



REQUEST FOR INTERNATIONAL 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. This is a requirement even if another entity is paying the costs. 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 instate 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. Agency heads are expected to exercise good judgment when approving travel.

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.

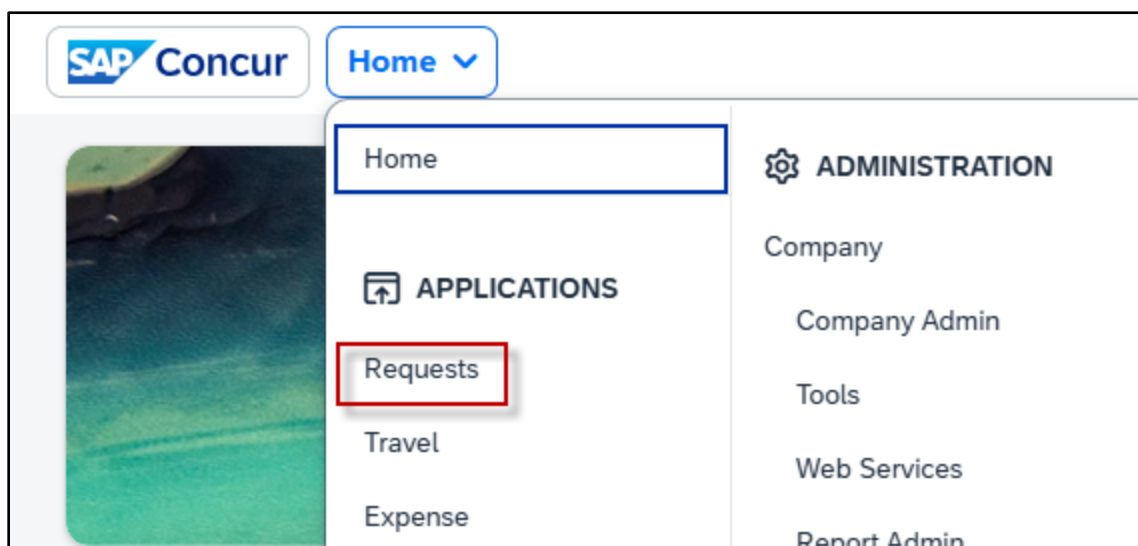
Once the Request is approved, conference registration fees and/or travel accommodations for air and hotel can be charged to the state travel card in advance of the state travel event and should be paid timely to prevent interest charges from incurring on the state travel card.

NOTE: Per the Fiscal Policy and Procedures Manual, the prepayment of expenses should not be made more than 60 days in advance of the travel event.

CREATING A NEW REQUEST

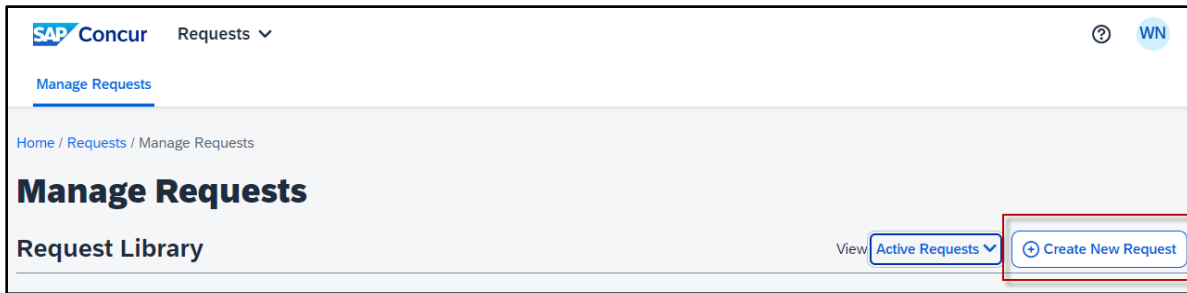
Select the **Home** dropdown at the top of the screen.

Select **Requests**.

