



REQUEST FOR SAME DAY TRAVEL





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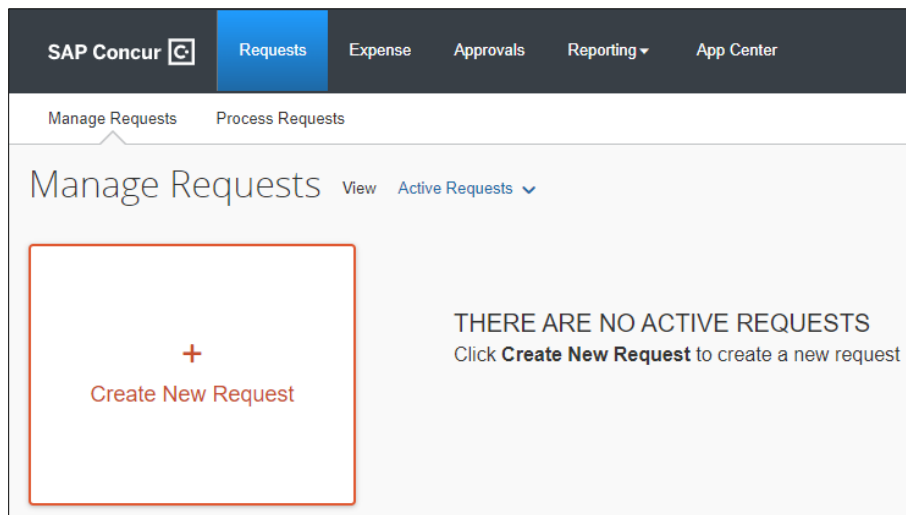
AUTHORIZATION TO TRAVEL

Per the Code of Alabama and the Fiscal Policy and Procedures Manual, an employee traveling in service of the state must be approved to travel prior to the event. The expenses must be reasonable and necessary for carrying out service for the state. The Request in Concur is the required authorization to travel for events out of state or those in-state that qualify for actual expense reimbursement. The Request must be approved by the Agency Head, or Governor for agency heads, before travel accommodations can be booked/charged to the state's travel card.

NOTE: An approved Request is necessary to create a travel related Expense Report in Concur. It is important to keep all travel Requests active until you are sure no other travel expenses related to the event are expected. Once the Request is inactivated or closed, the only way to submit future travel expenses is to create a new Request. For this reason, our office recommends keeping all Requests active for up to a month after the event.

Select the **Requests** tab on the menu bar.

Select **Create New Request**.





REQUEST HEADER

Complete the required fields (marked with red asterisk) on the Request Header.

- Request Policy** – The Request Policy will default to Out of State. Be sure to make the necessary change if the travel is for In State Actual, as selecting the wrong policy on the Request will prevent the traveler from submitting an Expense Report until the process is redone.
NOTE: The state or traveler must be a dues-paying member of the national, state, or regional organization holding the event to qualify for In State Actual. The Certification of In State Travel Expenses Form must be attached to the Request and Expense Report for processing. This [form](#) can be found on the Comptroller’s website under Online Forms.
- Request Name** – The Report Name must be formatted as “Destination, Travel Dates”. As an example, “Atlanta, GA – 10/1/2022”. The year must be included as part of the date.
NOTE: This is a required format that transfers to the Expense Report. The Expense Report will not be processed until this format is used.
- 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.
NOTE: If personal time is included in this trip, an explanation of dates and times must be included as an attachment to the Expense Report for auditing purposes.
- 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.
NOTE: This information is for workflow purposes only. Agency accounting offices can allocate expenses to different templates during their audit of the Expense Report.
- 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.

Select **Create Request** in the bottom right-hand corner of the screen



EXPENSES

You will be directed to start entering **Expected Expenses**.

Manage Requests | Process Requests

Atlanta, GA - 11/1/2022 \$0.00

Not Submitted | Request ID: 399T

[Copy Request](#) [Submit Request](#)

[Request Details](#) [Print/Share](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

Click the **Add** button and a list of expenses will appear. You will provide an estimated cost for each expense that is anticipated.

Add New Expected Expense

Search for an expense type

- 01. Hotel Expenses
 - Hotel Reservation
 - Laundry
 - Parking - Hotel
- 02. Transportation
 - Agency Booking Fees
 - Air Ticket
 - Airline Fees

Select **Air Ticket** to enter the estimated cost of the flight. Be sure to take into consideration that ticket prices may increase if the request is held up for any reason.

