CREATE AND SUBMIT A TRAVEL REQUEST

Travel Quick Reference Guide

Updated September 25, 2018

TRAVEL APPLICATION

Request

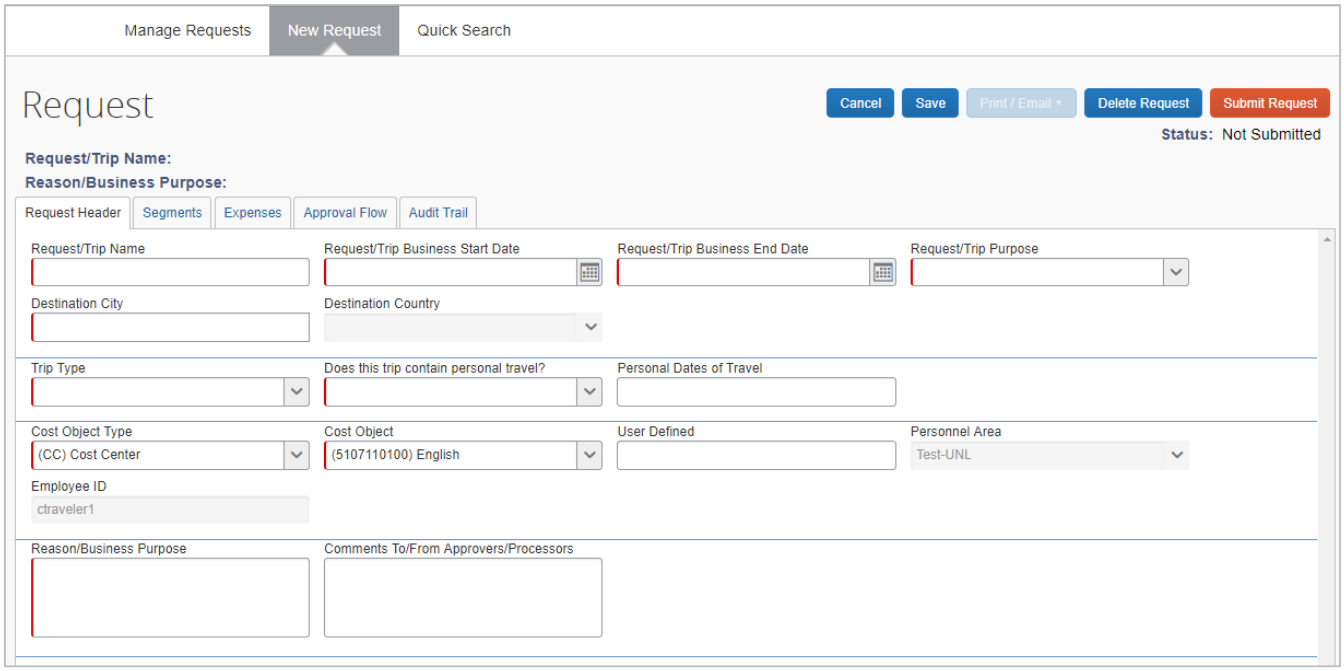
HELPFUL HINTS

- The purpose of a travel request is to obtain pre-travel authorization. This is required before booking any travel accommodations in the Concur booking tool.
- 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.
- The Concur application is single sign-on, meaning it is not necessary to enter credentials (user name or password) to access. Concur requests, booking, and expense applications can only be accessed via the Firefly portal.

PROCEDURE

To create a new request:

1. From the request tab in Concur, click on new request – *or* – from the home page, click on +New, then start a request.
2. A blank request appears.



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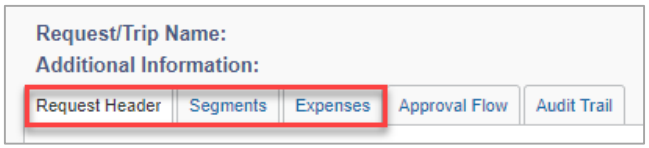
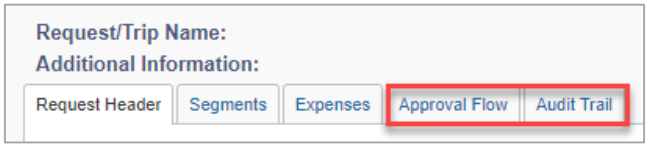
A request contains three main areas to enter travel information: Request Header, Segments, and Expenses.

