Concur: Create a Travel Request

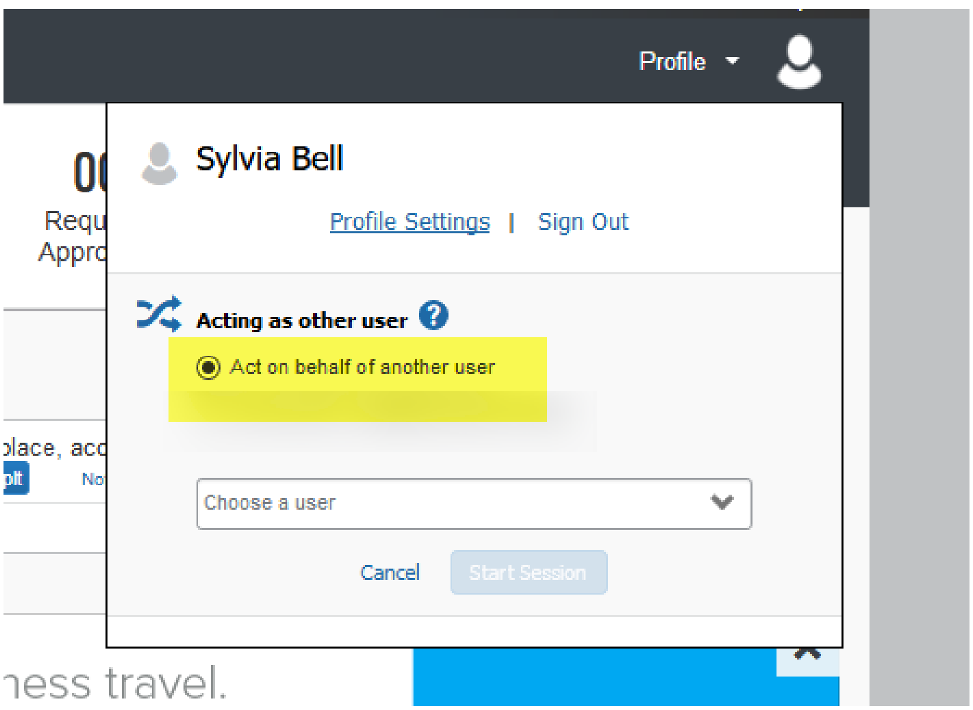
Purpose: All travel requires a request (Travel Authorization, T-Auth) for pre-trip approval and to encumber funds prior to traveling. Travel Requests are also used to contact a travel agent for booking assistance. Agents with World Travel Services may ask for a Request number before assisting you.

A Note Regarding Requests and Encumbrances

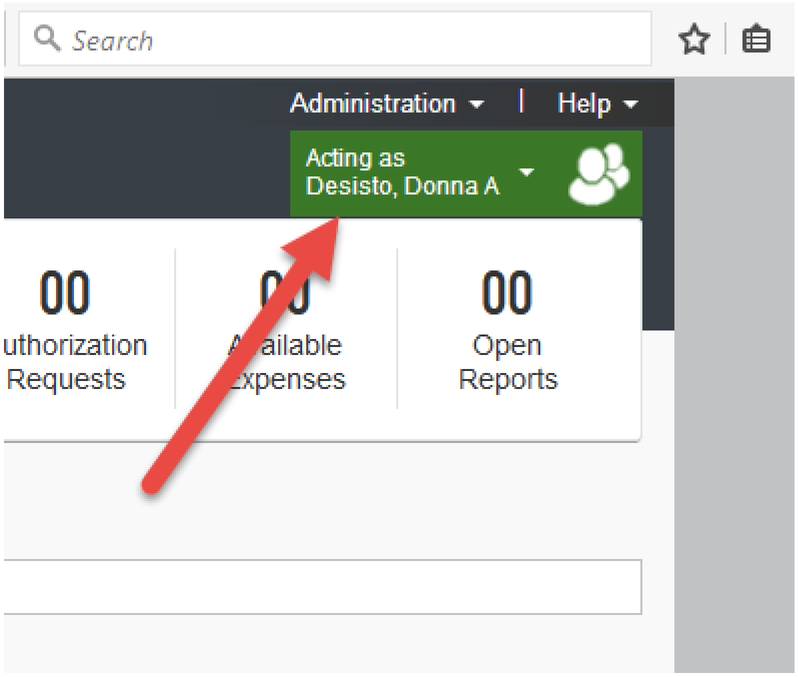
Amounts on a travel request are **estimates** to encumber funds. As travel requests should be created **prior to travel**, it is not possible to know the exact amounts or detailed expense types of expenses to be incurred**.** Users familiar with OMNI should note they are unable to import expense lines from a request into an expense report in Concur.

