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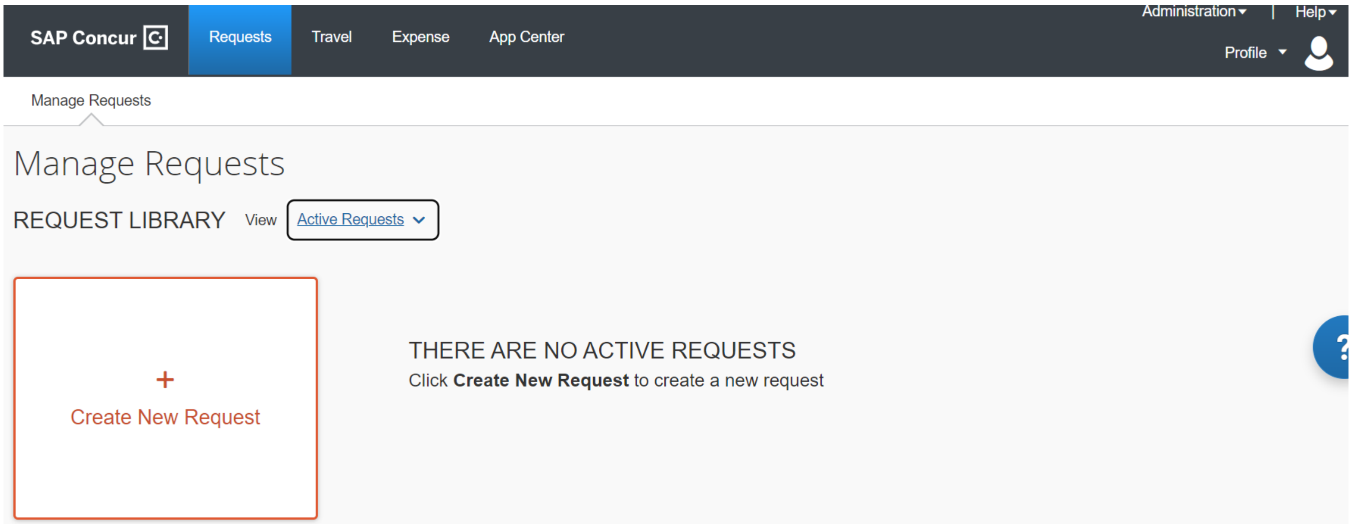
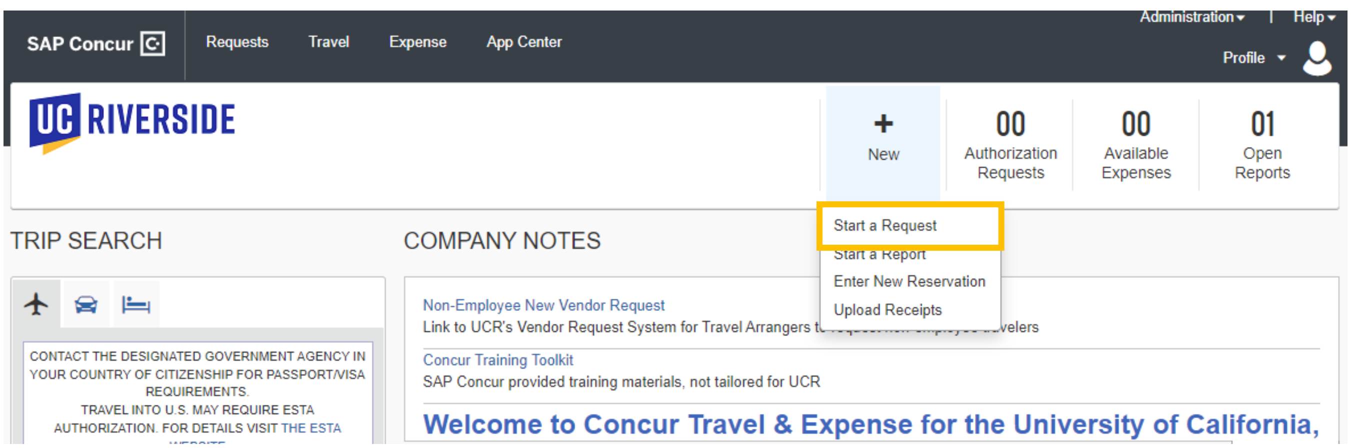
Create a Pre-Trip Travel Request

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.



