

CONCUR | CREATING/SUBMITTING/CLOSING 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. The University requires pre-approval for travel that involves any Airfare, Hotel or Car Rental for Employees, Students and Guests, prior to the start of the trip.

For Employees and Students, the Travel Request is initiated and approved in the Concur Request module. If a Request isn't submitted/approved prior to the start of travel, a Request must be submitted for approval post travel. Requests submitted post start of travel may be routed for additional approval.

For Guests that have pre-approval through other means (example - contract, purchase order, departmental program, event, conference, etc.) they will not require a pre-approval to be initiated or approved in the Concur Request module.

NOTE: (1) In these cases, the University Employee will attest to the fact in the Concur Expense Report Header or HuskyBuy that this pre-approval is held in the department and can produce this pre-approval if Requested. **(2)** Departments can also utilize Concur's Travel Request for Guest travel where there is no clear documentation as to the travel approval for the Guest.

If the guest or student request is for international travel and you would like to request international insurance through our CISI coverage, please complete the spreadsheet below and send it to us at travel@uconn.edu. This document provides an overview for submitting a Travel Request in Concur.

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LOGGING IN

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

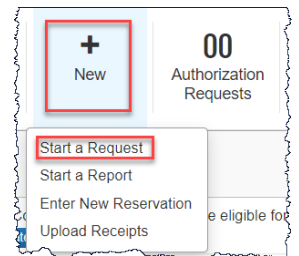
It is best practice to update your Concur profile with specific personal and account information. Profile information then populates respective fields throughout Concur, which minimizes manual input.

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

START A NEW REQUEST

All UConn business travel that includes Airfare, Car rental or Hotel (domestic and international) requires submission of a Travel Request in Concur, prior to the start of travel.

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



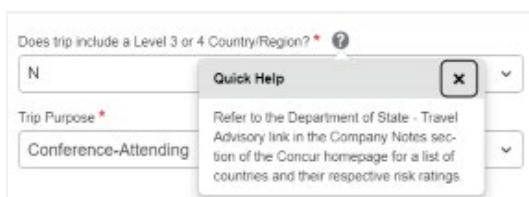
NOTE: Fields identified with a red bar are required. Complete all required fields

REQUEST HEADER

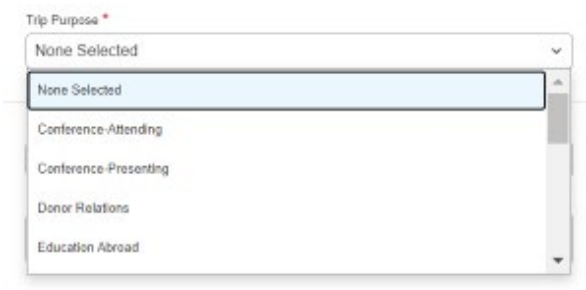
The Request Header is the default tab that displays when creating a new Request. Certain information, captured in the header, automatically feed to the Expense Report.


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 Quick Help Guide, identified by a question mark in a gray circle. Hover over any Quick Help Guide for helpful information as you complete each field.

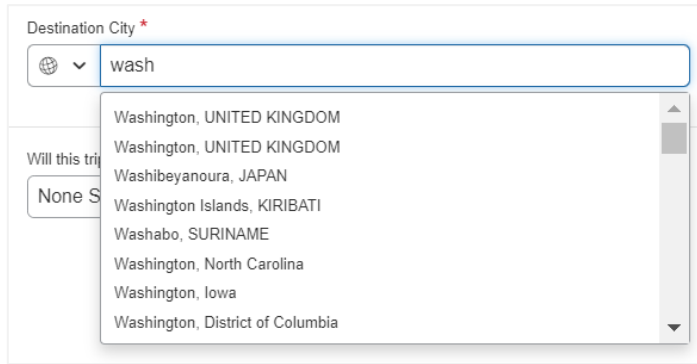


4. **Business Travel Start Date and End Date.** Enter the first day of your travel and the last day of your travel.
5. **Trip Purpose.** Make a selection from the dropdown, as appropriate.



 TIP: A conference Travel Request requires an attachment of a conference brochure or the information noted in the Business Justification field of conference name, topic, date and location.

