


Travel Request

A **Travel Request** will be required if the traveler travels domestically, including to Alaska & Hawaii. You must identify the estimated travel expenses that will be incurred throughout the trip. To ensure you comply with Travel policies, ask your budget coordinator to provide an amount that is allowed for your department to spend on your travel expenses. If you would like to submit a Travel Request for blanket travel, please refer to the [Blanket Travel Request Quick Guide](#).

Click on any of the links below to skip ahead to that section.

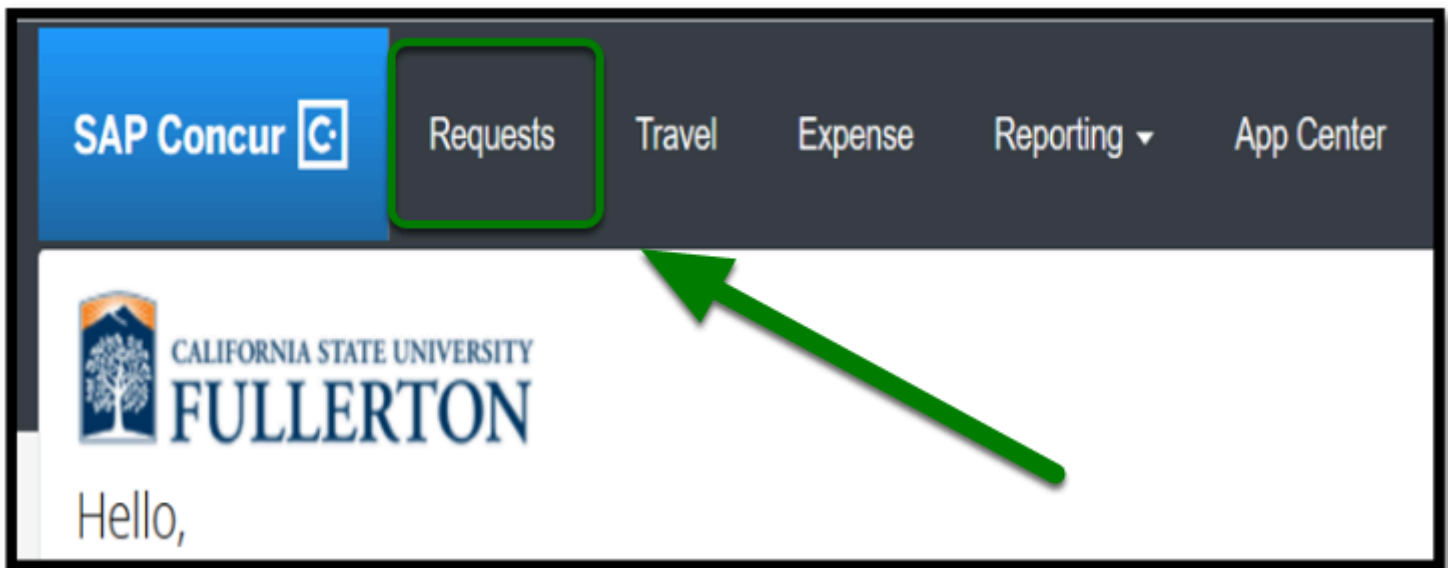
Table of Contents:

- [Creating a New Travel Request](#)
- [Completing the Request Header](#)
- [Entering Expenses into the Travel Request](#)
- [Submitting a Travel Request](#)

