

## **QuickStart Guide**

Concur® Premier: Travel Request

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### **Concur® Premier: Travel Request QuickStart Guide**

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# Welcome to Concur Premier: Travel Request

The Travel Request feature allows your company to control expenses by requiring approval before incurring travel expenses.

## Section 1: Create a Travel Request

### Step 1: Create a New Travel Request

#### How to...

1. From the **Active Work** section on the **My Concur** page, click the **Requests** tab.

#### Additional Information

You can also access the **Request** feature from the menu at the top of the screen.

Welcome, Tasha Oakland

My Concur **Request** Travel Expense Invoice Administration Profile

Get the Latest Mobile Features Now! Check App Stores for Current Versions

Travel Info  
Book travel with Concur, check travel rules set by your company, get travel maps, and more.

Company Info  
Welcome to Expense and Invoice. Please click the Expense or Invoice tab to start.

Active Work  
New Request View Requests

Requests (2) Expense Reports (2)

Request Name	Request ID	Status	Request Dates	Total	Expense Report?
Development Conference Technology development conference	2225	Approved	03/27/2011 03/31/2011	\$1,335.00	
Marketing Presentation XYZ Product Presentation	2228	Approved	02/21/2011 02/23/2011	\$730.10	

Available Company Card Charges [View All Charges](#)

Select Expense Report: New Expense Report Import Delete

Charge	Expense Type	Transaction Date	Amount
<input type="checkbox"/> American Airlines	Airfare	03/09/2011	\$364.10

Trip List << >>

Trip Name/Description	Locator	Status	Start Date	End Date	Expense Report?
-----------------------	---------	--------	------------	----------	-----------------

Weather

# Step 1: Create a New Travel Request (Continued)

## How to...

2. Click **New Request**.
3. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
4. Click **Save**.

## Additional Information

The **Request Header** tab appears. Your company defines the fields that appear on this page.

You must save the request before you can add **Segments**.

The screenshot shows the Concur web application interface. At the top, it says "Welcome, Tasha Oakland" and "Help | Log Out". The main navigation bar includes "My Concur", "Request", "Travel", "Expense", "Invoice", "Administration", and "Profile". Under "Request", there are links for "View Requests" and "New Request". The "Request" section has a title "Request" and buttons for "Cancel", "Save", and "Print / Email". Below this, it shows "Request Name:" and "Purpose:" fields, with a "Status: Not submitted" indicator. The "Request Header" tab is active, showing fields for "Request Name", "Request Policy" (set to "US Travel Request Policy"), "Start Date", "End Date", "Purpose", and "Comment".

# Section 1: Create a Travel Request (Continued)

## Step 2: Add Segments to a Travel Request

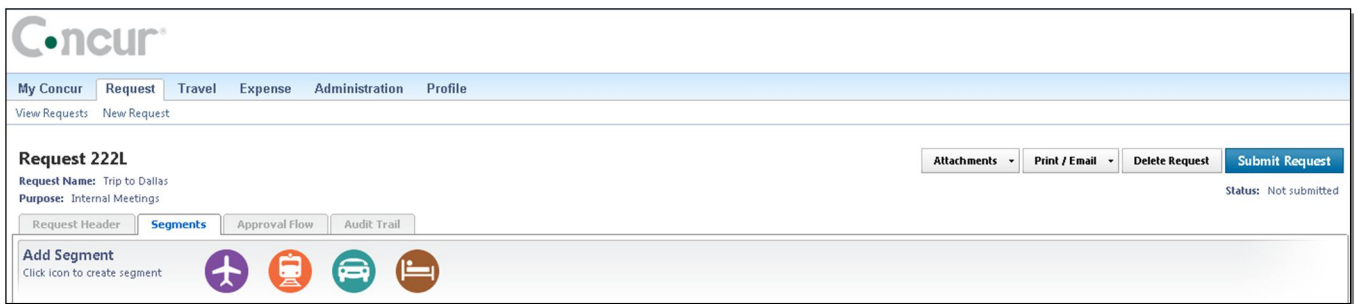
The icons at the top of the Segments tab represent the segments that are available to you based on the policy that you selected in the Request Header.

