

TRAVEL APPLICATION

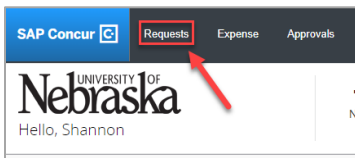
Request

HELPFUL HINTS

- The purpose of a travel request is to obtain pre-travel authorization. Per University policy, a travel request must be submitted and approved prior to booking any travel accommodations and prior to travel.
- Expenses cannot be submitted without an approved travel request.
- A travel request provides detailed information on where a traveler is going and why, the travel accommodations needed (e.g., airfare, hotel, etc.) and the costs that will be incurred.

PROCEDURE

After launching Concur from within Firefly, click on the requests tab.



The requests tab shows any *Active Requests* that were previously created. This includes requests that have been saved, submitted and/or approved.

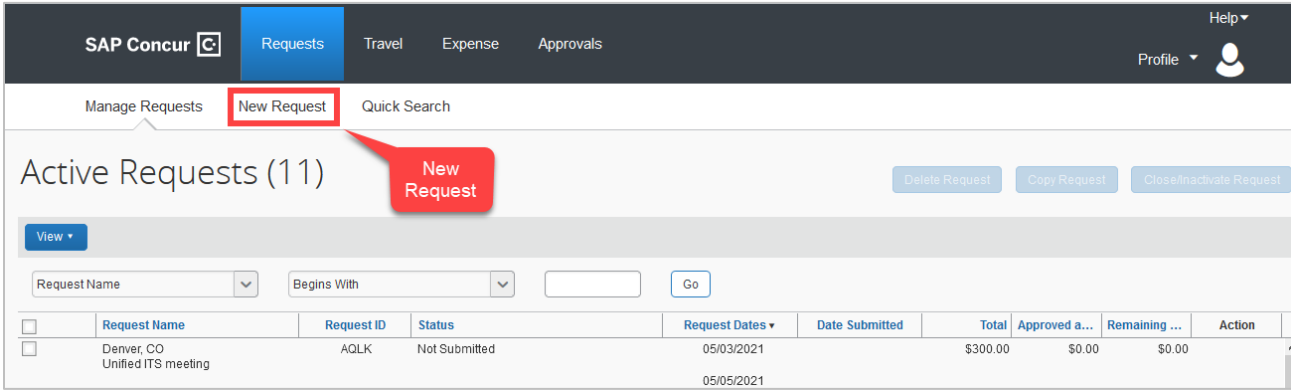
The screenshot shows the 'Active Requests' page in SAP Concur. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', and 'Approvals'. Below the tabs are options for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (11)'. There are buttons for 'Delete Request', 'Copy Request', and 'Close/Inactivate Request'. A search bar is present with fields for 'Request Name', 'Begins With', and a 'Go' button. Below the search bar is a table of active requests.

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Denver, CO Unified ITS meeting	AQLK	Not Submitted	05/03/2021		\$300.00	\$0.00	\$0.00	
<input type="checkbox"/>	San Diego, CA Human Resources conference	AQLF	Sent Back to User - Test, CTraveler2	05/05/2021	04/26/2021	\$1,398.80	\$0.00	\$0.00	
<input type="checkbox"/>	Roswell, NM Conference	ANLQ	Approved	04/30/2021	04/14/2021	\$1,211.00	\$1,211.00	\$1,211.00	Expense
<input type="checkbox"/>	Chicago HR meeting	ANFE	Approved	04/20/2021	04/09/2021	\$200.00	\$200.00	\$200.00	Expense
				04/09/2021					

