

Create and Submit Travel Requests in Concur® Travel and Expense

This QRC provides the steps for creating a travel request in Concur Travel and Expense by a traveler or the traveler's delegate. **A travel request can ONLY be submitted by the traveler.**

Creating a Travel Request Header

A **Request** must be filled out by the traveler or the traveler's delegate in the following situations:

- \$0 trip (no Purdue funding)

- Booked outside Concur (calling ALTOUR or using other method)

Note: If none of these situations applies, begin booking your trip on the **My Concur** page under **Trip Search**.

Go to the [Employee Portal](#) page.

Choose **Travel System (Concur)**.

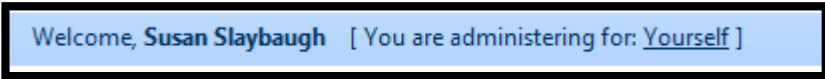
Enter your Purdue Career Account ID and password.



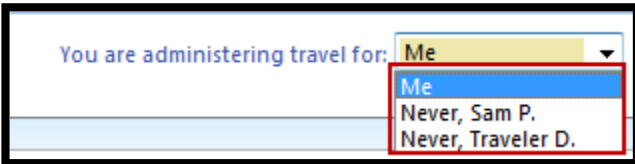
Travel System (Concur) - *NOTE: Only available if you have been trained on this application; this is in the process of being rolled out to all areas. Access to request & approve travel for Purdue employees*

Create and Submit Travel Requests in Concur® Travel and Expense

1. If you are booking on behalf of another traveler, click **Yourself**

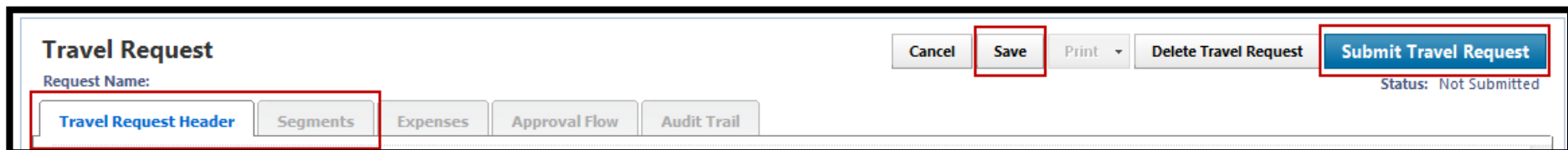
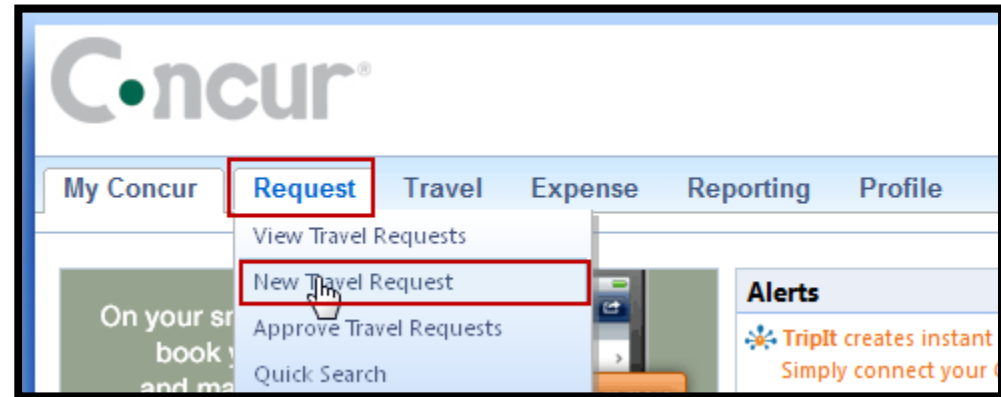


2. Select the individual you are booking on behalf of from the drop-down list.



3. At the top of the **My Concur** screen, click **Request → New Travel Request**.

Note: This can also be done by clicking “**New Travel Request**” in the Active work pane



Note: A travel request is ready to submit when you have completed all required fields in the **Travel Request Header**, **Segments** and **Expenses** tabs. If you have to leave the travel request before completing all required fields, click **Save** to ensure the data entered is saved.