### How to...

1. On the **Segments** tab, click the icon for the type of reservation that you need for the trip.

### Additional Information

If your company has more than one policy for a reservation type, the icon will appear with a dropdown arrow. In that case, you will select the reservation type from the dropdown menu.



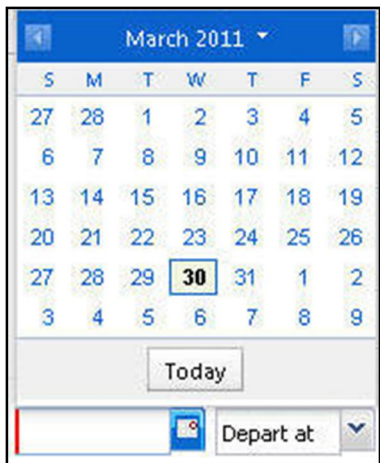
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.

If you enter a segment amount in a currency other than your reimbursement currency, and the expense rates are configured, then:

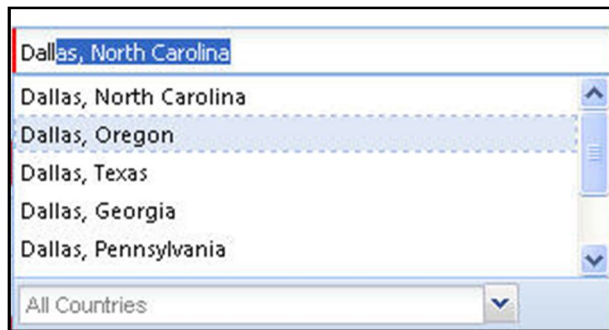
- The total will reflect the conversion to your reimbursement currency.
- The system will use the current exchange rate.
- The conversion is calculated when you save the segment, and it is recalculated if the segment is reopened and saved.

3. Click **Save**.

For date fields, use the calendar to select the date of the expense.



For auto-complete fields, type the first portion of your choice and then select from the list.



# Section 1: Create a Travel Request (Continued)

## Step 3: Add Additional Segments

The new segment fields will appear below the original segment fields.

### How to...

1. Click the icon for the next type of reservation that you need for the trip.
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
3. Click **Save**.

### Additional Information

Welcome, Tasha Oakland [Help](#) | [Log Out](#)

**Concur**

My Concur | Request | Travel | Expense | Administration | Profile

View Requests | New Request

**Request 222L** Attachments Print / Email Delete Request Submit Request

Request Name: Trip to Dallas Status: Not submitted  
Purpose: Internal Meetings Amount: \$452.70

Request Header | **Segments** | Approval Flow | Audit Trail

**Add Segment**  
Click icon to create segment

**Air Ticket** Round Trip One Way Amount: \$452.70 Modify Delete

**Outbound**  
From: Seattle, Washington  
To: Dallas, Texas  
Date: Monday, June 6, 2011 Depart at: 07:30 am  
Comment:

**Return**  
Date: Wednesday, June 8, 2011 Depart at: 09:00 am  
Comment:

**Car Rental** Amount: 0.00 USD Save Cancel

**Pick-up**  
City:   
Date:  At:   
Detail:

**Drop-off**  
City:   
Date:  At:   
Detail:

Comment:

# Section 2: Create a New Travel Request from a Reservation

## Step 1: Complete the Reservation

### How to...

1. Book the trip as usual in Travel.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click **Next**.
4. Click **Complete Booking**.

### Additional Information

The trip name will also be the name of the request. You can change this later, if needed, on the **Request Header** page.

You will see the trip name and itinerary, along with the quoted airfare amount.

The trip will now be placed in Approval Hold and you will be routed to the Request Header page.

### Trip Confirmation

To **COMPLETE BOOKING**, please Press the "Confirm Booking" Button after reviewing this page.  
To **CANCEL**, Press the Cancel button.