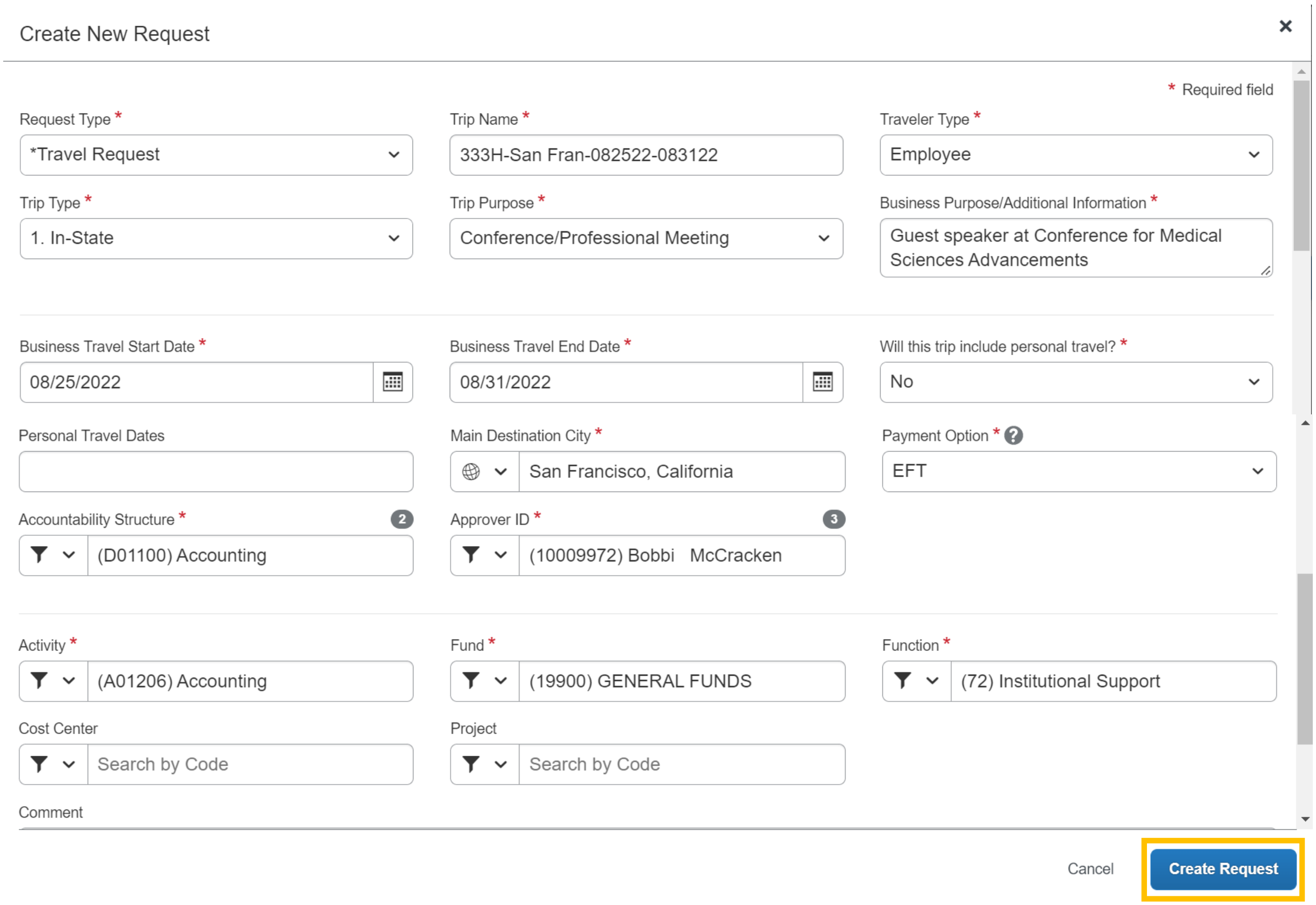
2. Or, from the Concur homepage, hover over **+ New** and select **Start a Request.**



Complete the Request Header

The **Request Header** tab appears.

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



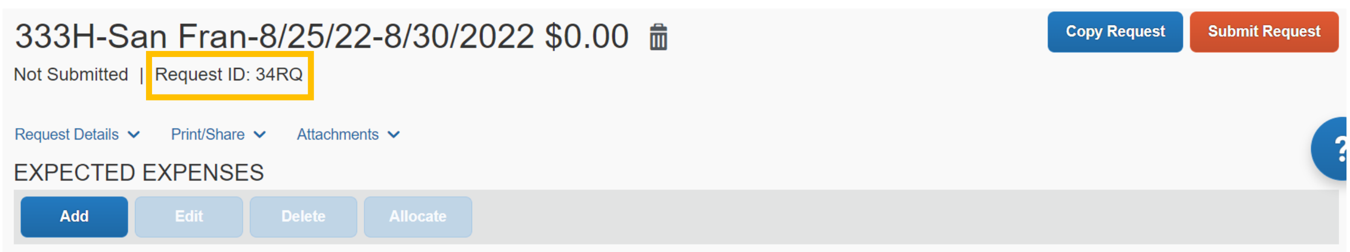
See field descriptions and further information in the table below.

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

4. 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.

