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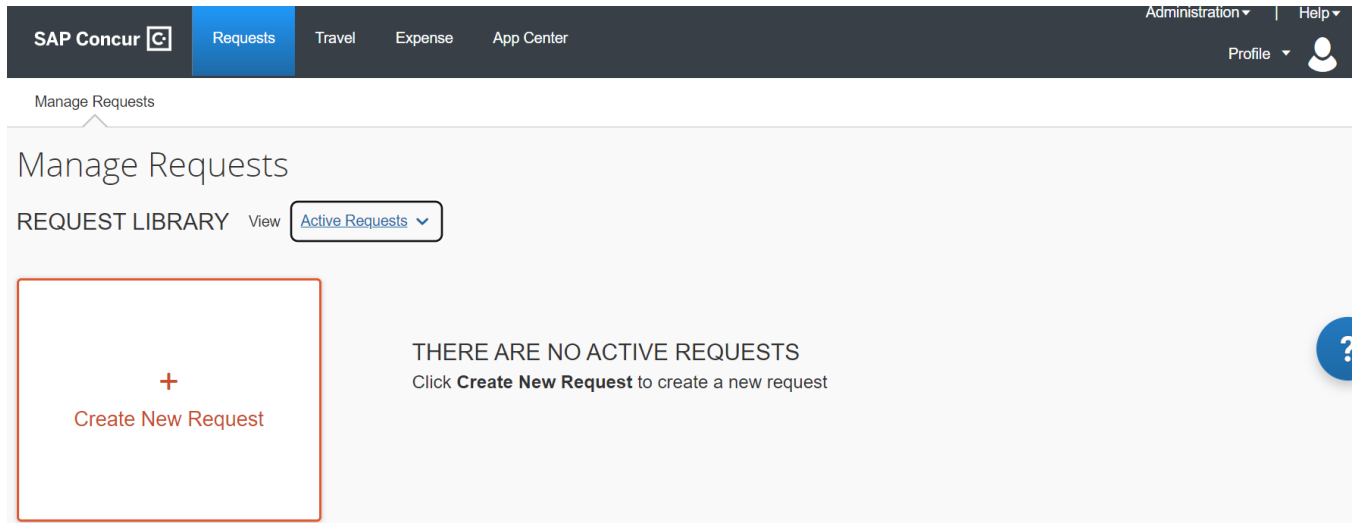
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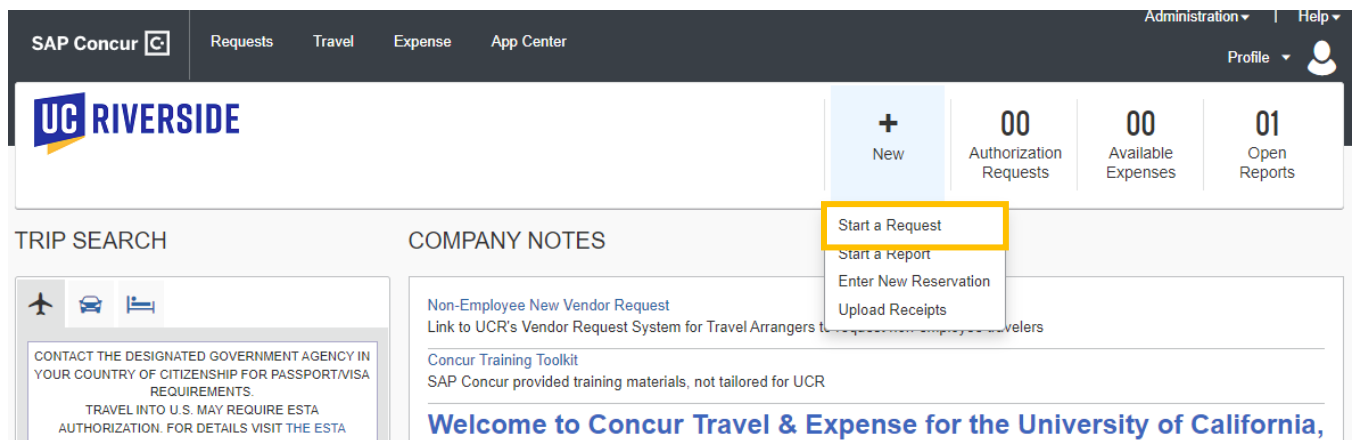
Create a Pre-Trip Travel Request

Create a Pre-Trip Travel Request

1. Click **Requests** on the header toolbar, and then select the tile named **+ Create New Request** on the request page.