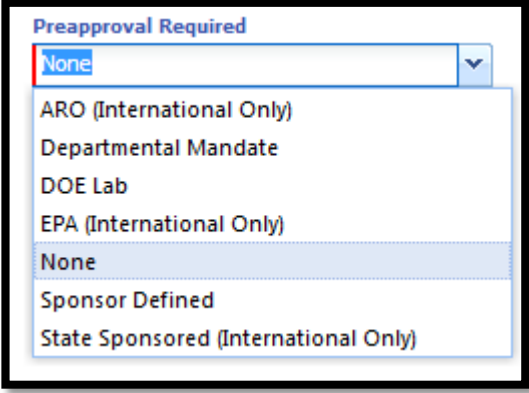


Complete Request Header

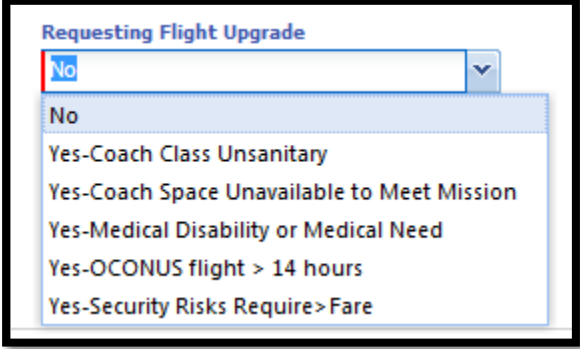
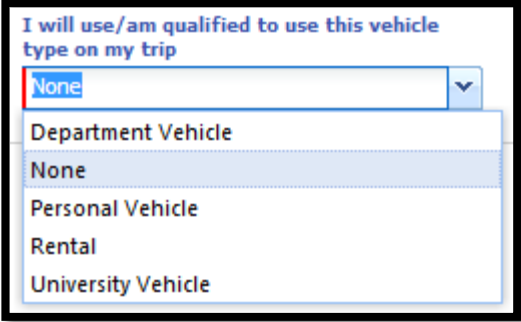
1. Complete Required Fields
*Highlighted with red line or heavy left bar.



Request Name	Use naming convention supplied by your Business Office. (limit of 40 characters)
Request Policy	Defaults to Purdue Travel Request Policy.
Traveler Type	Select one: Employee (EMP), NonEmployee (NE), Student, Team Travel (Team).
Travel Type	Select One: In State, International, International - Under Warning, Out of State.
Purpose of Travel	Select best option from drop-down menu.

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<p>Is this trip being paid for by Purdue?</p>	<p>Select yes or no.</p>
<p>Preapproval Required</p> <p>Note: Most request do NOT require pre-trip approval. However, if funding for your trip is from any of the areas listed or is mandated by your department head, select the appropriate item.</p> <p>Please note that automation does NOT replace communication. You must notify your supervisor that you are traveling prior to submitting a request.</p>	
<p>Departure Date</p> <p>Type date or choose the date from the calendar.</p>	
<p>Return Date</p> <p>Type date or choose the date from the calendar.</p>	
<p>If personal travel is included, list dates.</p>	<p>List any dates to be used as personal time.</p>
<p>If anyone is traveling with you, provide names/relationship.</p>	<p>List names of other employees, spouse, or other individuals who will be traveling with you.</p>

<p>Requesting Flight Upgrade</p> <p>Defaults to No; if Yes, select reason from drop-down.</p> <p>Note: If selecting Medical Disability or Medical Need, ensure approved exception is on file in the Business Office.</p>	<p>If yes, select reason from drop-down.</p> 
<p>I will use/am qualified to use this vehicle type on my trip.</p> <p>Select one from drop-down list.</p>	

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Account Assignment is a required field.

