

Concur – Create a Travel Request

Process: To start a travel request in the Concur system in advance of travel taking place.

PROCEDURES

Click on REQUESTS and then the sub menu option for New Request.

The screenshot shows the SAP Concur 'Request' form. The 'Request Policy' field is highlighted with a red bar, indicating it is a required field. Other fields include 'Trip Name', 'Destination City', 'Trip Start Date', 'Trip End Date', 'Trip Purpose', 'Trip Type', 'Traveler Type', 'How did you book this travel?', 'Does this trip include personal travel?', 'Personal Dates of Traveling', 'Logical System', 'Company Code', 'Cost Object Type', 'Cost Object ID', 'Fund', and 'Statistical Code'.

Enter required data in fields marked with red bar and click Save.

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Complete the following:

Request Policy

Trip Name – Use destination combined with last date of travel i.e. “081720-Troy” or other naming convention preferred by individual department.

Trip Start Date

Trip End Date

Trip Purpose

Trip Type

Traveler Type

How did you book this travel?

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Required fields- continued:

Does this trip include personal travel? If yes, the traveler will be required to enter the dates of personal travel.

Cost Object Type

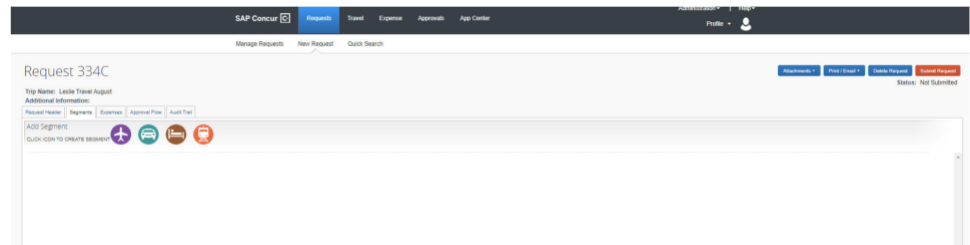
Cost Object ID

Optional fields of interest to the document creator:

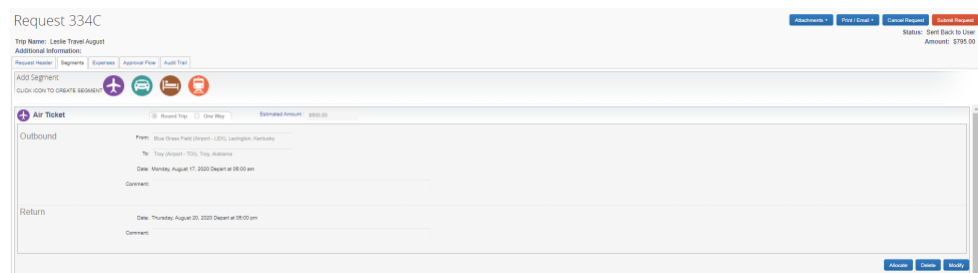
Utilize the “Additional Information” box for notes relevant to the travel/expense.

If a Statistical Order number will be used for this expense, please add in the available field.

After clicking SAVE a request number will be generated.



Click on the Segments tab to add estimated expenses for Airfare, Car Rental, Hotel and Train. Click on the airfare logo to add airfare (or choose rental car, hotel or train). Click Save after entering information in all required fields marked with red bar.



Airfare: Required fields are:

Estimated Amount

Outbound: From (originating airport for airfare)

To (Destination airport)

Date and time of departure

Return: Date and time of return

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To Add additional Segments click on the associated icon.

To add rental car, click on the car logo. After completing required fields, click save.

Request 334C

ADD SEGMENT
CLICK ICON TO CREATE SEGMENT

Car Rental Estimated Amount: 00.00

Pick-up
City: Troy, Alabama
Date: 08/17/2022 AM 11:00 am
Drop-off
City: Troy, Alabama
Date: 08/20/2022 AM 09:00 am

Complete all required fields marked in red:

Estimated amount

PICK UP City

DROP OFF City

Save.

To add Hotel, click on the hotel icon. After completing required fields, click save.