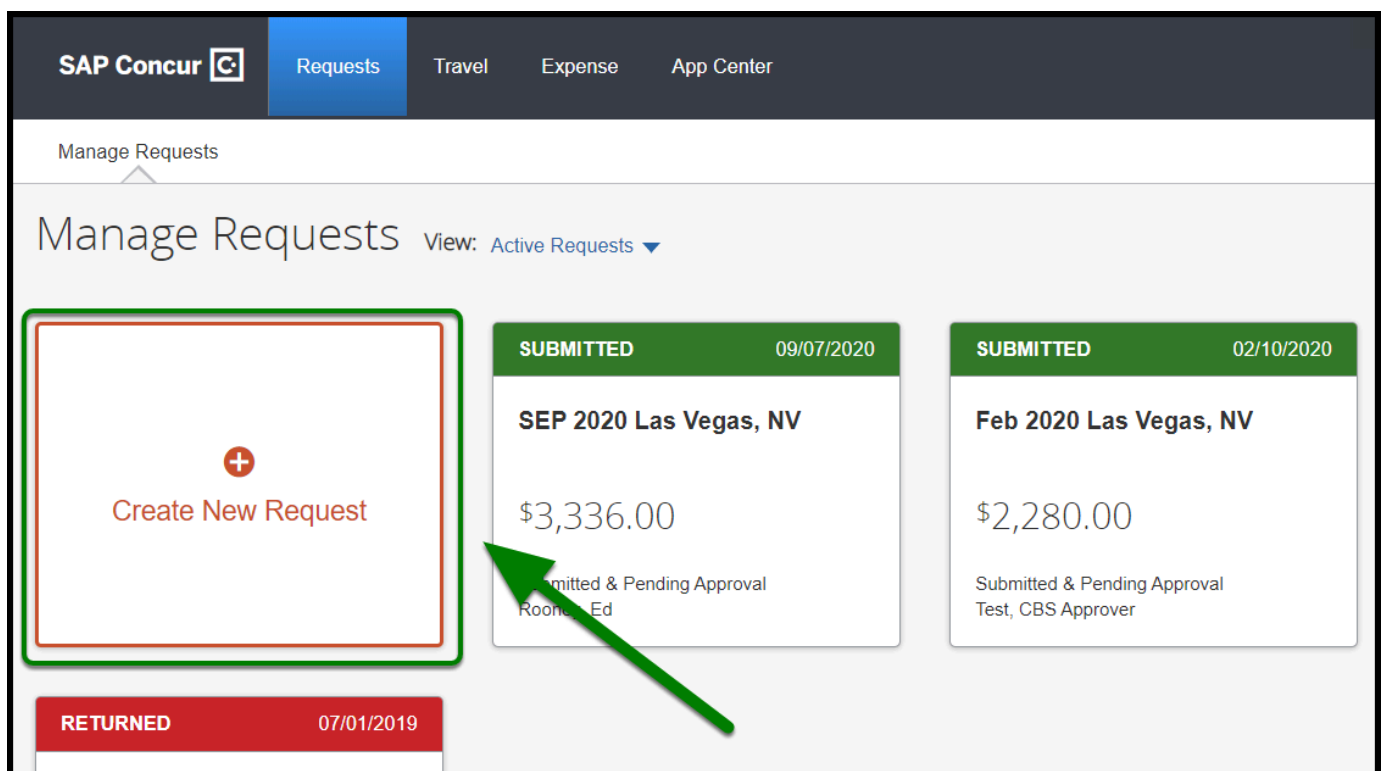
 If you need assistance with logging into Concur, please go to [Logging into Concur](#).

Creating a New Travel Request

Step 1: In the Concur Dashboard, click on the **Requests** tab.



Step 2: Click on **Create New Request**.



[back to top](#)

Completing the Request Header

Step 1: Once you have created a new request, fill out the applicable fields for the Request Header.

The screenshot shows the 'Create New Request' form with the following fields and values:

- Request Policy:** State Approve then Book
- Request/Trip Name:** (Empty)
- Will hotel cost exceed \$275 per night?:** None Selected
- Start Date:** MM/DD/YYYY
- Traveler/User Type:** Staff
- Main Destination Country:** Search by Country/Region
- Does this trip contain personal travel?:** None Selected
- Division:** (10238) VP Administration & Finance
- Class:** Search by Code
- How will you book your travel?:** None Selected
- Trip Type:** None Selected
- End Date:** MM/DD/YYYY
- Purpose:** (Empty)
- Add'l Cities/States or Cities/Countries Traveled To:** (Empty)
- # of personal day:** 0
- Department ID:** (10147) Adm & Finance IT
- Programs:** Search by Code
- Extension of:** Search by
- Personal travel combined with intl business travel:** None Selected
- Report/Trip Purpose:** None Selected
- Main Destination City:** (Empty)
- State:** None Selected
- Regions Traveling To:** Other/Not Listed
- Personal Dates and Locations:** (Empty)
- Fund:** Search by Code

Step 2: For **Request Policy** dropdown, make sure **State Approve then Book** is selected.

The close-up shows the 'Request Policy' dropdown menu with 'State Approve then Book' selected.

Step 3: For **Request/Trip Name** field, input the appropriate Request/Trip Name.

The close-up shows the 'Request/Trip Name' field with 'AUG 2021 Albany, NY' entered.

i Make sure to follow the proper naming convention:

Naming convention: [Month] [Year] [Destination]

Example: AUG 2021 Albany, NY.