6. **Destination City.** Start to type the **primary location** where *business is occurring (last or farthest)*. A live search result will display. Select a valid option from the dropdown.



The screenshot shows a form field labeled "Destination City" with a red asterisk. The input field contains the text "wash". A dropdown menu is open, displaying a list of search results: Washington, UNITED KINGDOM; Washington, UNITED KINGDOM; Washibeyanoura, JAPAN; Washington Islands, KIRIBATI; Washabo, SURINAME; Washington, North Carolina; Washington, Iowa; and Washington, District of Columbia. To the left of the dropdown, there is a label "Will this trip" and a button labeled "None S".

7. **Traveler Type.** This field defaults from your profile.

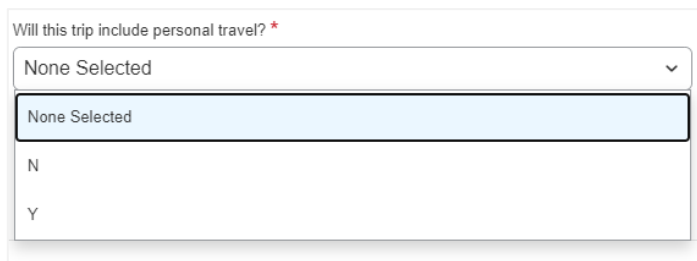
NOTE: If this is a Travel Request for a Guest or Student you will select appropriate traveler type from the drop-down menu.

8. **Trip Type.** Make a selection from the dropdown, as appropriate.



The screenshot shows a form field labeled "Trip Type" with a red asterisk. The dropdown menu is open, displaying the following options: None Selected (highlighted), In-State, International, and Out-of-State.

9. **Will this trip include personal travel?** If you are including additional time outside of business travel, select yes. *If yes, a business comparison for flights must be attached when submitting the expense report. Comparisons need to be done at the time of booking not when the trip is completed.*



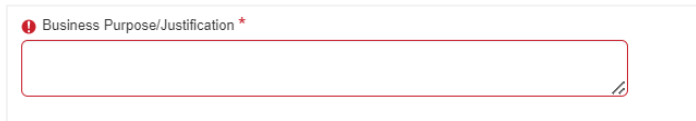
The screenshot shows a form field labeled "Will this trip include personal travel?" with a red asterisk. The dropdown menu is open, displaying the following options: None Selected (highlighted), N, and Y.

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

a. If yes, at time of booking, the traveler should:

- Call Anthony Travel directly.
- Obtain a business cost comparison.
- Book Travel reservation with Anthony Travel directly.
- A cost comparison can also be done in Concur following the instructions in the following document: [UConn Business Airfare Price Comparison](#)
- Cost comparisons must be attached to the Expense Report at the time of submission.

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



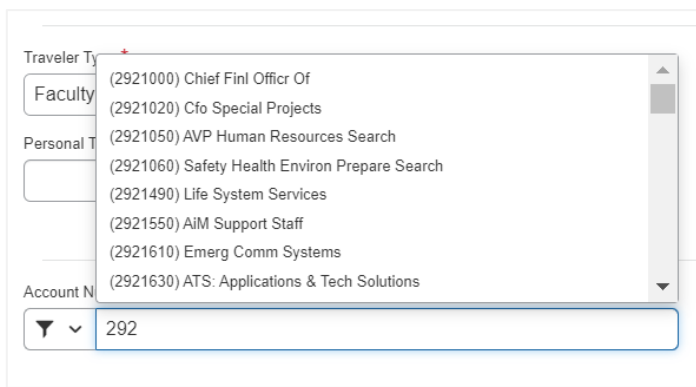
NOTE(S): (1) Additional Business Purpose/Justification notes are required if multiple destinations are on the Request.

(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. (3) Conference information can also be noted in this field if no conference brochure is available to be attached.

12. **Account Number.** This field should pre-populate to your default/home department account - based on profile settings.

If account information does not auto-populate:

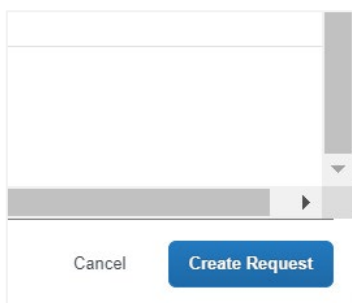
a. Type your KFS number in the **Account Number** field. Then select the account from the menu options that display.



