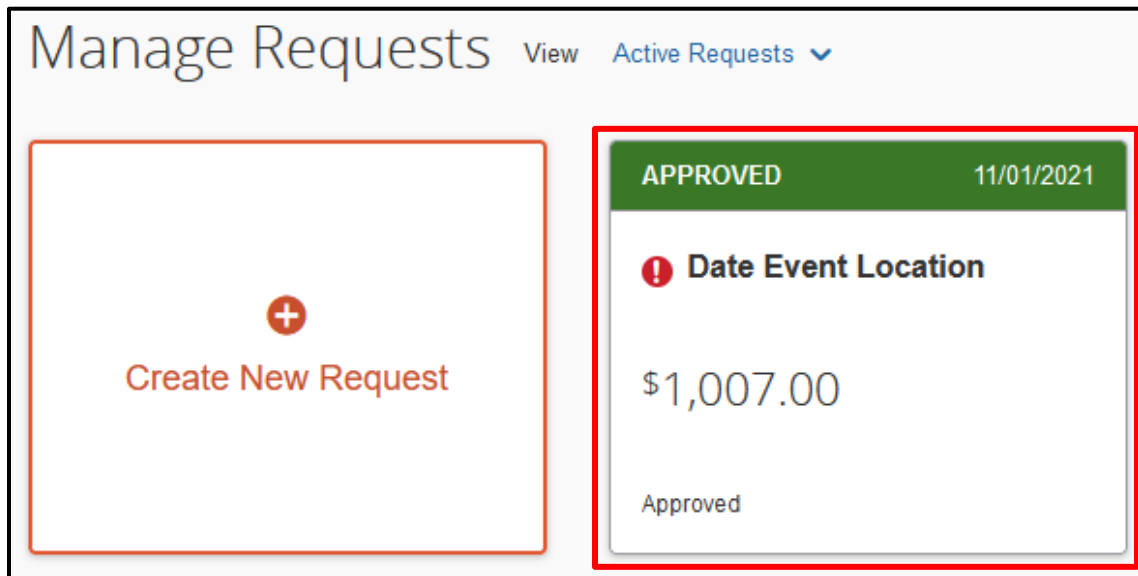
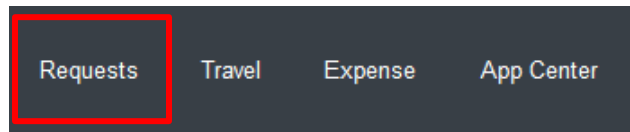
	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Lodging	Stamford, Connecticut	11/01/2021	\$500.00	\$500.00
<input type="checkbox"/>	Meals-Per Diem (Individual)	Stamford, Connecticut	11/01/2021	\$207.00	\$207.00

Adding a Request to an Expense Report

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

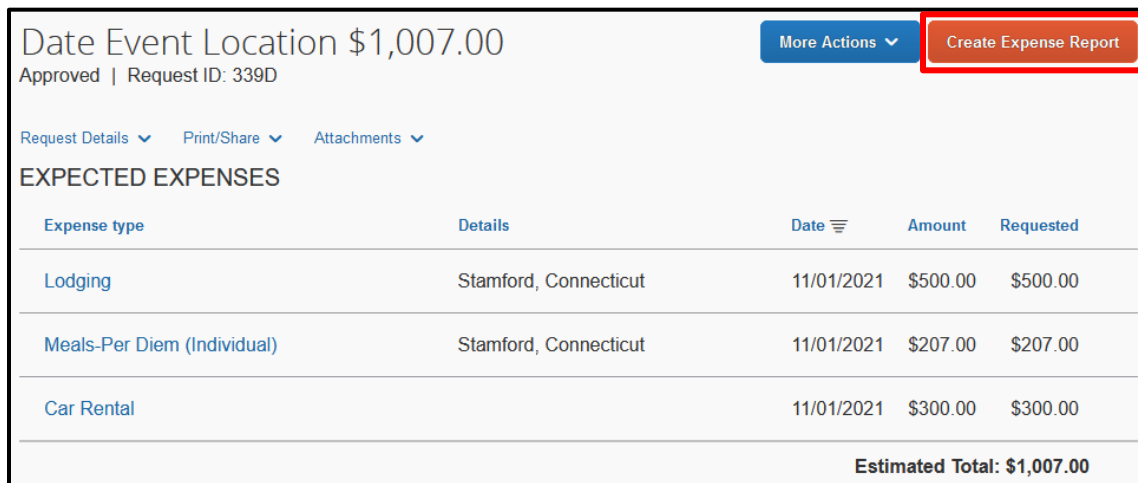
To add a request to an expense report

1. From the SAP Concur home page, click the **Requests** tab.
2. On the **Manage Requests** page, select the appropriate approved request.