New Expense: Air Ticket [Cancel](#) [Save](#)

[Round Trip](#) [One Way](#) [Multi City](#)

Outbound

From * To *

Date * Depart at * Comment

Return

Date * Depart at * Comment

Amount * Currency *



- **Select Round Trip, One Way or Multi City.**
- **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.
- **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.
- **Save**

Select **Car Rental** if you anticipate needing a rental car.

The screenshot shows a web form titled "New Expense: Car Rental". At the top right, there are "Cancel" and "Save" buttons. A note indicates that fields with an asterisk are required. The form is divided into sections for "Pick-up" and "Drop-off". Each section has a "City" field with a location icon, a "Date" field with a calendar icon, and an "At" field with a location icon. Below each section is a "Detail" text area. At the bottom, there is a "Comment" text area, an "Amount" field, and a "Currency" dropdown menu currently set to "US Dollar".

- **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.
- **Amount** – Enter the estimated cost of the rental car.
- **Save**



Select **Single Day Per Diem** under the Meals category to estimate the allowable meals and incidental expenses based on the CONUS rate. Be sure to enter the city where your state business will take place. Once you save this expense, the M&IE rate will calculate based on the date entered on the Request Header.

Add Expected Expense

Search for an expense type

Transit Costs

▼ 03. Meals

International Meals-Full Day

International Meals-Travel Day

M&IE Rate

Single Day Per Diem

New Expense: Single Day Per Diem
11/01/2022

Allocate

City *

Transaction Amount

Currency US, Dollar

Comment

Save Cancel

Continue adding other expenses that are anticipated for the travel event. 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.

New Expense: Mileage \$0.00
03/12/2022

Allocate

Transaction Date *

Transaction Amount

Currency US, Dollar

Distance *

Mileage Rate

Comment

0.555

NOTE: Any major expenses not included on the Request will not be authorized for reimbursement on the Expense Report.

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



ATTACHMENTS

Select **Attachments** and **Attach Documents** to upload your travel packet and any information necessary for the approval of your travel request. Attach the [Certification of In State Travel Expenses Form](#), if applicable.

If the attachment needs to be reviewed or edited, select **Attachments**. (Be sure pop-up blocker is turned off.) The dropdown menu will change. Select **View Documents** or **Delete Documents**.

SUBMIT REQUEST

After you have entered all information and verified it is accurate, **Submit Request**. Once you submit a request, you can recall to make corrections as long as the travel event has not occurred and no expenses have been paid against it.



Once the Request has been submitted, you will see the status of the approval process from the Manage Requests screen in the Request module.

The screenshot shows the 'Manage Requests' interface with a 'REQUEST LIBRARY' section. A dropdown menu is set to 'Active Requests'. The table below shows three request cards:

APPROVED	10/01/2022	SUBMITTED	09/07/2022	RETURNED	08/01/2022
London, UK - 10/1-10/5/22	\$5,742.00	⚠️ Gulf Shores, AL - 9/7-9/12/22	\$1,755.50	Charlotte, NC - 8/1-8/5/22	\$4,832.00
Approved		Pending Cost Object Approval		Sent Back to Employee	

REQUEST TIMELINE (APPROVAL WORKFLOW)

Select the **Request Details** dropdown, then **Request Timeline** to see the routing of your travel request.

The screenshot shows the 'Request Details' dropdown menu for a request titled 'Charlotte, NC - 3/12-3/15/22 \$2,546.00'. The dropdown options are:

- Request
- Request Header
- Request Timeline
- Audit Trail

The 'Request Timeline' option is highlighted. The background shows the request title and 'Pending Cost Object Approval | Request ID: 3974'. Other visible text includes 'EXPENSES', 'Details ↑↓', and 'Montgomery (MGM) - Charlotte (CLT) : P'.

The screenshot shows the 'Request Timeline' page for 'Gulf Shores, AL - 9/7-9/12/22 | \$1,755.50'. It features an 'Approval Flow' diagram with two steps:

- Cost Object Approval
COMPTROLLER (010-1242.917-UNCP01)
- Cost Object Approval
COMPTROLLER (010-1242.917-UNCP01)



REQUEST ID

Once your request has been approved, the 4-digit Request ID will be necessary to proceed with booking your travel in Concur. The Request ID can be found under the Request Name within the actual Request.

