

CONCUR | SUBMITTING A TRAVEL REQUEST

OVERVIEW

Concur Request makes department budgeting, requesting travel, and submitting travel-related expenses easier with a pre-trip request and approval process.

An approved request is required for every expense report that contains segments (i.e., airfare, hotel, car rental and/or rail). If a request wasn't submitted prior to travel, one must be submitted post travel. Requests submitted post travel is routed for additional approval.

This document provides an overview for submitting a travel request in Concur.

PROFILE SETUP

It is best practice to update your Concur profile with specific personal and account information. Profile information then populates respective fields throughout Concur, which minimizes manual input.

Refer to the [Navigation and Profile Setup](#) reference documentation for specific details.

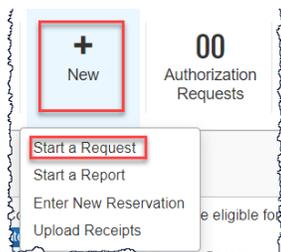
LOGGING IN

1. Navigate to any web browser.
2. Access Concur by clicking on the following link: [Concur SSO](#).

START A NEW REQUEST

All UConn business travel (domestic and international) requires submission of a travel request in Concur, prior to booking travel.

1. From the Concur homepage, hover on the **New** icon. A menu of options displays.
2. Click **Start a Request**.



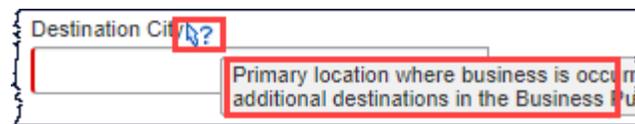
NOTE: Fields identified with a red bar are required. Complete all required fields

REQUEST HEADER

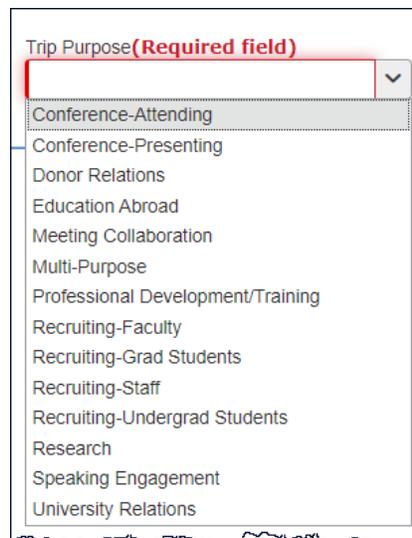
The Request Header is the default tab that displays when creating a new request. Certain information, captured in the header, automatically feed to Segments, Booking, and Expense Reporting.

1. **Request Policy.** This field will default as appropriate.
2. **Trip Name.** Enter a brief and accurate description of the nature of the business trip.
3. **Does trip include a Level 3 or 4 Country/Region?** Level 3 or 4 Country/Region field is required. Refer to the Company Notes section in Concur for additional assistance with the Level 3 or 4 Country/Region dropdown.

NOTE: Many fields have a tool tip, identified with a hovering cursor/question mark. Hover over any tool tip for helpful information as you complete each field.



4. **Business Travel Start Date and End Date.** Enter the first day of your travel and the last day of your travel.
5. **Trip Purpose.** Make a selection from the dropdown, as appropriate.



TIP: A conference travel request requires attachment of conference Agenda, including which meals are included.

6. **Destination City.** Start to type the **primary location** where *business is occurring (last or farthest)*. A *live search result displays*.

7. Select a valid option from the dropdown.
 8. Enter **additional destinations** in the **Business Purpose/Justification** field.

NOTE: The segments tab also captures additional destinations, as necessary.

9. **Traveler Type.** This non-modifiable field defaults from your profile.
 10. **Trip Type.** Make a selection from the dropdown, as appropriate. **Segments** include **Air, Hotel, Car Rental or Rail**.

NOTE: Puerto Rico and other U.S. territories will require an **International Travel Type** on the request header.

11. **Will this trip include personal travel?** If you are including additional time outside of business travel, select yes.

12. **Personal Travel Dates.** Complete this field, if personal travel = Yes.

- a. If yes, at time of booking, the traveler should:
- Call Key Travel/Anthony's directly.
 - Obtain a business cost comparison.
 - Book Travel reservation with Key Travel/Anthony's directly.
 - Cost comparison must be attached to expense report with submission.