2. Or, from the Concur homepage, hover over **+ New** and select **Start a Request**.



Complete the Request Header

The **Request Header** tab appears.

3. Enter the required fields (noted by red asterisks) and necessary optional fields

Create New Request

Request Type *

*Travel Request

Trip Name *

333H-San Fran-082522-083122

Traveler Type *

Employee

Trip Type *

1. In-State

Trip Purpose *

Conference/Professional Meeting

Business Purpose/Additional Information *

Guest speaker at Conference for Medical Sciences Advancements

Business Travel Start Date *

08/25/2022

Business Travel End Date *

08/31/2022

Will this trip include personal travel? *

No

Personal Travel Dates

Main Destination City *

San Francisco, California

Payment Option * ?

EFT

Accountability Structure *

(D01100) Accounting

Approver ID *

(10009972) Bobbi McCracken

Activity *

(A01206) Accounting

Fund *

(19900) GENERAL FUNDS

Function *

(72) Institutional Support

Cost Center

Search by Code

Project

Search by Code

Comment

Cancel

Create Request

See field descriptions and further information in the table below.

Field Name	Description
Request Type	Travel Request is set as the default) and should be used for pre-trip requests
Trip Name	Enter a meaningful trip name to help identify the trip. The suggested naming convention includes Request ID, Identifier, and Dates of Travel (ex. 333H, Dallas, TX 5/18 – 5/31/22). There is a 32-character limit.
Traveler Type	Select from the dropdown list
Trip Type	Select from the dropdown list
Trip Purpose	Select from the dropdown list
Business Purpose/Additional Information	Please provide as much detail as possible.
Business Travel Start Date	Date business expenses start. If personal days precede business dates, please be sure to still set travel start date to the date you leave for the trip
Business Travel End Date	Date business expenses end. If personal days are after business dates, please be sure to still set the travel end date to the date you return from the trip.

Will this trip include personal travel?	Select from the dropdown list
Personal Travel Dates	If the travel request will include personal travel, it should be documented when creating and submitting the request.
Main Destination City	If you anticipate traveling to more than one city and/or country, enter where you plan to spend most of your travel time. The Comments section can be used to enter additional destinations. If your city is unavailable in the dropdown list, select the city closest to your main destination.
Payment Option	Employees are typically paid via EFT
Accountability Structure	Informs travel routing approval workflow
Approver ID	Select the Financial Approver for the Request
FAU: Activity, Fund & Function	Provide funding information for the upcoming trip. If multiple funding sources are used, see Allocating Expected Expenses.
FAU: Cost Center & Project	Optional

- Click the **Create** button in the screen's lower right-hand corner.

Result: A Request ID number will be generated, and you can add any anticipated travel expenses. The Request ID number is required to use the University's Corporate Card "Direct-Billing" option in Concur Travel or to book directly with the University's travel agency.

333H-San Fran-8/25/22-8/30/2022 \$0.00

Not Submitted | Request ID: 34RQ

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES


Add Edit Delete Allocate

Add Expenses to a Pre-Trip Travel Request

After creating the Travel Request, you can add airfare, lodging, or other anticipated expenses. At least one expense must be added to the request before it can be submitted. Enter meaningful estimates for the related travel expenses. The travel request should reflect the anticipated cost for the trip and communicate the amount of campus department funding a traveler is seeking for a particular trip.

Follow these steps to add expenses to a travel request:

- Open the travel request and click the **Add** button.

333H-San Fran-8/25/22-8/30/2022 \$0.00 

Not Submitted | Request ID: 34RQ

Copy Request

Submit Request

Request Details  Print/Share  Attachments 

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

6. Select the type of expense you need to add.

Add Expected Expense

Search for an expense type

01. Airfare

02. Lodging

03. Ground Transportation

04. Individual Meals

05. Business Meetings

06. Social Activities and Entertainment

07. Conference/Training Registration

08. Other Expenses

For example, select 04. Individual Meals and populate fields. Once complete, click **Save**, and add additional expected expenses.

