QuickStart Guide

Concur® Premier: Travel Request

Proprietary Statement

Information contained in this document applies to the following products in effect at the time of this document's publication:

Concur® Premier: Travel Request QuickStart Guide

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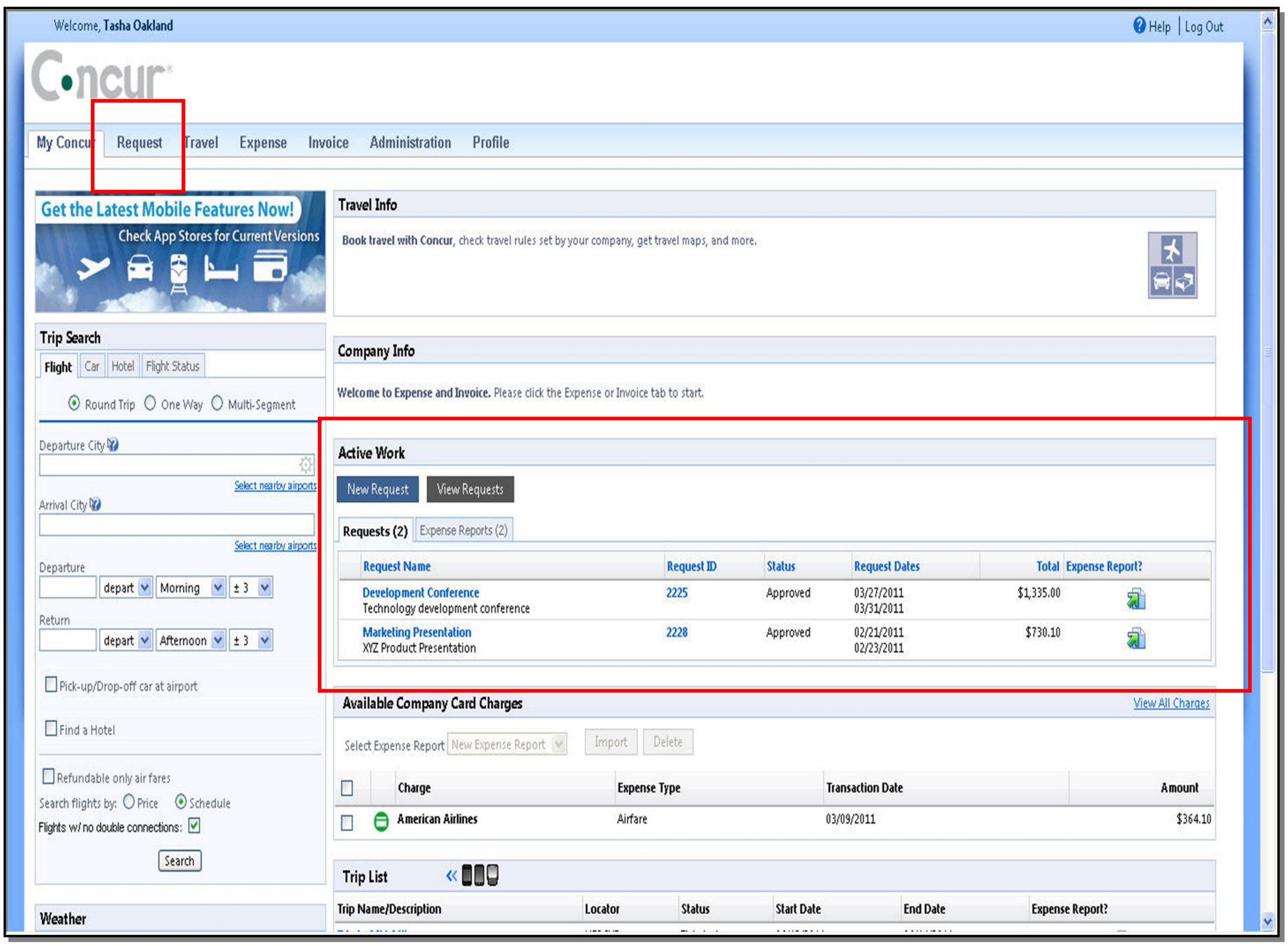
Welcome to Concur Premier: Travel Request

