

**SAP Concur** 

# CREATING A TRAVEL REQUEST





1. Select the **Request** tab on the menu bar.
2. Select **New Request**.

The screenshot shows the SAP Concur 'Request' form. The 'Request Header' section is active, showing fields for Request Policy (AL-Out of State), Request Name (Destination, Travel Dates), Start Date, End Date, Will this include days of Personal Travel? (No), Dates of Personal Travel, Department (010) FINANCE, Accounting Group (1242.917) Comptroller Fiscal Mgmt, Accounting Template (UNCP01) COMPTROLLER, Purpose, and Comment. Red bars indicate required fields.

Note: Required fields are marked with a red bar.

3. Complete the required fields on the Request Header.

- **Request Policy** – The Request Policy will default to Out of State. Make the necessary change if the travel is for In State Actual.
- **Request Name** – The Report Name should be formatted as “Destination, Travel Dates”. As an example, “Atlanta, GA – 10/1-10/3/18”.
- **Start Date** – Enter the trip start date.
- **End Date** – Enter the trip end date.
- **Will this include dates of Personal Travel?** – Select yes or no. If yes is selected, you will be required to enter dates in the Dates of Personal Travel field.
- **Dates of Personal Travel** – Enter dates only if personal travel is combined with the business travel event.
- **Department** – This information should default based on the user.
- **Accounting Group** - This information should default based on the user. *This information is for workflow purposes only.*
- **Accounting Template** - This information should default based on the user. *This information is for workflow purposes only.*
- **Purpose** – Enter the reason for the travel event.
- **Comment** – Use this field for any additional information that your approver will need to approve the request. Examples: 100% funded by organization, using motor pool, etc.

4. Select **Save** in the top right-hand corner of the screen.



5. You will be directed to the **Segments** tab.

The screenshot shows a software interface with five tabs: 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs is a section titled 'Add Segment' with the instruction 'CLICK ICON TO CREATE SEGMENT'. There are four circular icons: a purple airplane icon, a brown bed icon, a teal car icon, and an orange train icon.

In this section, you can enter the travel itinerary and estimated cost information related to your trip for air, hotel, rental car and rail. Be sure to take into consideration that ticket prices may increase if the request is held up for any reason.

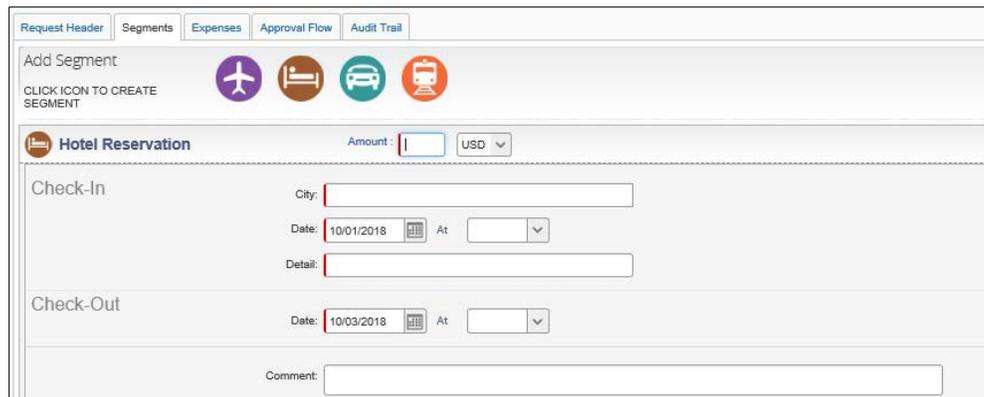
a. Select the airfare icon. 

The screenshot shows the 'Add Segment' form for an 'Air Ticket'. At the top, there are four icons: Air, Hotel, Rental Car, and Rail. Below the icons is the text 'CLICK ICON TO CREATE SEGMENT'. The form is titled 'Air Ticket' and has three radio buttons for 'Round Trip' (selected), 'One Way', and 'Multi-Segment'. There is an 'Amount' field and a 'USD' dropdown menu. The form is divided into 'Outbound' and 'Return' sections. The 'Outbound' section has fields for 'From:', 'To:', 'Date:' (with a calendar icon), 'Depart at' (with a dropdown menu), and a 'Comment:' field. The 'Return' section has fields for 'Date:' (with a calendar icon), 'Depart at' (with a dropdown menu), and a 'Comment:' field.