New Expense: 04. Individual Meals \$250.00

08/29/2022

Cancel

Save

 Allocate

Business Travel Start Date *

08/25/2022



Estimated Amount *

250.00

Currency *

US, Dollar



Comment

Meals for 8/25/2022 - 8/31/2022

Save

Cancel

Sample travel request:

SAP Concur
Requests
Travel
Expense
App Center

Administration
Help
Profile

Manage Requests

333H-San Fran-8/25/22-8/30/2022 \$2,050.00

Copy Request

Submit Request

Not Submitted | Request ID: 34RQ

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add
Edit
Delete
Allocate

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		01. Airfare		08/29/2022	\$750.00	\$750.00
<input type="checkbox"/>		03. Ground Transportation		08/29/2022	\$150.00	\$150.00
<input type="checkbox"/>		02. Lodging		08/29/2022	\$900.00	\$900.00
<input type="checkbox"/>		04. Individual Meals		08/25/2022	\$250.00	\$250.00
						\$2,050.00

Note: Comments associated with an expense are indicated by the blue icon. As estimated expenses are added, the anticipated cost for the trip can be viewed in the lower right-hand corner.

Allocate Expected Expenses

To allocate an expense to a funding source different than the FAU you initially provided on the Request Header, select the box next to the expense you want to change and click Allocate. By selecting multiple expenses, you can change the allocation for multiple expenses at once.

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add
Edit
Delete
Allocate

<input checked="" type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input checked="" type="checkbox"/>		01. Airfare		08/29/2022	\$750.00	\$750.00
<input checked="" type="checkbox"/>		03. Ground Transportation		08/29/2022	\$150.00	\$150.00
<input checked="" type="checkbox"/>		02. Lodging		08/29/2022	\$900.00	\$900.00
<input checked="" type="checkbox"/>		04. Individual Meals		08/25/2022	\$250.00	\$250.00
						\$2,050.00

Allocate

Expenses: 4 | \$2,050.00



Percent

Amount

Amount

\$2,050.00

Allocated \$2,050.00

100%

Remaining \$0.00

0%

Default Allocation

Code

Default

Percent %

100

Add

Edit

Remove

Save as Favorite

No Allocations

Cancel

Save

7. Select Allocate by the **Percent** or **Amount** method, then click **Add** to provide a funding source to be used.

Add Allocation



New Allocation

Favorite Allocations

Activity *

(A01206) Accounting

Fund *

(A01000) Dean's Office

(A01001) C&G Projects

(A01002) Engineering - Dean's Office

Function *

(A01003) ENG - Dean's Off-Initial Compl

(A01004) Comp Science

(A01005) Comp Sci - Init. Comp.

Cost Center

(A01006) Electrical & Computer Eng

(A01007) Elect & Comp Eng - IC

Cancel

Save

8. Complete this step as many times as necessary to continue adding funding sources, and once your amounts and funding sources are correct, click **Save**.

Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
	08/29/2022	\$750.00	\$750.00 Allocated

Allocated ✕

Total Allocated
\$750.00

Code ≡	Percent
A01004-19900-72	12.19512195

[View Allocation](#)

Result: You can click the **Allocated** button to review final funding sources and allocations.

Add a Travel Cash Advance

To request a cash advance, you must include the request when you are creating a pre-trip travel request.

9. Click the **Request Details** dropdown link.

10. Click **Add Cash Advance** from the dropdown

333H-San Fran-8/25/22-8/30/2022 \$2,050.00
Copy Request Submit Request

Not Submitted | Request ID: 34RQ

Request Details ▾ Print/Share ▾ Attachments ▾

Request
Edit Request Header
Request Timeline
Audit Trail
Linked Add-ons
Add Cash Advance

EXPENSES
Edit Delete Allocate

Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
01. Airfare		08/29/2022	\$750.00	\$750.00

Result: The New Cash Advance popup window will appear.

11. Enter the amount of the cash advance and in the **Cash Advance Comment** field, enter the justification for the cash advance request. Please provide as much detail as possible in the justification field.

