Travel Check List

Planning your Travel

- Purpose for the travel
- Where are you traveling
- What arrangement will be require in advance
- Have you identified your funding source?
- Who will need to approve your travel Request?

Travel Request Process

- Log into your Concur profile
- Select Request, then New Request
- **Request Header Tab**
- Request header mandatory fields (all boxes highlight in red)
- Trip Name, Trip Start & End Date, Travel Classification, Traveler Type, Contract / Grants (by default is set to No), Trip Purpose, **1. System** (travel) **2. System Member** (will always be 25), **3. Department** (select Your Department), **4. Account** (will always be Local).
- **Expense Tab**
- Is where you will encumber your travel expense
- Select New Expense by either typing in your expense or hovering over the expense title and selecting it (Example: Airfare), then entering the estimated cost along with any comments or description.
- Follow the above process until you have entered all your estimated expense.
- Note: By completing this process you will encumber and reserve the requested funding. It is important that when creating your Expense Report (**After Travel is Complete**) you attached your approved Travel Request.
- If you do not attach your **Approved Travel Request** to your expense report the encumbered funding will not be available for your department to use until, either you cancel the travel request or your Expense Report has been completed and submitted for review and approval.
- **Approval Flow Tab** is where you can view travel request approver (first in line to approve)
- You can manually add additional approvers
- If you are needing for the request to go to some else before the **Approver**, you will then select the **Blue Cross** symbol to add a step before the listed approver.
- If you are needing to add someone before or after the **Cost Approve**r you will the select one of the two **Blue Cross** on the left hand side. (First **Blue Cross** will add the step after the **Cost Approver** and the Second **Blue Cross** will add the step before the **Cost Approver**
- It is highly recommended that you attached any available supporting document to your Travel Request that will explain your submitted request (Example: Conference Itinerary or purpose for traveling)
- **Final Step in creating the travel request is Submitting your Travel Request by selecting the Submit Request Button.**

FOR ANY AND ALL QUESTIONS OR CONCERNS REGARDING TRAVEL REQUEST

CONTACT: *CONCUR ADMINISTRATOR*

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