NOTE: To attach a document to a request, complete the remaining required fields and then **Save** the request. An **Attachments dropdown displays**. Click the **Attachments** dropdown and then click **Attach Documents**.

13. **How will you book this travel?** Options in this dropdown are listed in recommended order.
 14. Click the appropriate option from the dropdown.

Below is a list of booking options with brief descriptions.

Option	Description
On-line booking in Concur	This is the recommended method for all university business travel, excluding complex international travel. Exceptions may apply.
Agent-assist using UConn Travel Management Company (TMC)	This option requires calling a TMC agent to book business travel. Complex international business travel, often with multiple stops, will warrant this option. Other exclusions may apply. NOTE: All agent-assist booked travel, using UConn TMC, incur an additional transaction fee.
Other (Outside UConn Travel Management Company and Concur)	This option is NOT RECOMMENDED. On an exception basis, when travel is booked outside of the Concur online booking tool, this option should be selected. NOTE: When booking outside of Concur, expense reimbursement is not guaranteed. A request must be submitted via the Concur on-line booking tool post-travel, which is escalated for higher approval.
Non-Travel	Non-Travel requests include business meals. Other exceptions may apply.

15. **Business Purpose/Justification.** Enter a brief description stating the business purpose of travel.

NOTE(S): (1) Additional Business Purpose/Justification notes are required if multiple destinations are on the request.

(2) If split funding applies (e.g., OVPR grant funding travel) and multiple justifications apply, traveler should include multiple justifications, even if attachment justification is required due to length of multiple justifications

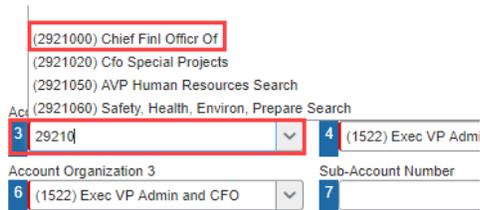
16. **Account Number** (and **Account Organization** related fields). This field should pre-populate to your

default/home department account - based on profile settings.

NOTE: If charging to more than one account, and federal grant account – BE SURE federal grant account is on request header to enforce FLY AMERICA Travel compliance.

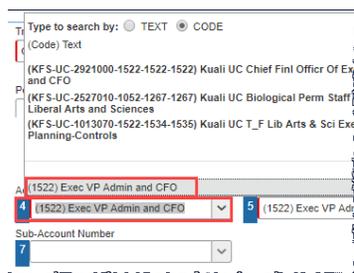
If account information does not auto-populate:

- Type your KFS number in the **Account Number** field. Then select a valid option from the menu options that display.



A screenshot of a dropdown menu for account selection. The menu is open, showing a list of accounts with their KFS numbers and descriptions. The account '(2921000) Chief Finl Officer Of' is highlighted. Below the list, there are two input fields: 'Account Organization 3' with a dropdown showing '(1522) Exec VP Admin and CFO', and 'Sub-Account Number' with a dropdown showing '(1522) Exec VP Admi'.

NOTE: Recently used accounts display at the top of the menu. When selecting a recently used account, all account related fields populate.



A screenshot of a search dropdown menu. The search criteria are set to 'CODE'. The dropdown is open, showing a list of accounts with their KFS numbers and descriptions. The account '(1522) Exec VP Admin and CFO' is highlighted. Below the list, there are two input fields: 'Account Organization 1' with a dropdown showing '(1522) Exec VP Admin and CFO', and 'Sub-Account Number' with a dropdown showing '(1522) Exec VP Ad'.

- Click the **Account Organization 1** dropdown; select the associated org number at the bottom of the list.
- Select the associated org number for the remaining Account Organization fields.

TIP: If a traveler uses the same Account Number (KFS Number) for most business travel charges, it is **best practice** to update your profile with account number (and respective account org fields).

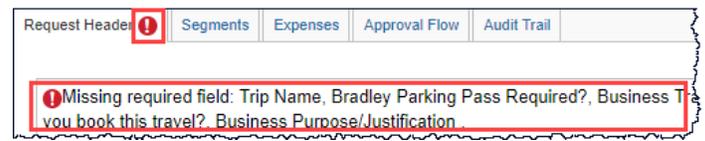
17. Cash Advances. Complete this field on a need only basis.

