



REQUEST FOR SAME DAY TRAVEL





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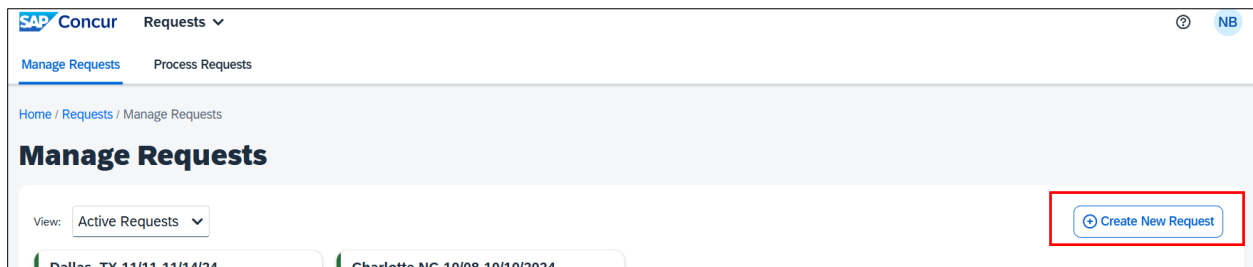
AUTHORIZATION TO TRAVEL

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

Create New Request

* Required field

Request Policy *	Request Name (Destination, Travel Dates) *	Start Date *
*AL-Out of State		MM/DD/YYYY
End Date *	Will this include days of Personal Travel? *	Dates of Personal Travel
MM/DD/YYYY	No	
Department * 1	Accounting Group * 2	Accounting Template * 3
(010) FINANCE	(1242.917) Comptroller Fiscal Mgmt	(UNCP01) COMPTROLLER
Purpose * 0/500	Total Posted Amount *	
	\$	
Comment 0/500		

Cancel Create Request



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**.

Mobile, AL 08/19/2024 Submit Request Copy Request Delete Request

Not Submitted | Request ID: 3CM9

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.

Search by expense type, category, description Collapse All Sections

- 01. Hotel Expenses
 - Hotel Reservation
 - Laundry
 - Parking - Hotel
- 02. Transportation
 - Agency Booking Fees
 - Air Ticket
 - Airline Fees
 - Baggage Fees
 - Car Rental
 - Parking - Airport
 - Rental Car Fuel

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

Save Cancel

Round Trip One Way Multi City

Outbound

From * * Required field

To *

Date * Depart at * 0/2000

Comment

Return

Date * Depart at * 0/2000

Comment

- **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.

New Expense: Car Rental Save Cancel

* Required field

Pick-up

City * Date * 10/08/2024 At hh:mm A

Detail

Drop-off

City * Date * 10/10/2024 At hh:mm A

Detail

Comment 0/2000

Amount * Currency * 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.

03. Meals

International Meals-Full Day

M&IE Rate

Single Day Per Diem

New Expense: Single Day Per Diem Save Cancel

Allocate * Required field

City *

Transaction Amount * Currency *

Comment 0/2000

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

Allocate

Transaction Date * 10/08/2024

Transaction Amount * Currency * US, Dollar (USD) Distance *

Mileage Rate 0.585

Comment 0/2000

Save **Cancel**

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.

Charlotte,NC-10/08-10/10/2024

Not Submitted | Request ID: 4P3M

Submit Request **Copy Request** **Delete Request**

Request Details Print/Share **Attachments**

EXPECTED EXPENSES **Attach Documents** **Add** **Edit** **Delete** **Allocate**

No Expected Expenses
Add expected expenses and/or travel plans to this request to submit for approval.



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**.

Home / Requests / Manage Requests / Charlotte, NC 11/05-11/10/24

Charlotte, NC 11/05-11/10/24 \$5,154.90

Sent Back to Employee | Request ID: 3CLQ | [View Timeline](#)

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

- View Documents
- Attach Documents
- Delete Documents

EXPTECTED EXPENSES

Expense type↓↑ Details↓↑

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.