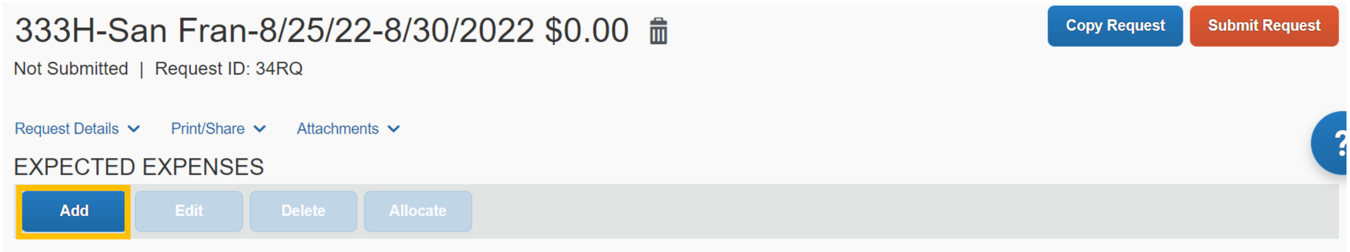


Add Expenses to a Pre-Trip Travel Request

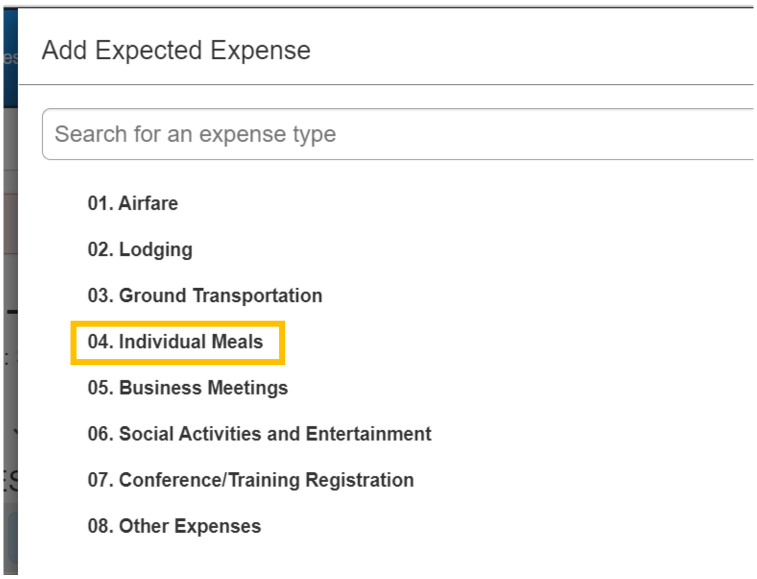
After creating the Travel Request, you can add airfare, lodging, or other anticipated expenses. At least one expense must be added to the request before it can be submitted. Enter meaningful estimates for the related travel expenses. The travel request should reflect the anticipated cost for the trip 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:

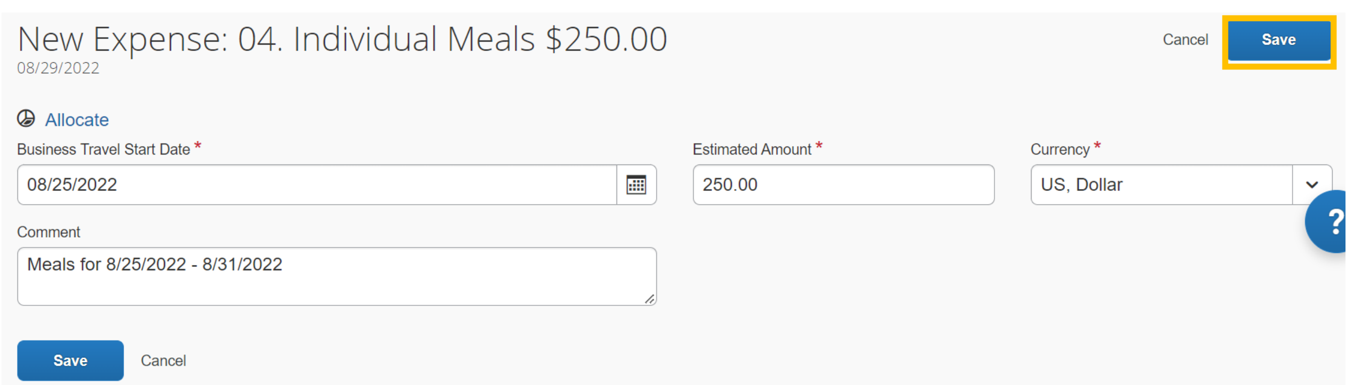
5. Open the travel request and click the **Add** button.