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.

13. **Sub-Account Number.** If the KFS account you are using has an associated sub-account number, type your sub-account number in the **Sub-Account Number** field, then select the account from the menu options that display.

14. Click **Create Request** at the bottom right.



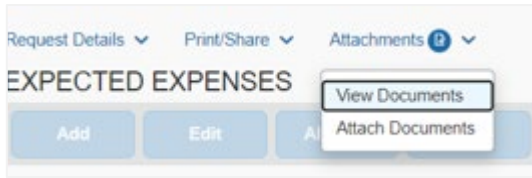
ALERTS

1. Click the **Alerts** drop-down arrow to the top right of the request to review any alerts that may display and take action as needed.



ATTACHMENTS

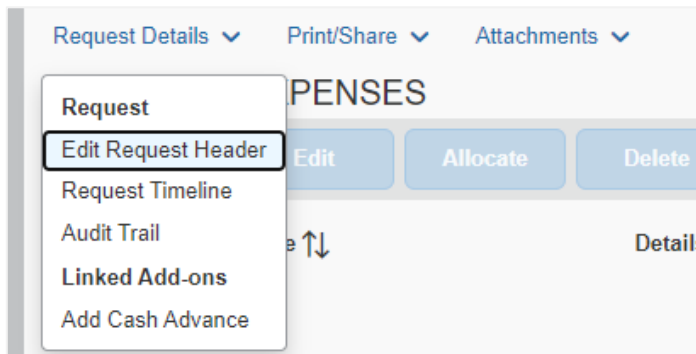
1. Click the **Attachments** dropdown and then click **Attach Documents**, to attach a document to a request.



REQUEST DETAILS

1. Click the **Request Details** drop-down menu to review the available options.
2. **Edit Request Header.** Select this option to return to the Request Header to make changes to the information that was completed in the previous steps.
3. **Request Timeline.** Select this option to review the Approval workflow of the Request after successfully submitting the request.
4. **Audit Trail.** Select this option to review the history of the Request after successfully submitting the request.
5. **Add Cash Advance.** Select this option on a need only basis after adding estimated trip expenses.

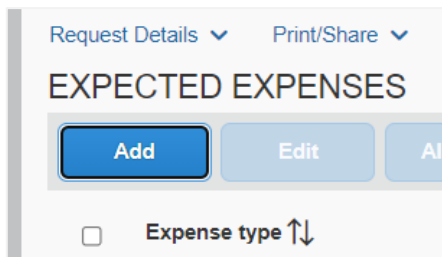
NOTE: (1) Travel cash advances will be limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly on a University Travel Card or by the University (such as air tickets, conference registration fees, meals, hotel, or rental car). Travel advances may only be Requested for \$500 or greater and will not be issued more than 10 days prior to the departure date. **(2)** Guests are not eligible for a Cash Advance.



EXPECTED EXPENSES

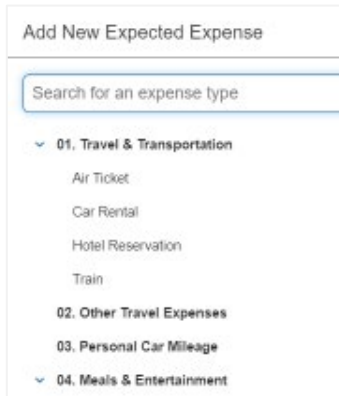
If the Trip includes Air, Hotel and Car Rental expected to be paid for or reimbursed by the University the estimated expenses are required to be added to the Request.

1. Click the blue **Add** button under Expected Expenses.



Air Ticket

1. Click **Air Ticket**.



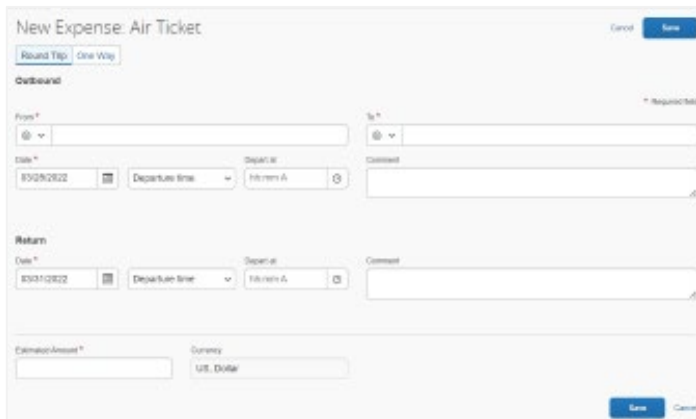
Add New Expected Expense

Search for an expense type

- 01. Travel & Transportation
 - Air Ticket
 - Car Rental
 - Hotel Reservation
 - Train
- 02. Other Travel Expenses
- 03. Personal Car Mileage
- 04. Meals & Entertainment

