Complete the Request Header
The request header is the title page of your request. Complete all required fields in red.

Note that a request does not result in reimbursement. It is a budgetary tool used to request permission and approval for your estimated expenses before you incur them. To submit your actual expenses for reimbursement, you must create a new expense report instead.

1. Create a New Request

A Request Does Not Result in Reimbursement
A request is used to request permission and approval for your estimated expenses before you incur them. It does not result in reimbursement.

To submit your actual expenses for reimbursement, you instead must Create a New Expense Report.

- On the home page, there are two ways to start a new request (Figure 1):
  1. In the top menu bar, click Requests, then click New Request at the top.
  2. In the Quick Task bar click New, then click Start a Request.

2. Complete the Request Header
The request header is the title page of your request. Complete all required fields in red for both travel and non-travel requests (Figure 2):

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
• **Request Policy** – keep at the default option *UB-Faculty Staff Not Integrated with Travel.*
• **Request Name** — enter a name for the request (example: ABC Conference.)
• **Request Type** — use the dropdown menu to select the correct request type:
  - Select *Non-Travel* for non-travel expense requests.
  - Select *Pre-Paid Airfare Only* for pre-paid airfare expense requests.
  - Select *Travel* for travel expense requests.
  - Select *UBF funding can use one report for both* if you will be using UBF funds and have both travel and non-travel expense requests.
• **Funding Account Source** — to the best of your knowledge, use the dropdown menu to select the funding source that will be used to reimburse the expenses you are requesting.
• **Request Purpose** — use the dropdown menu to select the purpose of the expenses you are requesting.
• **Business Purpose** — enter a description explaining the business reason of the expenses you are requesting.
• **UB Affiliation** — this is populated from your Human Resources record.
• **Request Trip Start and End Dates** — enter the start and end dates of the request. For travel requests, enter the expected dates of your trip. For non-travel requests, enter the expected date of purchase.

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• **Main Destination City** – select the city of the destination address you will travel to. For non-travel requests, select the city of your work location.

• **Main Destination Country** – this will automatically populate based on the main destination city you selected.

• **Restricted Travel** – select if you will travel to a banned state or warning country. For non-travel requests, select **Did not travel to warning areas**.

• **Approver, Funding Source, Entity and Account** — these fields are optional. Complete if you know the cost approver and account information, or leave these fields blank.

• **Comment** — this field is optional. If necessary, enter additional information about the business purpose or notes about the request.

• When finished, at the top click **Save**.