

# Concur Request QuickStart Guide



Concur Technologies

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# Create a New Request

**NOTE:** Your company may or may not use the Concur Request feature. Verify with your Concur administrator.

If your company is configured to use the Concur Request feature and if you have the Request User role:

- The **Requests** option appears in the menu.
- The **Open Requests** tile appears on the home page.

## Create a new request

To create a new request:

1. Either:
  - On the **Quick Task Bar**, click **New > Start a Request**.  
- or -
  - On the menu, click **Requests >Create New** (on the sub-menu) > **New Request**.

The **Request** page appears, with the **Request Header** tab selected.

2. On the header, complete all required fields and the optional fields - including [cash advance](#) - as directed by your company.
3. Click **Save**.
  - The request ID, request name, and purpose appear at the top.  
**NOTE:** The request ID is used by the travel agency for tracking.
  - The **Segments** tab becomes available.
4. On the **Segments** tab:
  - a) Select the desired segment icon. Note the following:
    - Hover the mouse pointer over any icon to read its "hover" text.

- If a policy uses the same icon twice, only **one** icon appears on the **Segment** tab. Click the down-pointing arrow to the right of the icon and select from the dropdown.

b) Complete the segment fields. Note the following about segment fields:

- **Amount** field:
  - Enter the total amount for the trip. Specifically, for car rental and hotel, enter the total amount - not the daily rate.
  - You can enter zero if necessary.
- **Detail** field (car rental and hotel):
  - Enter the *location* information, such as "pick-up at airport" or "hotel near the waterfront"
  - Enter the *preference* information, such as "automatic transmission, non-smoking" or "non-smoking room"

**NOTE:** These are general guidelines, check with your company to ensure that you fully understand what is expected in these fields.

c) Click **Save**. Note the following:

- As you save segments, the running total appears in the top right corner of the request (below the **Submit Request** button).
- If any of the segments are entered in a currency other than your reimbursement currency **and** if the Expense Rates feature is properly configured, then:
  - The total reflects the conversion to your reimbursement currency.
  - The system uses the current exchange rate.
  - The conversion is calculated when the segment is saved, and it is recalculated if the segment is reopened and saved.

d) Click another segment icon, complete the fields, and click **Save** until all desired segments have been added.

5. On the [Expenses](#) tab:

- Select the appropriate expense type and date.
  - Enter the estimated amount.
  - Add [attendees](#), if applicable.
6. To allocate, click the **Allocate** button for any of the segments or any of the expected expenses.
- NOTE:** Depending on configuration, Segments/Expected expenses be allocated individually, or may be required to be allocated as a group. *If the allocations are grouped, all segments and expected expenses on a request share the same allocations.*
- In the **Allocations for Request** window, allocate the request by percentage or amount.  
**NOTE:** Use an [allocation favorite](#), if desired.
  - When done, click **Save**.
7. [Attach images](#), if desired.
8. Click **Submit Request**.
- If you already have an approver, the request is submitted to that approver.
  - If you do not already have an approver, the **Approval Flow** tab appears. Select an approver and click **Submit Request**.