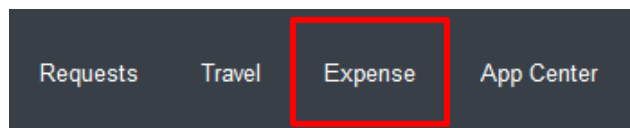


The request and all associated expenses appear.

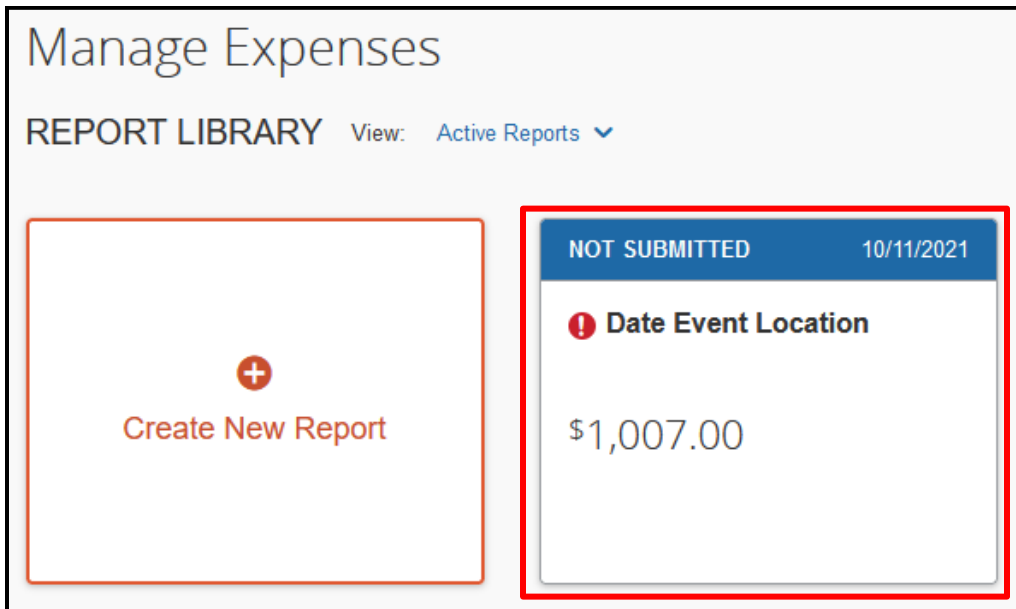
3. To create the expense report from the request, click **Create Expense Report**.



4. To view the expense report, from the SAP Concur home page, click the **Expense** menu.



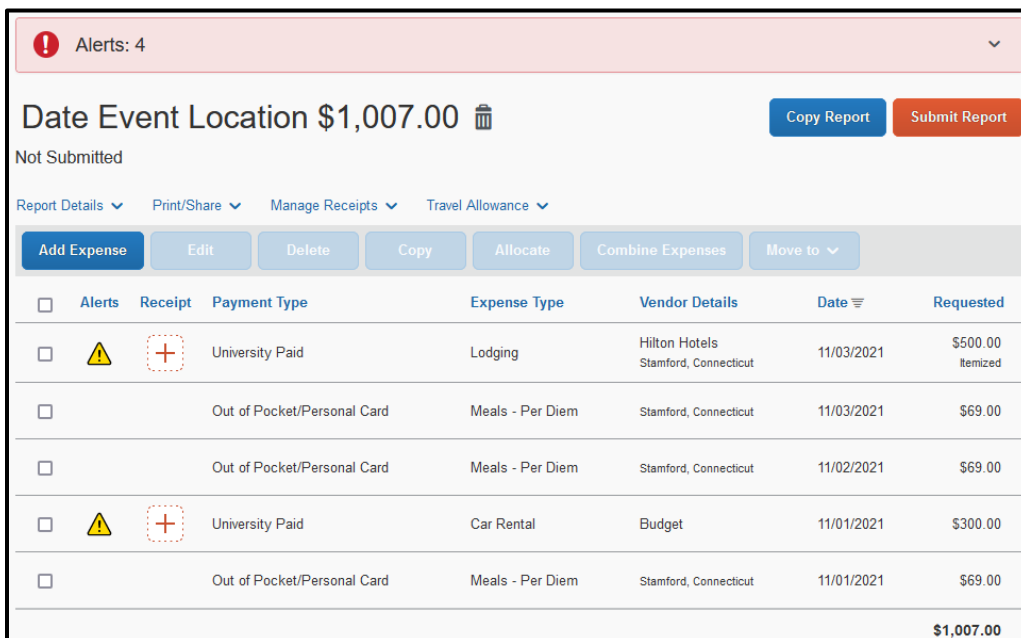
5. Click on the tile to open the report with the imported expenses.