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

Section 1: Create a Travel Request

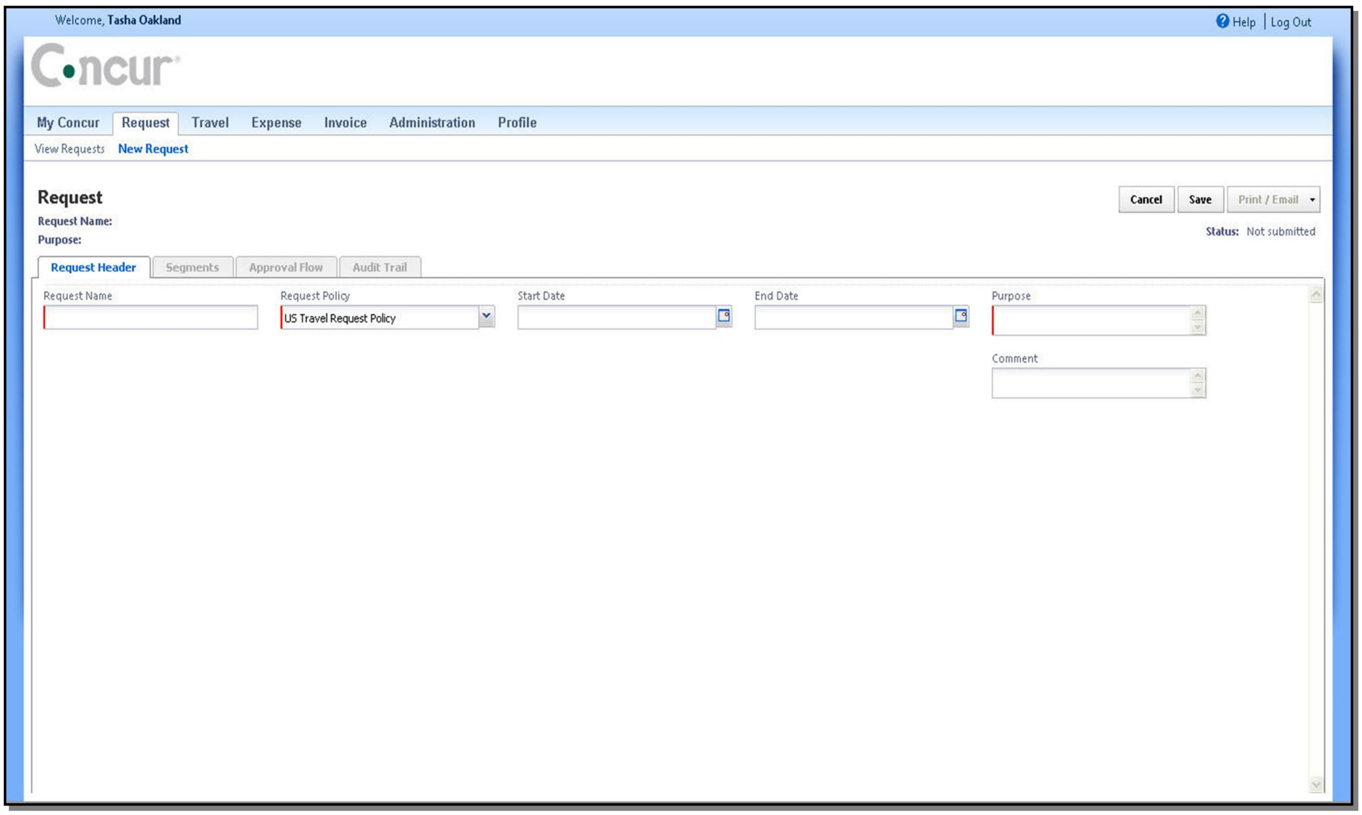
Step 1: Create a New Travel Request

How to...	Additional Information
1. From the **Active Work** section on the **My Concur** page, click the **Requests** tab.	You can also access the **Request** feature from the menu at the top of the screen.



Step 1: Create a New Travel Request (Continued)

How to...	Additional Information
2. Click **New Request**.	The **Request Header** tab appears. Your company defines the fields that appear on this page.
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**.	You must save the request before you can add **Segments**.

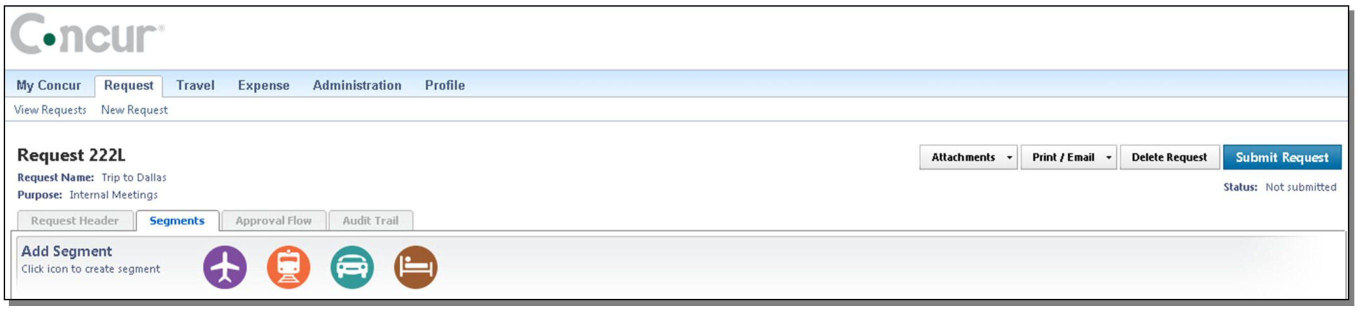


Section 1: Create a Travel Request (Continued)

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



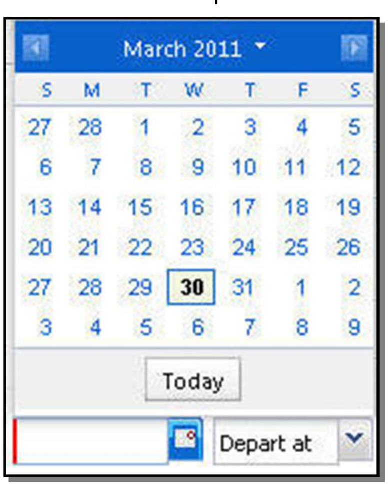
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.

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

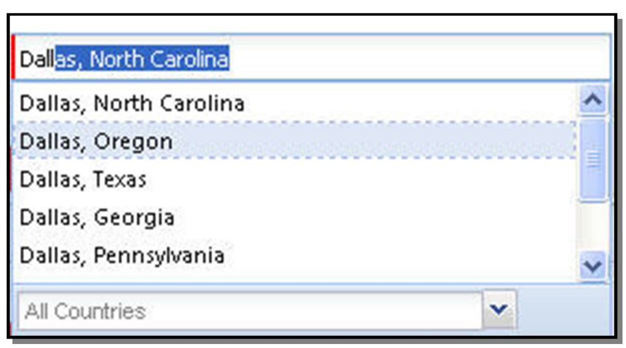
- The total will reflect the conversion to your reimbursement currency.
- The system will use the current exchange rate.
- The conversion is calculated when you save the segment, and it is recalculated if the segment is reopened and saved.

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.