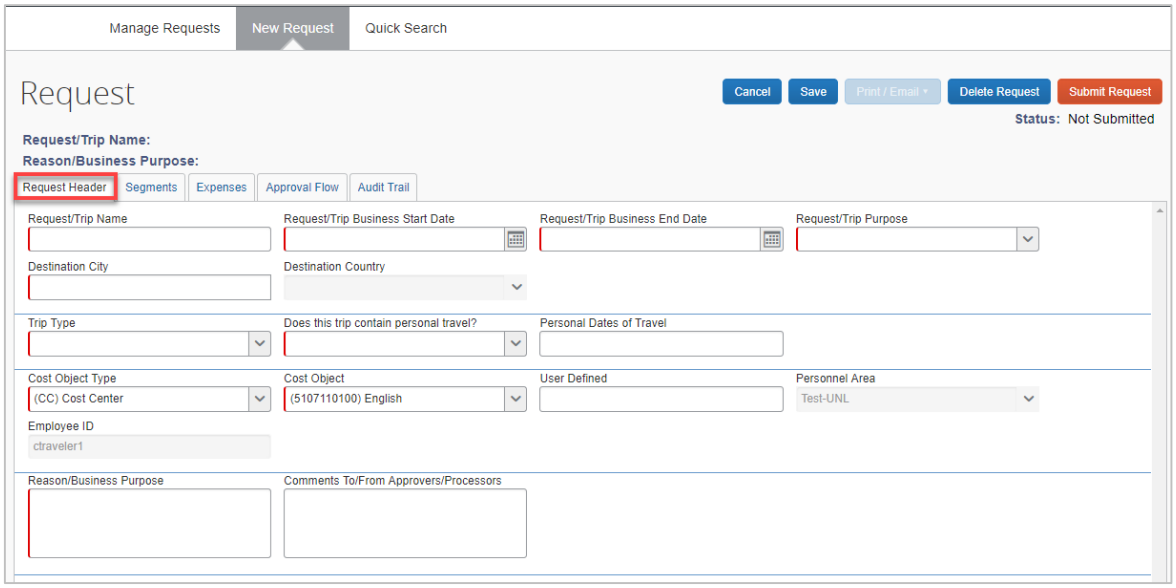


The Approval Flow and Audit Trail tabs are informational only.



Request Header

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



3. 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

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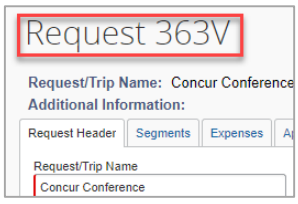
- *Does this trip contain personal travel?* Answer Yes or No. If the traveler intends to add on days to a business trip for personal travel it needs to be indicated.
- *Cost Object Type* – defaults to Cost Center; can be switched to WBS if desired
- *Cost Object* – defaults to the Cost Center associated with the traveler; can be changed if desired
- *Reason/Business Purpose* – provide a business purpose for the travel request

4. 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)
- *User Defined* – leave blank unless inputs are requested by a campus travel trainer
- *Personnel Area* – informational only
- *Employee ID* – informational only
- *Comments To/From Approvers/Processors* – opportunity to provide additional information to approvers and processors

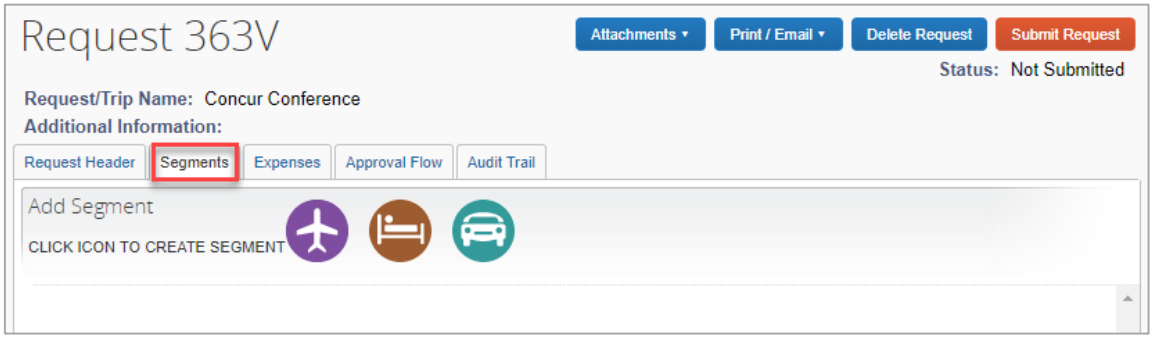
5. When the request header is complete, either click on Save or click on Segments tab to continue.

   Once saved, the request ID auto-generates and appears at the top of the request.



