CONCUR | STUDENTS
CREATING/SUBMITTING/CLOSING A TRAVEL REQUEST

OVERVIEW

This training document covers information on how to Request travel in Concur for **students excluding Grad Assistants, Grad Interns and Post-Docs**.

Concur Request makes department budgeting, requesting travel, and submitting travel-related expenses easier when travelling on UConn business with the pre-trip request and approval process.

An approved request is required, for all students planning to incur travel expenses on UConn business prior to the start date of the trip.

The request with segment (airfare, car rental or hotel) estimates should be submitted in the department travel coordinator's profile who will be using their travel card to purchase those expenses – this includes car rental which would be direct billed to UConn through Anthony Travel by the coordinator on behalf of the student.

Students can also submit a Travel request in their own profile if they need to initiate a request for a student travel card to cover incidental expenses such as actual meal expenses (if not claiming per diem reimbursement), baggage fees, ground transportation, etc. The request in the student's profile will then initiate an email to the student that includes links to the student travel card training and the request form for the student travel card. 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.
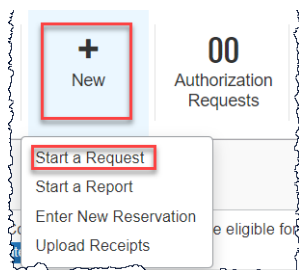
PROFILE SETUP

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

1. From the Concur homepage, hover on the **New** icon. *A menu of options displays.*

2. Click **Start a Request.**

+ New	00 Authorization Requests

Start a Request
Start a Report
Enter New Reservation
Upload Receipts

NOTE: Fields identified with a red bar are required. Complete all required fields
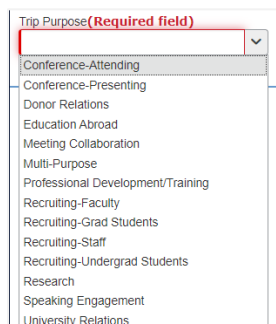
REQUEST HEADER

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.

3. **Request Policy.** This field will default as appropriate.

4. **Trip Name.** Enter a brief and accurate description of the nature of the business trip.

5. **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.

Destination City ☐?

Primary location where business is occur... additional destinations in the Business...
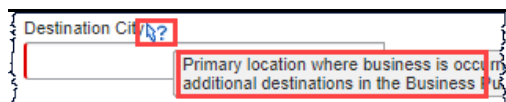
6. **Business Travel Start Date and End Date.** Enter the first day of your travel and the last day of your travel.

7. **Trip Purpose**. Make a selection from the dropdown, as appropriate.

Trip Purpose **(Required field)**

Conference-Attending
Conference-Presenting
Donor Relations
Education Abroad
Meeting Collaboration
Multi-Purpose
Professional Development/Training
Recruiting-Faculty
Recruiting-Grad Students
Recruiting-Staff
Recruiting-Undergrad Students
Research
Speaking Engagement
University Relations

8. **Destination City**. Start to type the **primary location** where *business is occurring (last or farthest). A live search result displays.*
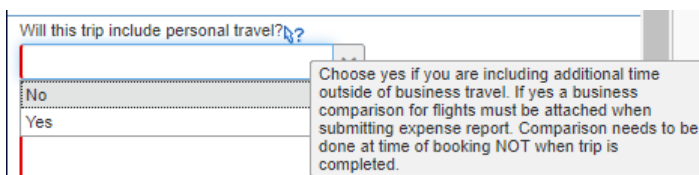

9. Select a valid option from the dropdown.

10. Enter **additional destinations** in **the Business Purpose/Justification** field.

NOTE: The segments tab also captures additional destinations, as necessary.

11. **Traveler Type**. Make a selection from the dropdown, as appropriate. *Choose Grad Student or UGrad Student based on the type of student.*

12. **Trip Type**. Make a selection from the dropdown, as appropriate.

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

14. **Personal Travel Dates**. Complete this field, if personal travel = Yes.

   a. If yes, at time of booking, the department travel coordinator should:

   - Call Anthony Travel directly.