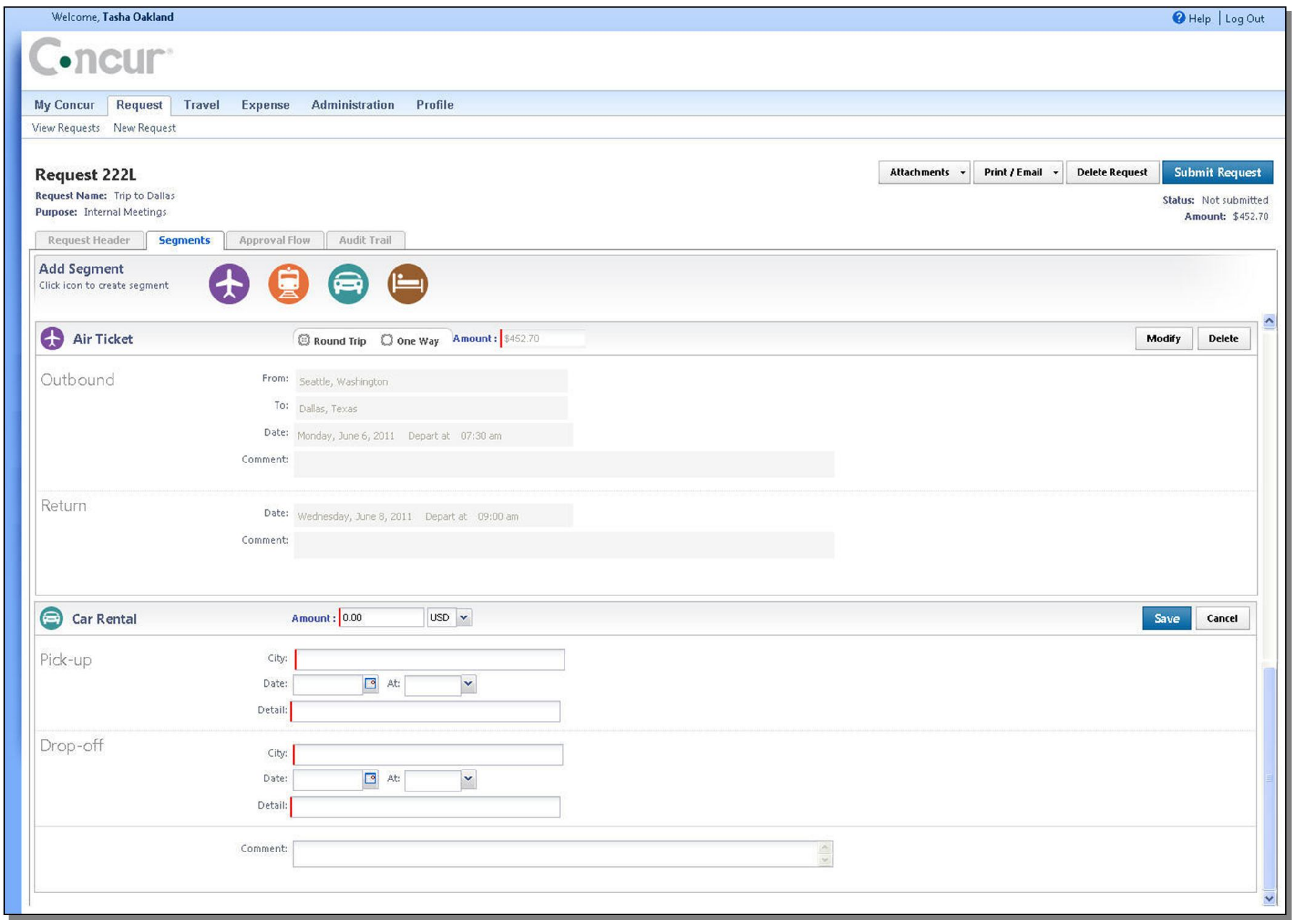


Section 1: Create a Travel Request (Continued)

Step 3: Add Additional Segments

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

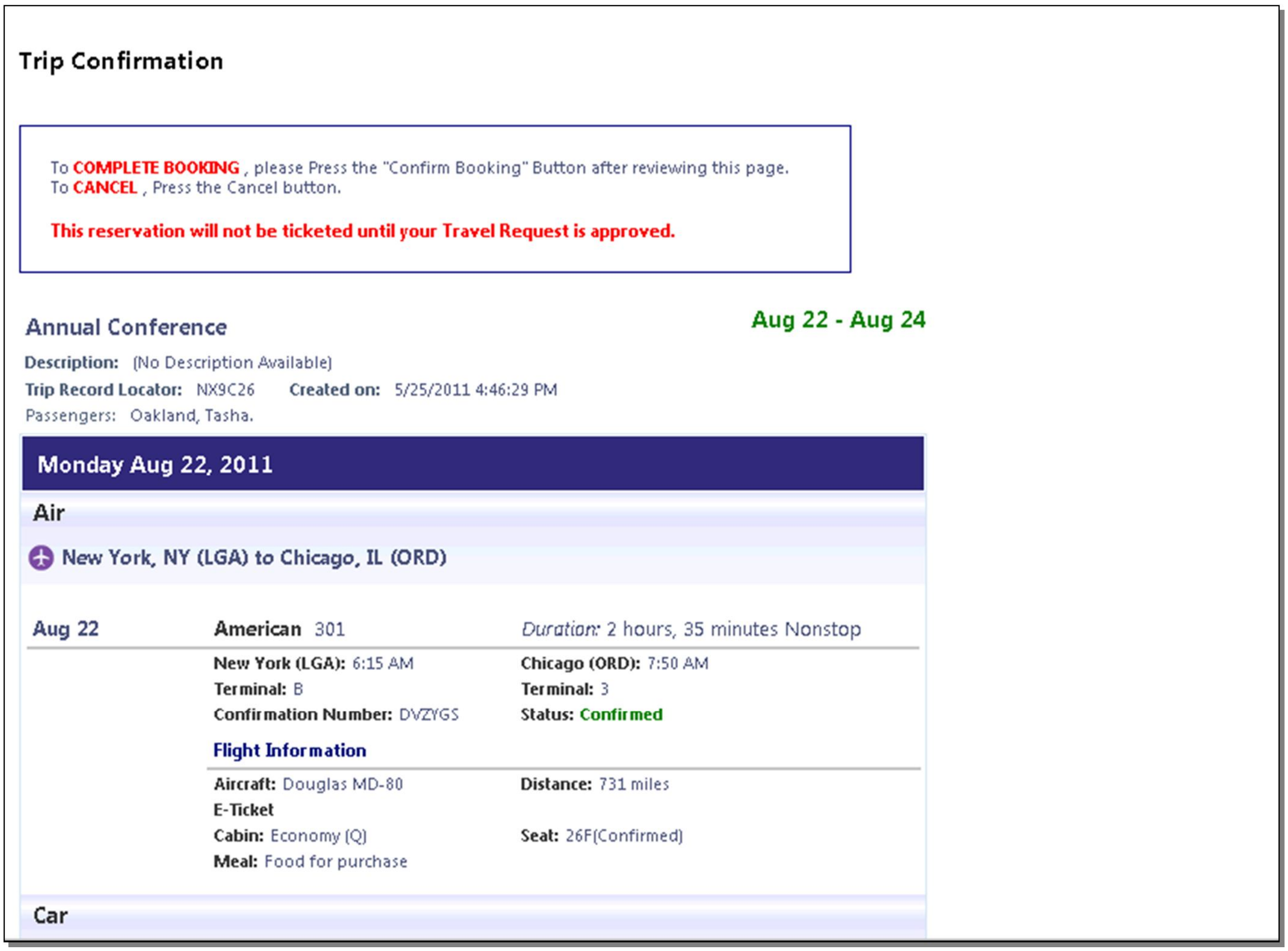
How to...	Additional Information
1. Click the icon for the next type of reservation that you need for the trip. 2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company. 3. Click **Save**.	