12. Click the **Save** button.

Add Attachments

Some travel will require documentation to be submitted along with a travel request.

Follow these steps to add an attachment to a travel request:

13. Click the **Attachments** dropdown link.
14. Click **Attach Documents** from the dropdown options. The hyperlink will allow you to upload files as support for the trip request. This could be a conference registration showing location/dates of trip, an itinerary for international travel, or any other support document that is helpful to have on hand for approvers.

333H-San Fran-8/25/22-8/30/2022
Not Submitted | Request ID: 34RQ

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Attach Documents

Document Upload and Attach

Upload and Attach
5MB limit per file

Close

Use Print/Share

The print/share hyperlink will allow you to save the request summary as a PDF or share it as deemed necessary.

15. Click **Print/Share** dropdown link, then **Request Printed Report**, and a popup window will appear. Using the **Email** button is the most common way to share the Pre-Trip Travel Request information between users.

Print/Share ▾ Attachmen

*Request Printed Report

Booking Business Travel

Request ID : 34RQ
Approval Status : Not Submitted

User Name : Virgil, Laura S.
*Email Address : laura.virgil@ucr.edu
Default Manager Name : Ellis-Suguitan, Asirra A.
Default Manager Email : asirra.suguitan@ucr.edu
Country of Residence : UNITED STATES
*Entity : UCR
*ORG : Planning, Budget & Admin
*Division : Business & Financial Services
*Department : Accounting

Sender Name : Virgil, Laura S.
*Email Address : laura.virgil@ucr.edu
Default Manager Name : Ellis-Suguitan, Asirra A.
Default Manager Email : asirra.suguitan@ucr.edu
Country of Residence : UNITED STATES
*Entity : UCR
*ORG : Planning, Budget & Admin
*Division : Business & Financial Services
*Department : Accounting

Start Date : 08/29/2022

Close

Print Save as PDF Email

View Request Details

Request Details ▾

Request
Edit Request Header
Request Timeline
Audit Trail
Linked Add-ons
Add Cash Advance

- **Edit Request Header** – takes you back to the request header where you started and noted the trip demographics. You can revisit an entry in the request header until the request is submitted.
- **Request Timeline** – shows you the approval workflow and what steps have been completed or are outstanding. Once submitted the report will route to the Financial Approvers to approve the funding. This information is based on the Accountability Structure/Approver ID entered on the Request Header.
- **Audit Trail** – shows you the timestamps of certain actions taken on the travel request.

Alerts

If any items require correction before moving forward, Concur will direct the user to the alert box for their review. Red errors must be corrected before submitting a request. If action is not required by the user to proceed, the alerts will have a yellow icon next to them.

Alerts: 2

REQUEST

Missing required field: Trip Purpose. [View](#)

The trip includes Personal Travel and will require additional review. [View](#)


333H-San Fran-8/25/22-8/30/2022 \$2,050.00

[Copy Request](#) [Submit Request](#)

Submit a Request

Once expected expenses have been added and allocated and the alerts have been reviewed and corrected, if needed, the request can be submitted into the automatic, electronic routing process.

16. In the top left corner, click **Submit Request**.

333H-San Fran-8/25/22-8/30/2022 \$2,050.00 

Not Submitted | Request ID: 34RQ

Copy Request

Submit Request

Request Details ▾ Print/Share ▾ Attachments ▾


EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ▾	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		01. Airfare		08/29/2022	\$750.00	\$750.00
<input type="checkbox"/>		03. Ground Transportation		08/29/2022	\$150.00	\$150.00
<input type="checkbox"/>		02. Lodging		08/29/2022	\$900.00	\$900.00
<input type="checkbox"/>		04. Individual Meals		08/25/2022	\$250.00	\$250.00
						\$2,050.00

17. From the popup window, read the acknowledgment and click **Accept & Continue**.

*UCR Travel Request User Confirmation

By clicking on the 'Accept & Submit' button, I certify that:

- This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official business for University of California, Riverside.
- This request is in compliance with UC Travel policy and other restrictions as applicable (e.g. Award Terms & Conditions, NCAA, etc.).