Request 334C

ADD SEGMENT
CLICK ICON TO CREATE SEGMENT

Hotel Reservation Estimated Amount: 00.00

Check-in
City: Troy, Alabama
Date: 08/17/2022 AM 09:00 am
Check-out
Date: 08/20/2022 AM 09:00 am

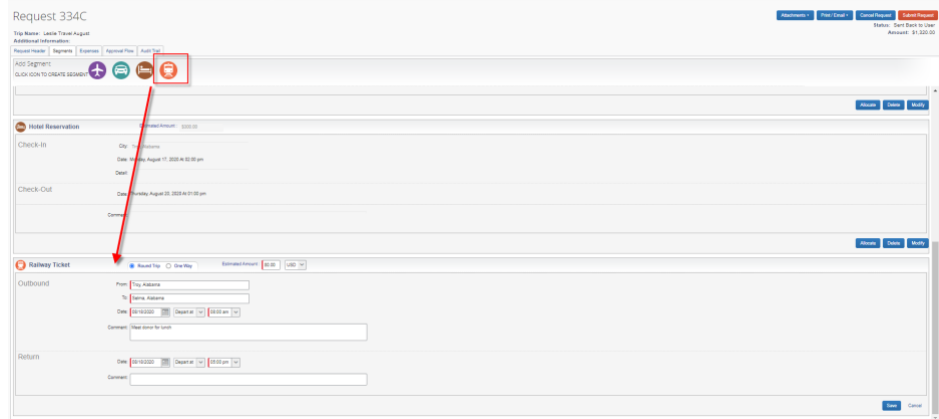
Complete all required fields marked in red:

Check-in: City (date of check-in will pre-populate from header)

Check-out: Date should pre-populate

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To add Train/rail expense, click on the train/rail icon. After completing required fields, click save.



Complete

the required fields:

Estimated amount

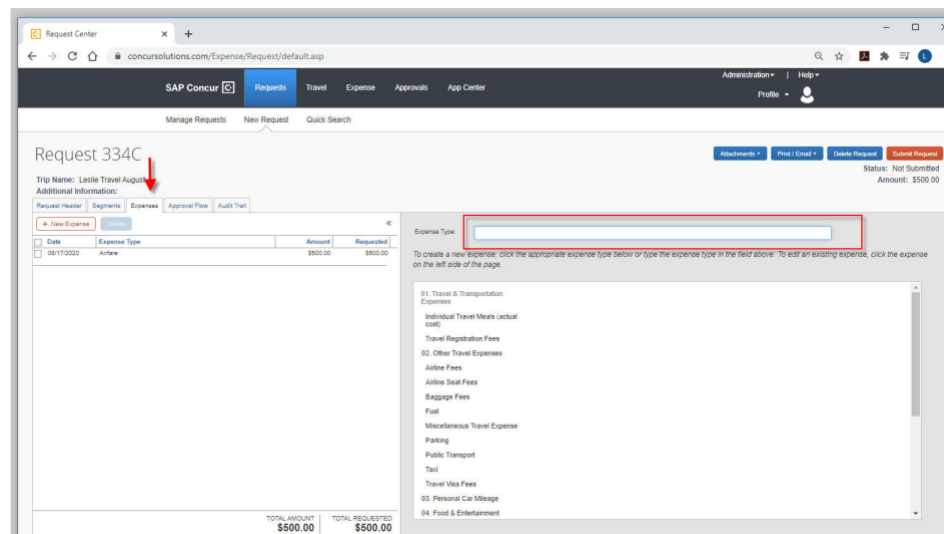
OUTBOUND From
To
Date/Time of departure

RETURN Date/Time of return

Once all segments are complete, add additional estimated expenses.

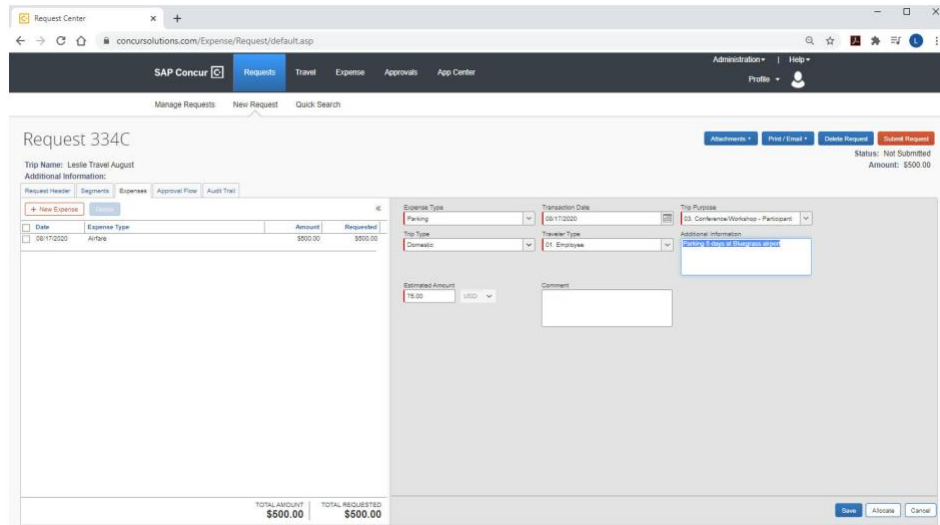
At any time the document creator can return to the header of the request by clicking on the "request header" tab.