Section 2: Create a New Travel Request from a Reservation

Step 1: Complete the Reservation

How to…	Additional Information
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.	The trip name will also be the name of the request. You can change this later, if needed, on the **Request Header** page.
3. Click **Next.**	You will see the trip name and itinerary, along with the quoted airfare amount.
4. Click **Complete Booking**.	The trip will now be placed in Approval Hold and you will be routed to the Request Header page.

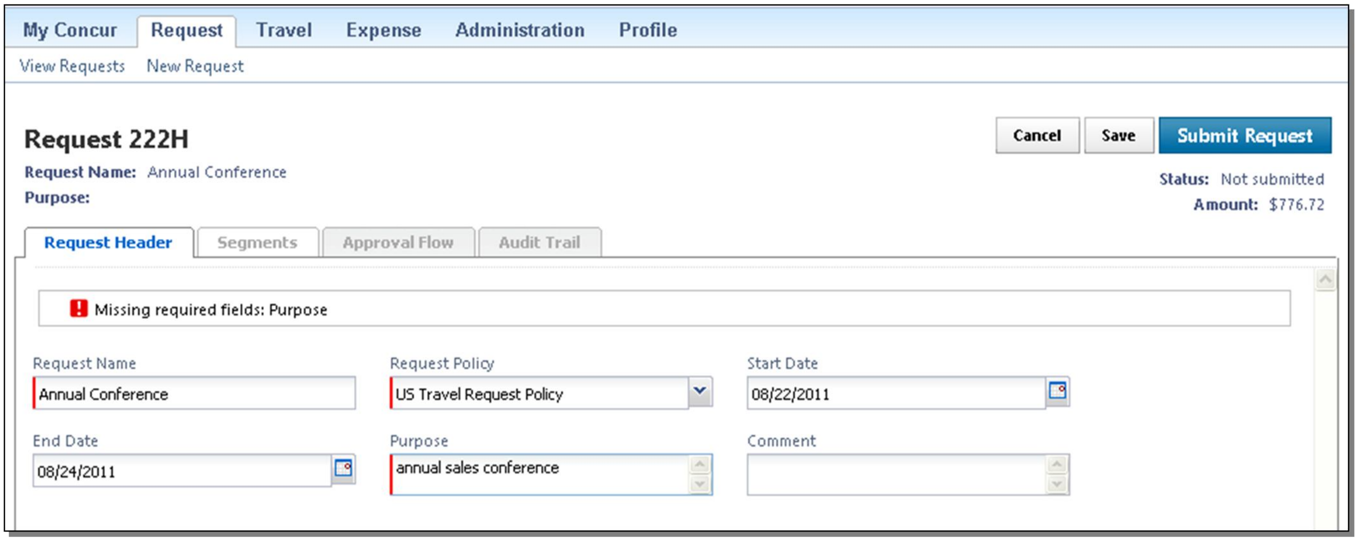


Section 2: Create a New Travel Request from a Reservation (Continued)

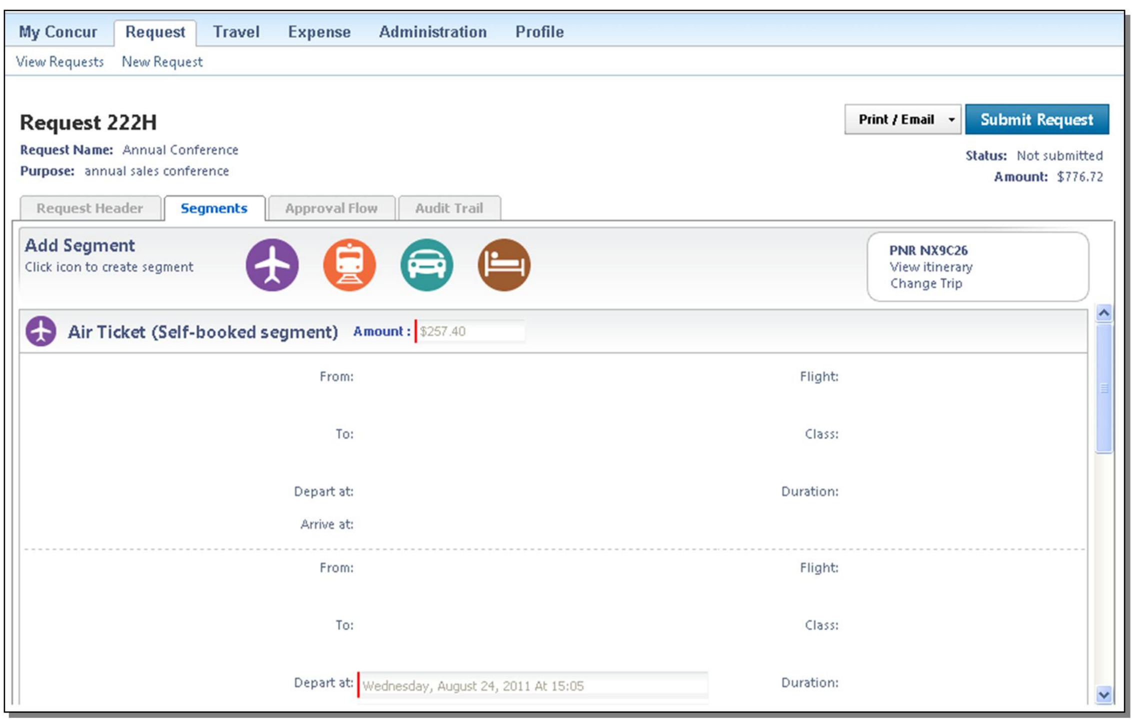
The system has created the travel request header and segments based on the itinerary information.

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.