**This reservation will not be ticketed until your Travel Request is approved.**

### Annual Conference

**Aug 22 - Aug 24**

Description: (No Description Available)

Trip Record Locator: NX9C26 Created on: 5/25/2011 4:46:29 PM

Passengers: Oakland, Tasha.

### Monday Aug 22, 2011

#### Air

 New York, NY (LGA) to Chicago, IL (ORD)

Aug 22 **American** 301 *Duration: 2 hours, 35 minutes Nonstop*

**New York (LGA):** 6:15 AM

**Chicago (ORD):** 7:50 AM

**Terminal:** B

**Terminal:** 3

**Confirmation Number:** DVZYGS

**Status:** **Confirmed**

#### Flight Information

**Aircraft:** Douglas MD-80

**Distance:** 731 miles

**E-Ticket**

**Cabin:** Economy (Q)

**Seat:** 26F(Confirmed)

**Meal:** Food for purchase

#### Car



## Section 2: Create a New Travel Request from a Reservation (Continued)

The system has created the travel request header and segments based on the itinerary information.

### Step 2: Complete the Travel Request

As you complete the request, you can allocate the segments, attach images, add segments, submit the request, and, eventually, associate the request with an expense report.

**Request 222H**  
Request Name: Annual Conference  
Purpose:   
Status: Not submitted  
Amount: \$776.72

Request Header | Segments | Approval Flow | Audit Trail

Missing required fields: Purpose

Request Name: Annual Conference  
Request Policy: US Travel Request Policy  
Start Date: 08/22/2011  
End Date: 08/24/2011  
Purpose: annual sales conference  
Comment:

If you make changes to the trip in Travel (such as changing the dates, locations, or prices of a segment), those changes are immediately reflected in the travel request. If you remove segments, those segments are removed from the travel request. If you cancel the trip, the travel request will keep its current status but all segments will be deleted.

**Request 222H**  
Request Name: Annual Conference  
Purpose: annual sales conference  
Status: Not submitted  
Amount: \$776.72

Request Header | **Segments** | Approval Flow | Audit Trail

Add Segment  
Click icon to create segment

PNR NX9C26  
View itinerary  
Change Trip

Air Ticket (Self-booked segment) Amount: \$257.40

From: Flight:  
To: Class:  
Depart at: Duration:  
Arrive at:

From: Flight:  
To: Class:  
Depart at: Wednesday, August 24, 2011 At 15:05 Duration:

## Section 3: Allocate a Travel Request

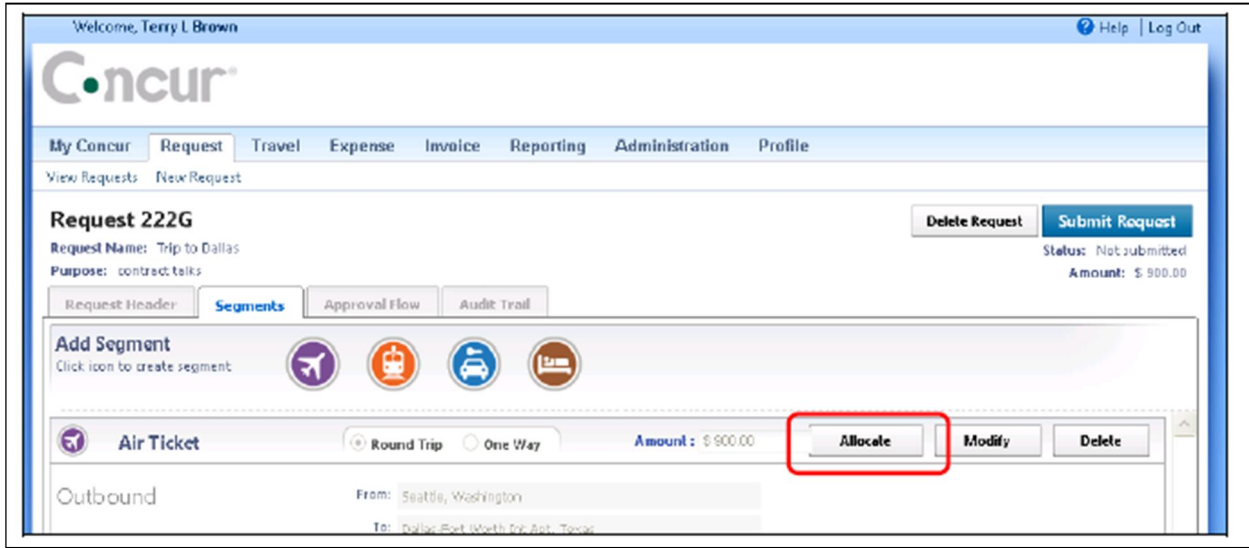
The Allocations feature allows you to allocate a travel request to projects or departments. Depending on your company's configuration, when associated with an expense report, the allocations from the travel request can be automatically copied to the associated expenses.

