RowanUniversity
INFORMATION RESOURCES & TECHNOLOGY

View
go.rowan.edu/APTravelPolicy
Contact
asktravel@rowan.edu
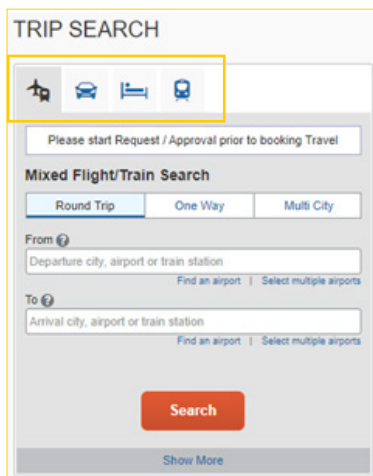
CREATING A REQUEST

CONCUR

MAY 2020

A Request is used to obtain pre-approval for a trip. It must include an estimate for all travel expenses you may incur while traveling on official Rowan University business.

REQUEST STEPS

- ✓ Find estimates for travel (Concur or 3rd party websites).
- ✓ Create a Request in Concur.
- ✓ Submit the Request to approver.
- ✓ The approver can approve the Request, approve and forward it to another approver or send the Request back to the traveler with comments.
- ✓ Once the Request is approved, and an Encumbrance # (E#) is issued, the traveler can make travel arrangements.
- ✓ Information from the Request will be in the Expense Report.

USE CONCUR TO FIND ESTIMATES

- • On the Concur home page, use the **Trip Search** to research.
- • Select the icon for the segment you want search.
- • In each category, choose the appropriate searches and filters to find the costs of each part of the trip.
- • Do not select any prices. Write down the information or take screenshots.
- • Return to the Trip Search by selecting **Travel** on the top left corner of the screen.
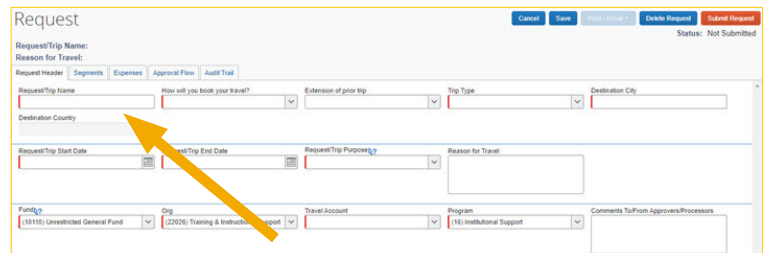

CREATE A REQUEST

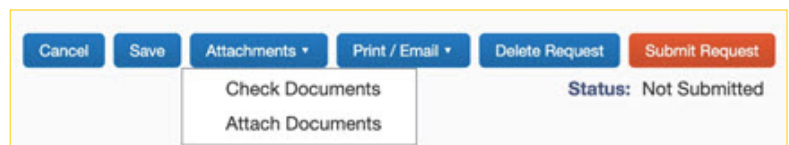From the Concur home page select **+ New** from the top of the page. Select **Start a New Request**.
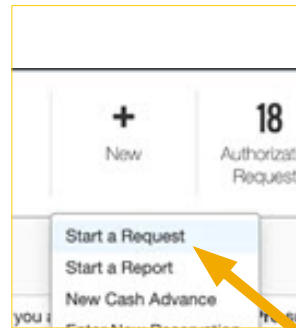
Complete information about your trip. Be sure to complete all required fields denoted by the red bar. Select **Save**.

Request/Trip Name: Required naming convention is Destination City and Conference name, workshop, etc. (Ex. Boston-AACOM)
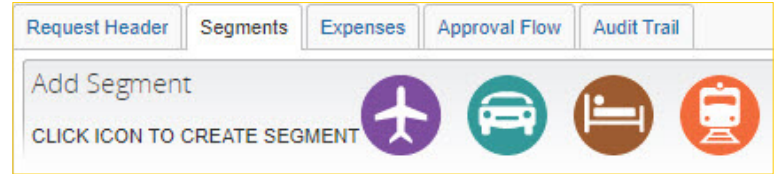

To attach supporting documents such as registration forms, select **Attachments** in the top right corner and then **Attach Documents. Browse, Open, Upload** and then **Close** to attach the document. **Save**.
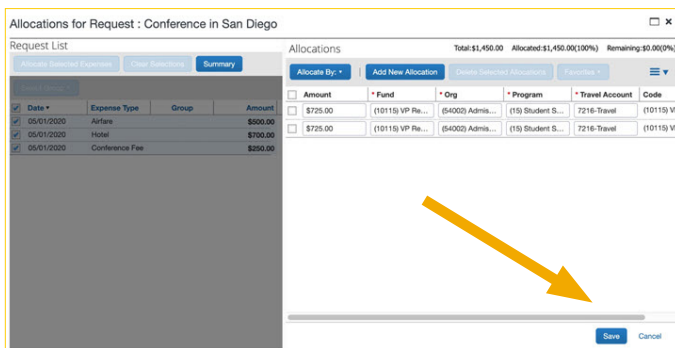
COMPLETE SEGMENTS

Using the estimates that you gathered, complete the Segments (air, auto, hotel and train) that are applicable to your trip. Be sure to complete all required fields denoted by the red bar.

| Request Header | Segments | Expenses | Approval Flow | Audit Trail |

Add Segment
CLICK ICON TO CREATE SEGMENT

Select the **Expenses** tab and enter any additional expenses.

ALLOCATE FOAPAL

Your Request will default to your department's FOAPAL. The allocation feature allows you to allocate expenses to other FOAPALs. Before allocating the expenses, make sure all expenses are entered. Select the expense.

Select **Allocate.**

Check the **Expense Type** (such as Air, Hotel, Conference fee).

Select **Allocate Selected Expenses.**

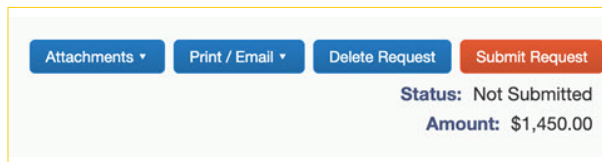Select **Allocate By** (% or amount).

Select **Add New Allocation**.

Enter **FOAPAL**.

Select **Save**.

SUBMIT

Select **Submit Request** when complete.

| Attachments ▾ | Print / Email ▾ | Delete Request | Submit Request |

Status: Not Submitted
Amount: $1,450.00

To see where your Request is in the approval process, select the **Approval Flow** tab. Select **Audit Trail** tab to view a record of all actions taken for a Request.

REVIEW STATUS OF REQUEST

Select **Requests** from the Concur top menu. You will see all the requests you created and the status of each. You can not change a Request, but you can recall one the has not been fully approved and then change or cancel it.

SAP Concur [C.]   Requests   Travel   Expense   App Center

RowanUniversity

Hello, Test Traveler

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