Segments

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



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

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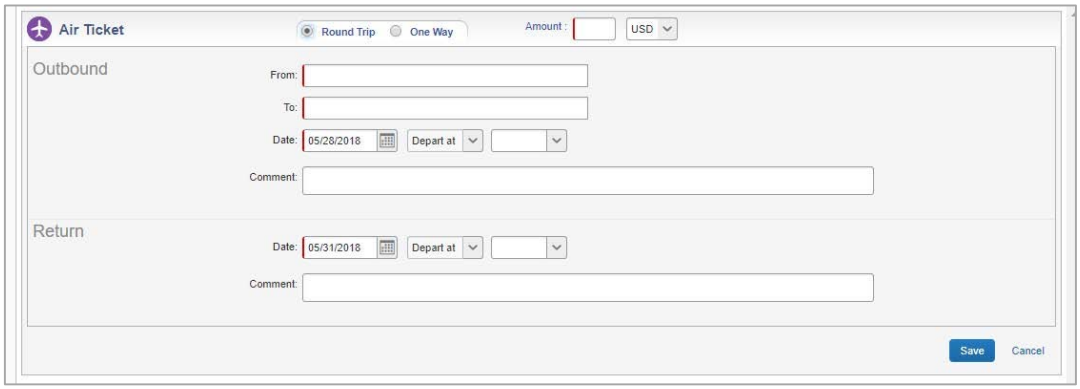
Air Ticket



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 over 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.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request.

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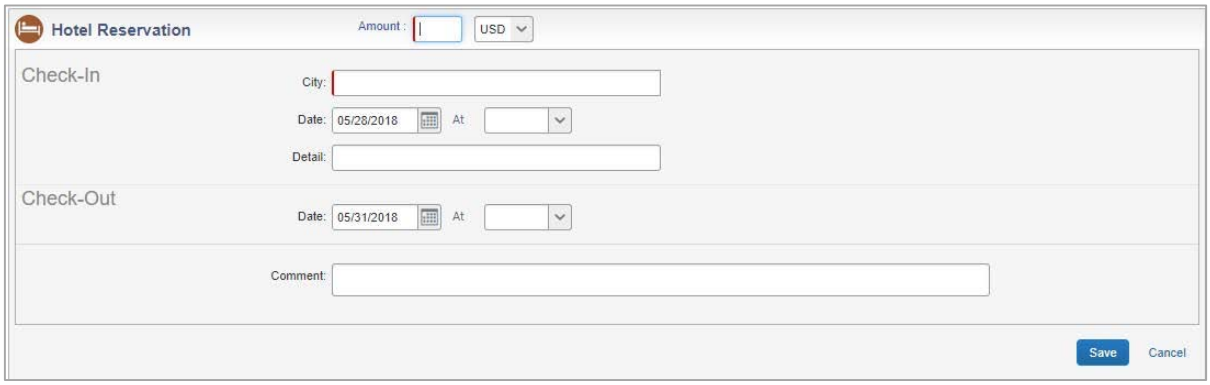
Hotel Reservation



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.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request (below the submit request button).

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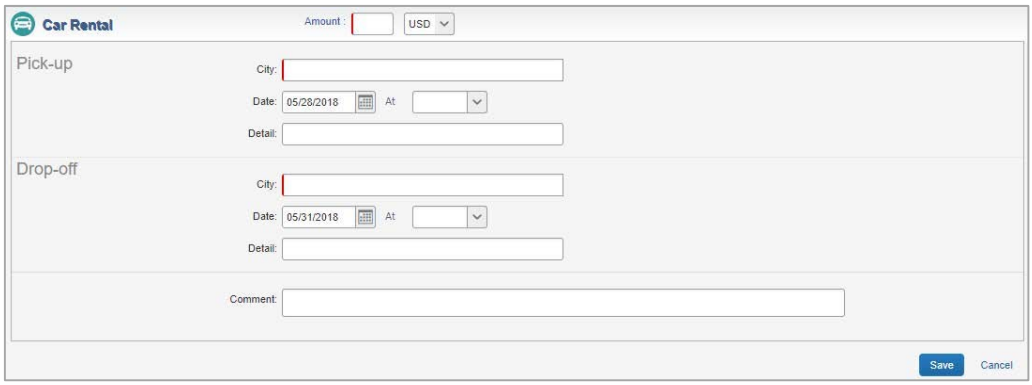
Car Rental



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.

If applicable, add other segments such as hotel reservation(s), car rental(s), or additional air ticket(s) by clicking on the corresponding icon. As segments are saved, the running total appears in the top right corner of the request (below the submit request button).

