

# CREATE AND SUBMIT A TRAVEL REQUEST

Updated April 26, 2021

## TRAVEL APPLICATION

### Request

### HELPFUL HINTS

- The purpose of a travel request is to obtain pre-travel authorization. Per University policy, a travel request must be submitted and approved prior to booking any travel accommodations and prior to travel.
- Expenses cannot be submitted without an approved travel request.
- The travel request allows the individual to provide detailed information on where the traveler is going and why, the travel accommodations needed (e.g., airfare, hotel, etc.) and the costs that will be incurred.

### CREATE A NEW REQUEST

From the request tab in Concur, click on new request – or – from the home page, click on +New, then start a request.

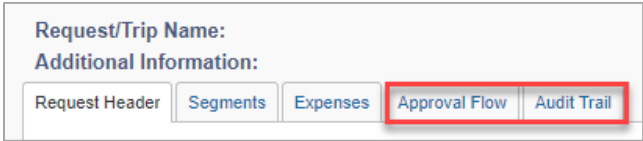
A blank request appears.

A request contains three main areas to enter travel information: Request Header, Segments, and Expenses.

# CREATE AND SUBMIT A TRAVEL REQUEST

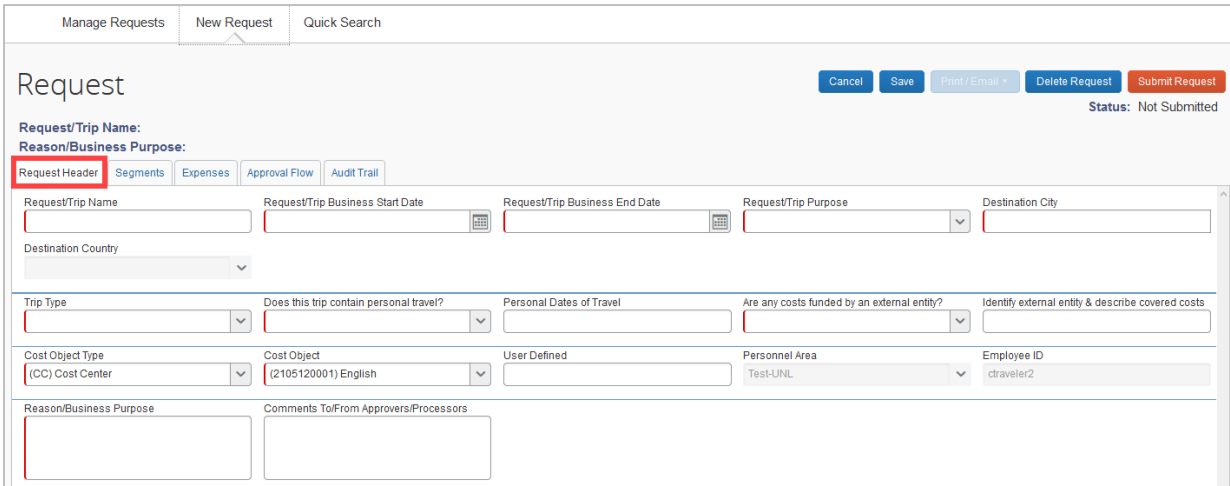
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The Approval Flow and Audit Trail tabs are informational only.



## REQUEST HEADER

A request header provides the general information about the requested trip. The fields with | (red left border) indicate the information is required.



Enter the following **required** information:

- *Request/Trip Name* – create a name for the trip. It is recommended to name the trip the destination city and date.
- *Request/Trip Business Start Date* – enter the start date of the trip
- *Request/Trip Business End Date* – enter the end date of the trip
- *Request/Trip Purpose* – enter the specific purpose or description of the trip
- *Destination City* – enter the destination city
- *Destination Country* – this will autofill after the city has been entered
- *Trip Type* – select either Domestic, International, Recruiting or Team/Group
- *Does this trip contain personal travel?* Answer Yes or No. If the traveler intends to add on days to a business trip for personal travel it needs to be indicated.
- *Are any costs funded by an external entity?* – if any of the costs associated with the trip are being funded by someone other than the university.
- *Cost Object Type* – defaults to Cost Center; can be switched to WBS if desired
- *Cost Object* – defaults to the Cost Center associated with the traveler; can be changed if desired
- *Reason/Business Purpose* – provide a business purpose for the travel request

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**Optional:** Enter the following information:

- *Personal dates of travel* – if the traveler intends to add on days to a business trip, enter the date(s)
- *Identify external entity & describe covered costs* – describe the external entity and covered costs
- *User Defined* – leave blank unless inputs are requested by a campus department
- *Personnel Area* – informational only
- *Employee ID* – informational only
- *Comments To/From Approvers/Processors* – opportunity to provide additional information to approvers and processors

When the request header is complete, either click on **Save** or click on **Segments** tab to continue. Once saved, the request ID auto-generates and appears at the top of the request.