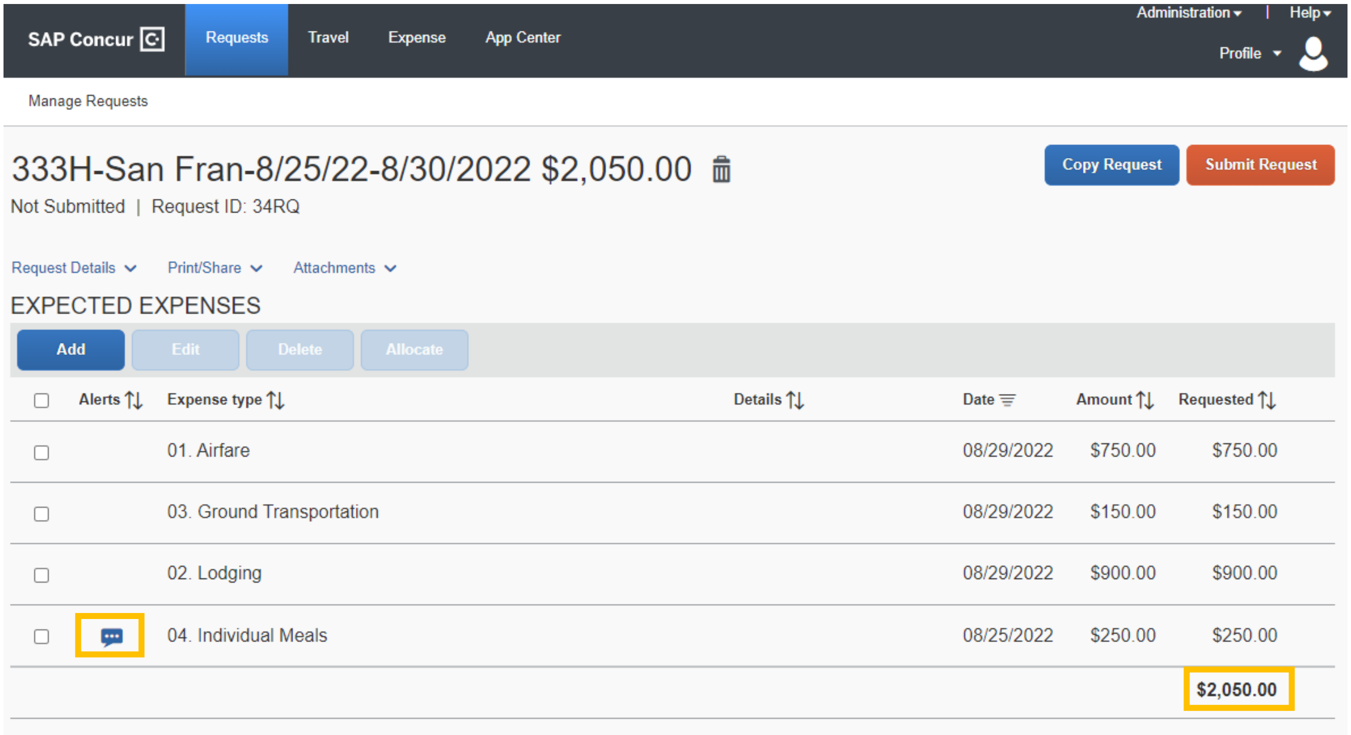
6. Select the type of expense you need to add.



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



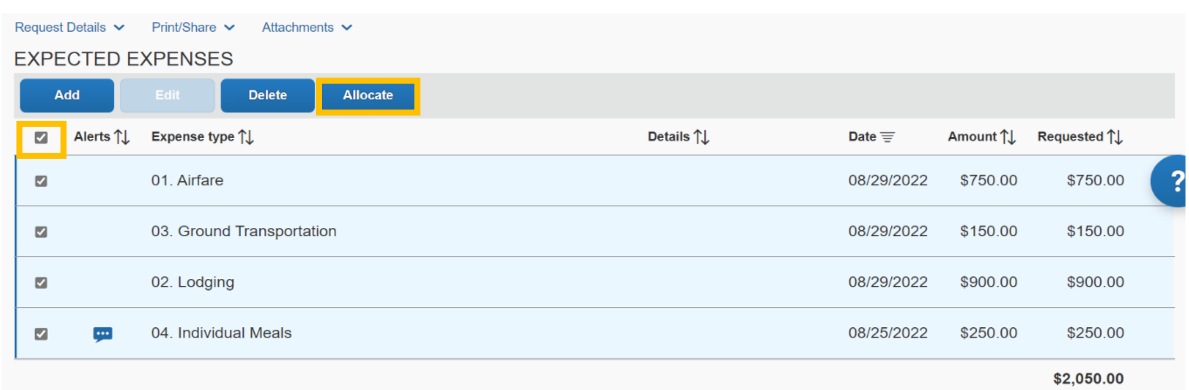
Sample travel request:

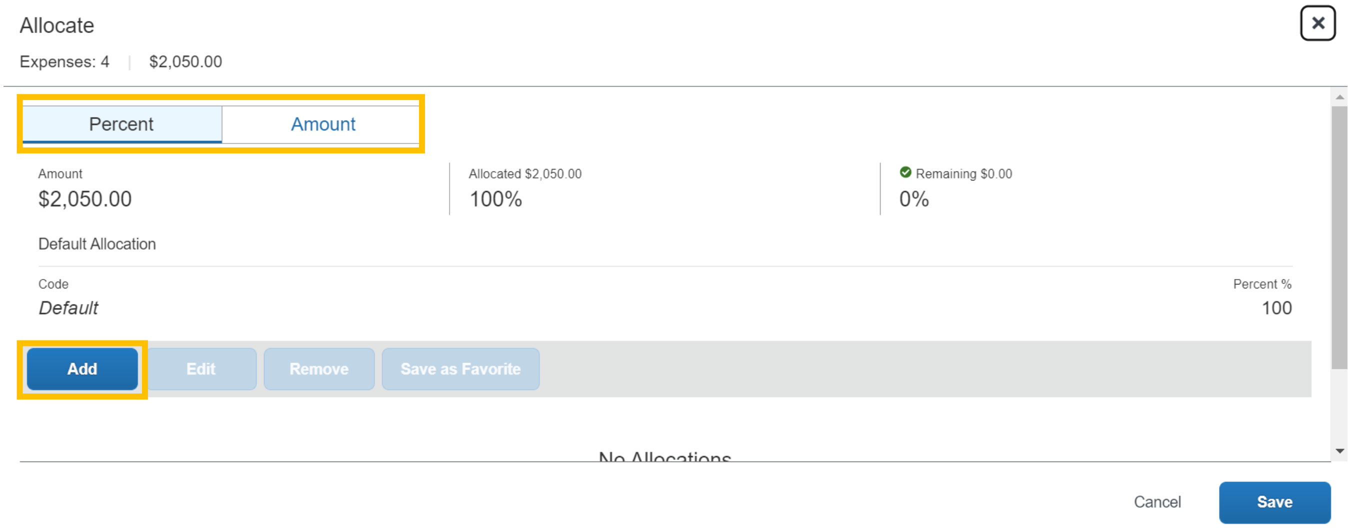


Note: Comments associated with an expense are indicated by the blue icon. As estimated expenses are added, the anticipated cost for the trip can be viewed in the lower right-hand corner.

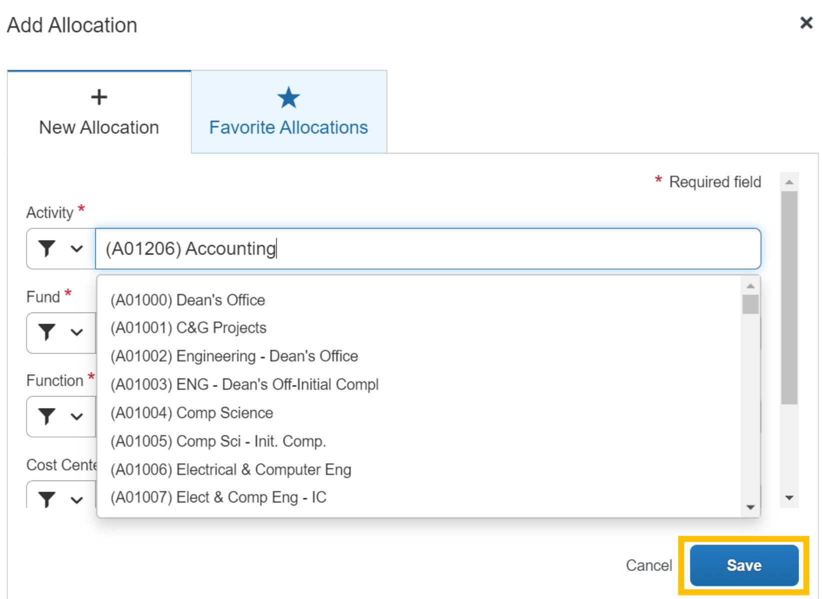
Allocate Expected Expenses

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.

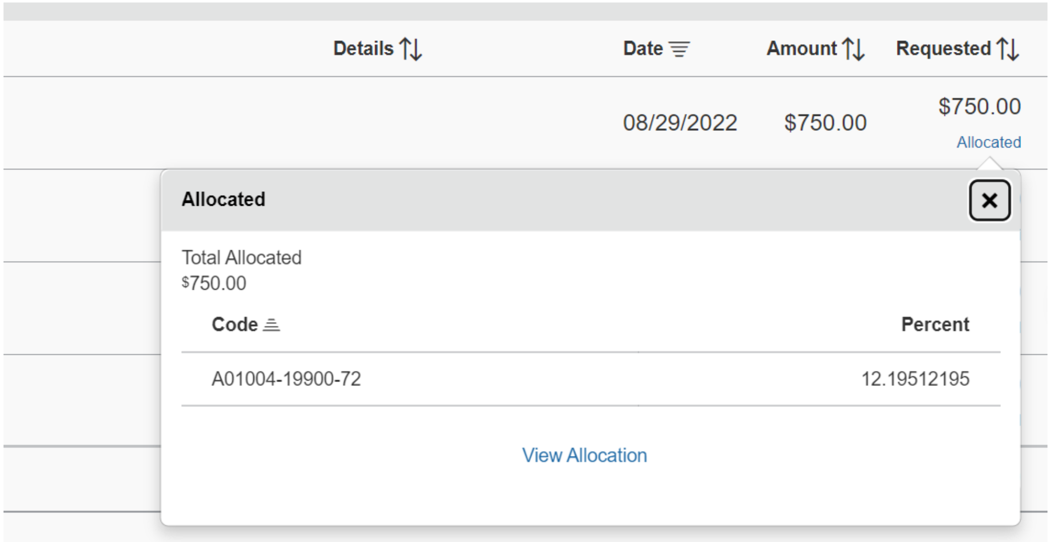




7. Select Allocate by the **Percent** or **Amount** method, then click **Add** to provide a funding source to be used.



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**.