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.

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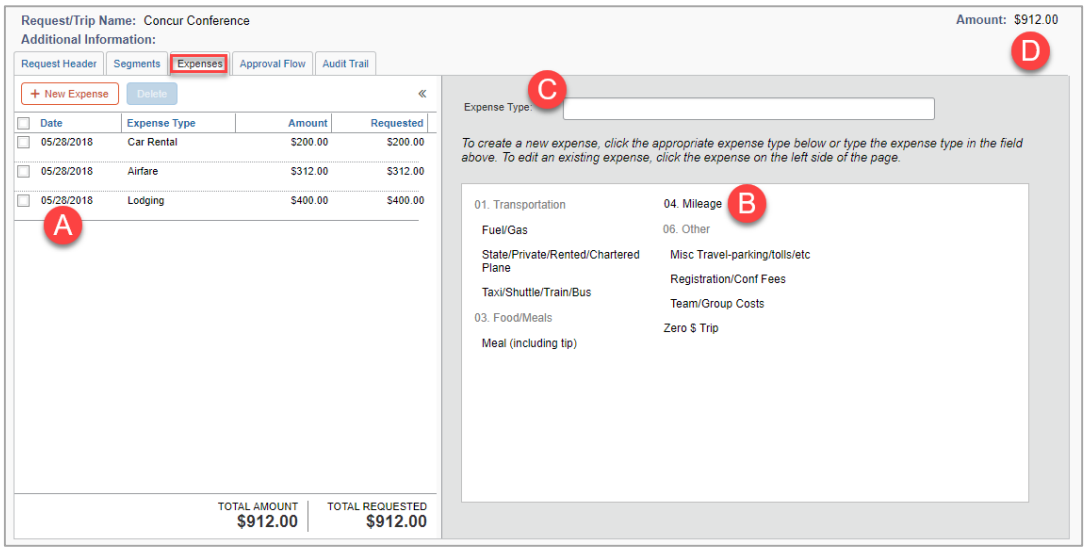
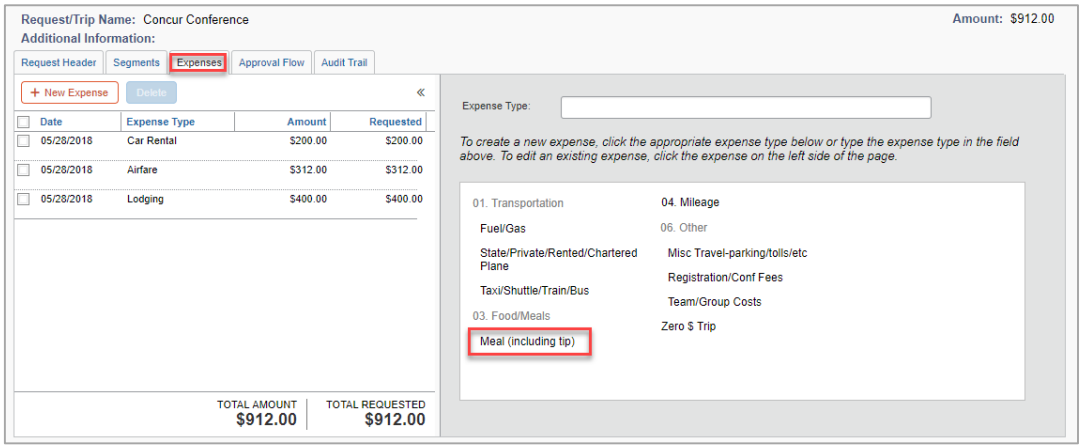


A. The expenses tab will transfer over any segments that have been entered for the travel request.
B. Expense types available
C. Search for expense types
D. The running total appears in the top right corner of the request

