

Quick Guide: Concur Requests

Guide Overview

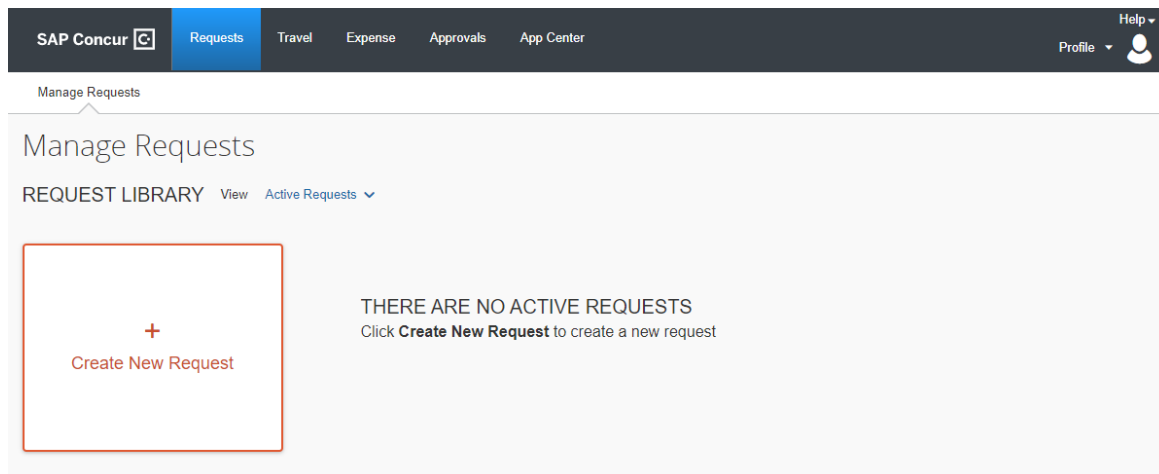
Allocation is classified as the action of assigning a chart field spread to an expense. **Allocations** can also be used to split expenses across different chart field spreads by percentage or amount.

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.

Quick Guide: Concur Requests

Request

- To create a new **Request**, click **New Request** from the top of the screen.
- 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 **Red Asterisk** must be completed.
 - The **Request Name** should be **Last Name Destination Date of Return**
i.e. Broncho CA 8/18/19
 - Please **do not abbreviate** the **Event Name/Nature of Official Business**, but only enter the Event Name in this field.
- Under the field: **Does this trip contain personal travel?** Select either: **Yes** or **No**.
- If choosing **Yes**, enter in the **Dates of Personal Travel** in the next field.
- If additional information for the **Request** needs to be provided, enter that in the **Comments** section.

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

- Traveler Type ***: 1-Faculty/Staff
- Official Duty Station Address ***: 100 N. University Drive, Edmond, OK 73034
- Request Name ***: (Empty)
- Trip Type ***: None Selected
- Trip Purpose ***: None Selected
- Event Name/Nature of Official Business ***: (Empty)
- Business Travel Start Date ***: MM/DD/YYYY
- Business Travel End Date ***: MM/DD/YYYY
- Destination City ***: (Empty)
- Destination Country**: (Empty)
- Does this trip include personal travel? ***: None Selected
- Start Date of Personal Travel (MMDD/YYYY)**: (Empty)
- End Date of Personal Travel (MMDD/YYYY)**: (Empty)
- Org ***: (010001) President's Office
- Fund ***: (100000) Educational & General
- Program ***: (60000) Executive Management
- Activity ***: Search by Code
- Email Address iData**: (Empty)
- User ID**: (Empty)

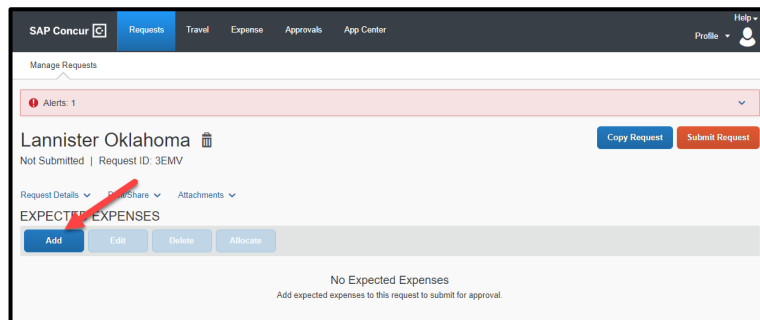
Buttons: Cancel, Create Request

Quick Guide: Concur Requests

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. For Org's that do not have an Activity code, select **NONE**.
8. Click **Save**.

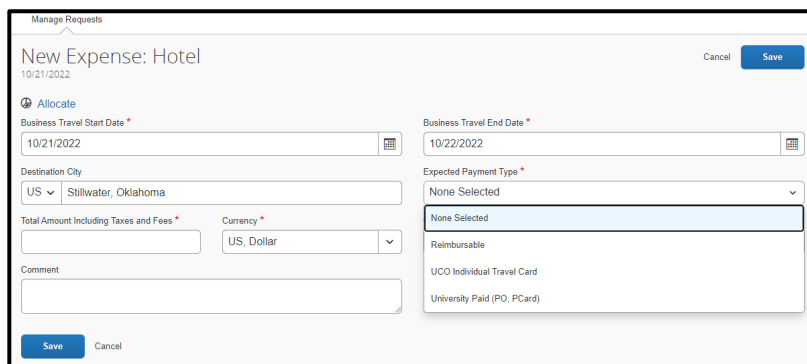
Estimated Expenses

9. Click **Add** to enter all estimated expenses.



The screenshot shows the SAP Concur 'Manage Requests' interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. Below the navigation, there is a header for 'Lannister Oklahoma' with a 'Copy Request' and 'Submit Request' button. The main section is titled 'EXPECTED EXPENSES' and contains an 'Add' button, which is highlighted with a red circle and a red arrow. Other buttons include 'Edit', 'Delete', and 'Allocate'. Below the buttons, it says 'No Expected Expenses' and 'Add expected expenses to this request to submit for approval.'