NOTE: Travel accommodations are not to be booked or charged to the state travel card until the Request has been approved to final.

Manage Requests Process Requests

Seattle, WA 6/1-6/5/22 \$5,313.70

Approved | **Request ID: 39A4**

This is the screen within the Travel module where the Request ID will be required.

Travel Arrangers Trip Library Templates Tools Concur XA

Trip Summary

- ✓ **Finalize Trip**
- ✓ Review Travel Details
- Enter Trip Information**
- Submit Trip Confirmation

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name
This will appear in your upcoming trip list.
Trip from Montgomery to Seattle

Trip Description (optional)
Used to identify the trip purpose

Send a copy of the confirmation to: [input field]

Send my email confirmation as
 HTML Plain-text

With my email confirmation...
Do not include directions to hotels with email [dropdown]

Please enter your approved travel request ID [Required]

You may HOLD this reservation until: 02/28/2019 10:00 pm Eastern

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip Hold Trip << Previous Next >> Cancel Trip



PRINTED REQUEST

A copy of the Request can be printed by selecting **Print/Share** and ***AL-Request Printed Report**.

Gulf Shores, AL - 9/7-9/12/22 \$1,755.50

Approved | Request ID: 397J

[Request Details](#) ▾
 [Print/Share](#) ▾
 [Attachments](#) ▾

REPORTS: 1

*AL-Request Printed Report

This report provides a summary of all details and allows the traveler to print, save or email the information to others.

*AL-Request Printed Report

Country of Residence : **UNITED STATES**
 *Org Unit 1 - Department : **FINANCE**
 *Org Unit 2 - Accounting Group : **Comptroller.Fiscal Mgmt**
 *Org Unit 3 - Accounting Template : **COMPTROLLER**

Start Date : **09/07/2022**
 End Date : **09/12/2022**
 Request Policy : ***AL-In State**
 Purpose : **GFOAA Conference**
 Total Posted Amount : **\$1,755.50**

Segments

Hotel Reservation
 Foreign Amount : \$1,000.00
 09/07/2022 Gulf Shores (US) 09/12/2022
 Check-In Detail : State Lodge
 Comment : BRYANT, LINDSAY S. (05/17/2022): Only including lodging amount for business days.
 Allocations : 100% (\$1,000.00) 010-1242.917-UNCP01

Expenses

Transaction Date	Expense Type	Entry Description	Foreign Amount	Amount
09/07/2022	Hotel		\$1,000.00	\$1,000.00
09/07/2022	M&IE Rate		\$335.50	\$335.50
09/07/2022	Tolls/Road Charges	Taking Motor Pool Car	\$20.00	\$20.00

Close

Print
Save as PDF
Email



CANCEL REQUEST

The Cancel Request action within the open Request can be used if the travel event has been canceled. If corrections need to be made, the traveler can recall the Request as long as the travel event has not occurred and no expenses have been paid against it.

NOTE: Be sure there are no potential expenses related to the travel event before cancelling the Request.

Gulf Shores, AL - 9/7-9/12/22 \$1,755.50

Approved | Request ID: 397J

[Request Details](#) [Print/Share](#) [Attachments](#)

More Actions ▼

- Cancel Request
- Copy Request
- Close Request

COPY REQUEST

The Copy Request action can be used to copy over the information into a new draft version of the Request. This is used sometimes if a Request was approved with some incorrect information and a few details need to be changed. This allows the traveler to copy over the information in order to make necessary adjustments.

NOTE: Be sure to cancel the incorrect Request to alleviate any confusion when it is time to create an Expense Report.

Gulf Shores, AL - 9/7-9/12/22 \$1,755.50

Approved | Request ID: 397J

[Request Details](#) [Print/Share](#) [Attachments](#)

More Actions ▼

- Cancel Request
- Copy Request
- Close Request

CLOSE REQUEST

The Close Request action is to be used once all pending and anticipated expenses have been submitted for the travel event. Once this action is performed, it cannot be undone. If other expenses related to the travel event arise, a new Request will have to be completed in order to process the travel expenses.

NOTE: Our office recommends keeping all Requests active for up to a month after the travel event.

Gulf Shores, AL - 9/7-9/12/22 \$1,755.50

Approved | Request ID: 397J

[Request Details](#) [Print/Share](#) [Attachments](#)

More Actions ▼

- Cancel Request
- Copy Request
- Close Request