### How to...

1. Complete the request as usual.
2. In the upper-right corner of the **Segments** page, click **Allocate**.

### Additional Information

After you save the first segment of the travel request, the **Allocate** button appears.



3. From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.
4. In the first column of the Allocations table, enter the **Percentage** or **Amount**.
5. Click in the field under the **Department** column heading.
6. Select the department that will receive the allocation.
7. Click **Add New Allocation**.
8. Repeat steps 5-7 for each new allocation.

Depending on your company's configuration, you might see different fields, other than Department, to complete.

A new allocations field appears.

Depending on your company's configuration, the request allocations do not have to total 100%.

### Section 3: Allocate a Travel Request (Continued)

Request List				Allocations Total: \$ 1,400.00 Allocated: \$ 1,400.00 (100%) Remaining: \$					
Allocate Selected Requests Clear Selections				Allocate By: Add New Allocation Delete Selected Allocation					
Select Group -									
<input type="checkbox"/>	Date	Segment Type	Group	Amount	<input type="checkbox"/>	Percentage	Department	Group	Cost Center
<input type="checkbox"/>	01/17/2011	Air Ticket	1	\$ 900.00	<input type="checkbox"/>	50	Sales	105-1	300
<input type="checkbox"/>	01/17/2011	Hotel Reserv...	1	\$ 500.00	<input checked="" type="checkbox"/>	50	Marketing	205-3	312

9. Click **Save**.
10. Click **Done**.

You cannot allocate segments individually. All segments on a request share the same allocations. If any segment is allocated - all segments are allocated.

## Section 4: Print and Submit/Resubmit Travel Requests

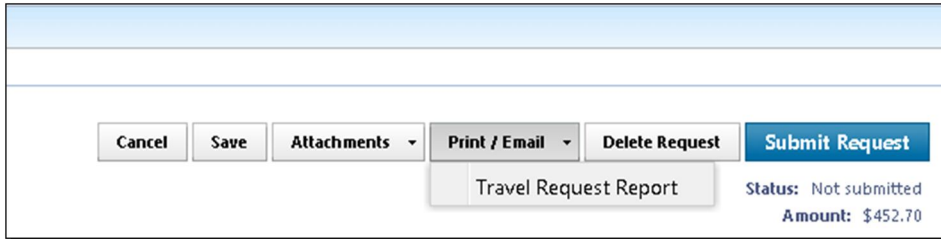
### Preview and Print Your Travel Request

#### How to...

1. On the **Travel Request** page, from the **Print/Email** dropdown menu, select **Travel Request Report**.
2. To print the report, click **Print**.

#### Additional Information

All segments of the travel request will print.



