Quick Guide:
Concur Requests

Guide Overview

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

Accessing Concur

Go to bronchotravel.uco.edu and login with your UCO credentials.

Requests

1. Click Requests from the main menu.

   a. If you have previous Requests, they will be displayed and will show the Status of each Request.

   b. Please note, you may see Audit rule pop-up warnings within the Concur modules. To view the warning, simply hover the mouse over the pop-up.
2. To create a new Request, click New Request from the top of the screen.

3. Enter the Traveler Type, Request Name, Trip Type, Trip Purpose, Event Name/Nature of Official Business, Business Travel Start & End Dates and the Destination City. Every field with a Left-Red side bar must be completed.
   a. The Request Name should be Last Name Destination Date of Return i.e. Broncho CA 8/18/19
   b. Please do not abbreviate the Event Name/Nature of Official Business, but only enter the Event Name in this field.

4. Under the field of Does this trip contain personal travel?, either select Yes or No.

5. If choosing Yes, enter in the Dates of Personal Travel in the next field.

6. If additional information for the Request needs to be provided, enter that in the Comments section.
7. If 100% of the trip is paid from a single Org, verify the Org listed will cover the full cost of the trip. If needed change the Org, Fund, Program and Activity chart field to the Org covering the full cost.

   a. Please note each field will need to be changed, you will not need to know the Fund, Program and Activity code, there is only one code associated to each Org.

After all Request information has been entered the Estimated Expenses will be entered before you submit the Request.

Estimated Expenses

8. Click on the Expenses Tab.
9. Enter all estimated Expenses.

![Image of Concur Request 337V]

a. The right side of the screen allows you to add additional expenses.

10. Select the Expected Payment Type of each Expense.

![Image of Payment Type Selection]

After all Estimated Expenses have been entered, they may then be allocated if funds are paid from different Orgs.
Allocate Expenses

11. For a single allocation, select the expense and then Allocate in the lower right corner.

To Allocate multiple lines check the boxes next to the item you be allocating.

12. Click the expense. Click Allocate Selected Expenses.
Quick Guide:
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13. Click **Add New Allocation**.

14. Enter the allocation by **Percentage or Amount**.

15. Enter the additional **Org, Fund, Program & Activity** codes and Click **Save**.

Please note, if allocating by an amount, the amount will automatically be converted back to a percentage when saved.
The expense will now show the allocation.

16. After all Expenses have been allocated click **Submit Request**.
Approval Flow

After the Request has been submitted click on the Approval Flow. This allows you to see where the request is in the approval process.
Audit Trail

If an approver has made a comment or request for correction, it will be documented in the Audit Trail.