Hello, and welcome to the Concur: Travel Request training video. This video will guide you in creating a Travel Request using Concur. A Travel Request is the first part of a two-part Travel process. Before we jump into the steps needed to create a Travel Request, let’s go over some helpful information.

Travel Requests are associated with Travel Expense Reports. The purpose of a Travel Request is to provide required preauthorization for UCSD business travel. An approved Travel Request is required to be attached to the Travel Expense Report before the Expense Report can be submitted. However, if you are only claiming reimbursement for mileage or solely airfare credit, then a request is not required. At the end of this video, we will discuss how to attach a Travel Request to a Travel Expense Report. To prepare a Travel Request on behalf of another UCSD employee, the employee will need to add you as their delegate.

To learn how to assign users to act on your behalf, please refer to our video and KBA on How to add a Request Delegate and an Expense Delegate in Concur. The link can be found in the description below, or in the Overview section if you are watching this within Services & Support.

If acting as a delegate for another employee, please verify that you have switched Concur profiles when creating both the Travel Request and the Travel Expense Report. Travel Requests do not carry across Concur accounts.

To create a Travel Request, log into Concur using your Single Sign-On. Select the Request module, then select New Request. Alternatively, you can hover over the + New tile from the Quick taskbar on the homepage and select Start a Request. In the Request Header tab, in Request Type, select Travel Request. Fill out all of the necessary trip information. Note that required fields are highlighted in red.

Proceed to enter in your Chart of Accounts and POETAF information (if necessary). Remember that the Fund value is also a required value. For more information on what to enter for these values, please consult with your fund manager or Financial Unit Approver. When you have completed the Request Header entries, click Save. Select the Expenses tab next to the Request Header tab to proceed. This is where you estimate the Expenses that will be incurred
by this trip. The estimate will not affect your ability to claim expenses - it will simply provide the approver of the trip the expected amount and number of expenses.

On the right hand side of the screen, select an Expense Type from the menu, for this Example, we will select an Air Travel Expense. Fill out the Expense Type required fields, highlighted in red, then select Save. Repeat this process until you have entered all of your estimated expenses. For each Expense Type, a line item displays on the left under the Expenses tab.

The last step is to add any attachments, if necessary. If an attachment is required by Concur, you will see an alert near the top of your screen. Please read and follow the instructions laid out by the alert. If you have any questions about documentation, contact us via Services & Support.

After confirming that everything looks to be in order, submit your Request by clicking Submit Request. The Request page will display. To view the status of your Travel Request, click the Approval Flow tab. All Travel Requests will go to your Financial Unit Approver for approval before being fully approved.

Once your Request is approved, you will be able to attach it to an Expense Report. This can be done one of two ways. Our recommended best practice is to select your Request and then select Create Expense Report at the top. You will be taken to the Report Header screen. For more information on creating an Expense Report, please refer to our KBA on that process. The link can be found in the description of this video.

If you have already created your Expense Report, open the Expense Report and select Report Details. Then, select Manage Requests from the drop-down menu. Select Add, and all of your Approved Requests will display. Select the appropriate request and select Add to Report.

Thank you for watching the Concur: Travel Request training video. I hope that you have found this video helpful and informative. If you have any questions, please contact us via Services & Support at support.ucsd.edu/finance. Have a good day!