   - Obtain a business cost comparison.

   - Book Travel reservation with Anthony Travel directly.

Note: (1) The department travel coordinator will use their Travel card to pay for the business portion of the airfare. (2) Any additional cost associated with the inclusion of personal days must be paid using the **student's personal card.**

   - 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 **Attach Documents.**

15. **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.
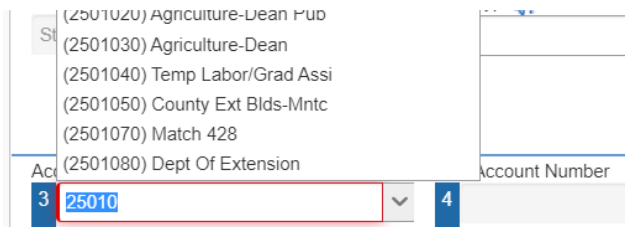
(2) If split funding applies (e.g., OVPR grant funding travel) and multiple justifications apply, traveler should include multiple justifications, even if attachment justification is required due to length of multiple justifications

16. **Account Number** (and **Account Organization** related fields). This field should pre-populate to your default/home department account - based on profile settings.

NOTE: (1) Your department travel coordinator will provide you with the KFS account number to be used. (2) 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:

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

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.
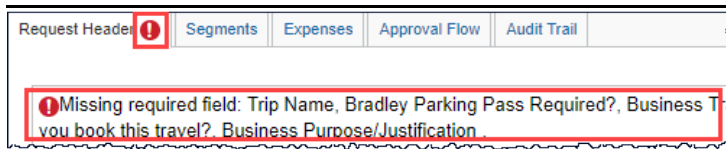
17. **Cash Advances.** Complete this field on a need only basis.

NOTE: Travel cash advances will be limited to 75% of estimated costs, excluding those costs that are eligible to be paid directly on a Student Travel Card or by an Employee's University Travel Card (such as air tickets, hotel, or rental car, Meal expenses, Ground transportation, etc.) Travel advances may only be requested for $500 or greater and will not be issued more than 10 days prior to the departure date.

18. Complete additional request header fields, as necessary.

19. Click **Save.** *A four character, alphanumeric, request ID populates (at the top of the request view).*
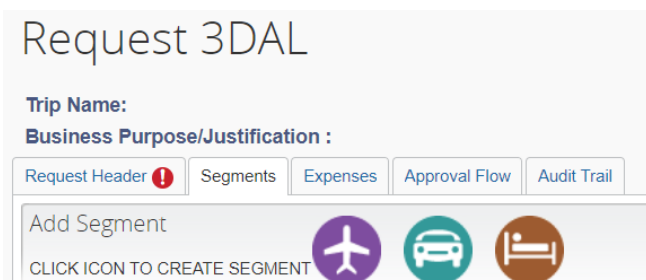
NOTE: Concur has policy requirements and procedural preferences built-in. If required fields are incomplete upon save or submit, a hard stop indicator displays. The request cannot be submitted successfully until all noted issues are resolved.

TRIP SEGMENTS

If the Trip includes segments, **the Segments tab is required to be completed in the department travel coordinator's profile** who will be using their travel card to pay for the student's travel. Segments include Air, Hotel and Car Rental.

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

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

Air Ticket

22. Click the **Air Ticket** icon. *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.

23. Complete the **Estimated Amount** field.

24. 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.*

25. Click to select a valid option from the list.

26. Begin typing a destination airport (full name or airport code) in the **To:** field.

27. Click to select a valid option from the list.

28. Complete the **Outbound Date**.

29. Complete the **Return Date**.

30. Click **Save.** *Options to Allocate, Delete, or Modify the segment become available.*

NOTE: Resolve any warning or hard stop indicators that result.

Car Rental

31. From the **Segments** tab, click the **Car Rental** icon. *The Car Rental fields display.*

32. Complete the **Estimated Amount** field.

33. Begin typing a city name in the **Pick-up Location** field**.** *A live search activates, a list of options become available for selection.*

34. 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.

