Travel Requests:
Creating Travel Requests

Welcome to our introductory training on creating travel requests in Concur.
A travel request must be submitted and approved for university travel before the travel takes place,
with the exception that no request is required for monthly in-state mileage travel.
To begin the process of completing a travel request, log in to Concur.
The log-in process takes you to your personal profile. If you are the traveler, this is the profile you want to use.
If you are a delegate acting on behalf of a traveler, you want to switch to that traveler’s profile. Instructions on how to do this are provided in our Delegates training video.
You are now ready to create the request. Click on Start a Request.
You will see a screen that looks like this.
Concur refers to the details on this screen as the request header.
You can always get back to the request header screen to view or edit it under the Request Details dropdown menu.
All fields on the header marked with a red asterisk are required fields. Fill them out with the trip details applicable to the travel you are requesting.
For the Request/Trip Name, the name should clearly identify the location and purpose of the trip you are making.
The Destination City field is the primary destination of your travel—the location of the main purpose of your travel.
The Personal Dates of Travel field is a free-text field.
This allows you to enter a single date,
a range of dates
or multiple individual dates as needed.
When all required fields—and any additional fields if necessary—are complete, click the Create Request button in the bottom right corner.
A new screen will appear that will allow you to manage the request.
From this screen, you can attach documents pertaining to the travel request if necessary, such as a conference agenda or the International Travel Registration, etc.
You can also add travel allowances by clicking the Manage Travel Allowance dropdown menu and selecting Add Travel Allowance.
And you can add expected expenses to the travel request by clicking the Add button.
A screen will appear allowing you to search for the type of expense you wish to add.
You can also scroll through the list of available expense types using the scroll bar on the right.
Once you click on an expense type, a screen will appear with fields pertaining to that expense type. Fill in all required fields (marked with the red asterisk) and any additional fields that apply.
Training Tip! Expenses on travel requests are expected expenses only and do not have to be exact.
When the expense details are complete, click Save.
If there are other expenses associated with the travel request, search for those and repeat the steps to provide required data.