Submitting a Travel Request in Concur Travel & Expense

COMPLETE THE FOLLOWING STEPS TO REQUEST TRAVEL REIMBURSEMENT BEFORE GOING ON YOUR TRIP
Quick Tip: Split Screen

This slideshow is a step-by-step instruction on setting up your out-of-pocket expense report in Concur. It is HIGHLY recommended that you split your screen between this PowerPoint and the website so you can follow along.
Resources

- Any questions or concerns, contact travel@uconn.edu
- Travel Project Website: https://travel.uconn.edu
- Extensive Training Materials can be found here:
  - https://concurproject.uconn.edu/training-documentation-and-user-guides/#
In Concur, a delegate is someone who is authorized to perform various tasks within the system on behalf of another Concur user.

There are several types of delegates:

- A Preparer Delegate
- An Approval Delegate
- A Previewer Delegate

**NOTE:** Separate from a delegate, a traveler must assign travel arranger(s), if desired.
Accessing Concur

- Accessing the Concur system is directly on the home page of [https://travel.uconn.edu](https://travel.uconn.edu)
- You should be able to see the NetID SSO Sign-in page. Sign in with your NetID to access Concur.
Part One – Creating a New Request

On the main menu of Concur, locate the **New** button at the top of the page and select **New** -> **Start a Request**.
This will be the group of fields you get when submitting a new request. The fields in red are required.

For travel requests, be sure Request Policy is listed as UCONN General. The other option is for Out-of-Pocket requests, which is the same process minus the specifics on travel.

Clicking on Save allows you to leave and go back to the request later.
PART ONE COMPLETE

NOW IT'S TIME TO FILL OUT THE FIELDS
Part Two – The Request Header

- **Trip Name**: The name of the trip you decide for yourself

- **Level 3 or 4 Country / Region**: See if the country you’re traveling to is listed as Level 3 or 4 on the State Department Website:
  
  - [https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html](https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html)
Part Two – The Request Header

▶ **Business Travel Start / End Date:** Enter the first day of your travel and the last day of your travel.
Trip Purpose: Choose a category in the drop down menu below that best fits your trip.
**Destination City:** Type the city that you are traveling to and choose it from the autofill list displayed.
Part Two – The Request Header

- **Trip Type**: Choose from the provided drop down list:
  - **In-State** – Within the state of Connecticut
  - **Out-of-State** – Anywhere within the United States outside of Connecticut
  - **International** – Outside of the United States
Part Two – The Request Header

- **Personal Travel:** Select whether personal time will be included in your business stay. If so, enter the dates in the **Personal Travel Dates**.

- If there is personal travel, you will need to call Key Travel to book your travel directly & obtain a business cost comparison (*this is the replacement for Sanditz*)
Part Two – The Request Header

- **Business Purpose:** Type the business-related reason for your travel request.
- **Account Number:** Type the KFS number for these expenses.
- **Cash Advances:** Complete on a need-only basis. Not a required field.
PART TWO
COMPLETE

SELECT SAVE, YOU SHOULD GET A FOUR CHARACTER REQUEST ID AT THE TOP OF THE WINDOW
SO YOU CAN LEAVE AND RETURN TO THIS REQUEST LATER IF NEED BE.

**BE SURE TO SAVE THIS REQUEST ID IN CASE YOU NEED ASSISTANCE FROM THE TRAVEL TEAM**
Part Three – Trip Segments

- **Trip Segments** refer to lodging and the modes of transportation used throughout the trip. This can include Air Travel, Hotel, Car Rentals, and Rail.

- This is found in the **Segments** tab of your request. Add the segments that apply to your trip.
Part Three – Air Travel

- **Air Travel** (purple icon with the plane)
- In a separate tab, open the Concur Travel module and search for available flights for your trip.
- Enter the cost you find from available flights in the **Estimated Amount** field.
Part Three – Air Travel

- Type the full name or airport code in the From and To sections (1). An autofill should activate so you can select a valid airport.
- Select the departure date in the outbound Date field (2).
- Select the return date in the return Date field (3).
If you need a parking pass at Bradley airport during this trip, select Yes on both dropdown menus titled Bradley Parking Pass. If not, select No on both. These fields should remain the same.
The **Comment** fields are not required, but enter any missing information if necessary.

When all information is completed, select **Save**. The option to allocate, delete, or modify the segment becomes available.
Part Three – Car Rental

- **Car Rental** (teal icon with the car)
- In a separate tab, open the Concur Travel module and search for available car rental details and find the estimated cost.
- Enter the amount you find in **Estimated Amount** field.
Part Three – Car Rental

Enter the location you are picking the car up in **Pick-Up Location**, and the location you are dropping the car off after your trip in **Drop-Off Location**.

Select the location from the autofill that appears as you type these in.
Part Three – Car Rental

- Enter the necessary pick-up & drop-off dates and times in the provided fields.
- Leave any pertinent information in the Comment field.
- When all information is completed, select Save. The option to allocate, delete, or modify the segment becomes available.
Part Three – Hotel Reservation

- **Hotel Reservation** (brown icon with the bed)
- In a separate tab, open the Concur Travel module and search for available hotels and find the estimated cost.
- Enter the amount you find in the *Estimated Amount* field.
Part Three – Hotel Reservation

- Type in the city this hotel is in in the **Check-In City** field, select the city from the autofill options.
- Enter the **Check-In Date** & **Check-out Date** in the provided fields.
- When all information is completed, select **Save**. The option to allocate, delete, or modify the segment becomes available.
PART THREE COMPLETE

YOU SHOULD HAVE ALL TRAVEL SEGMENTS LISTED ON THIS TAB
Part Four – Additional Expenses

► Go to the **Expenses** tab. This is for any expected expenses outside of the travel segments.

► Choose the most relevant expense in the list on the right hand side.
Each expense type will have an associated form with pertinent information to enter.

All fields with the red outline are required. The more information, the better.

Complete this information and click **Save**. From there, it should be in your expense list. To add to the list, select + **New Expense** and continue until all respective expenses are on the list.
Part Five – Submitting

- Select **Attachments -> Attach Documents** and add any related documents or emails to your trip.
- Once all of the information is complete, select the **Submit Request** button, followed by **Accept & Submit**. This will route the request to any necessary approvers.
- **NOTE:** Funding applications for AAUP/UCPEA remain the same and will need to be attached in the expense report after the trip.
PARTS 4 & 5 COMPLETE

YOUR REQUEST IS COMPLETE!