If Creating a Request on Behalf of Another Employee

The user must be acting as a delegate for that employee. To act as a delegate, click on **Profile** and select **Act on behalf of another user.**

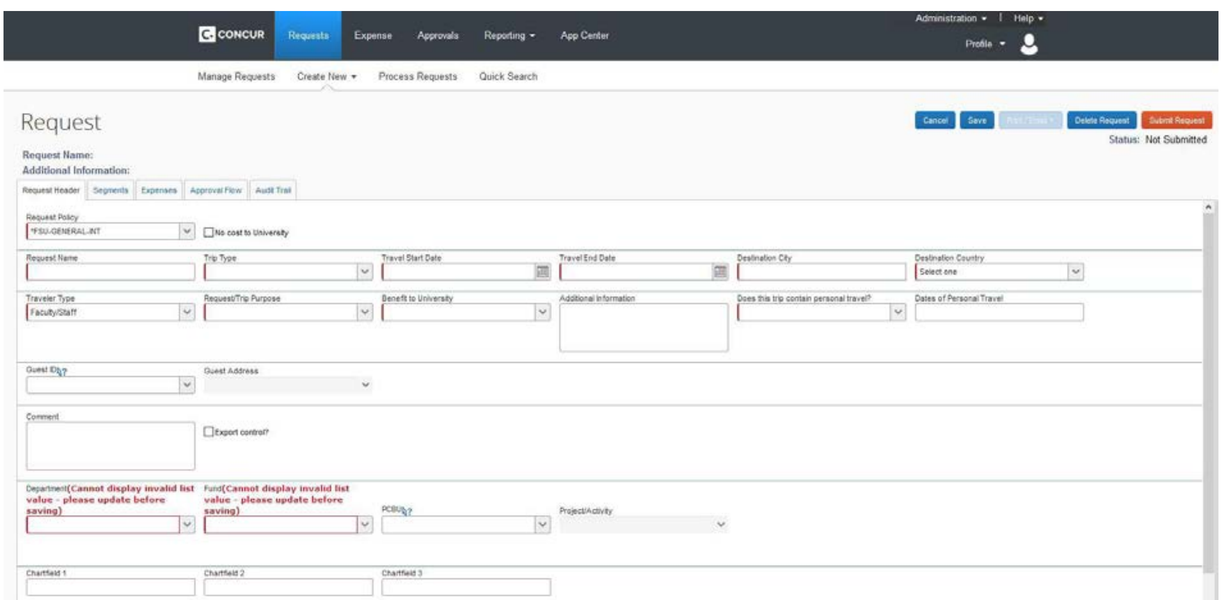


Select a user from the dropdown menu. When acting as a delegate, the appearance of the top right corner changes, indicating that the user is acting as a delegate.



Create a Travel Request

To begin a new Travel Request, click on **Requests** then select New Request. The user may alternatively click **Create New**, then select Request. All fields with a red sidebar are required.

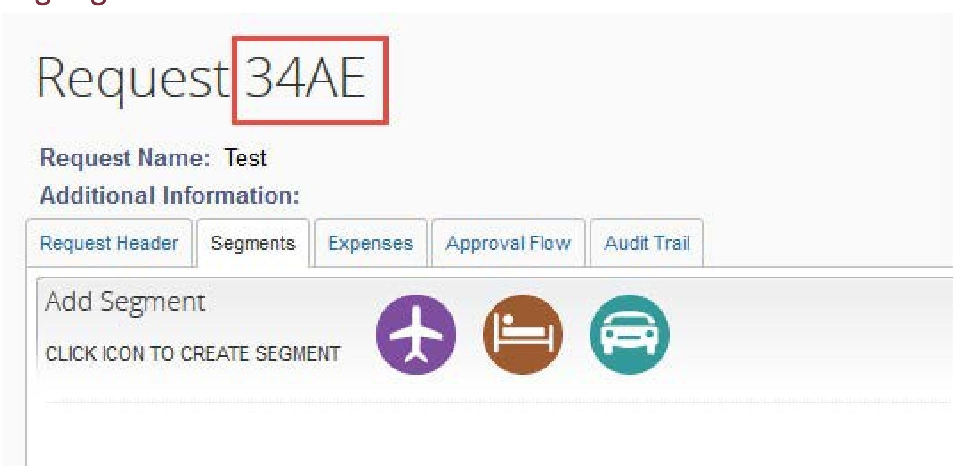


1. In the Request Header section, enter the appropriate values for each field.
    - **Trip Name** – enter something meaningful to you and your department
    - **Trip Type** – In-state, Out-of-state, Foreign