6. In the expense report, you should:

- Review the expenses to ensure they are accurate
- Correct any exceptions (indicated by either yellow triangles or red circles). Red exceptions must be corrected or you will not be allowed to submit the report.
- Attach any required receipts
- Add any additional travel expenses that were not captured in the request

NOTE: Requests created from an expense report will display an alert that prompts you to complete any required fields that weren't imported from the request.



Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>			University Paid	Lodging	Hilton Hotels Stamford, Connecticut	11/03/2021	\$500.00 Itemized
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Stamford, Connecticut	11/03/2021	\$69.00	
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Stamford, Connecticut	11/02/2021	\$69.00	
<input type="checkbox"/>			University Paid	Car Rental	Budget	11/01/2021	\$300.00
<input type="checkbox"/>		Out of Pocket/Personal Card	Meals - Per Diem	Stamford, Connecticut	11/01/2021	\$69.00	
						\$1,007.00	

Approving Requests

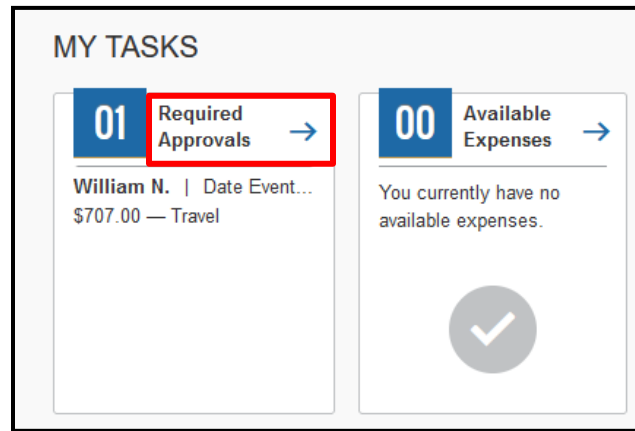
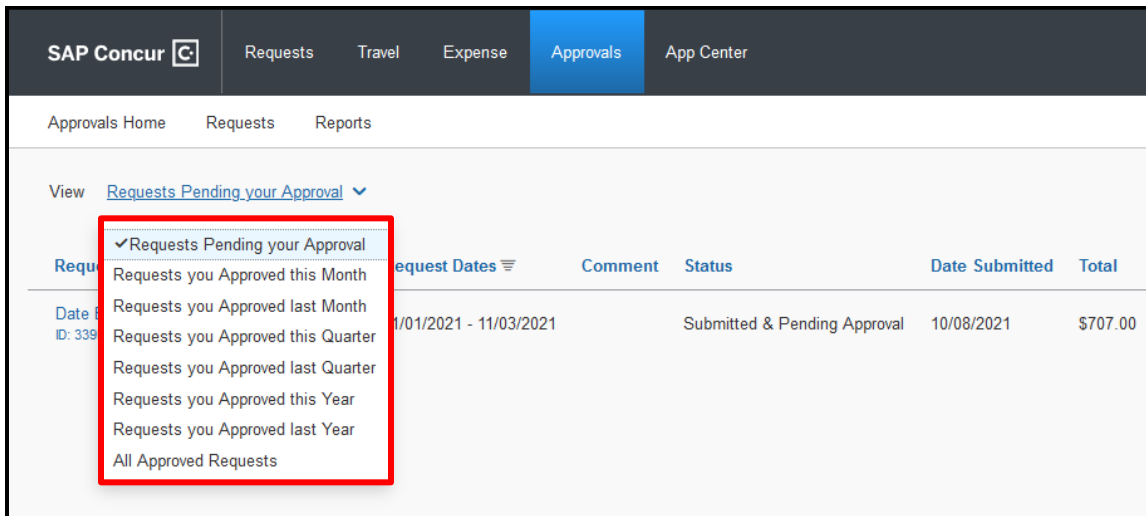
As an approver you are responsible for reviewing and approving requests before your employees incurs the expenses.