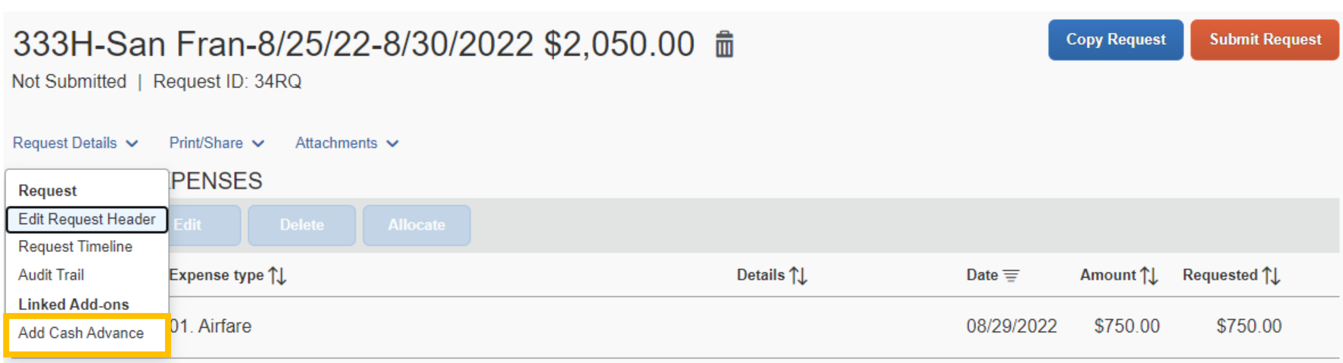
Result: You can click the **Allocated** button to review final funding sources and allocations.

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



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.

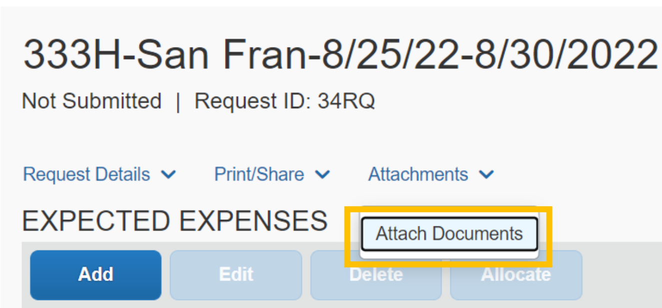
12. Click the **Save** button.

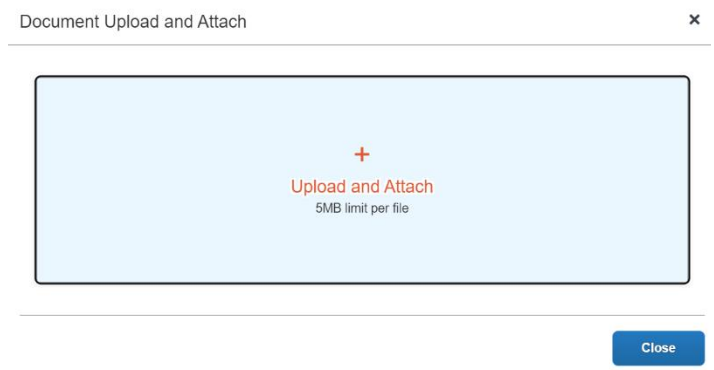
Add Attachments

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.