NOTE: Travel cash advances will be limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly on a University Travel Card or by the University (such as air tickets, conference registration fees, meals, hotel, or rental car). Travel advances may only be requested for \$500 or greater and will not be issued more than 10 days prior to the departure date.

18. Complete additional request header fields, as necessary.

19. Click **Save**. A four character, alphanumeric, request ID populates (at the top of the request view).

NOTE: Concur has policy requirements and procedural preferences built-in. If required fields are incomplete upon save or submit, a hard stop indicator displays. The request cannot be submitted successfully until all noted issues are resolved.



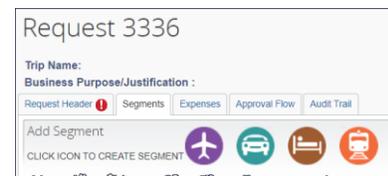
A screenshot of the request header tabs: Request Header, Segments, Expenses, Approval Flow, and Audit Trail. The Request Header tab is active, and a red error message is displayed: 'Missing required field: Trip Name, Bradley Parking Pass Required?, Business T you book this travel?, Business Purpose/Justification'.

TRIP SEGMENTS

If the Trip Type includes segments, the Segments tab is required. Segments include Air, Hotel, Car Rental, and Rail.

If a segment is not included with an original request, it cannot be included on the linked expense report. To add a segment to an expense report if it wasn't in the original request, will require the traveler to submit a new request with appropriate segment information for approval.

- Click the **Segments** tab, if not already selected.



A screenshot of a request view for 'Request 3336'. The 'Business Purpose/Justification' field is visible. Below it, there are four icons for adding segments: Air (airplane), Car Rental (car), Hotel (bed), and Rail (train). The text 'CLICK ICON TO CREATE SEGMENT' is displayed below the icons.

- Add segment(s) by clicking each icon, as necessary (e.g., Air, Car Rental, Hotel, or Rail).

Air Ticket

- Click **Air Ticket**. *The Air Ticket fields display. Round Trip is the default selection.*

NOTE(S): (1) A multiple destination trip will require multiple one-way air tickets. Select **One Way**, as needed. (2) Contact UConn's TMC for assistance with complex travel, as needed.

- Simultaneously launch a separate web browser, login to Concur, and use the Concur Travel module to view available flight details with respective flight estimated cost.
- Complete the **Estimated Amount** field.

4. Begin typing a departure airport (full name or airport code) in the **From:** field. *A live search activates, a list of options become available for selection.*
5. Click to select a valid option from the list.
6. Begin typing a destination airport (full name or airport code) in the **To:** field.
7. Click to select a valid option from the list.
8. Complete the **Outbound Date** and **departure time**.
9. Complete the **Return Date** and **departure time**.
10. Complete the **Bradley Parking Pass Required** fields. Make a selection from the dropdown (Yes/No), as appropriate. Refer to the tool tip for additional information.

NOTE: Due to system limitations, a traveler will see 2 Bradley Parking Pass fields. Both fields should be consistent – either Y or N.

11. Click **Save**. *Options to Allocate, Delete, or Modify the segment become available.*

NOTE: Resolve any warning or hard stop indicators that result.

Car Rental

1. From the **Segments** tab, click the **Car Rental** icon. *The Car Rental fields display.*
2. Simultaneously launch a separate web browser, login to Concur, and use the Concur Travel module to view available car rental details with respective estimated cost.
3. Complete the **Estimated Amount** field.
4. Begin typing a city name in the **Pick-up Location** field. *A live search activates, a list of options become available for selection.*
5. Click to select a valid option from the list.

NOTE: The Pick-up Location and Drop-off Location Dates field auto-populates from the request header.

6. Type a city name in the **Drop-off Location** field.
7. Click to select a valid option from the list.
8. Complete the pick-up and drop-off **time** fields, as desired.
9. Add comments, as desired.
10. Click **Save**. *Options to Allocate, Delete, or Modify the segment become available.*

Hotel Reservation

1. From the **Segments** tab, click the **Hotel Reservation** icon.
2. Simultaneously launch a separate web browser, login to Concur, and use the Concur Travel module to view available Hotel options with respective estimated cost.
3. Complete the **Estimated Amount** field.
4. Begin typing a city name in the **Check-in City** field. *A live search activates, a list of options become available for selection.*
5. Click to select a valid option from the list.
6. Begin typing a city name in the **Check-out City** field. *A live search activates, a list of options become available for selection.*
7. Click to select a valid option from the list.
8. Add comments, as desired.
9. Click **Save**. *Options to Allocate, Delete, or Modify the segment become available.*

EXPENSES

Any **non-segment travel** related expense should be added separately on the **Expenses** tab (e.g., mileage, meals, etc.).