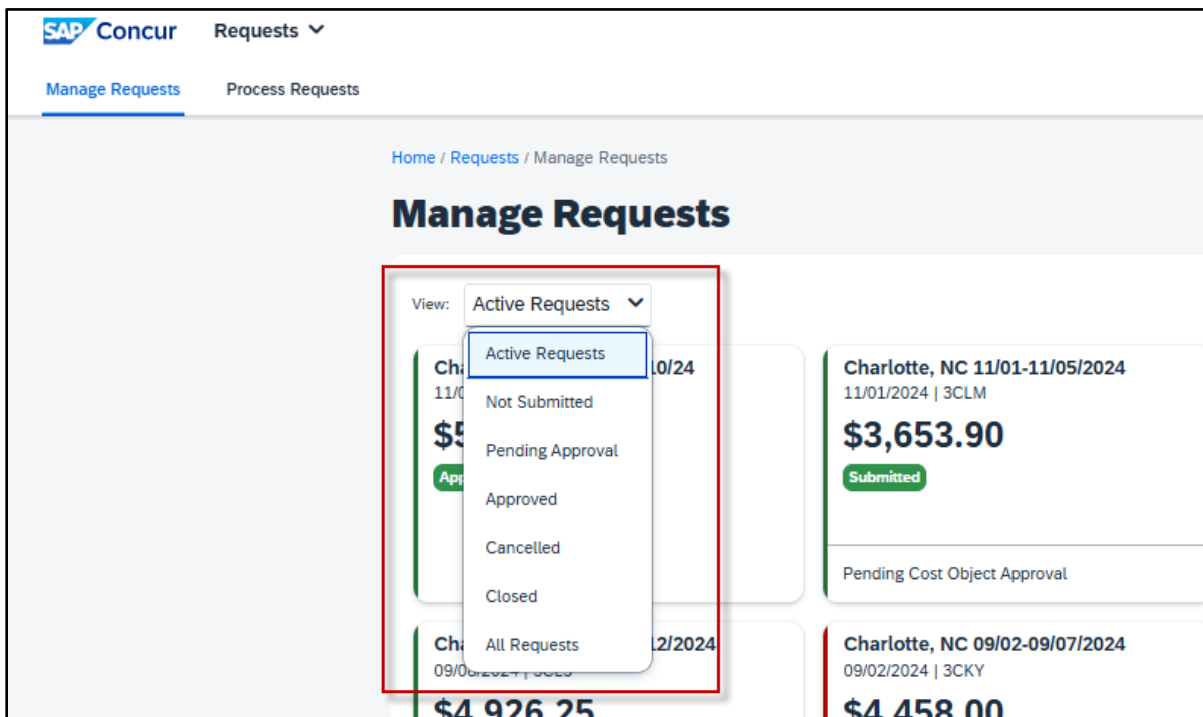




Select **Create New Request**.



If you need to pull up an existing Request, you can click the **Active Requests** dropdown for other selections.





REQUEST HEADER

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

- **Request Policy** – The Request Policy will default to Out of State.
- **Request Name** – The Report Name must be formatted as “Destination, Travel Dates”. As an example, “London, UK – 2/1-2/6/2024”. 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 business start date. This should be the date your business travel starts or would have started if personal time was not included.
- **End Date** – Enter the business end date. This should be the date your business travel ends or would have ended if personal time was not included.
- **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. If personal dates are added to the beginning or ending of a trip, those dates should be notated in this field, but do not need to be included in the “Start Date” or “End Date”, unless the personal time is occurring in the middle of the business trip.
- **Dates of Personal Travel** – Enter dates only if personal travel is combined with the business travel event. If personal dates are added to the beginning or ending of a trip, those dates should be notated in this field, but do not need to be included in the “Start Date” or “End Date”, unless the personal time is occurring in the middle of the business trip.

NOTE: It is the agency head’s responsibility to have a process for documenting and approving personal time with a business travel event. There should be some type of documentation required and attached to the Request.