To approve a request

1. From the SAP Concur home page, in the **My Tasks** section, click **Required Approvals**.

On the **Approvals** home page, the view defaults to **Requests Pending your Approval**.

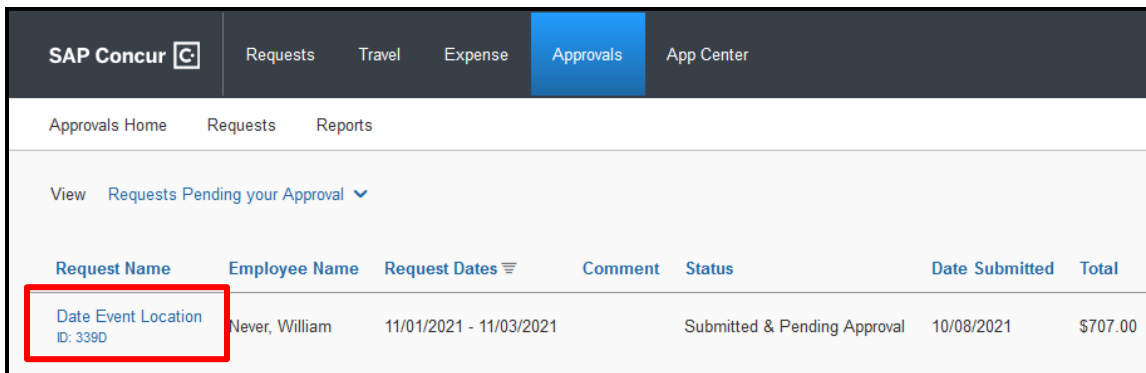
2. Click the **View** dropdown menu, and then select **Requests Pending your Approval**.

Request Name	Employee Name	Request Dates	Comment	Status	Date Submitted	Total
Date Event Location ID: 339D	Never, William	11/01/2021 - 11/03/2021		Submitted & Pending Approval	10/08/2021	\$707.00

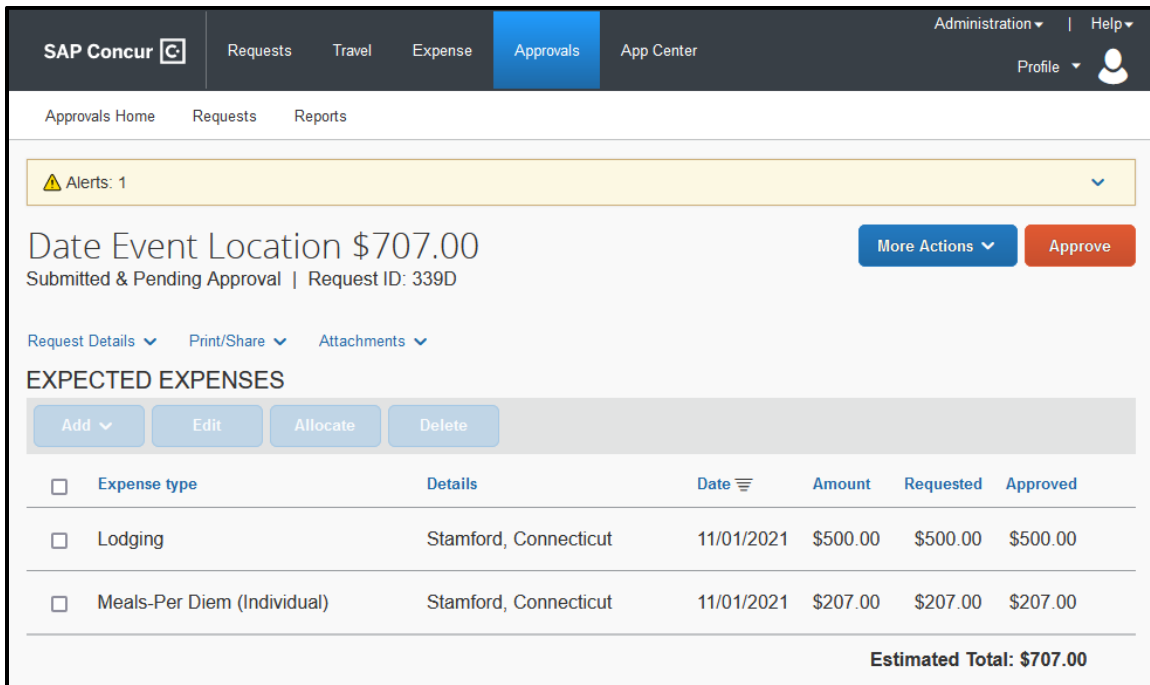
You can also view requests that you have approved by months, quarters, years, or all approved requests.