2. 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.



New Expense: Air Ticket

Round Trip | One Way

Outbound

From * To *

Date * Departure Time Airline Comment

Return

Date * Departure Time Airline Comment

Estimated Amount * Currency

Save Cancel

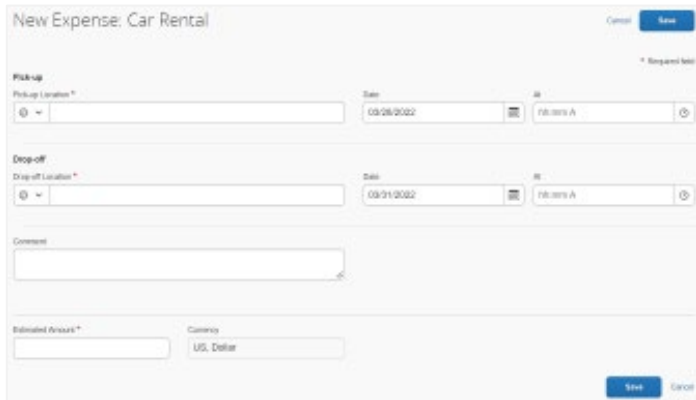
3. **TIP:** Simultaneously launch a different web browser, login to Concur, and use the Concur Travel module to view flight availability and estimated cost.
4. Begin typing a departure airport (full name or airport code) in the **From** field. A live search activates, a list of options become available 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**.
9. Complete the **Return Date**.
10. Complete the **Estimated Amount** field.

NOTE: The Bradley Parking Pass program has been temporarily suspended by the State of Connecticut due to Covid19 related parking lot closures. While this suspension is in place you may use pay for parking at the lowest cost parking lot available and seek reimbursement upon return from the trip along with your other travel expenses.

11. Click **Save**.

Car Rental

1. From the **Expected Expenses** menu, click the Add then click **Car Rental**. *The Car Rental fields display.*



TIP: Simultaneously launch a different web browser, login to Concur, and use the Concur Travel module to view Car rental availability and estimated cost.

2. Begin typing a city name in the **Pick-up Location** field. *A live search activates, a list of options become available for selection.*
3. Click to select a valid option from the list.
4. Type a city name in the **Drop-off Location** field.
5. Click to select a valid option from the list.
6. Complete the **Estimated Amount** field.
7. Click **Save**.

Hotel Reservation

1. From the **Expected Expenses** menu, click **Hotel Reservation**.



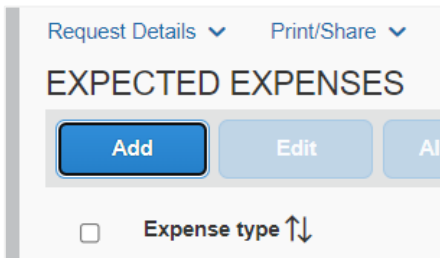
TIP: Simultaneously launch a different web browser, login to Concur, and use the Concur Travel module to view hotel availability and estimated cost.

2. The Check-in and Check-out dates will pre-fill from the Request header. Modify as needed.
3. Begin typing a city name in the **City** field. *A live search activates, a list of options become available for selection.*
4. Click to select a valid option from the list.
5. Complete the **Estimated Amount** field.
6. Click **Save**.