Click in the **Account Assignment** text box.

The **CODE** radio button is selected by default.

- Type an asterisk (*), followed by the account number.

or

Search by **TEXT**

- Change the radio button to **TEXT** and type an asterisk (*) followed by the account name (Football).

Note: Use the primary (most restrictive) account assignment. If all accounts are equally restrictive, list the account that is paying for majority of cost.

Choose the correct fund/cost center combination from list generated by Concur.


If you don't know the correct account assignment, click **Save** and refer to your business office or the job aid they provided.

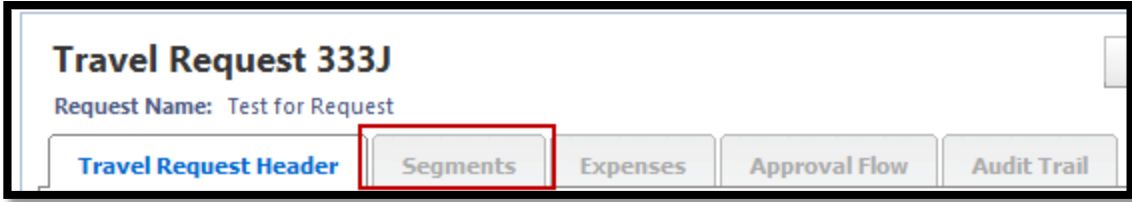
Tips:

Use as many digits of the account assignment as possible.

Use scroll bar at bottom of window to see account assignment name.

Create and Submit Travel Requests in Concur® Travel and Expense

Extension of	Select other Travel Request name if this request is in addition to another.
Comment	Enter any comments relevant to this request.
<p>Cash Advance</p> <p>If you are requesting a cash advance greater than the \$500 available through Visa Travel Card (or you do not have a Visa Travel Card); type the amount of the cash advance need in the Cash Advance Amount text box.</p> <p>Make sure USD is in the currency drop-down.</p> <p>Provide an explanation in the Cash Advance Comment box regarding the use of the funds.</p>	

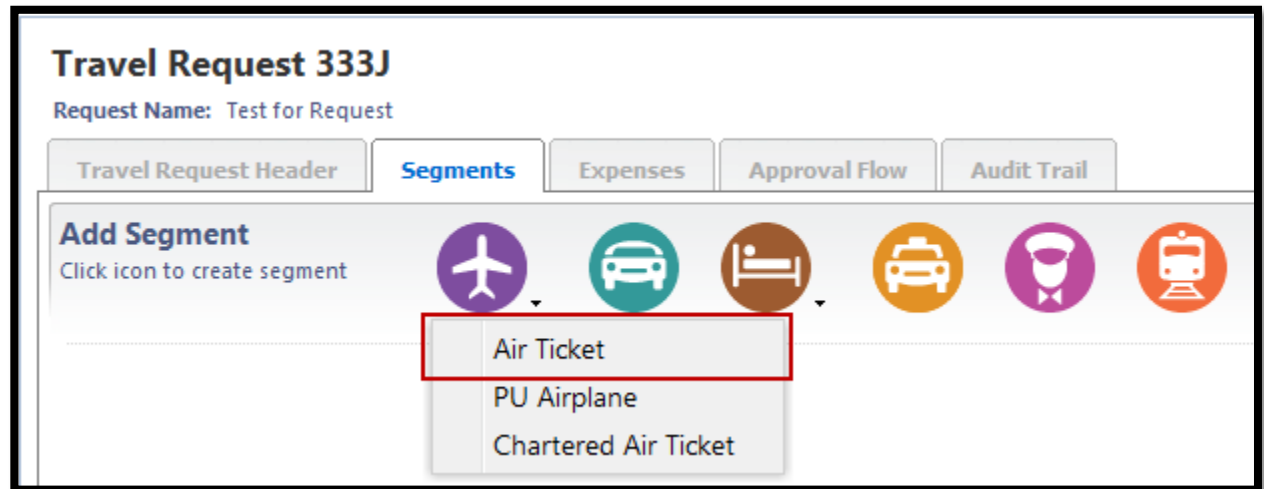
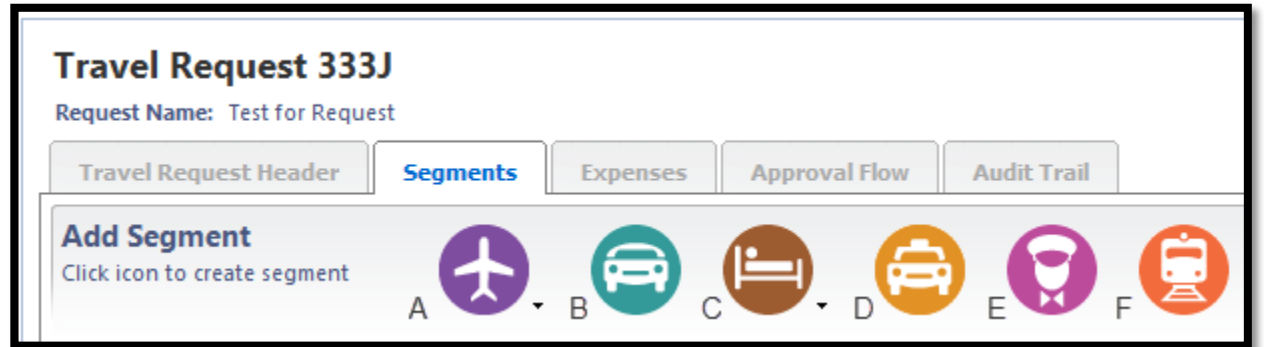
Completing the Segments Tab	
<p>Select the Segments tab.</p>	