3. Click the name of the request that you wish to review.



NOTE: As an approver you are required to review the details of the expected expenses and any attached documents before you approve the request.

4. Review the expenses and any supporting documents.



The screenshot shows the SAP Concur interface for reviewing an expense request. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The main content area displays the request details: 'Date Event Location \$707.00', 'Submitted & Pending Approval | Request ID: 339D'. Below this is a table titled 'EXPECTED EXPENSES' with columns for 'Expense type', 'Details', 'Date', 'Amount', 'Requested', and 'Approved'. The table lists two expense items: 'Lodging' for \$500.00 and 'Meals-Per Diem (Individual)' for \$207.00. The estimated total is \$707.00.

Expense type	Details	Date	Amount	Requested	Approved
<input type="checkbox"/> Lodging	Stamford, Connecticut	11/01/2021	\$500.00	\$500.00	\$500.00
<input type="checkbox"/> Meals-Per Diem (Individual)	Stamford, Connecticut	11/01/2021	\$207.00	\$207.00	\$207.00

Estimated Total: \$707.00

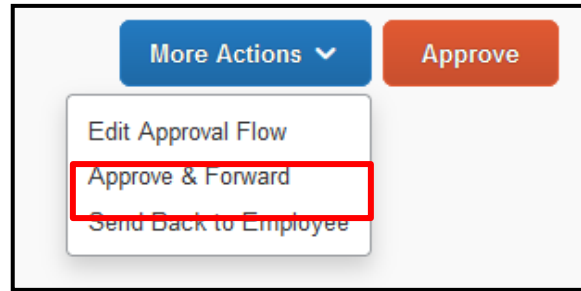
5. After reviewing the request, determine which action to take next. Your choices are:

- Send Back to Employee
- Approve
- Approve & Forward
- Edit Approval Flow

To send the request back to the employee

1. IF there are errors in the request or it violates policy in some way, click **More Actions** and then select **Send Back to Employee**.

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



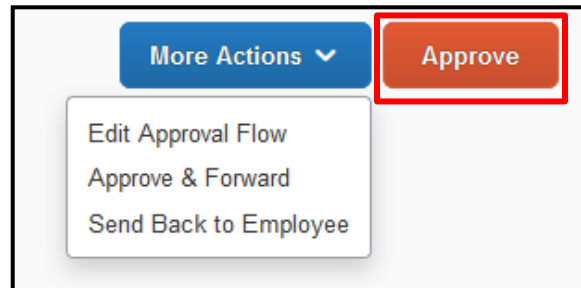
2. In the **Send Back to Employee** window, enter the **Comment**, then click **Send Back**.



To approve the request

1. IF there are no errors or policy violations and no other managers need to review the request, click **Approve**.

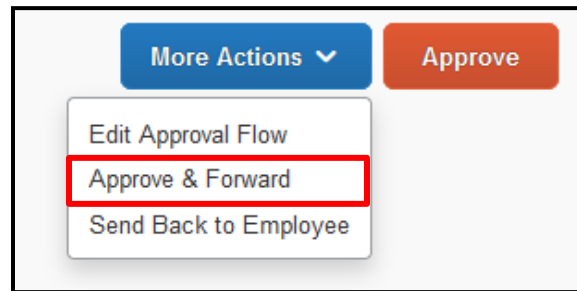
The employee will be notified that the request has been approved and it will no longer appear in your approval queue.