Click on the expenses tab to list additional expense types available. Type an expense description to sort/focus list to an appropriate option or double click on the item in the populated list.



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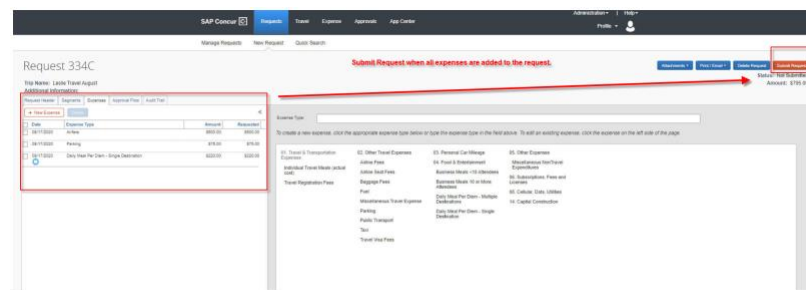
Enter the required information in the fields marked with red bars and then save. Continue adding estimated expenses and save after each option.



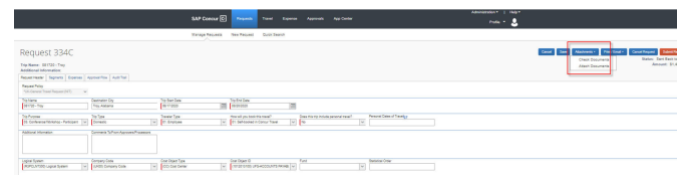
Some of the required fields will be populated from the information entered on the initial request screens. All fields with red bars must be populated for all expenses:

- Expense type
- Transaction date
- Trip purpose
- Trip type
- Traveler Type
- Estimated amount

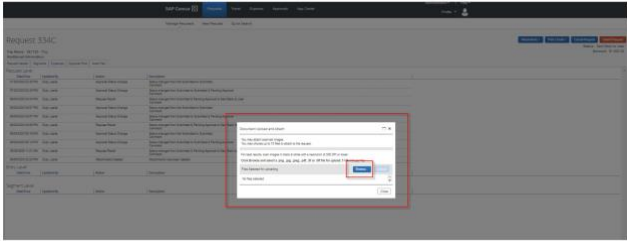
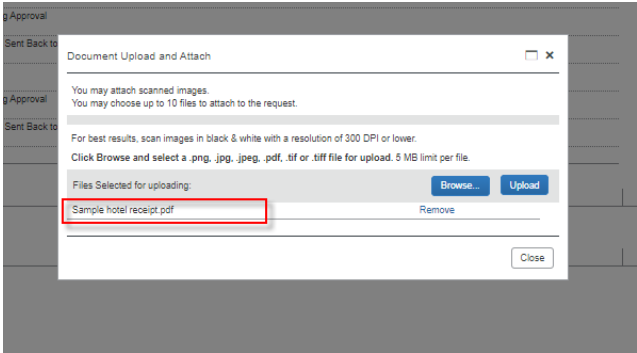
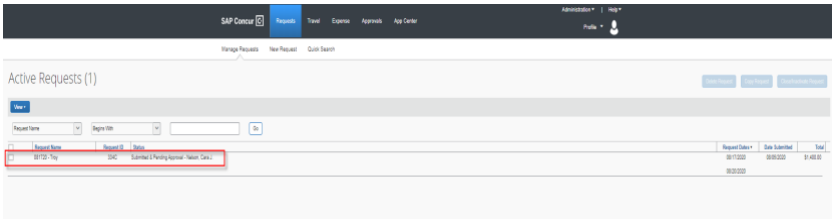
In the column on the left, the traveler has added airfare, parking and per diem for one location to the request.



To upload/add attachments:
From any screen during the request process, click on the Attachments button and choose attach documents.



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<p>The Document Upload and Attach box will open. Choose Browse to locate receipts or other documents related to the travel request.</p>											
<p>After choosing a file to upload, click upload. Once all attachments are uploaded, close the dialog box.</p>											
<p>After all known expenses are listed, submit the request by clicking the Submit Request button.</p> <p>After request is submitted, the system will return the user to their listing of active requests and their approval status.</p>	 <table border="1" data-bbox="456 1199 1284 1283"> <thead> <tr> <th>Request Name</th> <th>Request ID</th> <th>Request Status</th> <th>Date Submitted</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>68727-704</td> <td>704</td> <td>Submitted Pending Approval</td> <td>01/02/20</td> <td>\$1,482.00</td> </tr> </tbody> </table>	Request Name	Request ID	Request Status	Date Submitted	Total	68727-704	704	Submitted Pending Approval	01/02/20	\$1,482.00
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68727-704	704	Submitted Pending Approval	01/02/20	\$1,482.00							