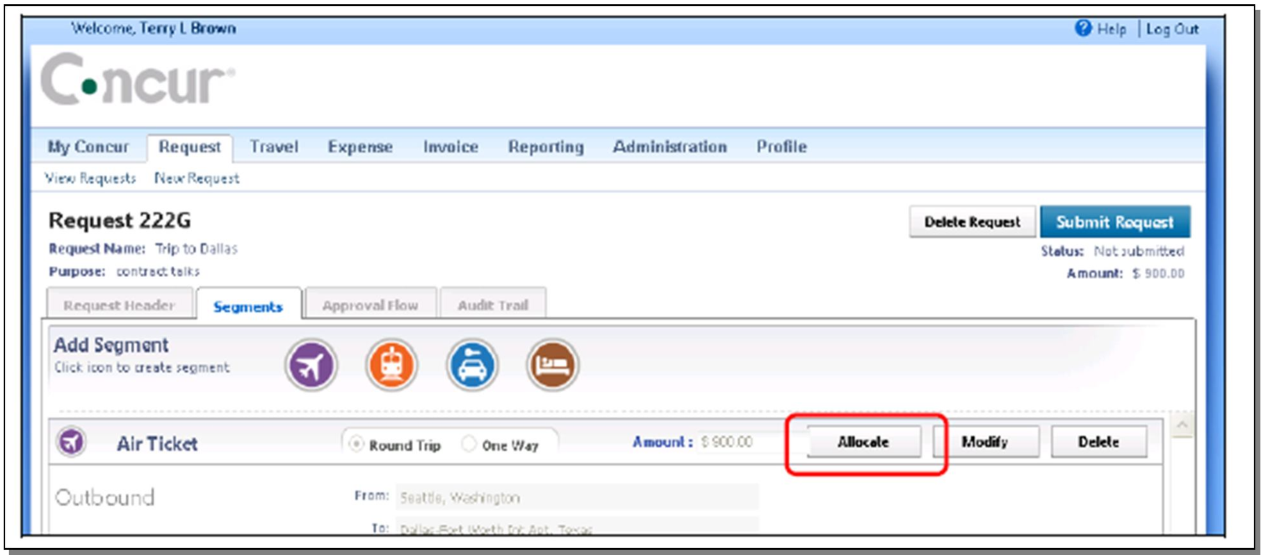
If you make changes to the trip in Travel (such as changing the dates, locations, or prices of a segment), those changes are immediately reflected in the travel request. If you remove segments, those segments are removed from the travel request. If you cancel the trip, the travel request will keep its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



Section 3: Allocate a Travel Request

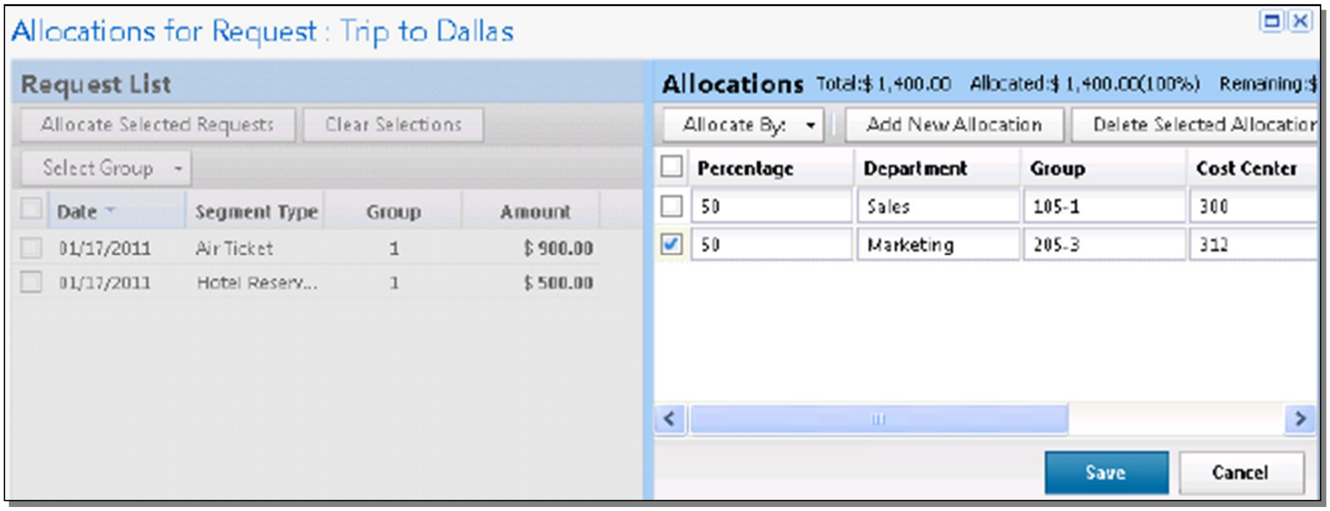
The Allocations feature allows you to allocate a travel request to projects or departments. Depending on your company's configuration, when associated with an expense report, the allocations from the travel request can be automatically copied to the associated expenses.

How to...	Additional Information
1. Complete the request as usual.	
2. In the upper-right corner of the **Segments** page, click **Allocate**.	After you save the first segment of the travel request, the **Allocate** button appears.



How to...	Additional Information
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.	Depending on your company's configuration, you might see different fields, other than Department, to complete.
6. Select the department that will receive the allocation.	
7. Click **Add New Allocation**.	A new allocations field appears.
8. Repeat steps 5-7 for each new allocation.	Depending on your company's configuration, the request allocations do not have to total 100%.

Section 3: Allocate a Travel Request (Continued)



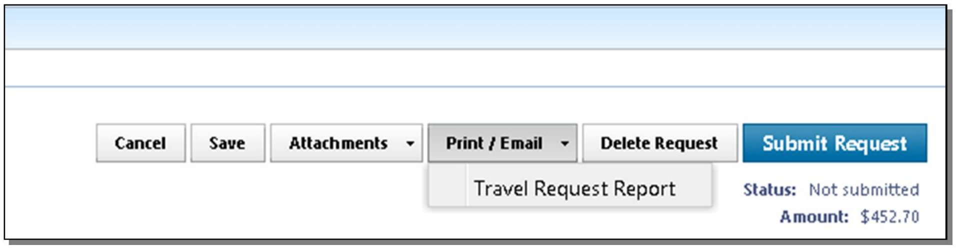
9. Click **Save**.
10. Click **Done**.

