

## Create a New Request

Create a new request to request permission and approval for your estimated business travel or non-travel expenses before you incur them. A request is used for budgetary purposes only and will not result in reimbursement.

### 1. Check with Your Department

- Before creating a request, check with your department to see if you are required to submit one.
  - Some departments require you to submit a request while others do not.
- 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 will need to create an expense report instead. For more information, refer to the tip sheet [Create a New Expense Report](#).

### 2. 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](#).

- Log in to Concur.
- Before starting the request, upload all supporting documentation images to the system.
  - For more information, refer to the tip sheet [Attach Receipts and Supporting Documentation](#).
- 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*.

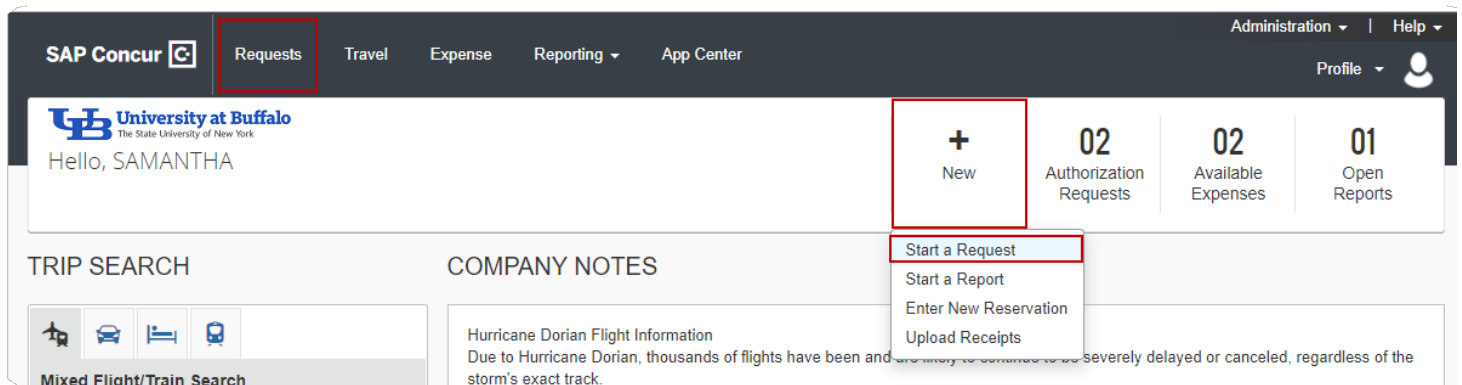


Figure 1

For travel and expense system support, email [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu)

### 3. Complete the Request Header

- On the request header, complete the required fields in red. When finished, at the top click *Save*.
  - For more information, refer to the tip sheet [Complete the Request Header](#).

### 4. For Travel Requests, Create Segments

- If you are requesting approval for estimated travel expenses, click the appropriate icon to create a travel segment (Figure 2).

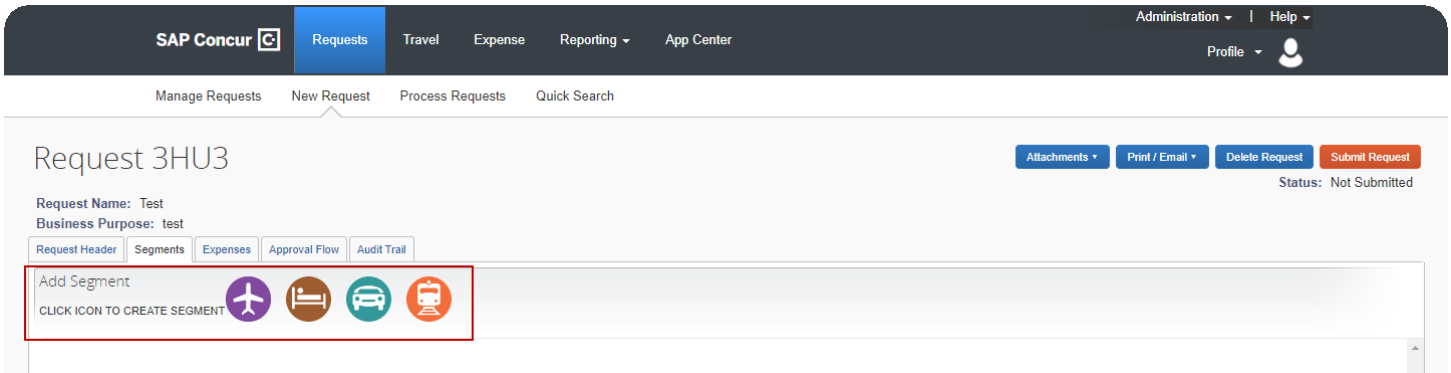


Figure 2

- For each travel segment, complete the required fields in red.
  - Enter your estimated travel information and the estimated amount.
  - When finished with each segment, at the bottom click *Save* (Figure 3).
  - Continue adding segments until all of your estimated travel expenses are entered.