The screenshot shows the 'Request Header' section of a travel request form. The request ID 'AQLF' is highlighted in a red box. Below the header, there are fields for 'Request/Trip Name' (San Diego, CA), 'Request/Trip Business Start Date' (04/27/2021), and 'Request/Trip Business End Date' (04/30/2021). The 'Destination Country' is set to 'UNITED STATES'. The 'Trip Type' is 'Domestic' and 'Does this trip contain personal travel?' is 'No'.

**SEGMENTS**

The segments tab contains the travel-based sections of airline ticket, hotel reservation, and car rental.

The screenshot shows the 'Segments' tab selected in the travel request form. The request ID 'AQLF' is at the top. There are buttons for 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted'. Below the tabs, there is an 'Add Segment' section with three icons: an airplane (airline ticket), a bed (hotel reservation), and a car (car rental). The text 'CLICK ICON TO CREATE SEGMENT' is next to the icons.

To create a segment, click on the corresponding icon . The appropriate segment fields appear.

### Air Ticket

**Request AQLF** Attachments | Print / Email | Delete Request | **Submit Request**  
 Status: Not Submitted

Request/Trip Name: San Diego, CA  
 Reason/Business Purpose: Human Resources conference

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

Add Segment  
 CLICK ICON TO CREATE SEGMENT

**Air Ticket** Round Trip  One Way  Amount: 400.00 USD

**Outbound**  
 From:   
 To:   
 Date:  Depart at   
 Comment:

**Return**  
 Date:  Depart at   
 Comment:

**Save** Cancel

The fields with | (red left border) indicate the information is required.

The default is set to round trip. This can be changed to one way. Enter the following **required** information:

- **Amount:** enter the estimated amount the air ticket will cost
- **From:** indicate the city the traveler is flying from
- **To:** indicate the city the traveler is flying to
- **Outbound Date:** the date will transfer from the Request Header
- **Return Date:** the date will transfer over from the Request Header

**Optional:** enter the following information:

- [Outbound] Depart at (toggles to Arrive at)
- [Outbound] Comment
- [Return] Comment
- [Return] Depart at (toggles to Arrive at)

Once all information is entered to the air ticket segment, click on **Save**. As segments are saved, the running total appears in the top right corner of the request.

### Hotel Reservation

The fields with | (red left border) indicate the information is required.

Enter the following **required** information:

- **Amount:** enter the estimated total amount the hotel reservation will cost. Enter the total amount – not the daily rate.
- **City:** indicate the city of the hotel

**Optional:** enter the following information:

- [Check-In] Date – transfers over from the Request Header
- [Check-In] Time
- [Check-In] Detail
- [Check-Out] Date – transfers over from the Request Header
- [Check-Out] Time
- [Check-Out] Comment

Once all the information is entered to the hotel reservation segment, click on **Save**.

### Car Rental

The screenshot shows a web interface for adding a travel segment. At the top, there are navigation tabs: Request Header, Segments, Expenses, Approval Flow, and Audit Trail. Below these is a section titled 'Add Segment' with the instruction 'CLICK ICON TO CREATE SEGMENT'. There are three icons: an airplane, a hotel, and a car. The car icon is highlighted with a red box. Below the icons are two sections: 'Pick-up' and 'Drop-off'. Each section has a 'City' field (with a red vertical bar on the left), a 'Date' field (with a calendar icon and a dropdown arrow), and a 'Detail' field. At the bottom, there is a 'Comment' field. In the bottom right corner, there are 'Save' and 'Cancel' buttons.

The fields with | (red left border) indicate the information is required.

Enter the following **required** information:

- **Amount:** enter the estimated total amount the car rental will cost. Enter the total amount – not the daily rate.
- **Pick-up City:** indicate the city where the vehicle will be picked up
- **Drop-off City:** indicate the city where the vehicle will be dropped off

**Optional:** enter the following information:

- [Pick-up] Date – transfers over from the Request Header
- [Pick-up] Time
- [Pick-up] Detail
- [Drop-off] Date – transfers over from the Request Header
- [Drop-off] Time
- [Drop-off] Comment

Once all the information is entered to the car rental segment, click on **Save**.

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## Travel Quick Reference Guide

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### EXPENSES

The expense types are listed on the right. Expenses can be added by clicking on the expense type, entering the information, and clicking on **Save**.