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

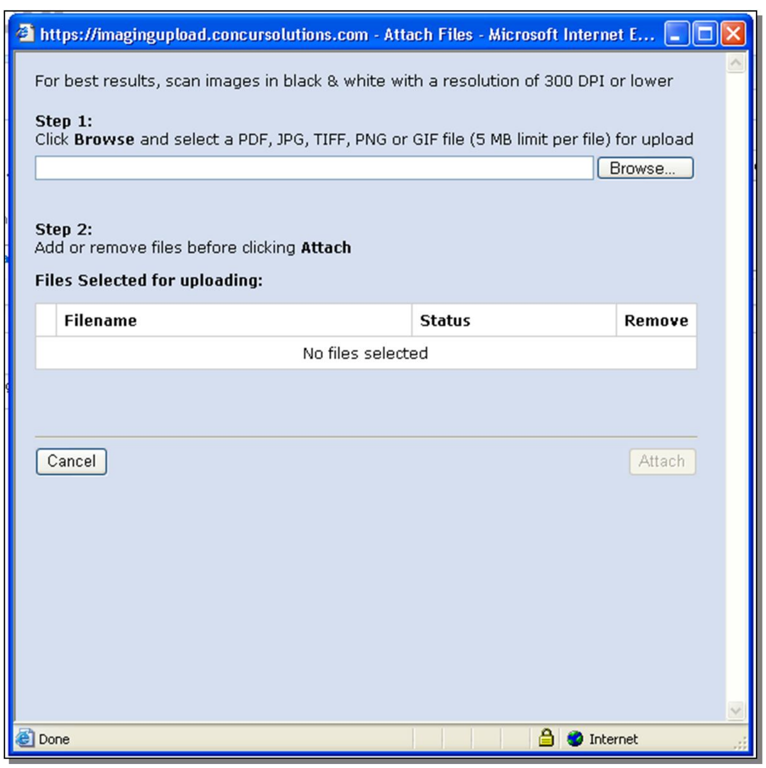
How to...	Additional Information
1. On the **Travel Request** page, from the **Print/Email** dropdown menu, select **Travel Request Report**.	
2. To print the report, click **Print**.	All segments of the travel request will print.



Attach a Scanned Image

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

How to...	Additional Information
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.	



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.

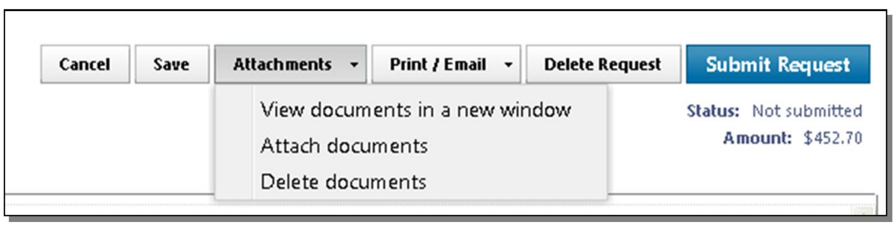
Delete Attached Images

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...

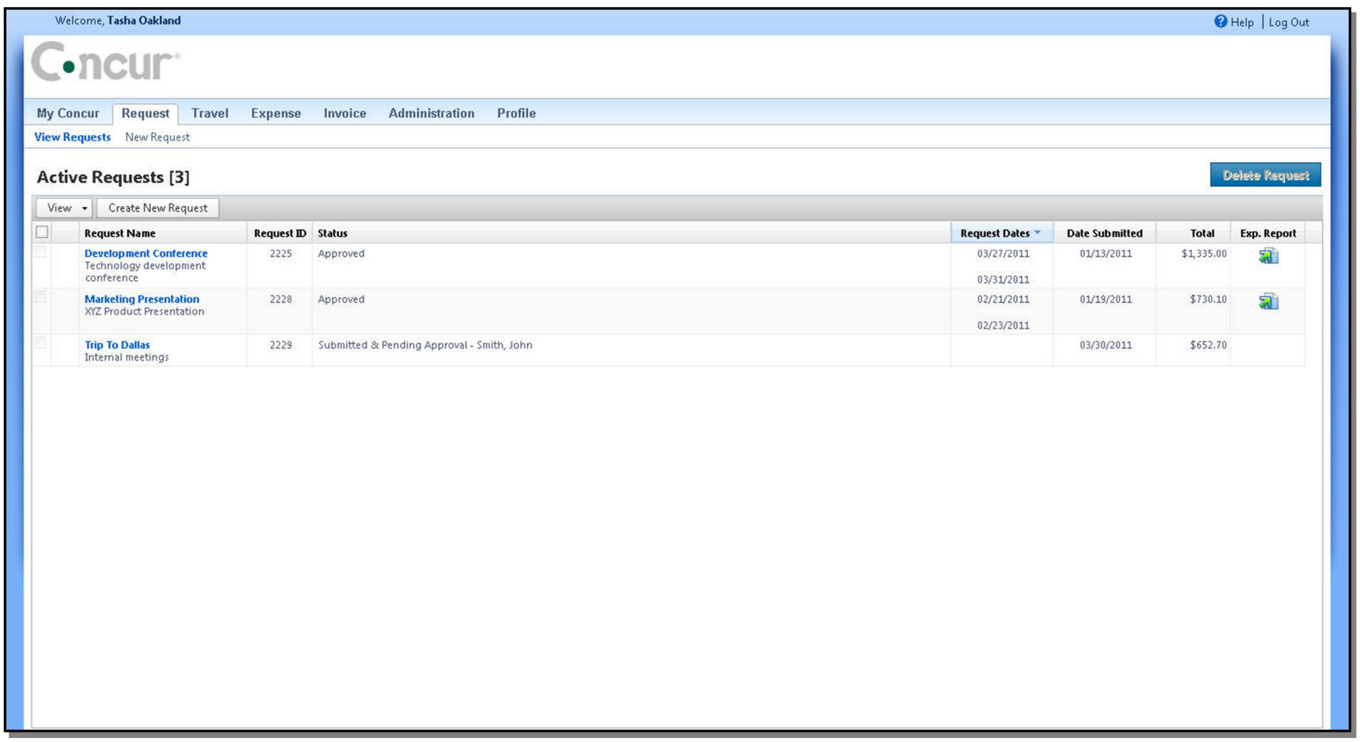
1. From the **Add Segment** page, click **Submit Request.**

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.



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.