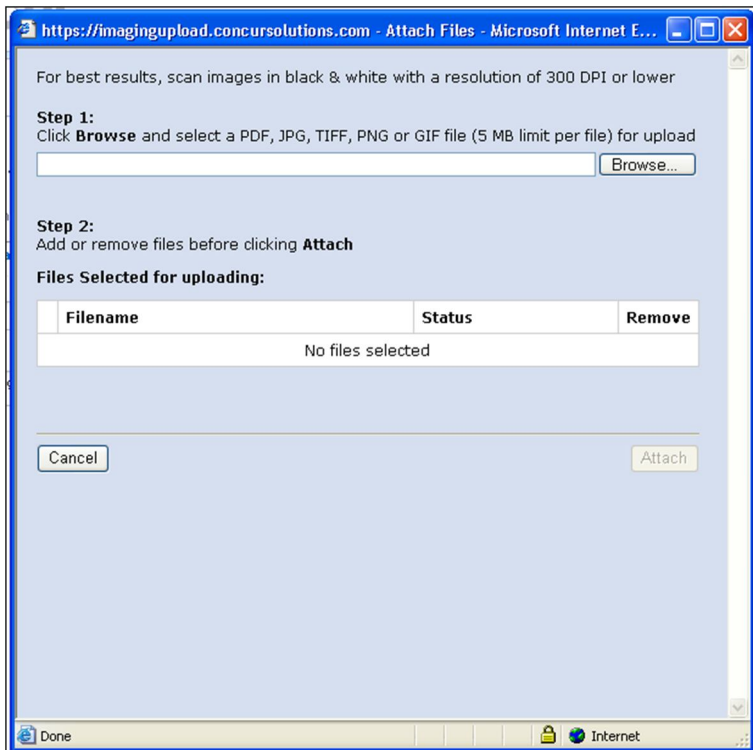
### Attach a Scanned Image

If your company uses Concur Imaging, you can attach scanned images to your travel requests.

#### How to...

1. On the **Travel Request** page, from the **Attachments** dropdown menu, select **Attach Documents**.
2. Click **Browse**, and then locate the file you want to attach.

#### Additional Information



## Attach a Scanned Image (Continued)

### How to...

3. Select the file, and then click **Open**.
4. To attach another image, click **Browse**, and then repeat the process.
5. Click **Attach**, and then click **Done**.
6. To view the attached attachments, from the **Attachments** dropdown menu, select **Check Documents**.

### Additional Information

The selected file appears in the **Files Selected for uploading** section of the window.

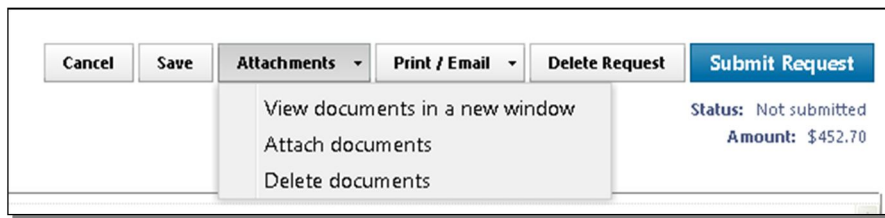
## Delete Attached Images

### How to...

1. On the **Travel Request** page, from the **Attachments** dropdown menu, select **Delete documents**.
2. In the confirmation window, click **Yes**.

### Additional Information

When you select the **Delete documents** option, all attached images are deleted. You cannot delete individual images.