Request AQLF

Request/Trip Name: San Diego, CA  
Reason/Business Purpose: Human Resources conference

Status: Not Submitted  
Amount: \$1,200.00

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

+ New Expense Delete

Date	Expense Type	Amount	Requested
04/27/2021	Airfare (commercial ticket)	\$400.00	\$400.00
04/27/2021	Lodging	\$600.00	\$600.00
04/27/2021	Car Rental	\$200.00	\$200.00

TOTAL AMOUNT \$1,200.00 TOTAL REQUESTED \$1,200.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	Meal (per diem)	Misc Travel-parking/tolls/etc
Plane (state/private/rented /chartered)	Official Func Exp-Agenda/Names	Registration/Conf Fees
Taxi/Shuttle/Train/Bus	04. Mileage	Team/Group Costs
		Zero \$ Trip

- A. The expenses tab will transfer over any segments that have been entered for the travel request.
- B. Search for expense types
- C. Available expense types
- D. The running total appears in the top right corner of the request

To enter a new expense, click on the expense type on the right.

Request AQLF

Request/Trip Name: San Diego, CA  
Reason/Business Purpose: Human Resources conference

Status: Not Submitted  
Amount: \$1,200.00

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

+ New Expense Delete

Date	Expense Type	Amount	Requested
04/27/2021	Airfare (commercial ticket)	\$400.00	\$400.00
04/27/2021	Lodging	\$600.00	\$600.00
04/27/2021	Car Rental	\$200.00	\$200.00

TOTAL AMOUNT \$1,200.00 TOTAL REQUESTED \$1,200.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	<b>Meal (per diem)</b>	Misc Travel-parking/tolls/etc
Plane (state/private/rented /chartered)	Official Func Exp-Agenda/Names	Registration/Conf Fees
Taxi/Shuttle/Train/Bus	04. Mileage	Team/Group Costs
		Zero \$ Trip

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The expense type screen appears. Enter the required information and click on **Save**.

Date	Expense Type	Amount	Requested
04/27/2021	Airfare (commercial ticket)	\$400.00	\$400.00
04/27/2021	Lodging	\$600.00	\$600.00
04/27/2021	Car Rental	\$200.00	\$200.00

TOTAL AMOUNT: \$1,200.00 | TOTAL REQUESTED: \$1,200.00

Expense Type: Meal (per diem) | Request/Trip Start Date: 04/27/2021  
Request/Trip Business End Date: 04/30/2021 | Destination City: San Diego, California  
# of days: 4 | GSA rate will be used to calculate total after you hit save: 0.00

Comment: [Empty text box]

Buttons: Save, Allocate, Cancel

The new expense type has been added to the list.

Request AQLF

Request/Trip Name: San Diego, CA | Reason/Business Purpose: Human Resources conference | Status: Not Submitted | Amount: \$1,398.80

Date	Expense Type	Amount	Requested
04/27/2021	Airfare (commercial ticket)	\$400.00	\$400.00
04/27/2021	Lodging	\$600.00	\$600.00
04/27/2021	Car Rental	\$200.00	\$200.00
04/27/2021	Meal (per diem)	\$198.80	\$198.80

TOTAL AMOUNT: \$1,398.80 | TOTAL REQUESTED: \$1,398.80

Expense Type: [Input field]

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- 01. Transportation
- 03. Food/Meals
- 06. Other
- Fuel/Gas
- Meal (per diem)
- Misc Travel-parking/tolls/etc
- Plane (state/private/rented /chartered)
- Official Func Exp-Agenda/Names
- Registration/Conf Fees
- Taxi/Shuttle/Train/Bus
- 04. Mileage
- Team/Group Costs
- Zero \$ Trip

Continue to add additional expenses as needed.




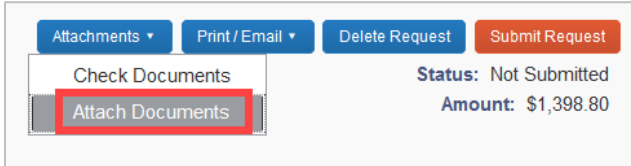
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## ADD ATTACHMENTS