1. Click the **Expenses** tab.



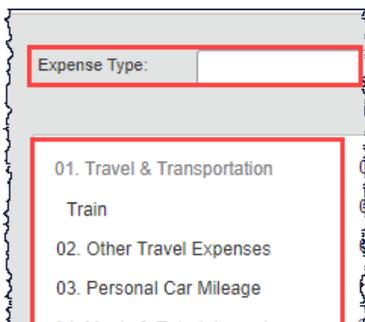
<input type="checkbox"/>	Date	Expe...	Amount	Requested
<input type="checkbox"/>	09/16/2019	Airfare	\$1,200.00	\$1,200.00
<input type="checkbox"/>	09/16/2019	Meal ...	\$436.50	\$436.50
<input type="checkbox"/>	09/16/2019	Car R...	\$500.00	\$500.00

NOTE: The individual segments appear as individual line items on the Expenses tab. Air, Car Rental, and Hotel can only be modified from the Segments tab.

2. Navigate to the Expense Type pane (to the right of the screen).

To create a new expense:

1. Click the appropriate expense type from the list of expenses on the right or
2. Type the expense type in the field above the list of expense types (on the right).

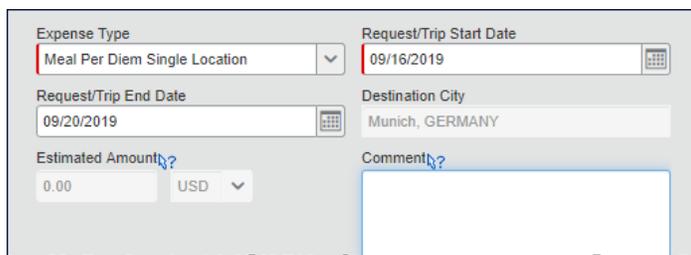


Expense Type:

- 01. Travel & Transportation
 - Train
- 02. Other Travel Expenses
- 03. Personal Car Mileage

3. Complete required expense type fields.

NOTE: Expense Type fields may vary between expense types.



Expense Type:

Request/Trip Start Date:

Request/Trip End Date:

Destination City:

Estimated Amount: USD

Comment:

4. Allocate expense to appropriate account(s), as desired.

NOTE: All segments must be allocated as a group – all with the same percentage or amount. Expected expenses can be allocated individually so they are different from segments or different from each other. Some, any, or all expected expenses can be allocated, whether or not segments are allocated.

5. Click **Save**.
6. Continue to add additional expenses, as applicable.

NOTE: To edit an existing expense, click the expense on the left.

SUBMITTING A REQUEST

1. Once segments and additional expenses are added to the request, click **Submit Request**. *An attestation displays.*
2. Read through the attestation, and then click **Accept & Submit**. *The request is submitted and routed to appropriate approval workflow.*
3. Approvals will route to direct supervisor and fiscal officer of account. Additional approvals may apply (e.g., SPS or Global Affairs, etc.).

NOTE: If an approved request is cancelled inadvertently, a new travel request must be created, and submitted for approval.

COPYING A PREVIOUS REQUEST

If you travel to the same destination more than once, there is a copy feature that will copy the request and you will need to make changes details, as necessary.

1. From the Concur homepage, click **Requests** from the top ribbon. *Your list of requests display.*
2. Click the checkbox, to the left, of the request you want to copy. *The Copy feature activates to the right.*
3. Click **Copy Request** (from the top right). *The Copy Request dialog displays.*
4. Modify the name of the request to reflect the new travel.
5. Update any other options, as necessary and then click **OK**. *A new request displays with the header tab active.*
6. Review the Request Header, Segments, and other Expenses for accuracy.
7. Attach documentation, as needed and then Submit the Request, as usual.

ADDITIONAL SUPPORT

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to
<https://concurproject.uconn.edu/home/>