Charlotte, NC-10/08-10/10/2024

Not Submitted | Request ID: 4P3M

Request Details ▾ Print/Share ▾ Attachments ▾

EXPTECTED EXPENSES Add Edit Delete Allocate

Submit Request Copy Request Delete Request

Charlotte, NC 10/08-10/10/2024 \$1,790.00

Pending Cost Object Approval | Request ID: 3CM7

Request Details ▾ Print/Share ▾ Attachments ▾

Recall Copy Request Cancel Request

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

Manage Requests Process Requests

Home / Requests / Manage Requests

Manage Requests

View: Active Requests ▾ Create New Request

<p>Dallas, TX-11/11-11/14/24 11/11/2024 3CLN</p> <p>\$1,101.51</p> <p>Approved</p>	<p>Charlotte, NC-10/08-10/10/2024 10/08/2024 3CLP</p> <p>\$1,073.16</p> <p>Approved</p>
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REQUEST TIMELINE (APPROVAL WORKFLOW)

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

Home / Requests / Manage Requests / Charlotte, NC 10/08-10/10/2024

Charlotte, NC 10/08-10/10/2024 \$1,790.00

Pending Cost Object Approval | Request ID: 3CM7

Request Details ▾ Print/Share ▾ Attachments ▾

Request

- Request Header
- Request Timeline**
- Audit Trail

EXPENSES



Details↓↑

Birmingham (BHM) - Charlotte (CLT) : Round Trip

Request Timeline

Charlotte, NC 10/08-10/10/2024 | \$1,790.00

Approval Flow

-  **Cost Object Approval**
COMPTROLLER (010-1242.917-UNCP01)
BRETT GANTT
-  **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.

Charlotte, NC 10/08-10/10/2024 \$1,790.00

Pending Cost Object Approval | Request ID 3CM7

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

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

TravelArrangersTrip LibraryTemplatesToolsConcur 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 Description (optional)
Used to identify the trip purpose

Send a copy of the confirmation to: ?

Send my email confirmation as

HTML Plain-text

With my email confirmation...

Do not include directions to hotels with email

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 / Boston, MA 10/31-11/03/2024

Boston, MA 10/31-11/03/2024 \$1,698.50

Approved | Request ID: 3CLR

Request Details ▾ Print/Share ▾ Attachments ▾

REPORTS: 2	*AL-Request Printed Report
Amount \$445.00	Remaining \$1,253.50

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: **3CLR**
 Minimum Departure Date: **10/31/2024**
 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: **10/31/2024**
 End Date: **11/03/2024**
 Request Policy: ***AL-Out of State**
 Purpose: **CONCUR CONFERENCE**
 Total Posted Amount: **\$1,698.50**

Segments

Hotel Reservation
 Foreign Amount : \$500.00
 10/31/2024 Boston (US) 11/03/2024
 Check-In Detail : Marriott
 Allocations : 100% (\$500.00) 010-1242.917-UNCP01

Air Ticket
 Foreign Amount : \$450.00
 10/31/2024 Birmingham-Shuttlesworth International (Airport - BHM), Birmingham (US) - Logan Intl (Airport - BOS), Boston (US) Departure time: 10:00 AM
 11/03/2024 Logan Intl (Airport - BOS), Boston (US) - Birmingham-Shuttlesworth International (Airport - BHM), Birmingham (US) Departure time: 2:00 PM
 Allocations : 100% (\$450.00) 010-1242.917-UNCP01

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.

Boston, MA 10/31-11/03/2024 \$1,698.50 [Create Expense Report](#) [Copy Request](#) [Cancel Request](#) [Close Request](#)

Approved | Request ID: 3CLR

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

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 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.

Boston, MA 10/31-11/03/2024 \$1,698.50 [Create Expense Report](#) [Copy Request](#) [Cancel Request](#) [Close Request](#)

Approved | Request ID: 3CLR

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

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.

Boston, MA 10/31-11/03/2024 \$1,698.50 [Create Expense Report](#) [Copy Request](#) [Cancel Request](#) [Close Request](#)

Approved | Request ID: 3CLR

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