## Section 4: Print and Submit/Resubmit Travel Requests (Continued)

### Submit Your Completed Travel Request

#### How to...

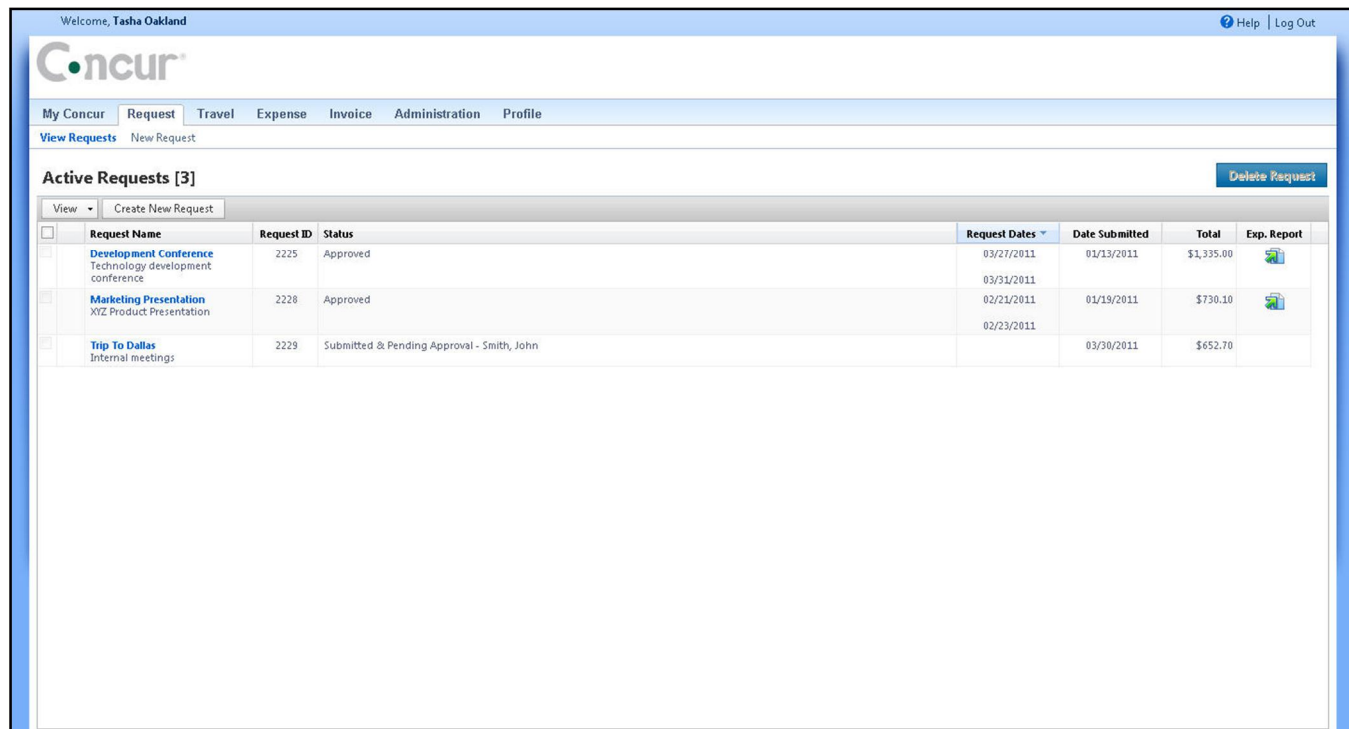
1. From the **Add Segment** page, click **Submit Request**.

#### Additional Information



If you have an assigned travel request approver, you will only need to click **Submit Request**.

If your company's configuration allows you to modify your approver, you will first click the **Approval Flow** tab, select the appropriate approver, and then click **Submit Request**.

After the request has been submitted, the **Active Requests** page appears. Your new travel request appears in the list.



The screenshot shows the Concur user interface for 'Active Requests'. The page title is 'Active Requests [3]' and there is a 'Delete Request' button. The table below lists three requests with columns for Request Name, Request ID, Status, Request Dates, Date Submitted, Total, and Exp. Report.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Exp. Report
Development Conference Technology development conferences	2225	Approved	03/27/2011	01/13/2011	\$1,335.00	
Marketing Presentation XYZ Product Presentation	2228	Approved	03/31/2011	01/19/2011	\$730.10	
Trip To Dallas Internal meetings	2229	Submitted & Pending Approval - Smith, John	02/23/2011	03/30/2011	\$652.70	

# Section 5: Associate a Travel Request to an Expense Report

You can associate a travel request to an expense report only after the travel request has been approved.