- **Travel Start/End Dates** - These fields should represent the time period of the business trip, and not include any extra days of personal travel.
- **Destination City** - Begin typing the city name and choose from list.
- **Destination Country** - Will auto-populate based on city selection but you may type in the field.
- **Traveler Type** - choose from drop down menu
- **Request/Trip Purpose** - select from the drop down menu
- **Benefit to University** - select from drop down menu
- **Additional Information** - Required if Request/Trip Purpose or Benefit to University is "Other". Otherwise, it's optional.
- **Does this trip contain personal travel?** - select yes or no.
- **Dates of personal travel** - fill in if answer to previous field is yes.
- **Guest ID** - If booking guest (non-employee) travel, enter the traveler's name here.
- **Department & Fund** - Required for all requests.
- **PCBU** - Project Costing Business Unit. Required for travel on projects only. It is always FSU01.
- **Project** - Required if travel is on a project.
- **Chartfields** - Optional.
- **Comment**- Required in certain circumstances, such as if the Travel Request is created after the dates of travel.

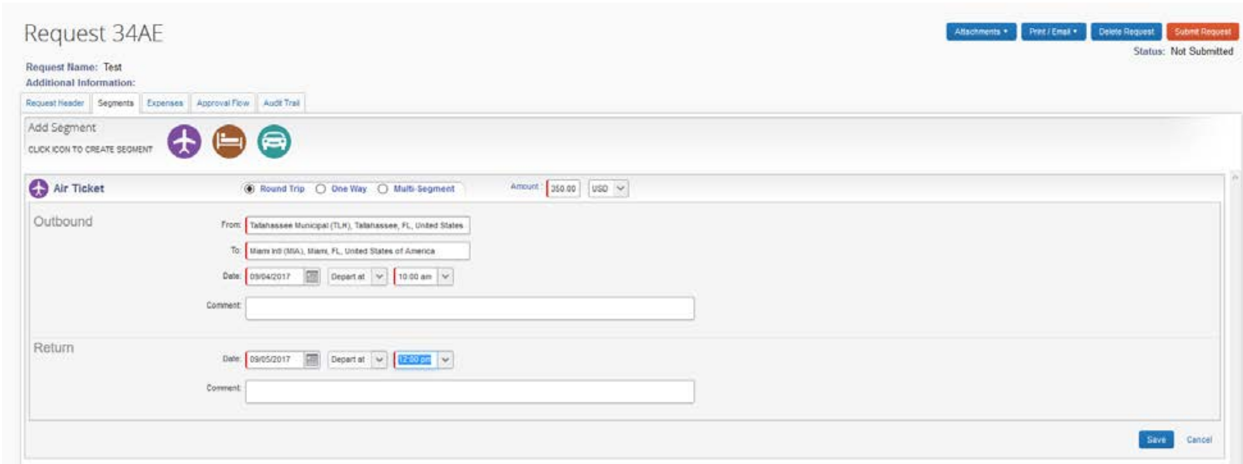
2. Click **Save**. A request number is generated.