Create and Submit Travel Requests in Concur® Travel and Expense

- A. Air Travel
- B. Car Rental
- C. Lodging
- D. Taxi Fare
- E. Care Service Reservation
- F. Railway Ticket

For air travel, select Air Ticket, PU Airplane or Chartered Air Ticket.

Note: Most travelers use Air Ticket.



Create and Submit Travel Requests in Concur® Travel and Expense

Enter estimated cost (\$\$) in **Amount** text box.

Complete the required fields in the **Air Ticket** section. (Knowing the airport code is helpful when entering the **From** and **To** locations.)

Click **Save**.

Select **Car Rental** segment icon.

Enter estimated \$\$ in **Amount** text box
Complete the required fields in the **Car Rental** section.

Click **Save**.

Note: If no care rental required, skip this step.

Select **Lodging** segment icon.

Note: Most travelers use Hotel Reservation. If you are using the Other Lodging option, explain why in the **Comment** text box.

Create and Submit Travel Requests in Concur® Travel and Expense

Enter estimated \$\$ in **Amount** text box.

Complete the required fields in the **Hotel Reservation** section.

Click **Save**.

Hotel Reservation Amount: 500.00 USD Save Cancel

Check-In City: Denver, Colorado
Date: 07/19/2012 At: 12:00 pm
Detail:

Check-Out Date: 07/20/2012 At: 09:00 am

Comment:

Create and Submit Travel Requests in Concur® Travel and Expense

Completing the Expenses Tab

Select the **Expenses** tab.

Travel Request 333J

Request Name: Test for Request

Travel Request Header Segments **Expenses** Approval Flow Audit Trail

Add Segment
Click icon to create segment

Travel Request 333J
Request Name: Test for Request

Attachments Print Delete Travel Request Submit Travel Request
Status: Not Submitted
Amount: \$2,100.00

Travel Request Header Segments **Expenses** Approval Flow Audit Trail

New Expense Delete

Date	Expense	Amount	Requested
<input type="checkbox"/>	07/19/2012 Airfare Expense	\$400.00	\$400.00
<input type="checkbox"/>	07/19/2012 Car Rental	\$200.00	\$200.00
<input type="checkbox"/>	07/19/2012 Lodging	\$500.00	\$500.00
<input type="checkbox"/>	07/11/2012 Registrations Expense	\$1,000.00	\$1,000.00