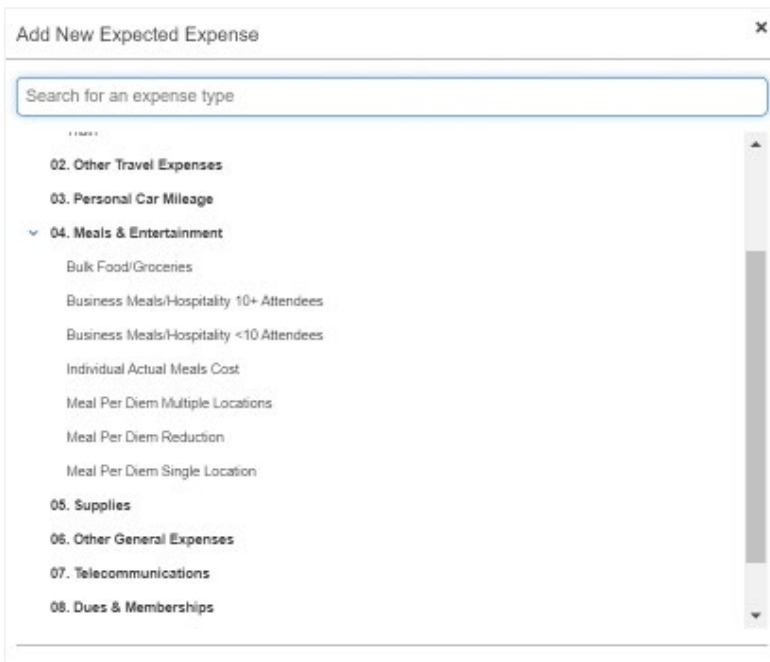
Other Expenses

Additional **travel** related expense can also be added in the **Expected Expenses** menu (e.g., mileage, meals, etc.).

1. Click Add in the **Expected Expenses** menu to get additional expense types.

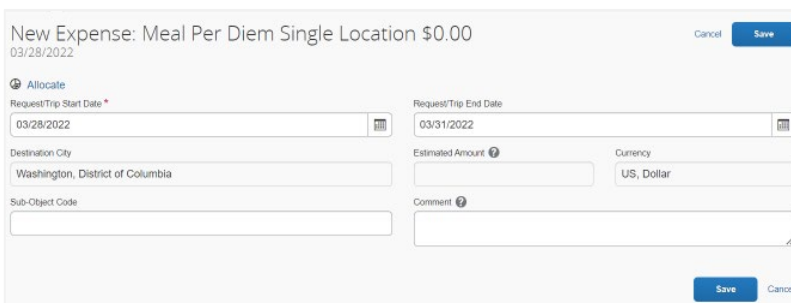


2. Click the appropriate expense type from the list of expenses that appear **or**
3. Type the expense type in the search field above the list of expense types.



4. Complete required expense type fields.

NOTE: Expense Type fields may vary between expense types.

A screenshot of a "New Expense" form. The title is "New Expense: Meal Per Diem Single Location \$0.00" with a "Cancel" button and a "Save" button. The form includes several fields: "Request/Trip Start Date" (03/28/2022), "Request/Trip End Date" (03/31/2022), "Destination City" (Washington, District of Columbia), "Estimated Amount" (empty), "Currency" (US, Dollar), "Sub-Object Code" (empty), and "Comment" (empty). There are "Save" and "Cancel" buttons at the bottom right.

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


ALLOCATIONS

The Allocations menu can be used to split an expense between multiple KFS account numbers or to charge individual expenses to different KFS account numbers.

1. To allocate an expense click the **checkbox** beside the expense type and click **Allocate**.

NOTE: Air Ticket, Car Rental and Hotel Reservations must always be allocated as a group.

Expense type	Details	Date	Amount	Requested
<input checked="" type="checkbox"/> Air Ticket	Hartford (BDL) - Washington (WAS) : Round Trip	03/28/2022	\$500.00	\$500.00
<input checked="" type="checkbox"/> Car Rental	Washington, District of Columbia - Washington, District of Columbia	03/28/2022	\$500.00	\$500.00
<input checked="" type="checkbox"/> Hotel Reservation	Washington, District of Columbia	03/28/2022	\$1,000.00	\$1,000.00



Certain travel expenses must be allocated as a group. Therefore, the following expense types will be included in this allocation:

- Airfare
- Car Rental
- Hotel Lodging

SUBMITTING A REQUEST

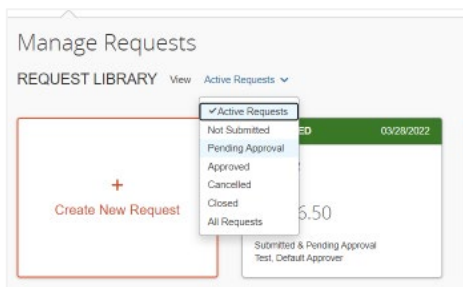
1. Once expenses are added to the Request, click **Submit Request**. *An attestation displays.*
2. Scroll to read through the attestation, and then click **Accept & Submit**.
3. Requests will route for Approval to the direct supervisor of the employee and fiscal officer of KFS account. Additional approvals may apply (e.g., Export Controls or Global Affairs, etc.).