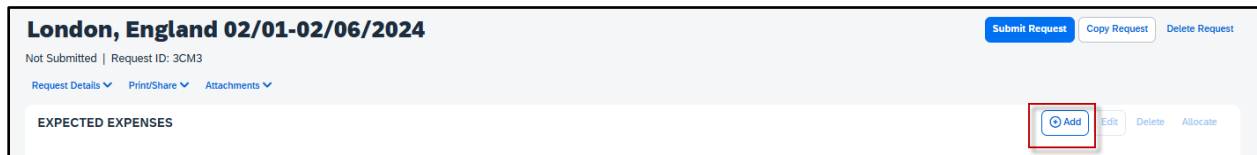
An explanation of dates and times must also be notated in the Comment field on the Expense Report Header, unless there are other factors involved that would make the determination of allowable business expenses more complicated. In those cases, a memo from the traveler will be necessary as an attachment 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, carpooling with another employee, etc.

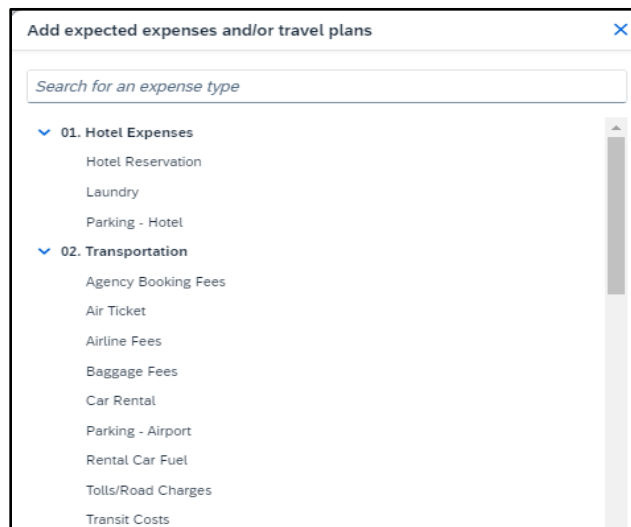
Select **Create Request** in the bottom right-hand corner of the screen.

EXPENSES

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



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





AIR

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.

The screenshot shows a web form titled "New Expense: Air Ticket". At the top, there are navigation links: "Home", "Requests / Manage Requests / London, UK - 2/1-2/6/2024 / New Expense: Air Ticket". The form has a "Cancel" button and a "Save" button in the top right corner. Below the title, there are three radio buttons: "Round Trip" (selected), "One Way", and "Multi City". The form is divided into "Outbound" and "Return" sections. Each section has a "From" field, a "To" field, a "Date" field, and a "Depart at" field. The "Outbound" section has a "Date" of "02/01/2024" and a "Depart at" of "hh:mm A". The "Return" section has a "Date" of "02/06/2024" and a "Depart at" of "hh:mm A". There are also "Comment" fields for both sections. At the bottom, there is an "Amount" field and a "Currency" dropdown menu set to "US, Dollar". There are "Save" and "Cancel" buttons at the bottom left.

- **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**

NOTE: Commercial airfare may be utilized for long distance trips, in excess of 8 hours. Main cabin seating should be utilized unless traveling outside the continental US. In those cases, Economy Comfort seating is permissible. All travel policies can be found in the [Fiscal Policy and Procedures Manual](#).

If upgrades are necessary, those must be paid for with personal funds.



HOTEL

Select **Hotel Reservation** to enter details and estimated cost of the hotel.

Hotel Reservation \$650.00 Save Delete Cancel

* Required field

Check-In

Date * At City *

Detail *

Check-Out

Date * At

Comment 0/2000

Amount * Currency *

Save Cancel

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



CAR

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

New Expense: Car Rental Save Cancel

* Required field

Pick-up

City * London, UNITED KINGDOM x

Date * 02/01/2024

At Munich A

Detail

Drop-off

City * London, UNITED KINGDOM x

Date * 02/06/2024

At Munich A

Detail

Comment 0/2000

Amount * 300

Currency * US, Dollar

Save Cancel

- **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**

M&IE

Select **M&IE** to enter the city of travel to calculate the allowable M&IE total for the trip.