Expense:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Airfare	...Ground Transportation	...Lodging
Airfare Expense	Chartered Bus	Other Lodging
Chartered Airfare	Parking	Misc Trip Expenses
PU Airplane	Shuttle	Miscellaneous
Ground Transportation	Subway	Other Transportation
Bus	Taxi	Ferry
Car Rental	Train	Tolls
Car Service	Lodging	Registrations
	Hotel	Registrations Expense
Subsistence		
Fixed Meals		

TOTAL AMOUNT \$2,100.00 | TOTAL REQUESTED \$2,100.00

Note: Complete the **Segments**, and **Expenses** tabs to ensure the total cost of travel is captured on the request, add all anticipated expenses. As an example shuttle, parking, taxi expenses, fixed meals, registration fees for conferences, ect.

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Complete all required fields.
Click **Save**.

Expense Type Shuttle	Transaction Date 08/16/2012
Description Shuttle to and from airport	Transaction Amount 100.00 USD
Comment 	

Save **Allocate** **Cancel**

Allocations

Click **Allocate** to apply allocations necessary to any estimated expenses.

Allocate by **Percentage** or **Dollar Amount** and enter appropriate account assignments for each allocation.

Click **Save**.

Note: A Request is allocated as an entire report. Each expense can not be allocated to multiple accounts. Itemization of allocations can be done in Expense

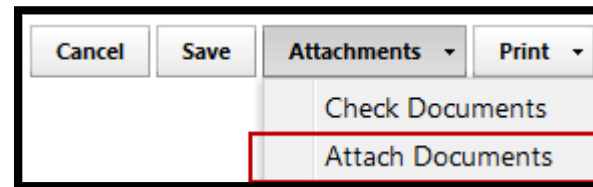
Allocations				Total:\$0.00	Allocated:\$0.00(100%)	Remaining:\$0.00(0%)
Allocate By: ▾				Add New Allocation	Delete Selected Allocations	
<input type="checkbox"/>	Percentage	* Account Assi...	SIO	Code		
<input type="checkbox"/>	50					
<input type="checkbox"/>	50					

Attach Additional Documentation

If you have documentation that needs to be included attach it to the travel request.

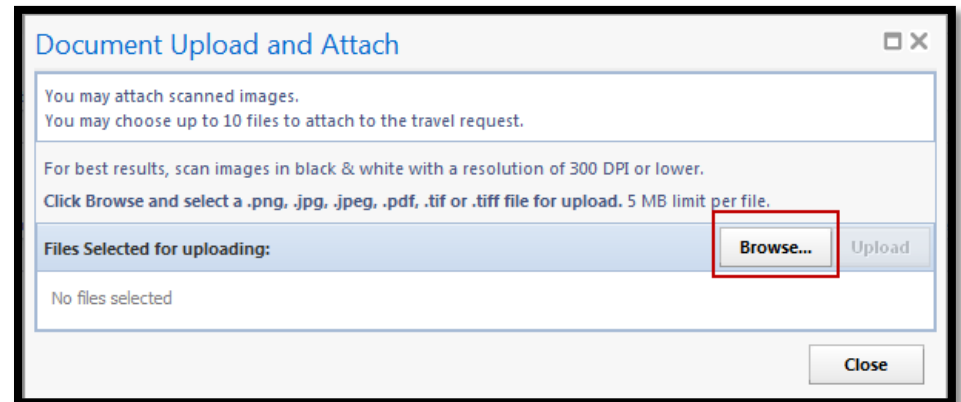


Select **Attach Documents** from the Attachments drop down box.