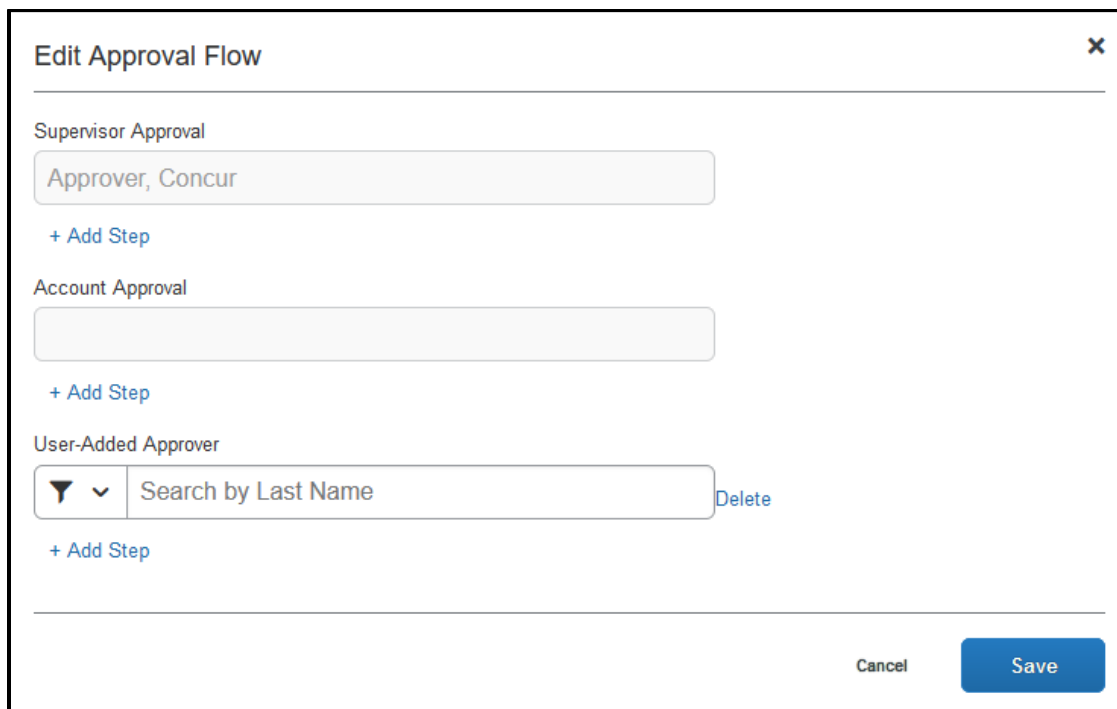
To approve and forward the request to an additional approver

1. IF there are no policy violations but the request requires the approval of additional managers, click **More Actions** and then select **Approve & Forward**.

NOTE: **Approve & Forward** is most often used when the cost of a request is shared by multiple teams or departments with separate budgets.



2. In the **Edit Approval Flow** window, **Add a Step** as needed, then search for and select the approver in the **User-Added Approver** field.



The image shows a window titled 'Edit Approval Flow' with a close button (X) in the top right corner. The window contains three sections for adding approval steps:

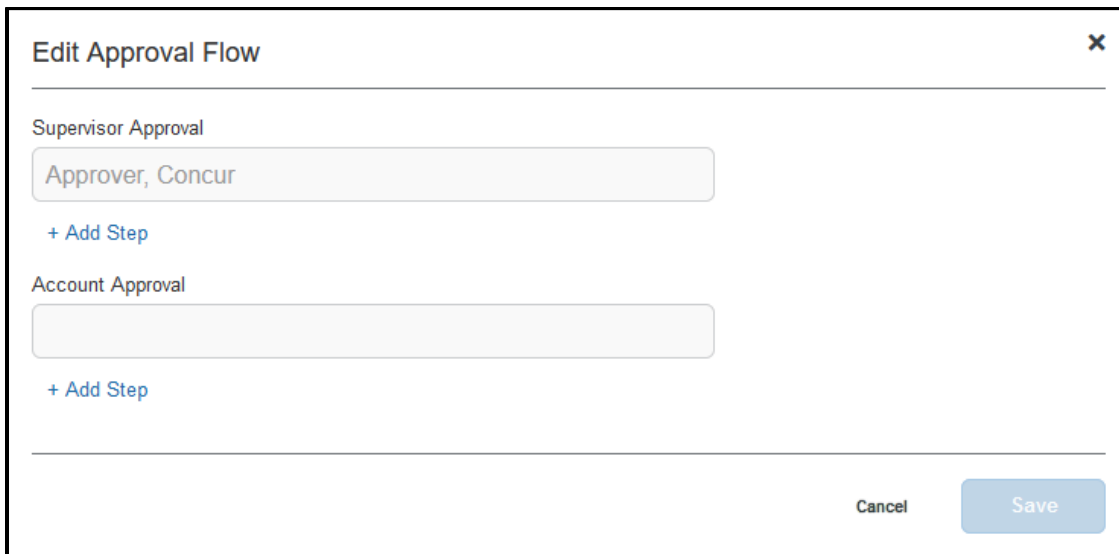
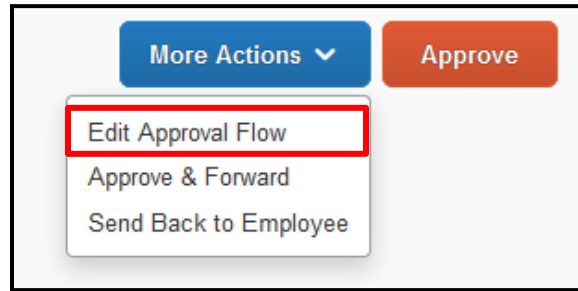
- Supervisor Approval:** A text input field containing 'Approver, Concur' and a '+ Add Step' link below it.
- Account Approval:** An empty text input field and a '+ Add Step' link below it.
- User-Added Approver:** A search input field with a dropdown arrow on the left, containing the text 'Search by Last Name', and a 'Delete' button on the right. A '+ Add Step' link is below it.

At the bottom right of the window are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in blue.

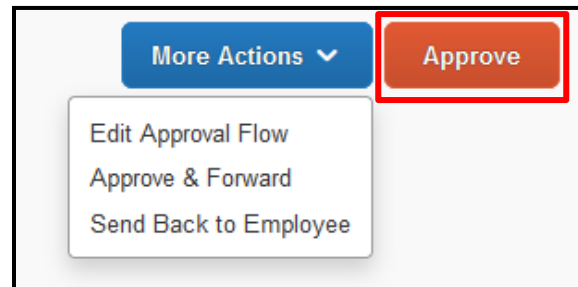
3. When you are done adding your approval steps, click **Save**. to approve and forward the request on to the next step and approver you added to the workflow.

To edit the approval flow

1. IF there are no policy violations but the request requires the approval of several other managers, click **More Actions**, and then select **Edit Approval Flow**.
2. In the **Edit Approval Flow** window, click **Add Step** to add an additional approval step for this request, or several steps, as needed.
3. In the **User-Added Approver** field, search for and select the approvers that you want to add to the workflow.