35. Type a city name in the **Drop-off Location** field.

36. Click to select a valid option from the list.

37. Add comments, as desired.

38. Click **Save.** *Options to Allocate, Delete, or Modify the segment become available.*

Hotel Reservation

39. From the **Segments tab**, click the **Hotel Reservation** icon.

40. Complete the **Estimated Amount** field.

41. Begin typing a city name in the **Check-in City** field**.** *A live search activates, a list of options become available for selection.*

42. Click to select a valid option from the list.

43. Begin typing a city name in the **Check-out City** field**.** *A live search activates, a list of options become available for selection.*

44. Click to select a valid option from the list.

45. Add comments, as desired.

46. Click **Save.** *Options to Allocate, Delete, or Modify the segment become available.*

NOTE: All segments must be allocated as a group – all with the same percentage or amount.

EXPENSES

If students require a student travel card to cover incidental expenses such as actual meals expenses (If not claiming per diem reimbursement), baggage fees, ground transportation etc., the estimated expenses should be added to the request **in the student's profile on the Expenses tab.**
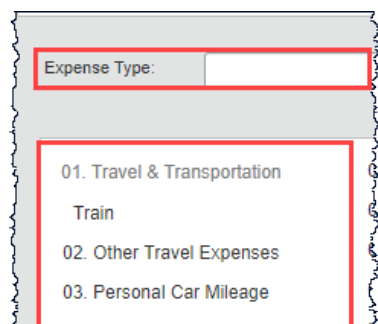
47. Click the **Expenses** tab.

48. Navigate to the Expense Type pane (to the right of the screen).

To create a new expense:

49. Click the appropriate expense type from the list of expenses on the right or

50. Type the expense type in the field above the list of expense types (on the right).

51. Complete required expense type fields.

NOTE: Expense Type fields may vary between expense types.

52. Allocate expense to appropriate account(s), as desired.

53. Click **Save.**

54. Continue to add additional expenses, as applicable.

NOTE: To edit an existing expense, click the expense on the left.

SUBMITTING A REQUEST

55. Once segments and additional expenses are added to the request, click **Submit Request**. *An attestation displays.*

56. Read through the attestation, and then click **Accept & Submit**. *The request is submitted and routed to appropriate approval workflow.*

57. Approvals will route to the fiscal officer of the account(s) entered on the Request. 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.
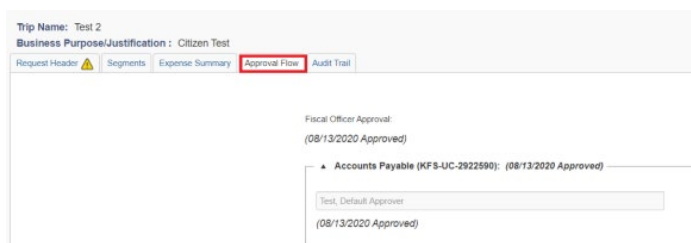
58. From the Concur homepage, click **Requests** from the top ribbon.

59. Click the blue 'View' button at the top left of the page and select 'Pending Requests' from the drop-down menu.
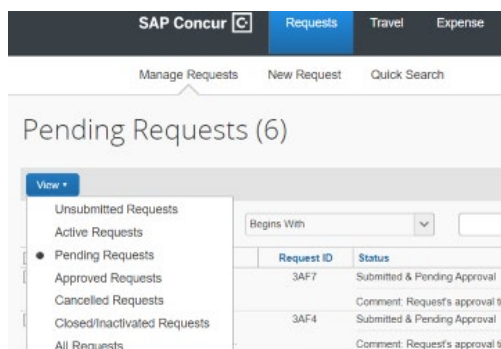
60. Click on the request name that you would like to review.

61. With the request open, click on the Approval flow tab.

62. 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.