10. Select the **Expected Payment Type** of each Expense




The screenshot shows the 'New Expense: Hotel' form in SAP Concur. The form is titled 'New Expense: Hotel' and has a 'Save' button. It contains several fields: 'Business Travel Start Date' (10/21/2022), 'Business Travel End Date' (10/22/2022), 'Destination City' (US - Stillwater, Oklahoma), 'Total Amount Including Taxes and Fees', and 'Currency' (US, Dollar). The 'Expected Payment Type' dropdown menu is open, showing options: 'None Selected', 'Reimbursable', 'UCO Individual Travel Card', and 'University Paid (PO, PCard)'. The 'None Selected' option is currently selected.

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

Quick Guide: Concur Requests

Allocate Expenses

11. For a single allocation, select the expense and then click **Allocate**.

Lannister Oklahoma \$245.00  Copy Request Submit Request

Not Submitted | Request ID: 3EMV

Request Details ▼ Print/Share ▼ Attachments ▼


EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Hotel	Stillwater, Oklahoma	10/21/2022	\$150.00	\$150.00
<input type="checkbox"/>	Car Rental		10/21/2022	\$75.00	\$75.00
<input type="checkbox"/>	Miscellaneous		10/21/2022	\$20.00	\$20.00
					\$245.00

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

12. Click the expense. Click **Allocate Selected Expenses**.

Lannister Oklahoma \$245.00  Copy Request Submit Request

Not Submitted | Request ID: 3EMV

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input checked="" type="checkbox"/>	Hotel	Stillwater, Oklahoma	10/21/2022	\$150.00	\$150.00
<input checked="" type="checkbox"/>	Car Rental		10/21/2022	\$75.00	\$75.00
<input type="checkbox"/>	Miscellaneous		10/21/2022	\$20.00	\$20.00
					\$245.00

Quick Guide: Concur Requests

13. Click **Add**.

The screenshot shows the 'Allocate' dialog box with the following details:

- Expenses: 2 | \$225.00
- Buttons: **Add** (highlighted), Edit, Remove, Save as Favorite
- Summary: Amount \$225.00, Allocated \$225.00 (100%), Remaining \$0.00 (0%)
- Default Allocation: Code *Default*, Percent % 100
- Message: "No Allocations. These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently."
- Buttons: Cancel, **Save**

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

The screenshot shows the 'Allocate' dialog box with a table for adding allocations. The 'Add' button is highlighted. The table has the following columns: Org, Fund, Program, Activity, Code, and Percent %.

<input type="checkbox"/>	Org ↑↓	Fund ↑↓	Program ↑↓	Activity ↑↓	Code ≡	Percent %
<input type="checkbox"/>	President's Office	Educational & General	Executive Management	NONE	010001-100000-60000-NONE	<input type="text" value="50"/>

Buttons: Cancel, **Save**

Quick Guide: Concur Requests

15. To divide between multiple Orgs click **Add** and 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.

EXPECTED EXPENSES					
Add Edit Delete Allocate					
<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Hotel	Stillwater, Oklahoma	10/21/2022	\$150.00	\$150.00 <small>Allocated</small>
<input type="checkbox"/>	Car Rental		10/21/2022	\$75.00	\$75.00 <small>Allocated</small>
<input type="checkbox"/>	Miscellaneous		10/21/2022	\$20.00	\$20.00
					\$245.00

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

Lannister Oklahoma \$245.00

Not Submitted | Request ID: 3EMV

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

EXPECTED EXPENSES


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

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Hotel	Stillwater, Oklahoma	10/21/2022	\$150.00	\$150.00 <small>Allocated</small>
<input type="checkbox"/>	Car Rental		10/21/2022	\$75.00	\$75.00 <small>Allocated</small>
<input type="checkbox"/>	Miscellaneous		10/21/2022	\$20.00	\$20.00
					\$245.00

Quick Guide: Concur Requests

Approval Flow

After the Request has been submitted click on the **Request Timeline**. This allows you to see where the request is in the approval process.

Lannister Oklahoma \$245.00 


Not Submitted | Request ID: 3EMV

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

EXPECTED EXPENSES

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

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Hotel	Stillwater, Oklahoma	10/21/2022	\$150.00	\$150.00 <small>Allocated</small>
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<input type="checkbox"/>	Miscellaneous		10/21/2022	\$20.00	\$20.00
					\$245.00

Request Timeline 

Lannister Oklahoma | \$245.00

Approval Flow

- Travel Office Approval

Request Summary

Submitted
Never, William 10/04/2022

Pending External Validation
Never, William 10/04/2022

[Close](#)