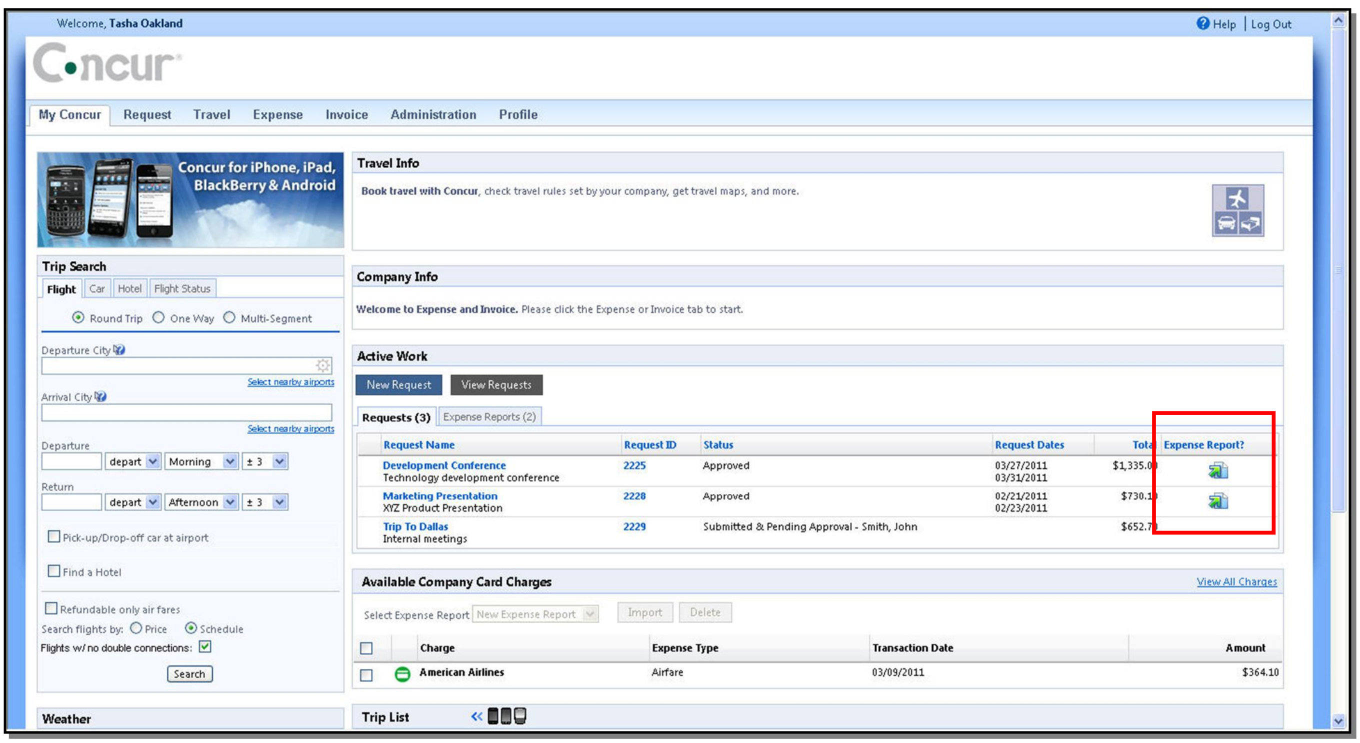
Additional Information

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.

2. Click the **Expense Report?** button.

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



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

How to...

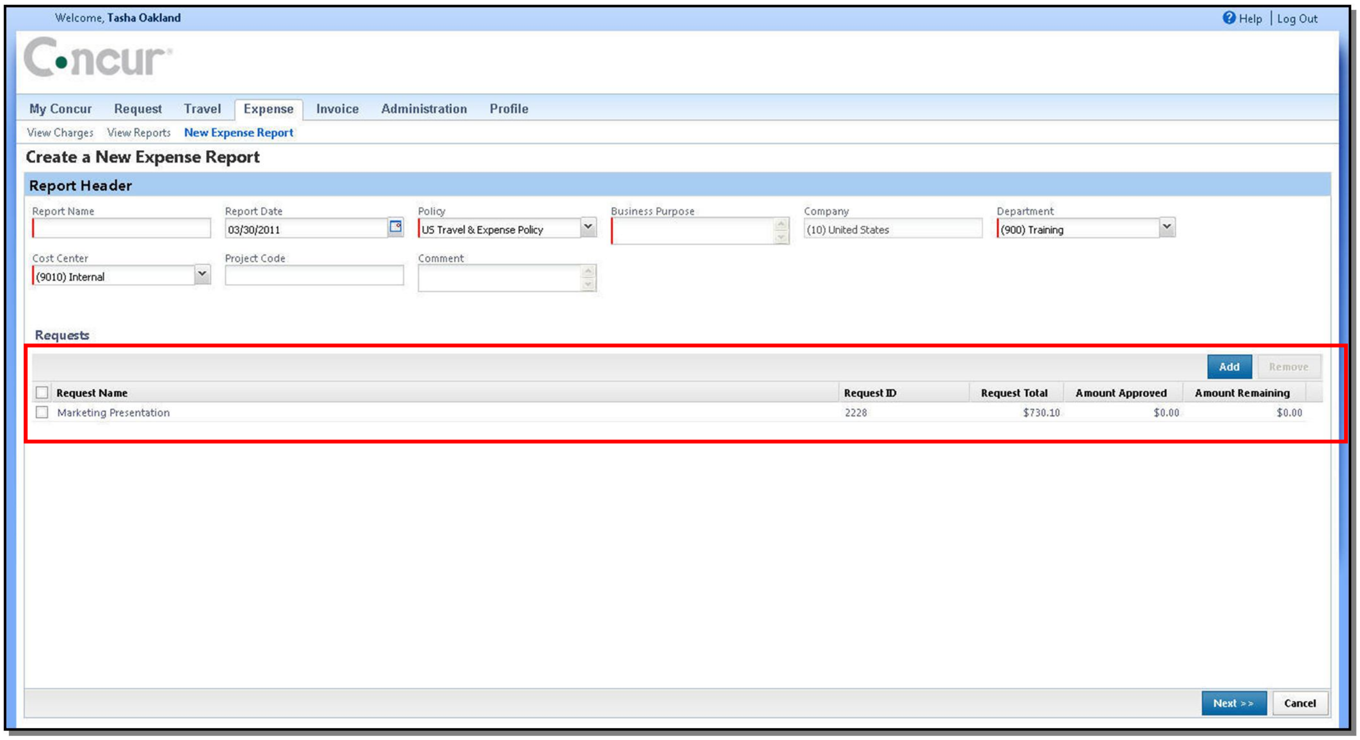
3. On the **Report Header** page, complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.

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.