63. From the Concur homepage, click **Requests** from the top ribbon. *Your list of requests display.*

64. Click the checkbox, to the left, of the request you want to copy. *The Copy feature activates to the right.*

65. Click **Copy Request** (from the top right). *The Copy Request dialog displays.*
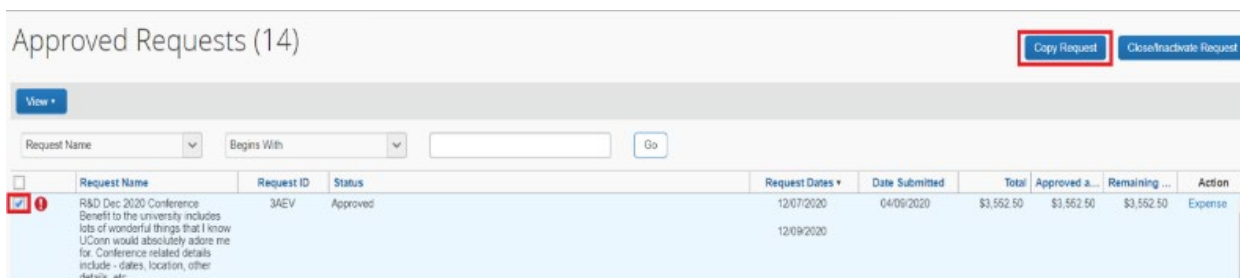
66. Modify the name of the request to reflect the new travel.

67. Update any other options, as necessary and then click **OK.** *A new request displays with the header tab active.*

68. Review the Request Header, Segments, and other Expenses for accuracy.

69. Attach documentation, as needed and then Submit the Request, as usual.

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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.
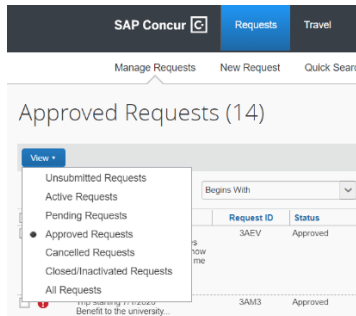
3. Click the checkbox beside the approved request that you do not need to create an expense report for.
4. Click the 'Close/Inactive' button at the top right of the page.
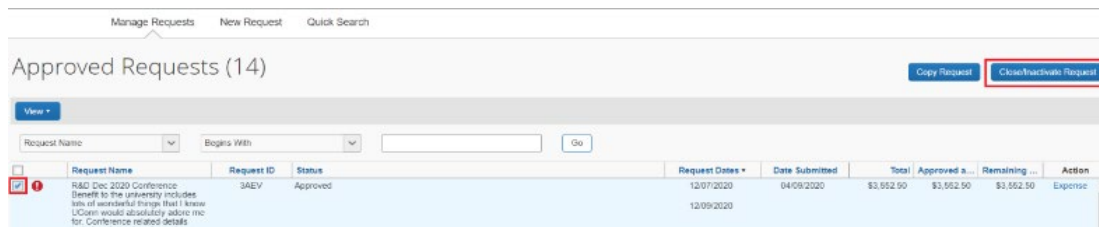
STUDENT TRAVEL CARDS

UConn has provided students with the option to pay for certain travel expenses such ground transportation including trains, actual meal expenses (if not claiming per diem reimbursement), baggage fees, etc., using a university backed student travel card.

Note: Airfare and hotel will be paid for by the department travel coordinator using their own travel card and car rental will be direct billed to UConn by the coordinator via contacting Anthony Travel.

After completing and submitting a Concur request, students will receive an email with the information needed to request a student travel card.

The student travel card will be valid for three (3) years from the date of issue, however the active dates of use for the card will be based on the dates of the current request that is used to initiate the loading of funds for the new trip.

After the end of each trip the card value will be reduced to $1 until a new request is created for a new trip.

Students are required to complete a student travel card training and sign a cardholder agreement once per year.

Further information on UConn student travel cards can be found on the UConn Travel website.

ADDITIONAL SUPPORT

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

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