

## 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):
  - In the top menu bar, click *Requests*, then click *New Request* at the top.
  - In the *Quick Task* bar click *New*, then click *Start a Request*.

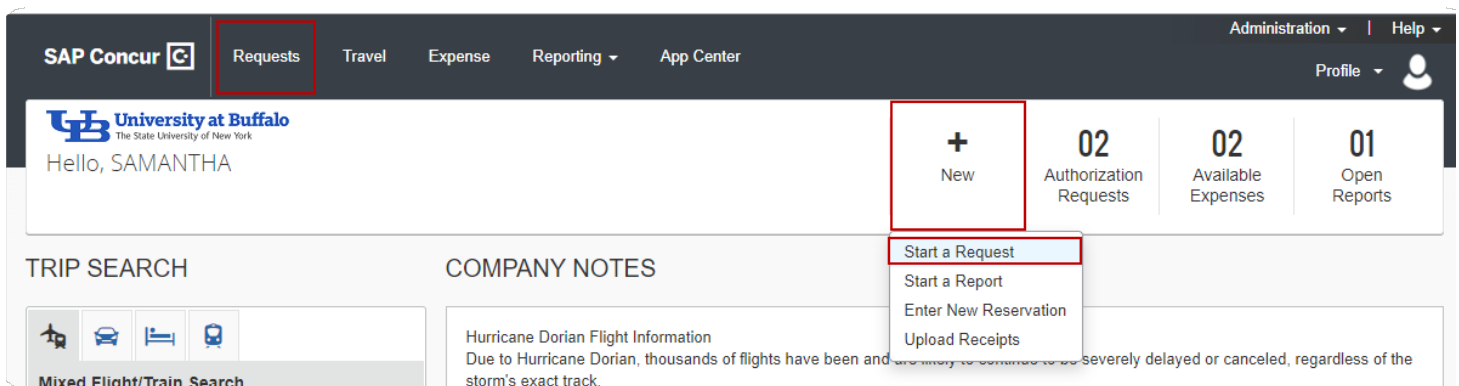


Figure 1

### 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](mailto:ubs-travel-expense-support@buffalo.edu)

The screenshot shows the 'Request' form in SAP Concur. At the top, there are navigation tabs: 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. Below these are 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The form itself has a header with 'Request Name:' and 'Business Purpose:'. Below that are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Request Policy' dropdown is set to '\*UB-Faculty/Staff Not Integrated with Tra'. The form contains several rows of input fields: 'Request Name', 'Request Type', 'Funding Account Source', 'Request Purpose', and 'Business Purpose'; 'UB Affiliation' (set to 'Staff'); 'Request/Trip Start Date', 'Request/Trip End Date', 'Main Destination City', and 'Main Destination Country'; 'Restricted Travel', 'Approver', 'Funding Source', 'Entity', and 'Account'. A 'Comment' field is at the bottom. On the right side, there are buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The status 'Status: Not Submitted' is displayed at the bottom right.

Figure 2

- **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*.