New Expense: M&IE Rate Save Cancel

* Required field

Allocate

City * London, UNITED KINGDOM x

Transaction Amount *

Currency * UK, Pound Sterling (GBP) x

Exchange Rate * 1 GBP = 1.268698431 Reverse Rate

Amount in USD *

Comment 0/2000

Save Cancel

- **City** – Enter the destination for State business.
- **Save**

The Transaction Amount will be blank, but clicking Save will initiate the calculation. Concur will look to the travel dates notated on the Request Header and calculate the allowable M&IE total for the entire trip.



NOTE: If there are personal days included in the trip dates, the traveler will not be able to claim those amounts on the Expense Report.

OTHER ANTICIPATED EXPENSES

Continue adding other expenses that are anticipated for the travel event. Some of the most commonly used expenses are as follows:

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

The screenshot shows a web form titled "Mileage \$26.32". At the top right are buttons for "Save", "Delete", and "Cancel". Below the title is the date "02/01/2024" and an "Allocate" button. A "Transaction Date" field is set to "02/01/2024". The "Transaction Amount" is "26.32", "Currency" is "US, Dollar (USD)", and "Distance" is "45". The "Mileage Rate" is "0.585". There is a "Comment" field with a character count of "0/2000". At the bottom left, a "Save" button is highlighted with a red box, and a "cancel" button is next to it.

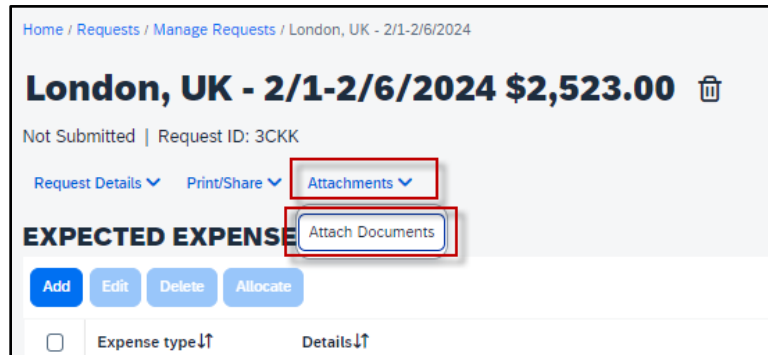
NOTE: Any major expenses not included on the Request will not be authorized for reimbursement on the Expense Report.

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

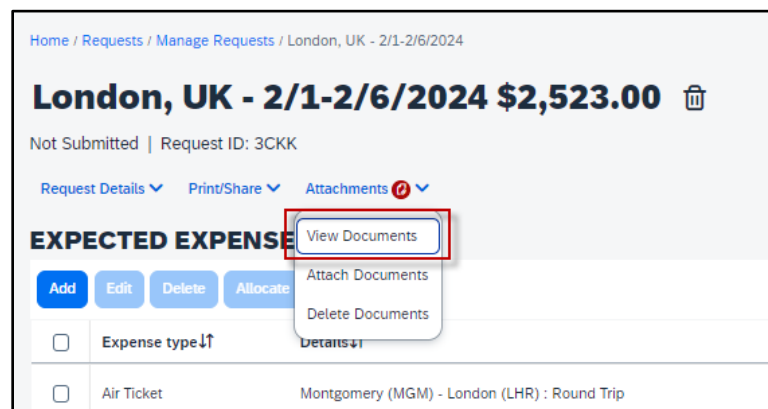


ATTACHMENTS

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

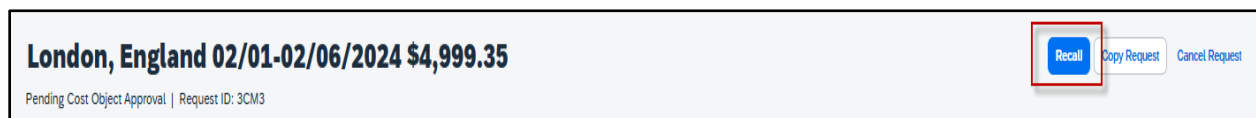


If the attachment needs to be reviewed or edited, select **Attachments**. (Be sure pop-up blocker is turned off.) The dropdown menu will change. Select **View Documents** or **Delete Documents**.