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

Section 6: Review and Approve a Travel Request

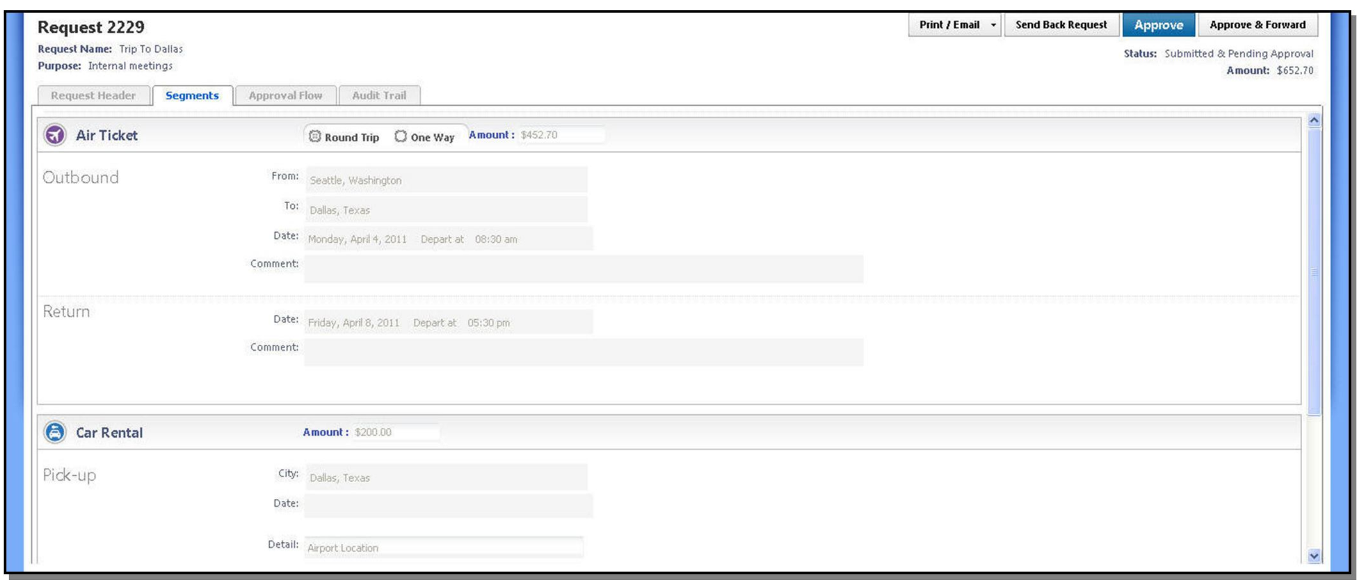
As an approver, you can approve a travel request, send a travel request back to the employee to modify and resubmit, or approve and forward a travel request.

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.	

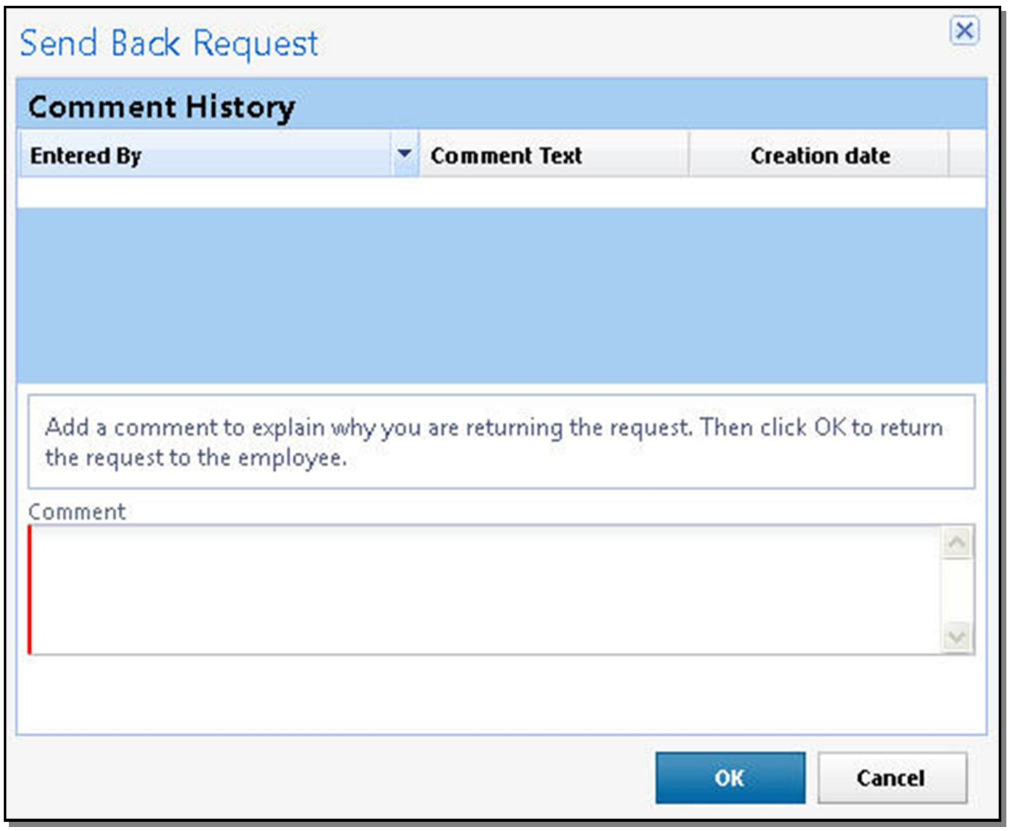
How to...	Additional Information
2. Click the request name.	The **Request Header** page appears.
3. On the **Request Header** page, review the header information.	
4. Click the **Segments** tab, and then review the segments information.	
5. When ready to approve, click **Approve**.	The travel request moves to the next step in the workflow.



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

Send a Travel Request Back to the Employee

How to...	Additional Information
1. In the **Approval Queue** section on the **My Concur** page, click the **Requests** tab.	
2. Click the request name.	The **Request Header** page appears.
3. Click **Send Back Request**.	The **Send Back Request** dialog box appears.
4. Enter a **Comment** for the employee, and then click **OK**.	The request is returned to the employee.



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...	Additional Information
1. In the **Approval Queue** section on the **My Concur** page, click the **Requests** tab.	
2. Click the request name.	The **Request Header** page appears.
3. Click **Approve & Forward**.	The **Approval Flow** page appears.
4. In the **User-Added Approver** field, type the search criteria.	The system displays all matches for the search criteria that you enter.
5. From the list of options displayed by the search, select the appropriate approver.	
6. Click **Approve**.	The request is forwarded to the selected approver.