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



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

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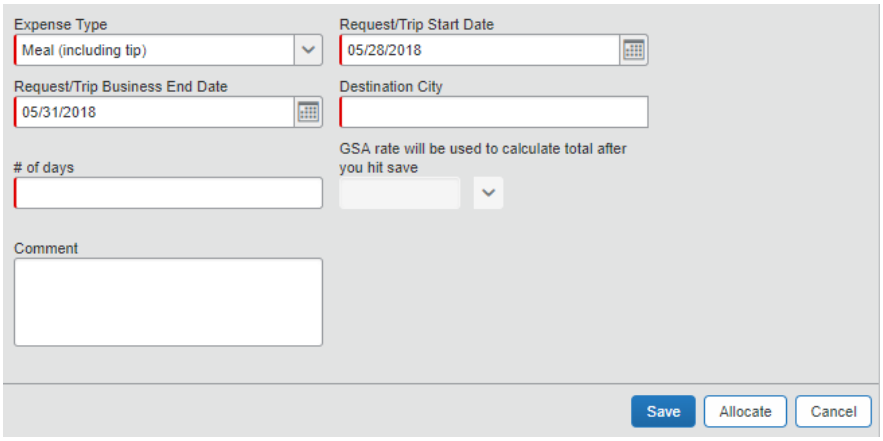
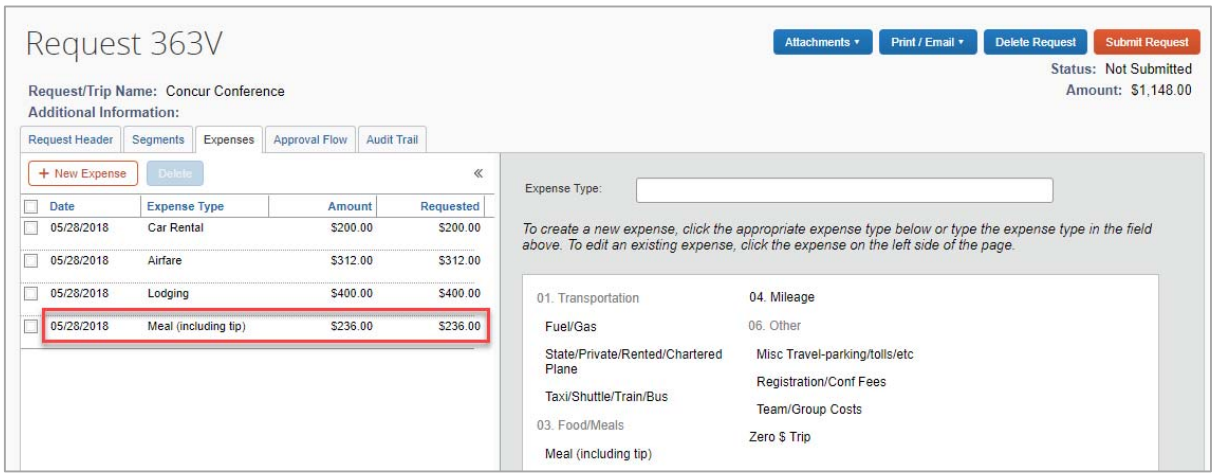


The new expense has been added to the list.



Continue to add additional expenses as needed.

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. Attachments - add a document to the request (e.g., conference brochure or other information)

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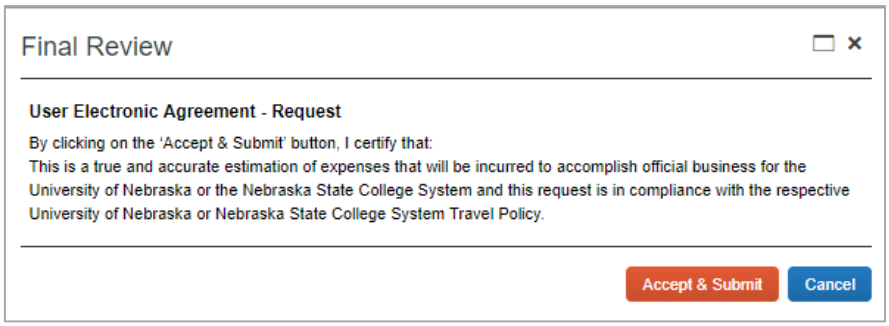
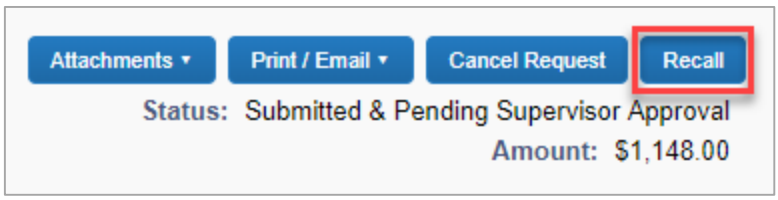
b. Print/Email – displays a linear view of the request and provides options to save as PDF, email or print
c. Delete Request – deletes entire request
d. Submit Request - progresses the request for Final Review. A pop-up window appears, click on **Accept & Submit**.



A submitted request can be edited if not yet approved. Click on **Recall**.



A confirmation pop-up will appear.

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

If a request has already been approved, the request can either be canceled or closed/inactivated. See additional documentation for those activities.

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