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.

Home / Requests / Manage Requests

Manage Requests

Request Library

| | | |
|--|--|---|
| Atlanta, GA - 5/1-5/5/24 05/01/2024 3CKG \$2,197.00 Submitted Pending Cost Object Approval | Nashville, TN - 3/28-3/31/2024 03/28/2024 3CKD \$1,500.00 Returned Sent Back to Employee | London, UK - 2/1-2/6/2024 02/01/2024 3CKK \$2,523.00 Submitted Pending Cost Object Approval |
|--|--|---|

REQUEST TIMELINE (APPROVAL WORKFLOW)

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

Home / Requests / Manage Requests / London, England 02/01-02/06/2024

London, England 02/01-02/06/2024 \$4,999.35

Pending Cost Object Approval | Request ID: 3CM3

Request Details ▾ Print/Share ▾ Attachments ▾

- Request
- Request Header
- Request Timeline**
- Audit Trail

EXPENSES

Details ⬆

Atlanta (ATL) - London (LON) : Round Trip

Car Rental London, UNITED KINGDOM - London, UNITED KINGDOM

Request Timeline

London, England 02/01-02/06/2024 | \$4,999.35

Approval Flow

- Cost Object Approval**
COMPTROLLER (010-1242.917-UNCP01)
WILLIAM POOLE



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.

Home / Requests / Manage Requests / London, England 03/11-03/15/2024

London, England 03/11-03/15/2024 \$6,616.39

Approved | Request ID: 3CLY

Request Details ▾ Print/Share ▾ Attachments ▾

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

Travel Arrangers Trip Library Templates Tools Concur XA

Trip Booking Information

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

Finalize Trip

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

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: [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**.

Home / Requests / Manage Requests / London, England 03/11-03/15/2024

London, England 03/11-03/15/2024 \$6,616.39

Approved | Request ID: 3CLY

Request Details ▾ **Print/Share ▾** Attachments ▾

| | |
|----------------------|-----------------------------------|
| REPORTS: 1 | *AL-Request Printed Report |
| Amount \$1,306.01 | Remaining \$6,616.39 |

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

Booking Business Travel

Request ID : 3CLY
Minimum Departure Date : 03/11/2024
Approval Status : Approved

Employee Name : GANTT, BRETT
Email Address : brett.gantt@comptroller.alabama.gov
Country of Residence : UNITED STATES
*Org Unit 1 - Department : FINANCE
*Org Unit 2 - Accounting Group : Comptroller Fiscal Mgmt
*Org Unit 3 - Accounting Template : COMPTROLLER

Sender Name : GANTT, BRETT
Email Address : brett.gantt@comptroller.alabama.gov
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 : 03/11/2024
End Date : 03/15/2024
Request Policy : *AL-Out of State
Purpose : job aids
Total Posted Amount : \$6,616.39

Segments

Hotel Reservation
Foreign Amount : \$2,000.00
03/11/2024 London (GB) 03/15/2024
Check-In Detail : Hilton
Allocations : 100% (\$2,000.00) 010-1242.917-UNCP01

Air Ticket
Foreign Amount : \$3,000.00
03/11/2024 Hartsfield Intl (Airport - ATL), Atlanta (US) - London (Area Airports - LON) (GB) Departure time: 6:00 AM

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.

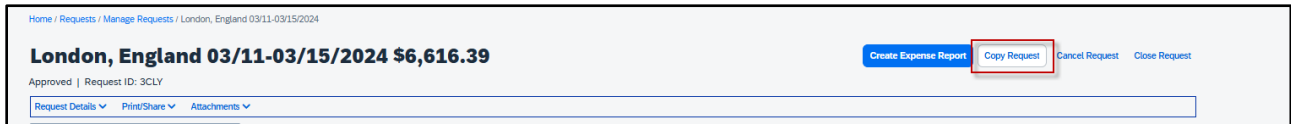
NOTE: Be sure there are no potential expenses related to the travel event before cancelling the Request.



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.



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 to process the travel expenses.

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