## How to...

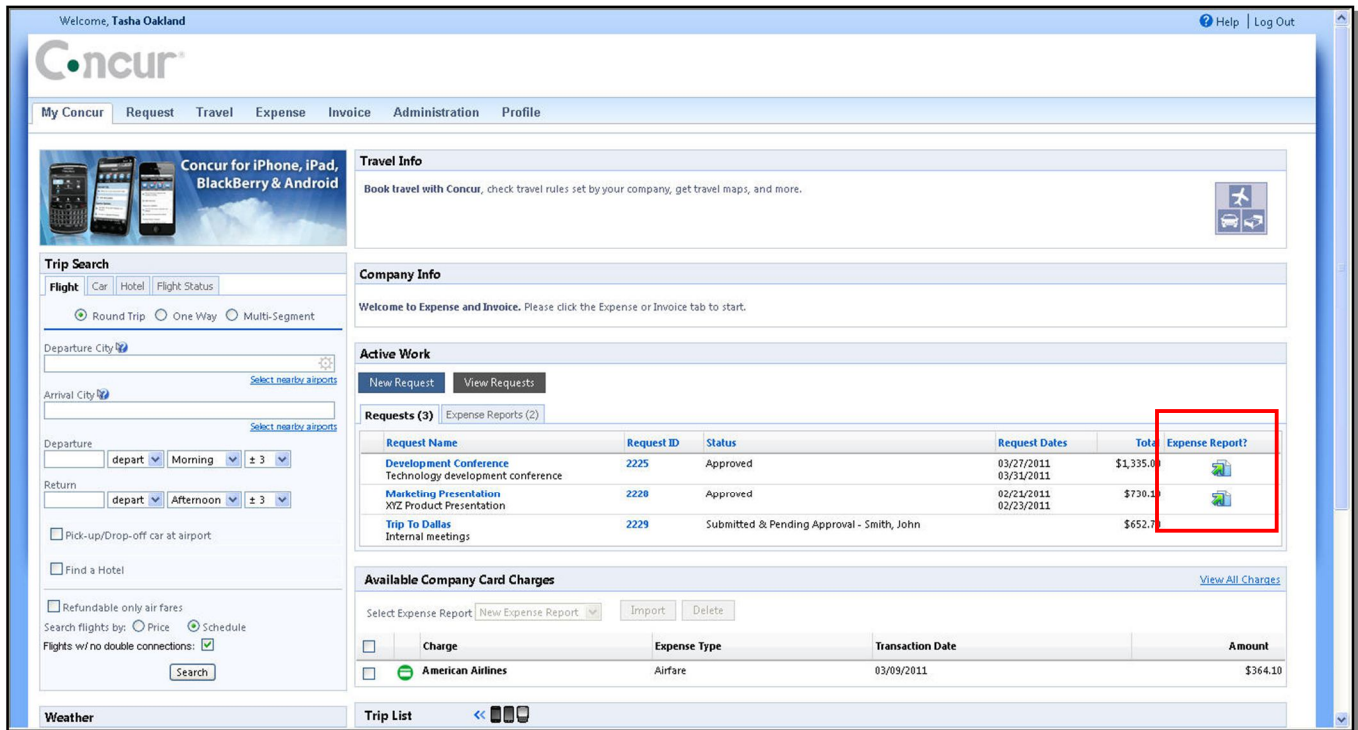
1. From the **Active Work** section on the **My Concur** page, click the **Requests** tab.
2. Click the **Expense Report?** button.

## Additional Information

There are three ways that you can associate a travel request to an expense report:

- Create a new report and apply the travel request from the report header.
- Create a new report from the travel request by clicking the **Expense Report?** button for the approved travel request.
- Apply a travel request to an existing report before adding expenses.

The **Expense Report?** button is only available for approved travel requests.



## Section 5: Associate a Travel Request to an Expense Report (Continued)

### How to...

3. On the **Report Header** page, complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
4. Click **Next**.

### Additional Information

Your company defines the fields that appear on this page.

Notice that the associated request(s) appear in the **Requests** section.