Click **Browse...**

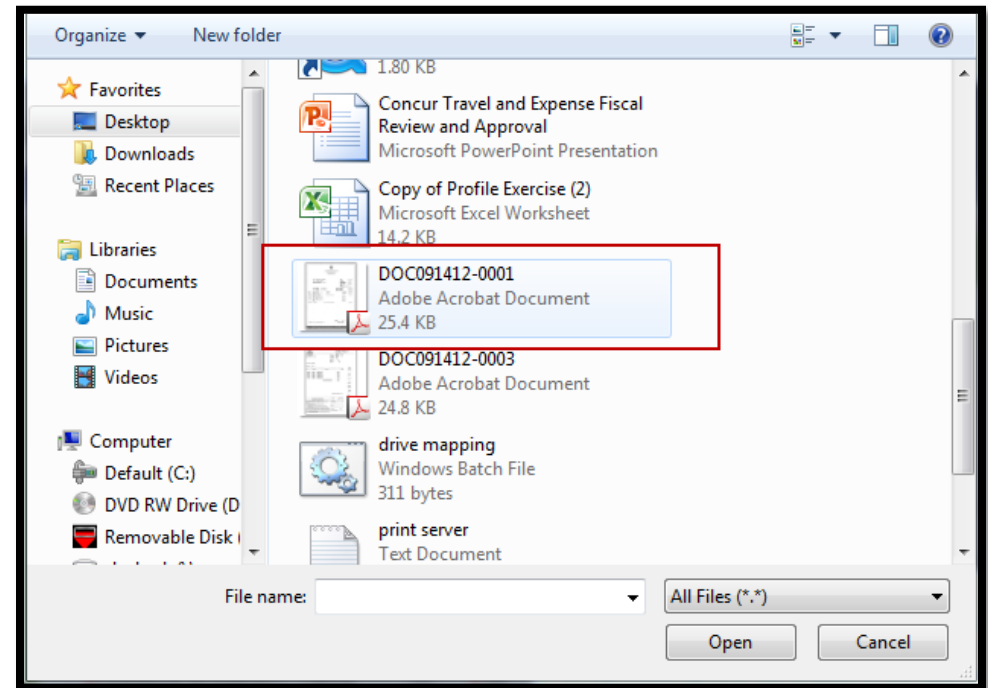
Note: Add all documents you wish to attach (i.e. Drive vs. Fly, Cost Comparison, personal travel, receipts for charges in advance of trip, conference registration and hotel booked outside Concur details, etc.)



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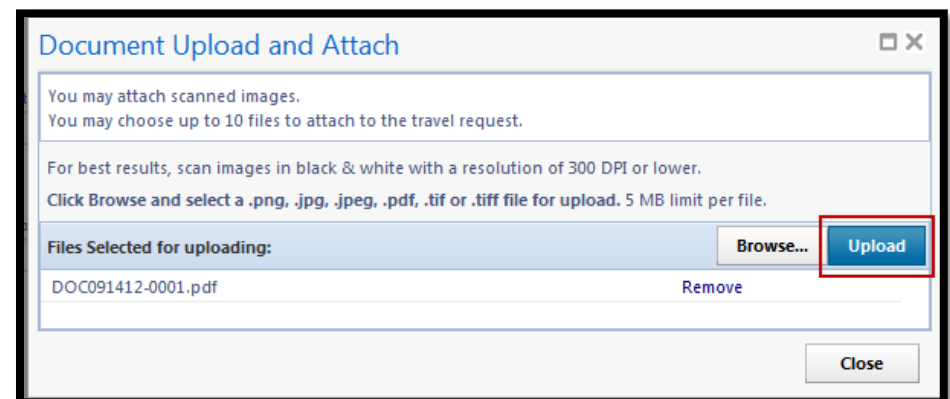
Select your document from the **Choose File to Upload** window