Adding Segments

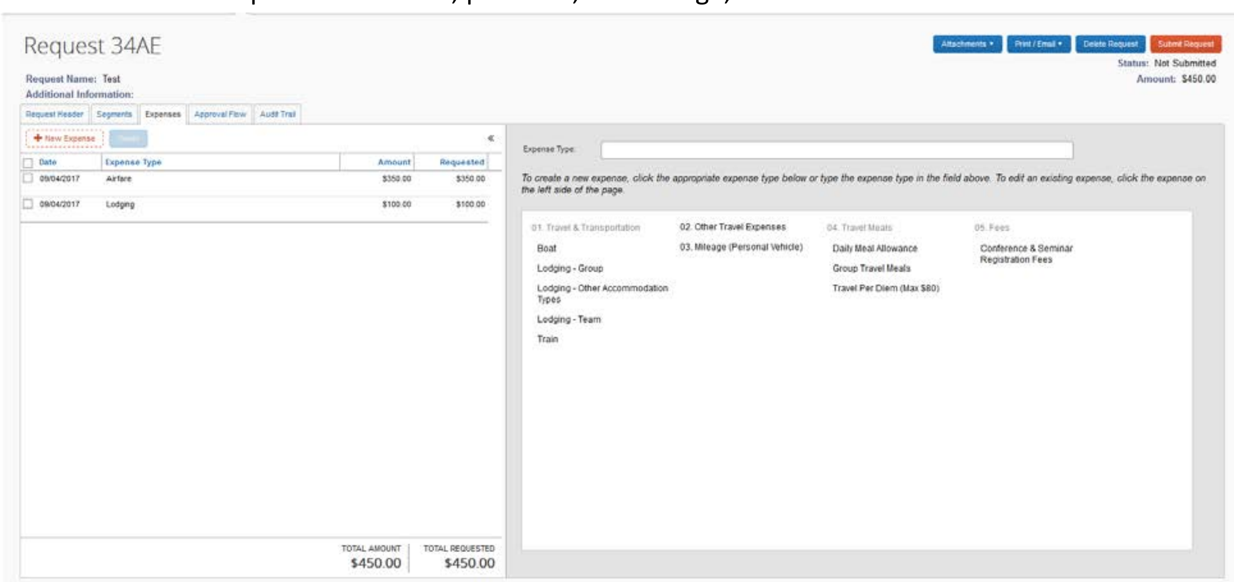


3. Segments or Expenses must be added to the request in order to complete and submit the request. Segments include airfare, car rental, and hotel.
4. Click the Segments tab next to the Request Header tab.

5. Click on one of the three icons to create the segment. We will look at airfare.
6. Select Round Trip, One Way, or Multi-Segment. Round Trip is the default.

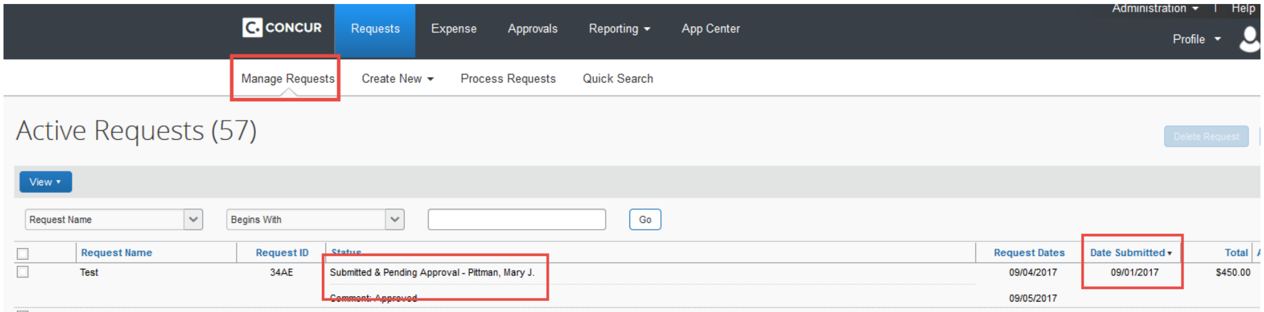


7. Enter the estimated amount of the airline ticket in the Amount field.
8. Enter Airports traveling From/To. From and To Dates default from the Request Header, but can be changed to different days within the time period of the request.
9. Click **Save**.
10. Similarly, enter Car Rental and Hotel information, if applicable. Click **Save**.
11. If you need to change something, click Modify, make the change and click **Save**.
12. Click the Expenses tab. On the left side of the screen you will see the estimated expenses established within the Expenses tab. The right side of the screen allows you to add additional estimated expenses for meals, per diem, car mileage, etc.



13. To add an additional expense, click the Expense name. Enter required information (remember that a request is an estimate) and click **Save**.
14. When finished click **Submit Request**.
15. Click **Accept & Submit**.

16. Note: Available balance checking (Budget Check) occurs immediately upon request submittal. If the request fails the available balance check, it will automatically be returned. When this happens, verify that all department/fund codes are correct or contact the budget manager.



17. The request will appear on the Active Requests page.
18. You may click on the request to open it.
19. You may recall a request at any point in the approvals workflow to modify it.