Business & Finance Bulletin G-28: <https://policy.ucop.edu/doc/3420365>

Cancel

Accept & Continue

Pre-Trip Travel Request Approvals

Pre-Trip Travel Request Approvals

It is considered best practice to for Travelers to receive pre-trip travel request approvals before proceeding with making travel arrangements. If needed, the requestor can recall the request only if the request has not been approved. If the request has been approved, the requestor would have to cancel or close request.

System Generated Notifications

- Financial Approvers will receive email notifications to approve a Pre-Trip Travel Request.
- Travelers (and their Delegate Travel Arrangers) will receive email notifications of approval status changes (i.e. approved or rejected).

Approvers

- Financial Approvers can delegate the initial review of Requests to a 'Financial Previewer.' Financial Previewers can confirm documentation and approvals are received, then notify the Financial Approver that the Request is ready for approval.
- Approvers can add additional approvers into the workflow if necessary.

Approval Status

- Not Submitted
- Submitted
- Submitted & Pending Approval
- Cancelled
- Approved
- Sent Back to User

Alter a Pre-Trip Travel Request

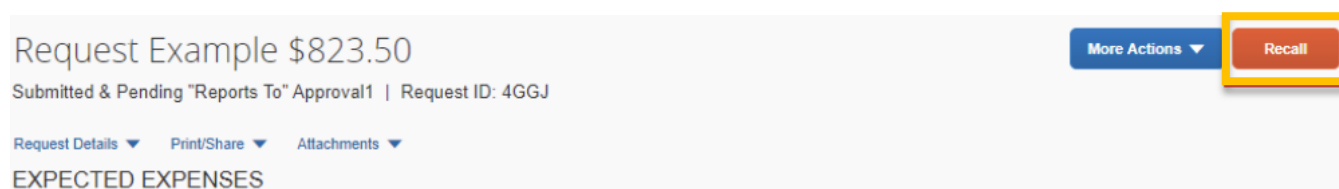
Alter a Pre-Trip Travel Request

If there is a need to revisit and alter a request because dates, locations, or significant cost changes are necessary, there are a few options.

Recall a Request

You cannot change, cancel, or delete a Request that has been submitted unless you **Recall** it first. You can only recall a request that is not in "Approved" status. If the request has been fully approved, you will need to take different steps as noted below in Replacing a Request.

1. Click the **Request Name** from the **Manage Requests** page.
2. Click **Recall**.



The screenshot shows a user interface for a travel request. At the top, it says 'Request Example \$823.50'. Below that, it says 'Submitted & Pending "Reports To" Approval1 | Request ID: 4GGJ'. There are three links: 'Request Details', 'Print/Share', and 'Attachments'. At the bottom, it says 'EXPECTED EXPENSES'. On the right side, there is a 'More Actions' dropdown menu and a 'Recall' button, which is highlighted with a yellow border.

3. Click **Yes** to confirm the Recall. The status of the request is updated to Sent Back to User.
4. Make any necessary changes, then select one of the following options **Cancel Request** (found under More Actions) or **Submit Request** to resubmit the newly changed request.


Cancel a Request

If a trip is canceled or elements have changed so significantly, please cancel the request by going back to the Requests tab and opening the request.

1. Open the request and select **Cancel Request** under **More Actions**. Enter a comment, then click **OK**.

Delete a Request

If you begin a Request and do not wish to continue, you can click the trash can icon to delete it.

333H-San Fran-8/25/22-8/30/2022 \$2,050.00 

Copy RequestSubmit Request

Not Submitted | Request ID: 34RQ

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

AddEditDeleteAllocate

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		01. Airfare		08/29/2022	\$750.00	\$750.00

Resources for Help and Support

Travel Support

We recommend starting with your Travel Arranger or department Financial Manager to answer Concur system and travel-related questions. The Travel Support desk in Business and Financial Services is available to provide supplemental support to users and answer policy questions, technical or access issues, and T&E Card inquiries.

Email: Travelfeedback@ucr.edu

Website: [Travel Support](#) | [Impact23 \(ucr.edu\)](#)

Training and Other Materials

Training and reference guides are available to provide additional guidance on completing various tasks in the Concur system. Please visit our webpage for training and additional reference materials.

Website: [Travel and Expense](#) | [Impact23 \(ucr.edu\)](#)