Request 3HU3

Request Name: Test  
Business Purpose: test

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

Add Segment  
CLICK ICON TO CREATE SEGMENT

Air Ticket  
Round Trip | One Way | Multi-Segment  
Amount:  USD

Outbound  
From:   
To:   
Date: 10/28/2019  
Comment:

Return  
Date: 10/31/2019  
Comment:

Save Cancel

Figure 3

## 5. Add Expenses

- Click the *Expenses* tab at the top of the request.
- For both travel and non-travel requests, add your estimated expenses.
- Click *New Expense*. Search and select the appropriate expense type from the list (Figure 4).

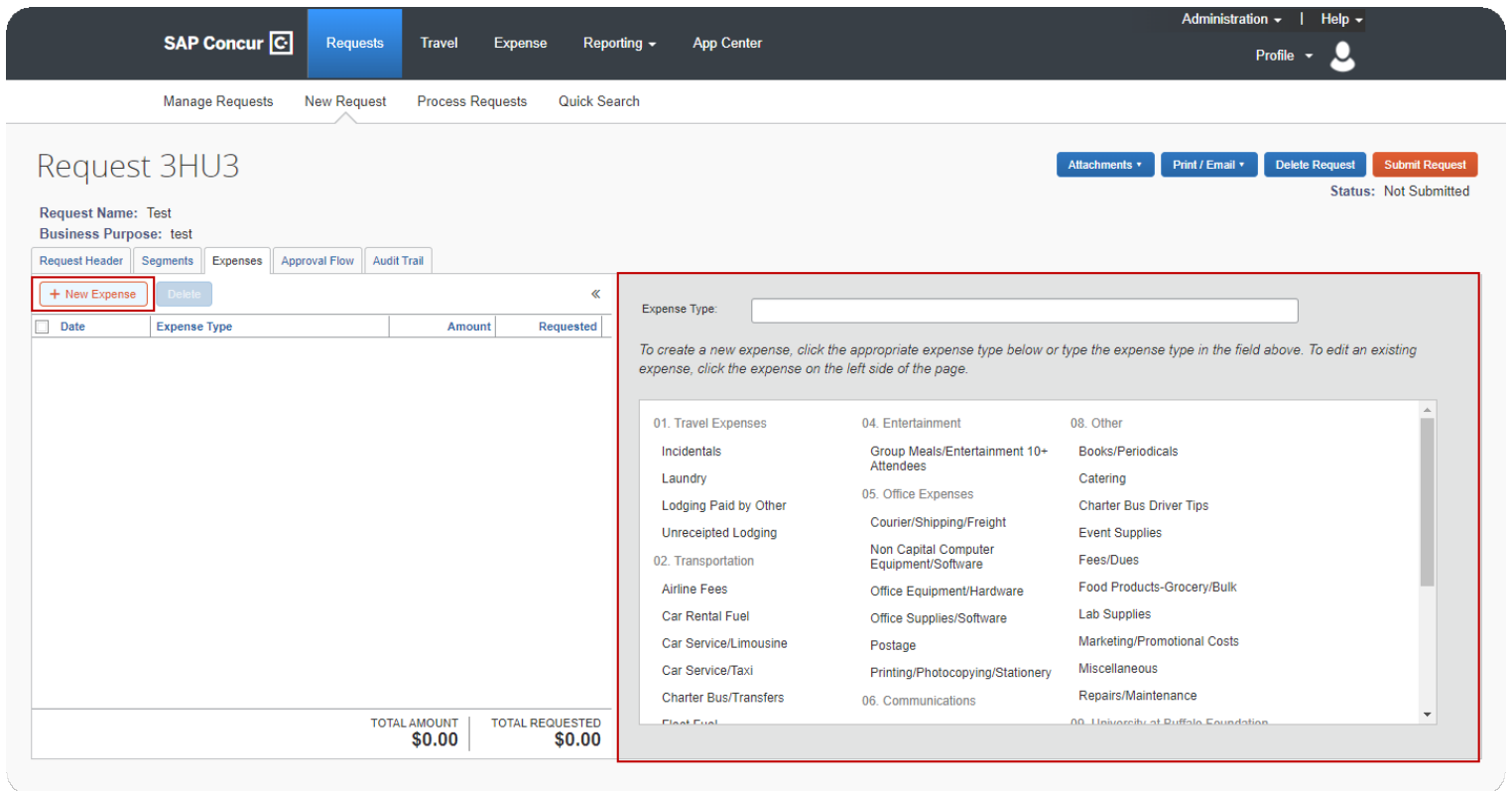


Figure 4

- For each expense, complete the required fields in red.
  - For *Transaction Amount*, enter the estimated expense amount.
  - When finished, click *Save*.
- Be sure to attach any supporting documentation to the request.
  - At the top of the request, click *Attachments* then click *Attach Documents*.
  - Click *Browse* to select your files. Click *Open* then click *Upload*, then click *Close*.
- When finished creating your request, at the top click *Submit Request*.
  - Your request will be submitted to your time and attendance supervisor for approval.
  - Once your supervisor approves your request, you are approved to make your purchases.