NOTE: (1) If a request is not yet fully approved you can open the request and 'Recall' the request to make changes. (2) If an approved Request is cancelled inadvertently, a new Travel Request must be created, and submitted for approval.

REVIEWING THE REQUEST APPROVAL TIMELINE

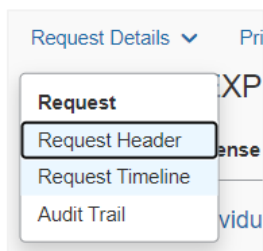
After submitting a Request, you may want to check whose approval your Request is currently pending, or which request timeline step has already been approved.

1. From the Concur homepage, click **Requests** from the top ribbon.
2. Click the drop-down arrow beside 'View' at the top of the page and select '**Pending Requests**' from the drop-down menu.



3. Click on the **Request name** that you would like to review.

- With the Request open, click the **Request Details** drop-down arrow then select **Request timeline** from the drop-down menu.



- You will now see each approval timeline step with the name of the corresponding approver. If a step has been previously approved, the approval flow step will show a green circle and checkmark. The approval date will also show to the right under the word **Approved**.

Request Timeline
test2 | \$2,276.50

Approval Flow

- Direct Supervisor Approval
Test, Default Approver
- Fiscal Officer Approval

Request Summary

SUBMITTED
Test, Traveler? 03/10/2022

SUBMITTED & PENDING APPROVAL
Test, Traveler? 03/10/2022

APPROVED
Test, Default Approver 03/10/2022

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.

- From the Concur homepage, click **Requests** from the top ribbon. *Your list of Requests display.*
- Click the name of the Request you want to copy to open that request.
- Click the More Actions drop-down arrow and select **Copy Request**. *The Copy Request dialog displays.*

test2 \$2,276.50
Pending Cost Object Approval | Request ID: 3QWT

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Expense type ↑↓	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓
Air Ticket	Hartford (BDL) - Washington (WAS) : Round Trip	03/28/2022	\$500.00	\$500.00
Car Rental	Washington, District of Columbia - Washington, District of Columbia	03/28/2022	\$500.00	\$500.00
Hotel Reservation	Washington, District of Columbia	03/28/2022	\$1,000.00	\$1,000.00
Meal Per Diem Single Location	Washington, District of Columbia	03/28/2022	\$276.50	\$276.50
Estimated Total:				\$2,276.50

- Modify the name of the Request to reflect the new travel.

Copy Request

New Request Name *

Starting Date For New Request (Previous Date 03/31/2022) *

Include:

Expenses

- Update the date as necessary and then click **Create New Request**. *A new Request displays with the header tab active.*
- Review the Request Header and Expected Expenses for accuracy.
- Attach documentation, as needed and then Submit the Request, as usual.

CLOSING A REQUEST

If you have a fully approved Request for travel that has been completed and you do not need to create an expense report, the Request will need to be closed.

- From the Concur homepage, click **Requests** from the top ribbon.
- Click the name of the Request you want to **Close** to open that request.
- Click the More Actions drop-down arrow and select **Close Request** then click **OK**.

test2 \$2,276.50
Approved | Request ID: 3QWT

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
Air Ticket	Hartford (BDL) - Washington (WAS) : Round Trip	03/28/2022	\$500.00	\$500.00
Car Rental	Washington, District of Columbia - Washington, District of Columbia	03/28/2022	\$500.00	\$500.00
Hotel Reservation	Washington, District of Columbia	03/28/2022	\$1,000.00	\$1,000.00

ADDITIONAL SUPPORT

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

For additional reference material, refer to <https://travel.uconn.edu/training-and-resources/>