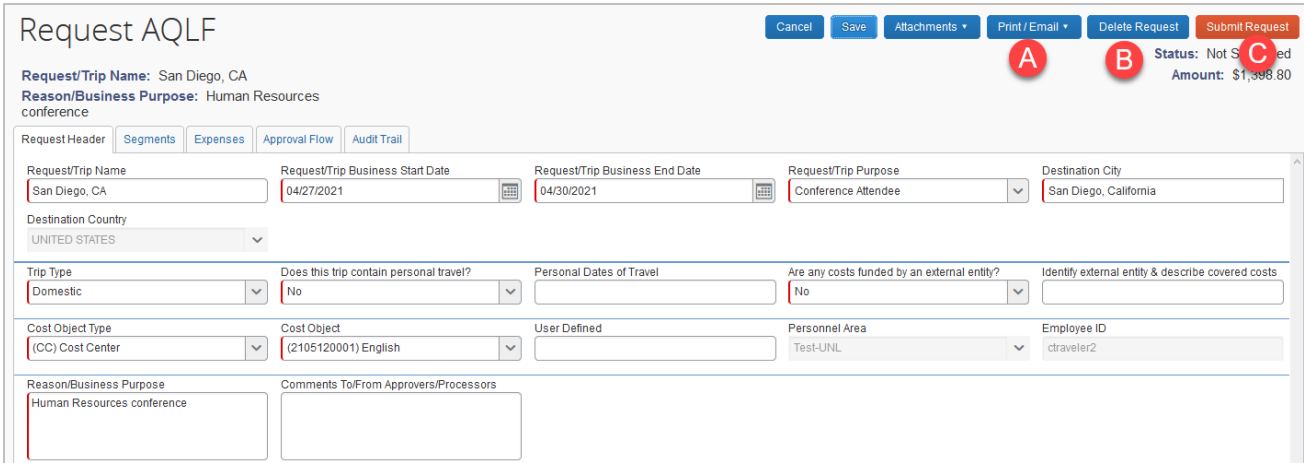
To add an attachment to the request, such as a detailed conference brochure, click Attachments at the top right and select Attach Documents from the dropdown menu.

 Attachments in the travel request do not carry over into the expense report.

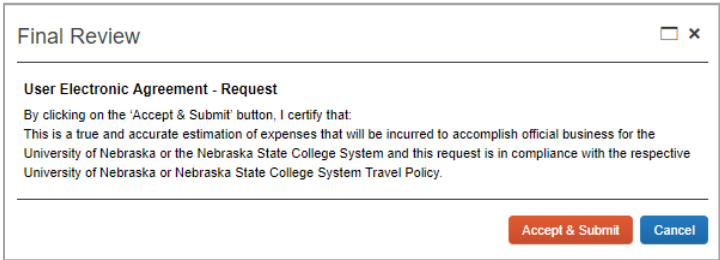


## SUBMIT THE REQUEST

Once all the information has been entered, several options are available. To save the request, return to the Request Header and click on **Save**.



- a. **Print/Email** – select either *pre-trip approval report* or *audit trail*. A linear view of the corresponding information will display and provide options to save as PDF, email or print
- b. **Delete Request** – deletes entire request
- c. **Submit Request** - progresses the request for Final Review. A pop-up window appears, click on **Accept & Submit**.

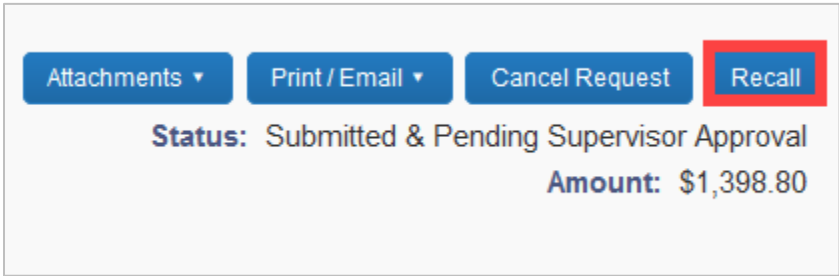


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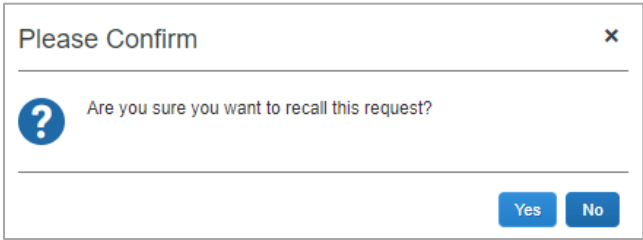
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## RECALL THE REQUEST

A submitted request can be edited if not yet approved. To recall, open the request and click **Recall** at the top right.



A confirmation pop-up will appear.



From the request overview screen the status shows 'Sent Back to User.'

Request Name		Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	San Diego, CA Human Resources conference	AQLF	Sent Back to User	04/27/2021 04/30/2021	04/26/2021	\$1,398.80	\$0.00	\$0.00	
<input type="checkbox"/>	Roswell, NM Conference	ANLQ	Approved	04/15/2021 04/20/2021	04/14/2021	\$1,211.00	\$1,211.00	\$1,211.00	Expense

If a request has already been approved, the request cannot be recalled or updated.