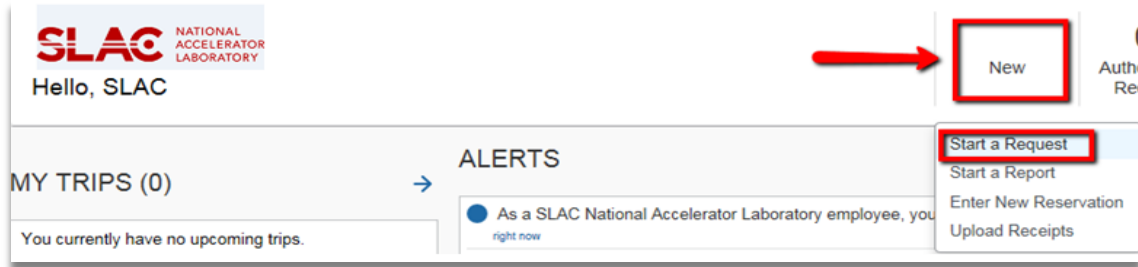


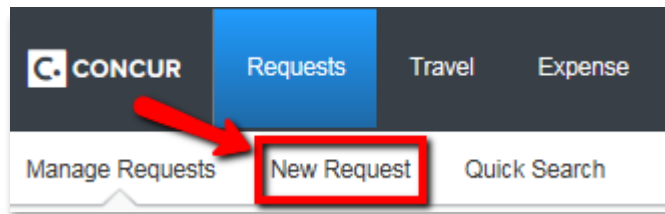
## Creating a Request (Detailed)

**Objective:** This section will go over the steps in detail on how to create a Domestic Travel Request.

1. Hover over the + *New* button near the top of the screen and **select** *Start a request*.



- a. OR **click** on *Requests* at the top left of the screen. This will take you to a screen with your active requests shown. You can then **click** *New Requests* in order to create a new request.



2. On the *Requests* page you will see 4 tabs, titled *Request Header*, *Expenses*, *Approval Flow*, and *Audit Trail*, with *Request Header* selected.

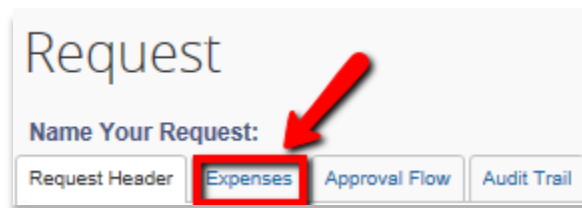
A screenshot of the 'Request' form in the CONCUR system. The form has a title 'Request' and a status 'Status: Not Submitted'. At the top right, there are buttons for 'Cancel', 'Save', 'Print', 'Delete Request', and 'Submit Request'. Below the title, there are four tabs: 'Request Header', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is selected. The form contains several fields: 'Request Policy?' (dropdown menu with 'SLAC-Domestic Travel' selected), 'Name Your Request' (text input), 'Request/Trip Start Date' (calendar icon), 'Request/Trip End Date' (calendar icon), '\*Trip Type' (dropdown menu with 'Domestic' selected), and another '\*Trip Type' (dropdown menu with 'Domestic' selected). There are also checkboxes for 'Will you be attending a conference?' and 'Will this include personal travel?'. A 'Comment' text area is below these. At the bottom, there are fields for 'Project (Required field)', 'Activity', 'WBS', 'Fund', 'Org', and 'Location'. A note at the bottom says 'To Continue: Click on the 'Expenses' tab'.

3. **Select** between *Foreign* and *Domestic* Travel from the Request Policy dropdown first and then proceed with the rest of the *Request Header* form.

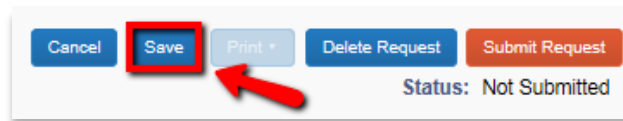
**Note:** Make sure to select a *trip type* that matches your request policy (i.e. For **\*SLAC – Foreign Travel** select *Foreign* as the trip type and for **\*SLAC – Domestic Travel** select the *Domestic* trip type.)

**Note:** When a project number is selected, the drop down menus for *Activity*, *WBS*, and *Fund* will narrow down to only show what is applicable to the project selected.

4. After completing the *Request Header*, continue on to the *Expenses* tab. Clicking the *Expenses* tab will save your progress from the *Request Header* tab automatically.

