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, prior to the start date of travel, for every expense report that contains segments (i.e., airfare, hotel, and/or car rental). 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 are routed for additional approval. 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.

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 (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 Segments 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.

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.

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

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

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

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.
      - A cost comparison can also be done in Concur following the instructions in the following document: [UConn Business Airfare Price Comparison](#)
      - 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 attaching Documents.

13. **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.

14. **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:

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

```
Account Number

3 26010

(260103) Agriculture-Dean
(260104) Temp Labor/Grad Asst
(260105) County Ext Bldgs-Mntc
(260107) Match 428
(260180) Dept Of Extension
```

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

**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.

15. **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.

16. Complete additional request header fields, as necessary.

17. Click **Save.** A **four character, alphanumerical, 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.

### TRIP SEGMENTS

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

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

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

### Air Ticket

1. 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.

2. 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.

3. 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.**

9. Complete the **Return Date.**

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. Add comments, as desired.

9. 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.

   - **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).

3. Complete required expense type fields.

   **NOTE:** Expense Type fields may vary between expense types.

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.

REVIEWING THE APPROVAL WORKFLOW

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

1. From the Concur homepage, click Requests from the top ribbon.
2. Click the blue ‘View’ button at the top left of the page and select ‘Pending Requests’ from the drop-down menu.
3. Click on the request name that you would like to review.
4. With the request open, click on the Approval flow tab.

5. You will now see each approval workflow steps with the name of the corresponding approver. If a step has been previously approved, the approval date will show below with the word ‘Approved’ in parenthesis.

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.

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

CLOSING/INACTIVATING A REQUEST

If you have an 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/inactivated.

1. From the Concur homepage, click Requests from the top ribbon.
2. Click the blue ‘View’ button at the top left of the page and select ‘Approved Requests’ from the drop-down menu.

3. Click the checkbox beside the approved request that you do not need to create an expense report for.

4. Click the ‘Close/Inactive’ button at the top right of the page.

**ADDITIONAL SUPPORT**

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

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