Welcome, Tasha Oakland | Help | Log Out

Concur

My Concur | Request | Travel | Expense | Invoice | Administration | Profile

View Charges | View Reports | **New Expense Report**

### Create a New Expense Report

#### Report Header

Report Name: [Red Bar] Report Date: 03/30/2011 Policy: US Travel & Expense Policy Business Purpose: [Red Bar] Company: (10) United States Department: (900) Training

Cost Center: (9010) Internal Project Code: [Red Bar] Comment: [Red Bar]

#### Requests

<input type="checkbox"/> Request Name	Request ID	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/> Marketing Presentation	2228	\$730.10	\$0.00	\$0.00

Next >> | Cancel

5. Complete and submit the expense report, as usual.



## Section 6: Review and Approve a Travel Request

As an approver, you can approve a travel request, send a travel request back to the employee to modify and resubmit, or approve and forward a travel request.

### Review and Approve a Travel Request

All requests awaiting your review and approval appear in the **Approval Queue** section on the **My Concur** page.

#### How to...

#### Additional Information

1. In the **Approval Queue** section on the **My Concur** page, click the **Requests** tab.

	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
<input type="checkbox"/>	Trip To Dallas Internal meetings	2229	Oakland, Tasha		03/30/2011	\$652.70

2. Click the request name.
3. On the **Request Header** page, review the header information.
4. Click the **Segments** tab, and then review the segments information.
5. When ready to approve, click **Approve**.

The **Request Header** page appears.

The travel request moves to the next step in the workflow.

**Request 2229** Print / Email Send Back Request Approve Approve & Forward

Request Name: Trip To Dallas  
Purpose: Internal meetings  
Status: Submitted & Pending Approval  
Amount: \$652.70

Request Header **Segments** Approval Flow Audit Trail

**Air Ticket** Round Trip One Way Amount: \$452.70

Outbound  
From: Seattle, Washington  
To: Dallas, Texas  
Date: Monday, April 4, 2011 Depart at: 08:30 am  
Comment:

Return  
Date: Friday, April 8, 2011 Depart at: 05:30 pm  
Comment:

**Car Rental** Amount: \$200.00

Pick-up  
City: Dallas, Texas  
Date:  
Detail: Airport Location

## Section 6: Review and Approve a Travel Request (Continued)

### Send a Travel Request Back to the Employee

#### How to...

1. In the **Approval Queue** section on the **My Concur** page, click the **Requests** tab.
2. Click the request name.
3. Click **Send Back Request**.
4. Enter a **Comment** for the employee, and then click **OK**.

#### Additional Information

- The **Request Header** page appears.
- The **Send Back Request** dialog box appears.
- The request is returned to the employee.

**Send Back Request**

**Comment History**

Entered By	Comment Text	Creation date
------------	--------------	---------------

Add a comment to explain why you are returning the request. Then click OK to return the request to the employee.

Comment

OK Cancel

## Section 6: Review and Approve a Travel Request (Continued)

### ***Add an Additional Review Step for a Travel Request***

Depending on your company's configuration, you can add additional approval steps for a travel request, as needed. For example, if a travel request has an amount that is greater than your authorized approval limit, you can manually select an appropriate additional approver for the travel request.

#### How to...

1. In the **Approval Queue** section on the **My Concur** page, click the **Requests** tab.
2. Click the request name.
3. Click **Approve & Forward**.
4. In the **User-Added Approver** field, type the search criteria.
5. From the list of options displayed by the search, select the appropriate approver.
6. Click **Approve**.

#### Additional Information

The **Request Header** page appears.

The **Approval Flow** page appears.

The system displays all matches for the search criteria that you enter.

The request is forwarded to the selected approver.

The screenshot shows the Concur web application interface. At the top, there is a navigation bar with tabs for 'My Concur', 'Request', 'Travel', 'Expense', 'Administration', and 'Profile'. Below this, there are sub-tabs for 'View Requests', 'New Request', and 'Approve Requests'. The main content area is titled 'Request 2229' and includes the following information: 'Request Name: Trip To Dallas', 'Purpose: Internal meetings', 'Status: Submitted & Pending Approval', and 'Amount: \$652.70'. There are buttons for 'Save Workflow', 'Print / Email', 'Send Back Request', and 'Approve'. The 'Approval Flow' tab is selected, showing a 'Manager Approval' field with 'Smith, John' and a 'User-Added Approver' field. The 'Approve' button is highlighted in blue.