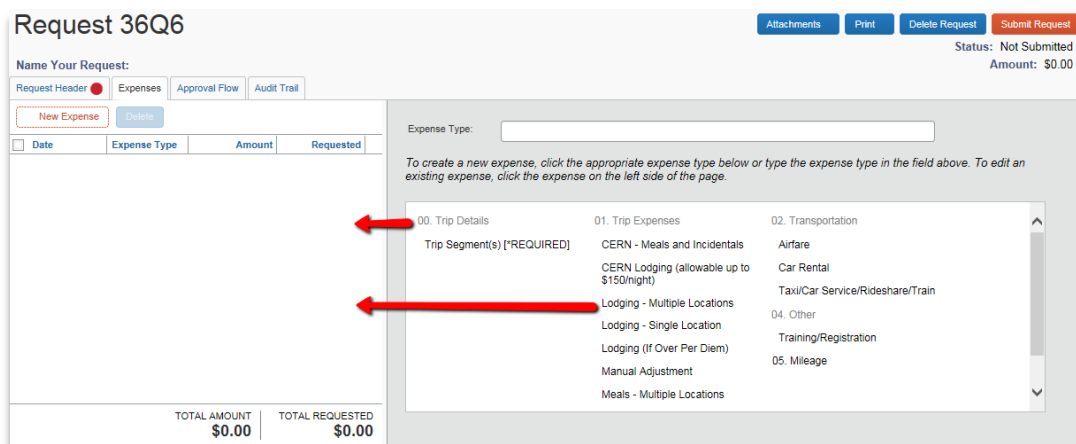


- a. OR click the *Save* button near the upper right hand corner of the screen.



5. Once the *Expenses* tab is selected, you will see the page divided in two.

**Note:** On the right side you will a list of available expenses to select from. The left side will populate with each expense you enter and save to the request.



6. **Click** on any of the expense listed in the right hand side of the screen.



**Note:** It is recommended that you complete the **Trip Segments** expense first. It is a required expense and you will not be able to complete your request without this expense type.

7. For each expense selected, **complete** all the fields.

8. Once all the fields are filled out, **click** the *Save button* on the lower right hand side.

TOTAL AMOUNT \$0.00 | TOTAL REQUESTED \$0.00 | Save Allocate Cancel

9. After clicking *Save*, the expenses will appear on the left half of the screen.



**Note:** On the right side you will see a list of available expenses to select from. The left side will populate with each expense you enter and save to the request.

**Request 36Q6** Attachments Print Delete Request Submit Request  
Status: Not Submitted  
Amount: \$800.00

Name Your Request:  
Request Header Expenses Approval Flow Audit Trail

New Expense Delete

Date	Expense Type	Amount	Requested
04/20/2017	Airfare	\$800.00	\$800.00

Expense Type: Airfare Transaction Date: 04/20/2017  
Description: [Text Area] Transaction Amount: 800.00 USD  
Comment: [Text Area]

TOTAL AMOUNT \$800.00 | TOTAL REQUESTED \$800.00 | Save Allocate Cancel

10. Continue adding all relevant expenses for the trip.

11. Once you have finished, **click** *Submit Request*.

12. **Read** the popup containing the SLAC User Confirmation and then **click** *Accept & Submit*.

**Final Review**

**SLAC User Confirmation Agreement**

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for SLAC and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying SLAC in full for those expenses.

**Accept & Submit** **Cancel**

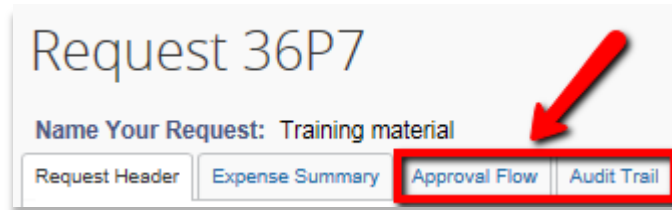


**Note:** The expense types under request are to provide an estimate of your trip, not an actual amount. Actual expenses will be compiled later when filling out the expense report.

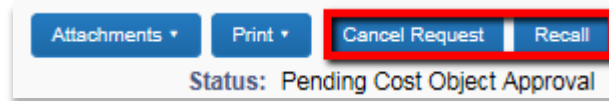
13. Your request will now be visible in the *Active Request* page.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total
Training material	36Q6	Submitted & Pending Approval - Approver, Default	05/17/2017	05/03/2017	\$800.00

14. By clicking on your request, you can review your request, as well as check on the approval progress under the *Approval Flow* and *Audit Trail* tabs.



15. You can also *cancel* or *recall* your request by clicking the appropriate buttons in the upper right hand corner.



**Note:** Recalling your request is useful if you need to make changes to your request. Canceling your request will remove your request fully from the system, and you will need to create a brand new request if you wish to resubmit your request. Note that doing either action will cause your approval process to reset.