- **Select Round Trip, One Way or Multi-Segment.**
- **Amount** - Enter the estimated cost of your airfare in the Amount field. This field is only for the ticket cost and applicable taxes and fees. Baggage will be estimated in another area of the request.
- **From** – Enter the departure airport.
- **To** – Enter the destination airport.
- **Outbound Date** – Enter the date you are departing and the estimated time of departure.
- **Return Date** – Enter the date of your return flight and the estimated time of departure.
- **Save**



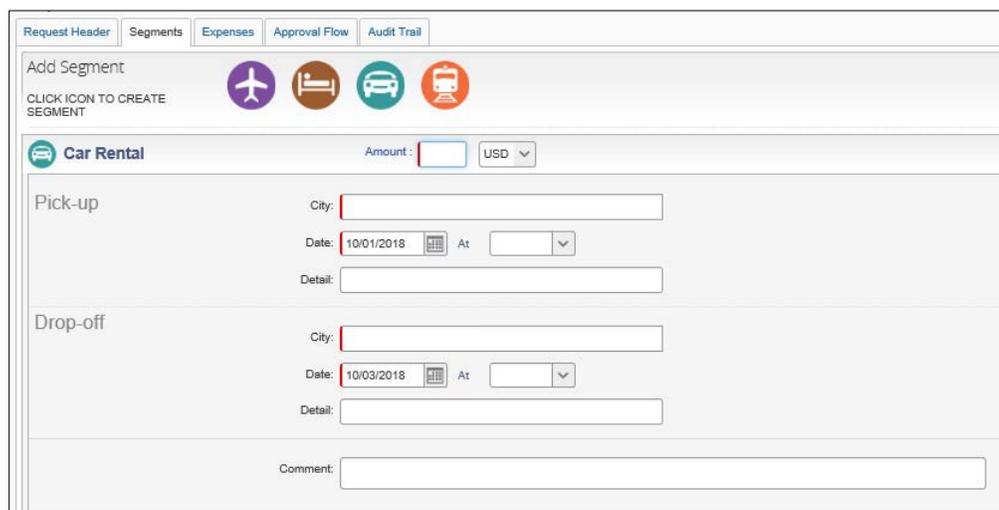
b. Select the hotel icon. 



The screenshot shows a web interface for creating a travel request segment. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs is an 'Add Segment' section with the instruction 'CLICK ICON TO CREATE SEGMENT' and four icons: an airplane, a hotel, a car, and a train. The 'Hotel Reservation' segment is selected, and its details are shown in a form. The form includes an 'Amount' field with a currency dropdown set to 'USD'. Below this are two sections: 'Check-In' and 'Check-Out'. The 'Check-In' section has a 'City' field, a 'Date' field with a calendar icon and a date of '10/01/2018', and a 'Detail' field. The 'Check-Out' section has a 'Date' field with a calendar icon and a date of '10/03/2018'. At the bottom of the form is a 'Comment' field.

- **Amount** – Enter the estimated cost of your hotel stay. This cost should include all fees, taxes, parking, etc.
- **City** – Enter the city the hotel is located.
- **Check-In Date** – Enter the date of check-in.
- **Detail** – Enter the name of the hotel you wish to book.
- **Check-Out Date** – Enter the date of check-out.
- **Save**

c. Select rental car icon. 



The screenshot shows a web interface for creating a travel request segment. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs is an 'Add Segment' section with the instruction 'CLICK ICON TO CREATE SEGMENT' and four icons: an airplane, a hotel, a car, and a train. The 'Car Rental' segment is selected, and its details are shown in a form. The form includes an 'Amount' field with a currency dropdown set to 'USD'. Below this are two sections: 'Pick-up' and 'Drop-off'. The 'Pick-up' section has a 'City' field, a 'Date' field with a calendar icon and a date of '10/01/2018', and a 'Detail' field. The 'Drop-off' section has a 'City' field, a 'Date' field with a calendar icon and a date of '10/03/2018', and a 'Detail' field. At the bottom of the form is a 'Comment' field.

- **Amount** – Enter the estimated cost of the rental car.
- **Pick Up City** – Enter the city where you will pick up the car.
- **Date** – Enter the date you will pick up the car.
- **Drop Off City** – Enter the city where you will drop off the car.



- **Date** – Enter the date you will drop off the car.
- **Save**

6. Select the **Expenses** tab to enter estimates of other travel expenses related to your trip.

Some of the most commonly used expenses are as follows:

- Baggage Fees
- Airport Parking
- Transit Costs
- Conference Registration
- Mileage – Enter the estimated mileage and the system will calculate the allowable mileage reimbursement amount for the trip.

- M&IE Rate – Select the city you are traveling to and the system will calculate the allowable total M&IE (Meals and Incidental Expenses) for the trip. The dates are pulled from the Header Tab.

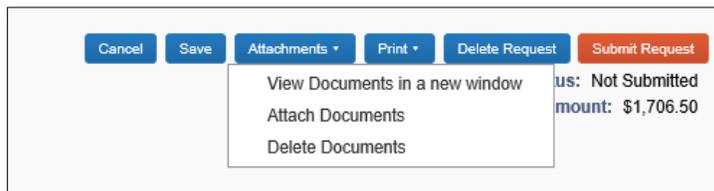
Be sure to **Save** after each expense type is completed.



7. Select **Attachments** and **Attach Documents** to upload your travel packet and any information necessary for the approval of your travel request.



If the attachment needs to be edited, select **Check Documents**. (Be sure pop-up blocker is turned off.) The dropdown menu will change. Select **View Documents in a new window**.



8. After you have entered all information and verified it is accurate, **Submit Request**. Once you submit a request, you can only recall the request if your approver has not started the approval process.

9. Select the **Approval Flow** tab to see the routing of your travel request.



10. Once your request has been approved, the 4 digit Request ID will be necessary to proceed with booking your travel in Concur.