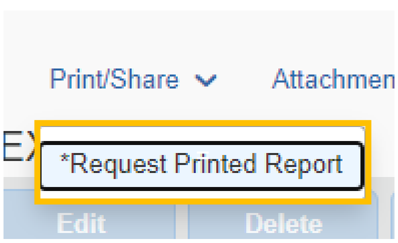


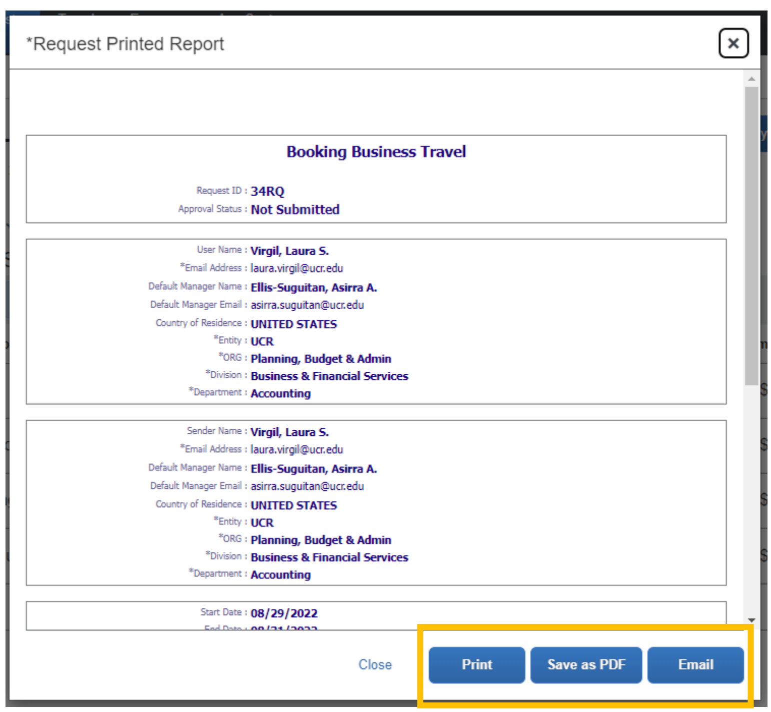


Use Print/Share

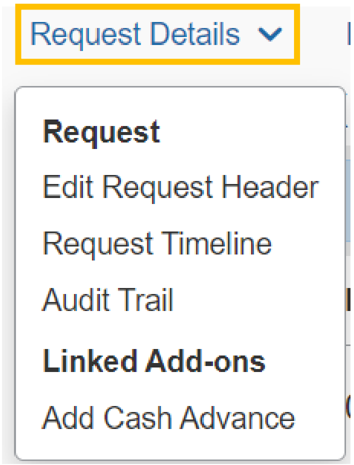
The print/share hyperlink will allow you to save the request summary as a PDF or share it as deemed necessary.

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.





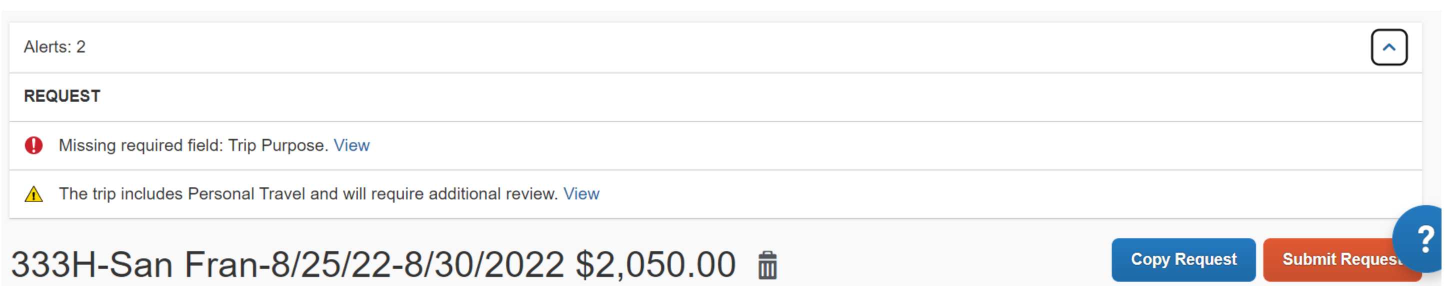
View Request Details



- **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

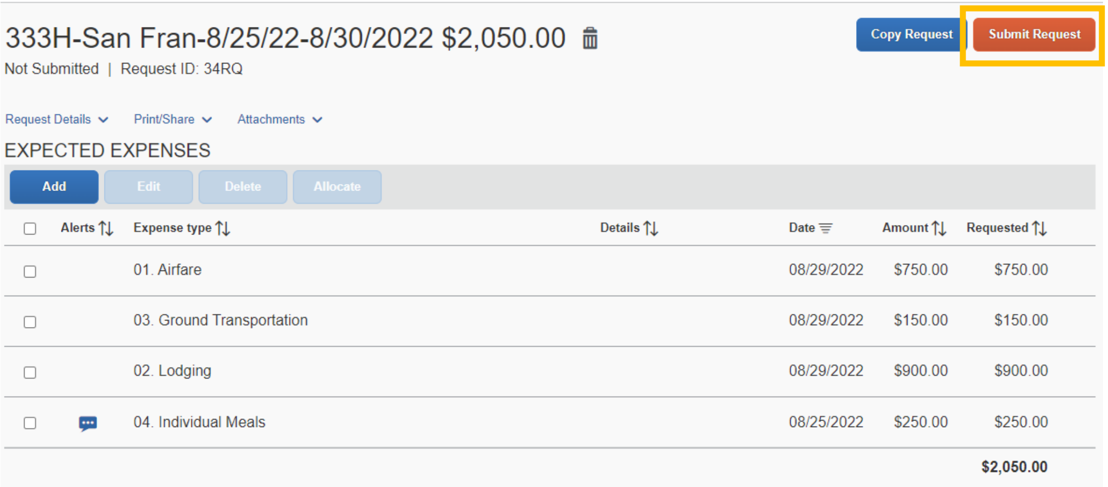
If any items require correction before moving forward, Concur will direct the user to the alert box for their review. Red errors must be corrected before submitting a request. If action is not required by the user to proceed, the alerts will have a yellow icon next to them.



