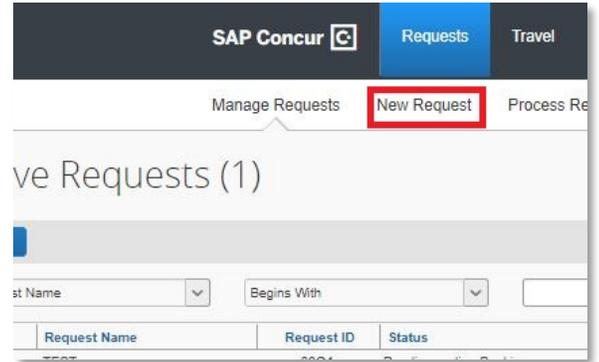
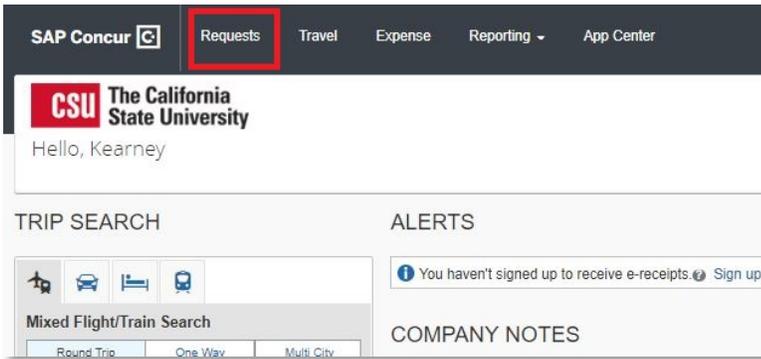


How to create a new Request in Concur

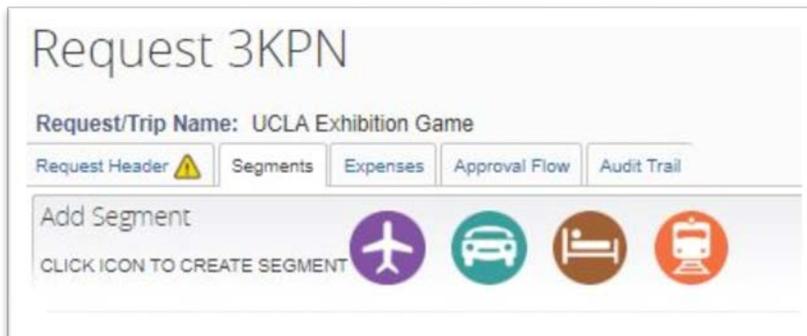
1. Log into SAP Concur and click on “Requests” in the upper left. Then click, “New Request”



2. Fill out all fields with a red bar. If you are requesting personal days of travel along with your trip, be sure to request those days here so your flights will line up correctly. Once this page is filled out, click “Save” in the upper part of the screen.

A screenshot of the SAP Concur 'Request' form. The form is titled 'Request' and has a 'Request/Trip Name' field filled with 'ACDA'. The 'Request Header' tab is selected. The form has several sections: 'Request/Trip Name' (ACDA), 'Trip Type' (1-In-State), 'How will you book your trip?' (1 - Book via Concur Travel), 'Travel Start Date' (09/10/2019), and 'Travel End Date' (09/18/2019). The 'Traveler Type' is '2-Staff', 'Trip Purpose' is 'Conference', 'Personal Dates of Travel-If none enter N/A?' is '8/17, 8/18', 'Destination City/State' is 'Los Angeles, California', and 'Final Destination Country' is 'UNITED STATES'. There are also fields for 'Business Unit', 'Fund', 'Department', 'Program', 'Class', and 'Project'. The 'Save' button is highlighted with a red box.

3. You will be guided to the Segments tab. If you are flying, renting a car, staying in a hotel, or using the train, be sure to request these segments here (even if you are booking any or all outside of Concur). This will allow the transactions to sync properly when you return.



4. Click on any of the circles to request that segment.

5. Put your best guess of the total cost of the flight, the airports you're flying from and to, and click “Save.”

6. If you are requesting a rental car, be sure to enter the correct pick-up location as it may be an airport. Put your best guess of the total cost, and click “Save.”

- If you are requesting a hotel, put your best guess of the total amount, and the city you'll be staying in. Be sure to put in the nightly rate of \$275 as per CSU travel policy (unless you have a special circumstance where it will be over). If you are over the nightly rate, put in that amount and add a comment as to why. Click "Save."

A screenshot of a web form for requesting a hotel. At the top, there are three circular icons: a car, a hotel, and a train. Below them is an 'Amount' field with a currency dropdown set to 'USD'. The 'City' field is empty. The 'Date' is set to '11/19/2019' with a calendar icon and a dropdown for 'At'. The 'Detail' field is empty. Below that, another 'Date' is set to '11/22/2019' with a calendar icon and a dropdown for 'At'. A 'Comment' field is empty. At the bottom, there are two fields: 'Maximum Nightly Rate' and 'Over Rate Comment'. A red 'Save' button is in the bottom right corner.

- Next, click on the Expenses tab and begin to build up an idea of your expenses for this trip. I have marked some frequently used expenses below:

A screenshot of the 'Expenses' tab in a travel request system. The request name is 'UCLA Exhibition Game'. The 'Expenses' tab is selected and highlighted with a red box. Below the tab are buttons for '+ New Expense' and 'Delete'. A table with columns 'Date', 'Expense Type', 'Amount', and 'Requested' is shown. To the right, there is an 'Expense Type' input field and a list of expense categories with radio buttons: 01. Travel Expenses (Incidentals, Other Accommodation, Team/Group Travel, 02. Personal Car Mileage), 03. Transportation (Ground Transportation, Parking/Tolls, 04a. Meals & Incidentals - International, Alaska & Hawaii, 04b. Meals - Domestic), 05. Hospitality (Hospitality, 09. Other, Other Expense, Registration/Fees).

- When picking meals domestic, make sure to put the correct number of business days in the required field. This will auto populate the correct food total in your expenses column.

A screenshot of the expense details form for '04b. Meals - Domestic'. The 'Expense Type' is '04b. Meals - Domestic'. The 'Travel Start Date' is '11/19/2019' and the 'Travel End Date' is '11/22/2019'. The '# of Business Days' field is highlighted with a red box and contains the number '4'. The 'Non-GSA Daily Meal Rate' is '55'. The 'Amount' is '0.00' and the currency is 'USD'. There is a 'Comments To/From Approvers/Processors' field.

- Once you have built up your expenses, click on "Submit Request" on the upper right of the screen.

A screenshot of the bottom right of the screen. There are four buttons: 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. The 'Submit Request' button is highlighted with a red box. Below the buttons, the status is 'Status: Not Submitted' and the amount is 'Amount: \$2,610.00'.

Need more info?
Contact Kearney (Car-knee) at x5791

Or check out our website at:
<https://procurement.humboldt.edu/concur>