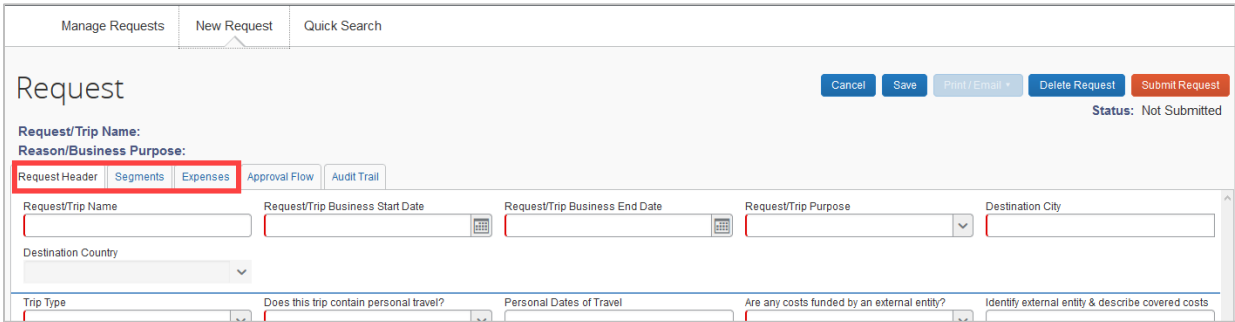
OVERVIEW – TRAVEL REQUEST

Updated April 26, 2021

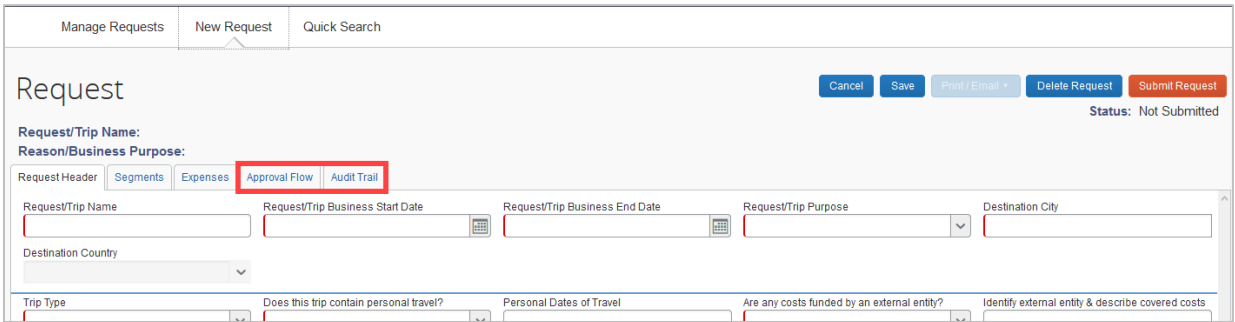
New requests are created by clicking on *New Request*.



The new request page appears. A travel request contains three main areas to enter travel information: Request Header, Segments, and Expenses.



The Approval Flow and Audit Trail tabs are informational only.



OVERVIEW – TRAVEL REQUEST

Updated April 26, 2021

The Request Header is an outline of the trip information, including the trip dates, purpose, and destination. The fields with (red left border) indicate the information is required.

The screenshot shows the 'Request' form with the following fields in the 'Request Header' section:

- Request/Trip Name (required)
- Request/Trip Business Start Date (required)
- Request/Trip Business End Date (required)
- Request/Trip Purpose (required)
- Destination City (required)
- Destination Country
- Trip Type
- Does this trip contain personal travel?
- Personal Dates of Travel
- Are any costs funded by an external entity?
- Identify external entity & describe covered costs
- Cost Object Type (CC Cost Center)
- Cost Object (2105120001) English
- User Defined
- Personnel Area (Test-UNL)
- Employee ID (ctraveler2)
- Reason/Business Purpose
- Comments To/From Approvers/Processors

Segments: includes estimated costs for air ticket, hotel reservation, and car rental. Add a segment by clicking on the corresponding icon.



The screenshot shows the 'Request AQLW' form with the following details in the 'Segments' section:

- Request/Trip Name: St Paul, M
- Reason/Business Purpose: Project meeting
- Amount: \$300.00
- Segment: Air Ticket (Round Trip, Amount: \$300.00)
- Outbound:
 - From: Lincoln Municipal (Airport - LNK), Lincoln, Nebraska
 - To: Minneapolis St Paul Intl (Airport - MSP), Minneapolis, Minnes
 - Date: Thursday, May 27, 2021
 - Comment:
- Return:
 - Date: Friday, May 28, 2021
 - Comment:

OVERVIEW – TRAVEL REQUEST

Updated April 26, 2021

Expenses: estimated additional expense to be incurred due to travel. Available types are listed. Any segments previously entered will be carried over to the expense tab within the travel request.

Request AQLW

Request/Trip Name: St Paul, Minnesota
Reason/Business Purpose: IT Project meeting

Status: Not Submitted
Amount: \$300.00

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

+ New Expense | Delete

Date	Expense Type	Amount	Requested
05/27/2021	Airfare (commercial ticket)	\$300.00	\$300.00

Expense Type:

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.

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	Meal (per diem)	Misc Travel-parking/tolls/etc
Plane (state/private/rented /chartered)	Official Func Exp-Agenda/Names	Registration/Conf Fees
Taxi/Shuttle/Train/Bus	04. Mileage	Team/Group Costs
		Zero \$ Trip

The expense types are listed on the right. Additional expenses can be added by clicking on the expense type, entering the information, and clicking **Save**.

Request AQLW

Request/Trip Name: St Paul, Minnesota
Reason/Business Purpose: IT Project meeting

Status: Not Submitted
Amount: \$300.00

Request Header | Segments | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete

Date	Expense Type	Amount	Requested
05/27/2021	Airfare (commercial ticket)	\$300.00	\$300.00

Expense Type:

Request/Trip Start Date:

Request/Trip Business End Date:

Destination City:

of days:

GSA rate will be used to calculate total after you hit save
0.00

Comment:

TOTAL AMOUNT: \$300.00 | TOTAL REQUESTED: \$300.00

Save | Allocate | Cancel

When all the required information has been entered, several options are available to proceed:

- To save the request, return to the request header tab and click on **Save**.
- Attachments: add a document to the request (e.g., conference brochure or other information) by clicking Attachments and selecting Attach Documents.
- Print/Email: select either *pre-trip approval report* or *audit trail*. A linear view of the corresponding information will display and provide options to save as PDF, email or print
- Delete the request: deletes entire request
- Submit the request: progresses the request for final review and submits for supervisor approval