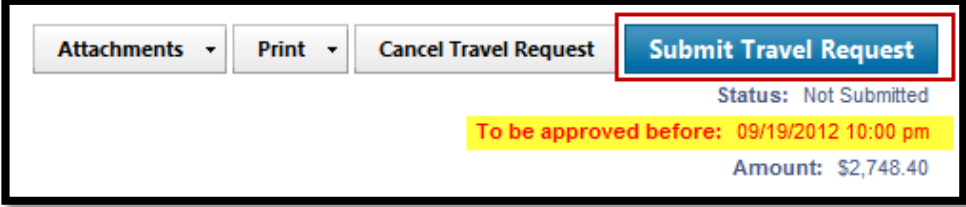
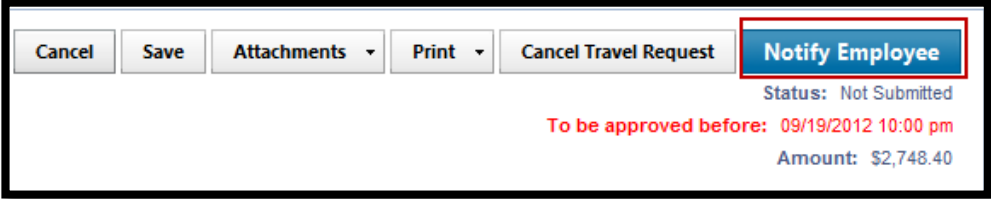
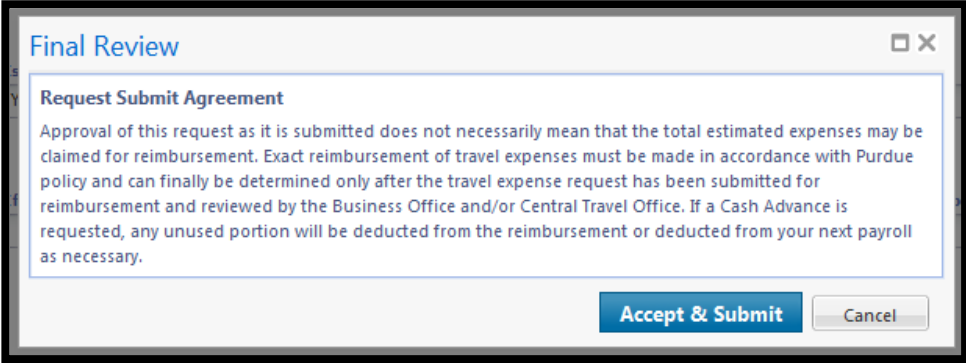
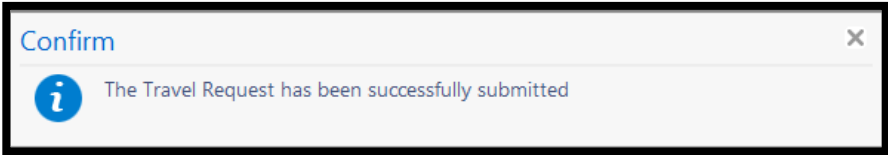
Click **Open**