4. When you are done adding approval steps and approvers, click **Save**.
5. Click **Approve**.

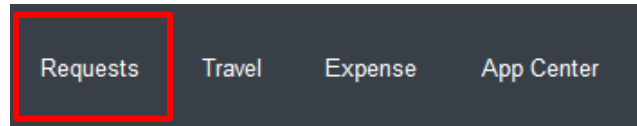


Closing a Request

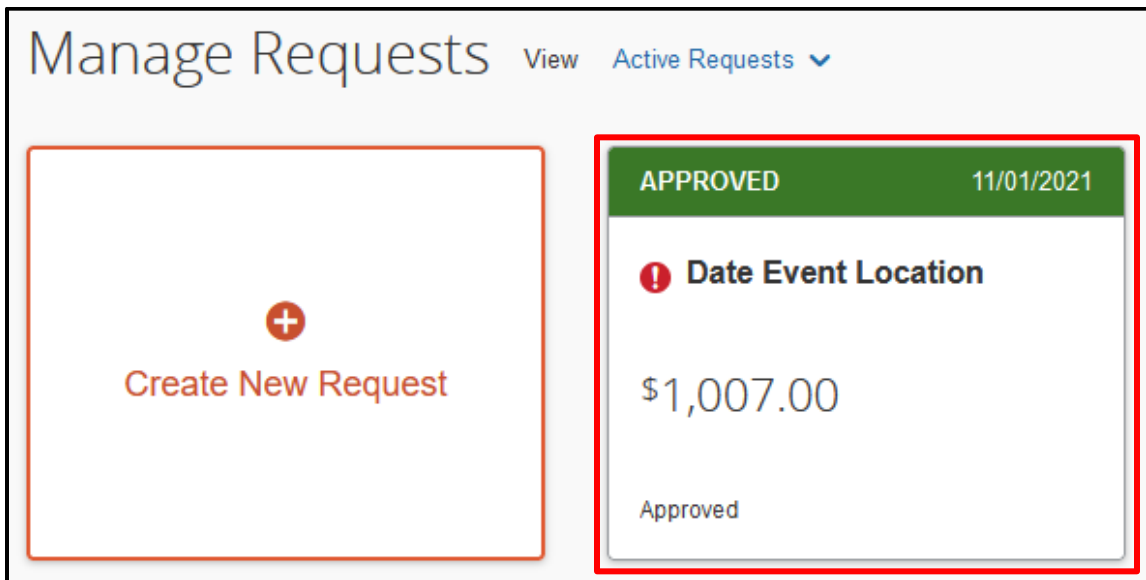
After you submit all your expenses related to a request, you can close the request. After you close a request, you can no longer associate it with an expense report.

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.

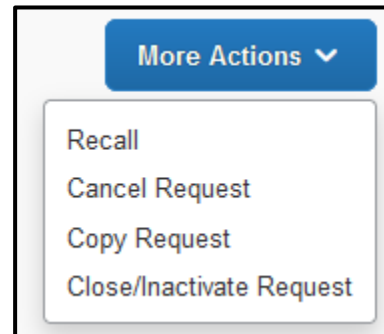
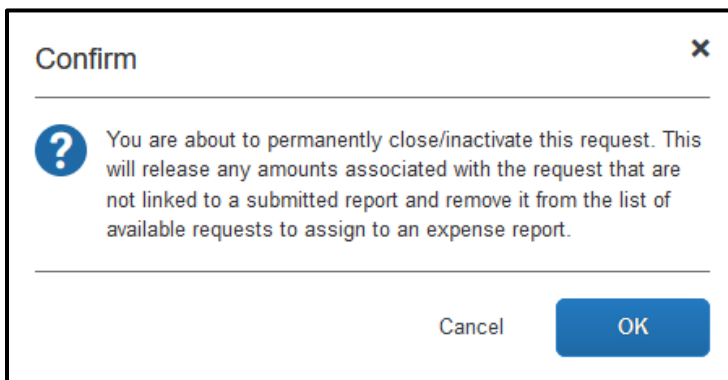


2. Select the tile for the request that you want to close.



3. Click **More** then select **Close/Inactivate Request**.

4. Click **OK** to permanently close/deactivate the request.



- To view closed requests, on the **Active Requests** page, click the **View** dropdown arrow, and then select **Closed/Inactivated Requests**.

Active Requests ▼

- ✓ Active Requests
- Not Submitted
- Pending Approval
- Approved
- Cancelled
- Closed
- All Requests

A list of your closed requests is displayed. You cannot attach a closed request to an expense report.

Manage Requests View Closed ▼

[Create New Request](#)

Request Type	Request Name	Status	Request Dates ☰	Requested	Approved
Travel	William T Never ID: 336Q	Cancelled 09/28/2021	10/04/2021 - 10/08/2021	\$745.00	\$745.00
Travel	Date Team Opp Location ID: 333C	Approved 08/23/2021	08/16/2021 - 08/20/2021	\$3,645.00	\$3,645.00
Travel	Date WB Opp Location ID: 333F	Cancelled 08/25/2021	08/09/2021 - 08/13/2021	\$2,700.00	\$2,700.00
Travel	Date Event Location ID: 334X	Cancelled 09/09/2021	08/02/2021 - 08/05/2021	\$814.00	\$814.00