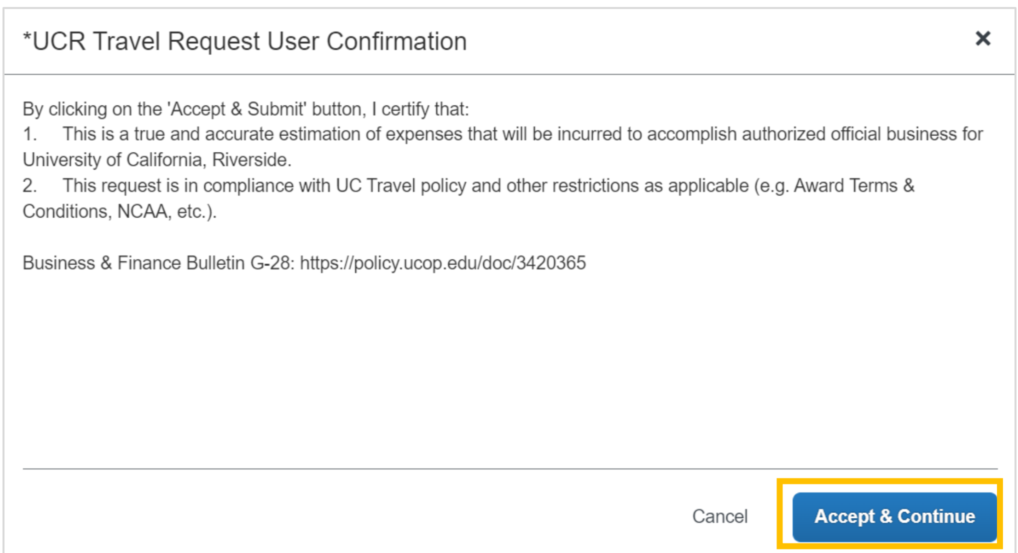
Submit a Request

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**.



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

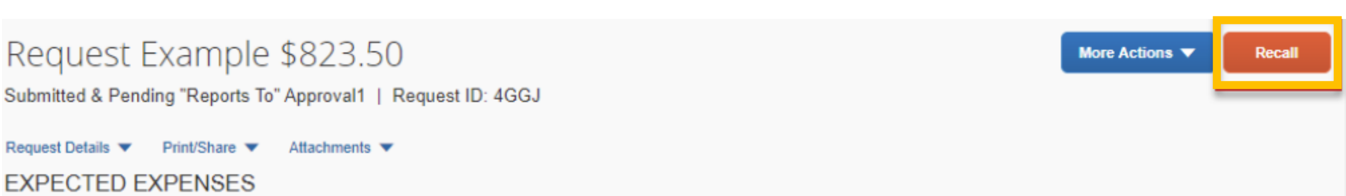
If there is a need to revisit and alter a request because dates, locations, or significant cost changes are necessary, there are a few options.

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**.



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.

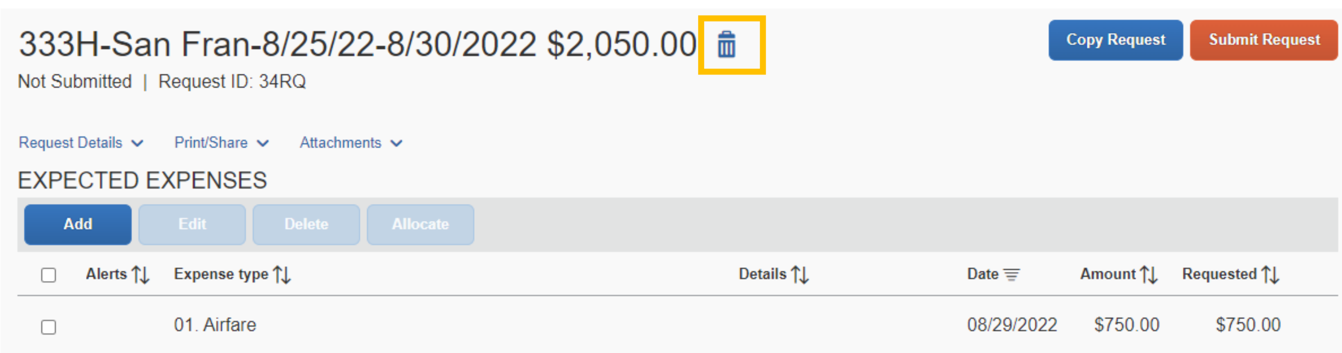
Cancel a Request

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.



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)