Travel Request

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Travel Request Overview

- **Travel Request** - Formerly known as a Request for Authorization to Travel (RAT) is required to obtain preapproval of your travel prior to making any travel reservations and completing and submitting an Expense Report.

- Approved Travel Requests will automatically close 60 days after the Travel Request **Travel End Date**.
Creating a New Travel Request

To Create a New Travel Request from the Concur Homepage, you have two options:

- On the Quick Task Bar, under **New > Start a Request**
  
  OR

- On the menu, click **Requests > New Request**
Creating a New Travel Request

Travel Request consists of the following Tabs:

- Request Header
- Segments (Airfare, Car Rental, Hotel)
- Expenses
- Approval Flow
- Audit Trail
<table>
<thead>
<tr>
<th>Required Fields</th>
<th>Appropriate Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request/Trip Name</td>
<td>Enter Trip Name such as Conference/Workshop name (Trip Identifier)</td>
</tr>
<tr>
<td>Trip Type</td>
<td>In State, Out-of-State, International</td>
</tr>
<tr>
<td>How will you book your trip?</td>
<td>Book Travel via Concur, Outside Concur – If you want to book Air, Hotel, and/or Car Rental via Concur, choose Book Travel via Concur.</td>
</tr>
<tr>
<td>Travel Start and End Date</td>
<td>Start and End Date of your Travel</td>
</tr>
<tr>
<td>Traveler Type</td>
<td>Staff or Faculty</td>
</tr>
<tr>
<td>Trip Purpose</td>
<td>Choose a travel purpose description from the drop-down list</td>
</tr>
<tr>
<td>If Faculty, is class covered?</td>
<td>Yes, No, NA? (Do you have a plan/substitute for your classes while you are away?)</td>
</tr>
<tr>
<td>Personal Dates of Travel</td>
<td>Enter Personal Dates of Travel. If none, enter NA</td>
</tr>
<tr>
<td>Destination City/State &amp; Final Destination Country</td>
<td>Enter Destination City and State &amp; Final Destination Country. Final Destination Country should populate based on the Destination City/State</td>
</tr>
<tr>
<td>Are you traveling to a banned State?</td>
<td>Yes, No? Yes-Banned States will be listed</td>
</tr>
<tr>
<td>Chartfield Information</td>
<td>Default chartfield will populate with NGOO1 fund, but can be changed</td>
</tr>
</tbody>
</table>
Step 1: Complete Travel Request Header.

Step 2: Once Header is complete, click on Segments Tab.
Requesting a Travel Advance

- You can request a Travel Advance on the Request Header. However, you must contact AP Travel Desk for setup first.
- Once your account is setup, you will see the **Cash Advance** option below the chartfield information.
- Travel Advance eligible for international and group travel only.

If you do not see this option, that means your account is not setup yet.
There are 3 **Segments** you will need to fill out estimates for if applicable to your travel:

- Airfare
- Car Rental
- Hotel

If booking any of these segments in Concur, the information you enter in each segment will populate your search criteria in the booking tool.
The dates will populate and move over from the Request Header. Fill in all applicable fields and click Save.

If you indicated you will Book travel via Concur Travel and you enter an Airfare segment, you must book the airfare in Concur. Otherwise, if you want to book airfare outside of Concur, but want to book hotel or car rental in Concur, add the airfare estimate under the Other Expense Expense Type and indicate airfare in the comments.

Enter an estimated Amount.

If one way, or have multiple legs of your trip, select One Way radio button.

From/To fields will bring up a selection of locations once you start typing a location.

Click Save.
After you save each segment, you have the option to Allocate, Delete or Modify the segment. Or, you can wait until all your estimated expenses are entered and allocate at the end.
Car Rental

Enter an estimated Amount

City fields will bring up a selection of cities once you start typing the city name.

If booking via Concur, make sure to indicate time/s. This will populate your search criteria.

Click Save.
Fill in all applicable fields and click **Save**.

Enter **Maximum Nightly Rate** that you estimate your hotel expense. If your hotel nightly base rate is more than $275 before tax, you will need to attach the Authorization for One-Time Exception form to your Expense Report. Please have the form approved prior to booking your hotel reservation to ensure full reimbursement eligibility.

**Dates will move over from request.**

**Enter an estimated Amount**

**Enter estimated max nightly rate you may have.**

**Nightly rates exceeding $275 (excluding taxes) will require written justification and approval to be attached to your Expense Report. Reimbursement will not be processed without the appropriate campus approval.**

**Click Save.**
You can provide estimates for the following additional Expense Types:

- **01. Travel Expenses**
  - Other Accommodation
  - Team/Group Travel
  - Personal Car Mileage

- **03. Transportation**
  - Ground Transportation
  - Meals & Incidents - International, Alaska & Hawaii
  - Meals - Domestic

- **05. Hospitality**
  - Hospitality

- **09. Other**
  - Other Expense
  - Registration/Fees

- Not all Expense Types are available in the request module. In this case, you can enter an estimated amount under **Other Expense** and then claim the actual expenses on your Expense Report to have the requested amount closer to the actual expenses.

- By Selecting Meals – it will automatically calculate $55 x the # of travel days. This is only an estimate.

- After clicking on the Expense Type and entering the required and optional information if needed, you can then **Allocate** (if needed) and **Save**.
Add your additional expenses. Once each expense is saved, it will appear on the left hand side.

If you need to attach a document, click on Attachments > Attach Documents.

Must Attach Request for Foreign Travel Insurance Coverage form (FTIP) to your Travel Request for International Travel.

Please Note: Attached documents will not carry over to your Expense Report. You will need to attach them again to the Expense Report if needed.
Allocate, Delete, Modify

After you save each segment/expense, you have the option to allocate, delete or modify.

- **Allocate**: You can allocate a valid chartfield for a particular expense if necessary. If you will be using the same chartfield from your **Request Header**, then no further action is needed.
  - You have the option to allocate by **Percentage** or **Amount**.
- **Delete**: If you want to delete the segment/expense all together.
- **Modify**: If you need to make changes to any part of the expense.
After you have completed the **Request Header**, **Segments** and **Expenses**, you can submit your request by clicking **Submit Request**.

You can also click on **Print/Email** and a PDF version of the Travel Request will pop up and you can make your selection. It is best to do this after the Travel Request is fully approved.

If you wish to delete your entire request, you can do so by clicking **Delete Request**. You will not be able to delete a request once the request is submitted. However, you can **Recall** the Request after submission if it has yet to be fully approved, or **Cancel** the Request at any time.
Travel Request Approval Workflow

Concur Approval Workflows

Travel Request = In-State/Out-of-State

1. Travel Request Submitted
2. "Reports To" Approver
3. Budget Approver
4. Travel Request Approved

Travel Request = International

1. Travel Request Submitted with Foreign Travel Insurance Form attached.
2. "Reports To" Approver
4. Risk Approval
5. Manual routing: Approve and Forward to appropriate VP
6. VP Approver
7. Budget Approver
8. Campus President
9. Travel Request Approved

Purple arrow = Automated routing to approver
Red arrow = Manual routing to approver
The Audit Trail Tab will show a record of all actions and descriptions within the approval workflow conducted by the traveler, delegate, or approver for that particular Travel Request/Expense Report.

The Audit Trail will show the user who completed the action.

Anytime the Travel Request/Expense Report gets modified, approved, sent back, comment added, chartfield edited, will be recorded.

Anyone who can access the Travel Request/Expense Report will be able to access and view the Audit Trail.
Need More Information?

- For more in depth information regarding Concur Travel & Expense, please check out the Conur Handbook and other related documentation at: https://fiscaff.sfsu/travel.com