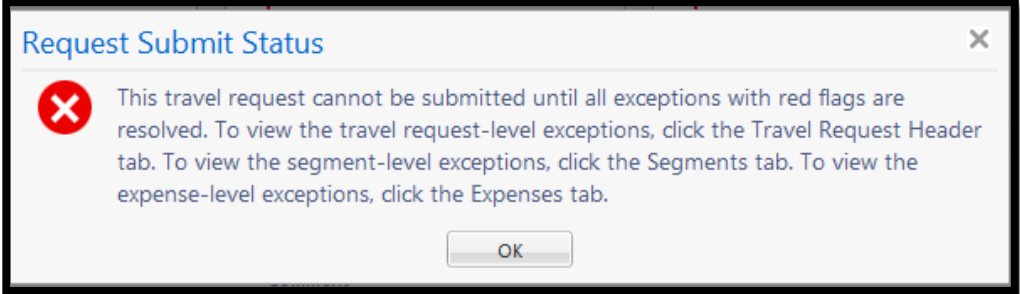
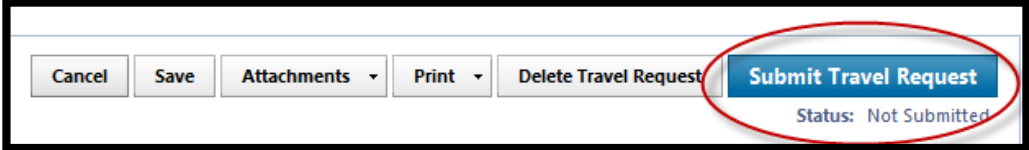
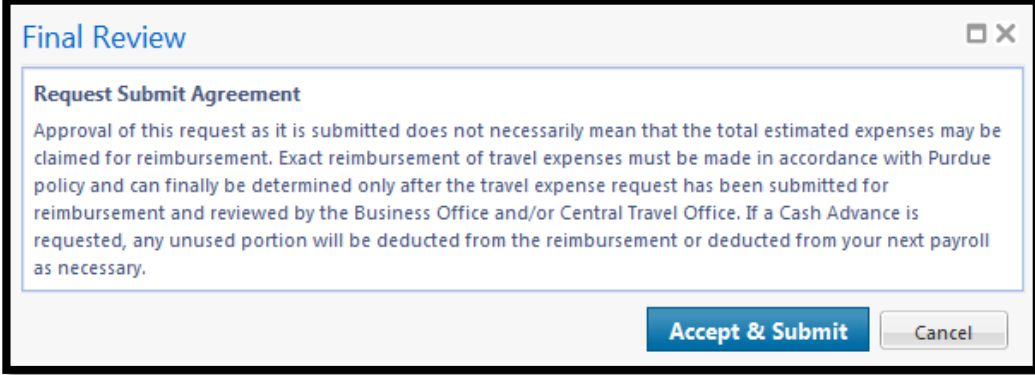


Click **Upload**

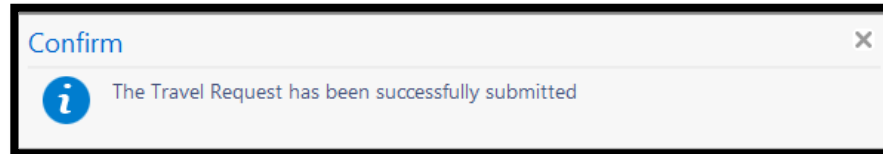
Click **Close**



Submitting a Request	
<p>If you are arranging travel for yourself, click Submit Travel Request.</p> <p>Or</p>	
<p>If you are arranging travel on behalf of someone else, click Notify Employee.</p> <p>Note: The traveler must submit his/her own Travel Request.</p>	
<p>Review the Request Submit Agreement.</p> <p>Click Accept & Submit.</p>	
<p>If the travel request is successfully submitted, a confirmation pop-up box appears.</p>	

If you receive errors when you click Accept & Submit	
<p>If there are errors, this screen appears and the errors listed must be fixed. Read error message, then click OK to close this window.</p> <p>Return to appropriate tab and fix all errors</p>	
Resubmit after the errors are fixed	
<p>After fixing the errors identified by the system or the approver, click Submit Travel Request</p>	
<p>If there are no errors, this screen will appear. Click Accept & Submit.</p>	

Once the report is successfully submitted, you will get this confirmation pop-up.



Notifications

Notifications are sent to the following individuals overnight:

- Traveler's supervisor
- Chief of all funding sources
- Co-PI of all funding sources
- Fiscal approver of all funding sources
- Traveler/traveler assistant/delegate

Making Reservations through ALTOUR

To make a reservation please call ALTOUR at 1-855-512-7955 and speak with a Purdue dedicated travel agent. This number can be used for domestic and international reservations. The reservations desk can also be reached by email at reservations.in@altour.com.

The Altour contact information is also located under **Travel Info** on the **My Concur** page.

Note: When calling after hours your Dedicated Agent and the Online Help Desk calls transfer to The Altour after hours Desk.