Step 4: For **How will you book your travel?** dropdown, select the appropriate option that applies to your booking preference.

How will you book your travel? *

None Selected

None Selected

1. Outside of Concur

2. Concur Travel Booking

End Date *

- **Request for Outside of Concur** = You will be booking your trip outside of Concur (i.e., with another travel agent/vendor).
- **Request for Concur Travel Booking** = You will be booking your trip through Concur.

Step 5: For the **Extension of** dropdown, select the appropriate travel request, if you are linking this request to an existing approved travel request.

Extension of

Search by ▼

Personal travel combined with int'l business travel

i Please refer to the [Amended Travel Request \(New UI\)](#) for more information.

Step 6: For **Will hotel cost exceed \$275 per night** dropdown, select the appropriate option for your trip.

Will hotel cost exceed \$275 per night? *

None Selected

None Selected

N/A - Int'l Travel

No (excludes taxes and international travel)

Yes

i If you select **Yes**, you must enter a comment to explain the reason the hotel cost would exceed \$275 per night.

Step 7: For **Trip Type** dropdown, select the appropriate option for your trip.

Trip Type *

None Selected

None Selected

In-State

International

Out-of-State

Step 8: For **Start Date** and **End Date**, click on the calendar icon to select the dates of your trip.

Start Date *

MM/DD/YYYY

< August 2020 >

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |

End Date *

MM/DD/YYYY

< August 2020 >

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |

Step 9: For **Report/Trip Purpose** dropdown, select the appropriate option that best suits the purpose of your trip.

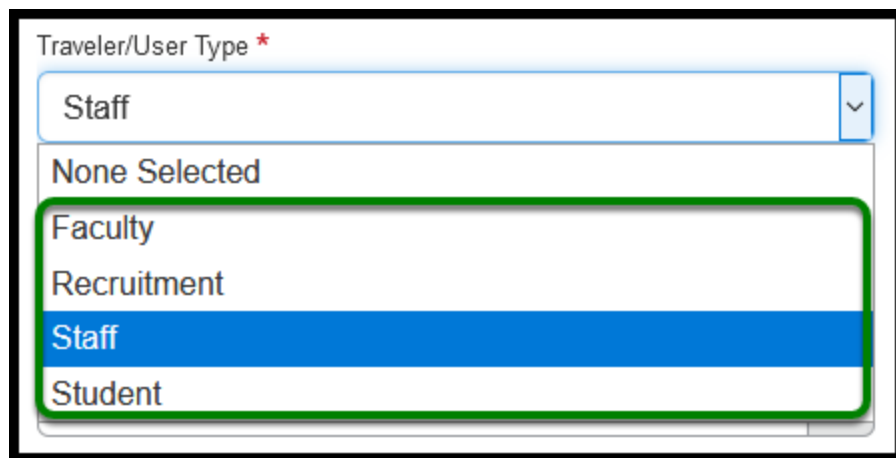
Report/Trip Purpose *

Conference

None Selected

- Blanket Travel (Mileage and Parking)
- Conference
- Field Research
- Meeting
- Non-Employee Travel
- Other Travel
- P-Card Paid Travel by/for Other(s)
- POST UPD Training
- Recruitment
- Retreat
- Study Abroad
- Teaching
- Training

Step 10: For **Traveler/User Type** dropdown, select the appropriate option which best represents the traveler.



Traveler/User Type *

Staff

None Selected

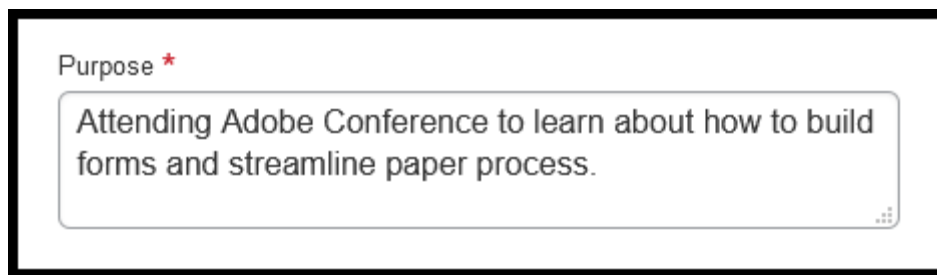
Faculty

Recruitment

Staff


Student

Step 11: For **Purpose** field, enter the reason for your travel in the text box provided.

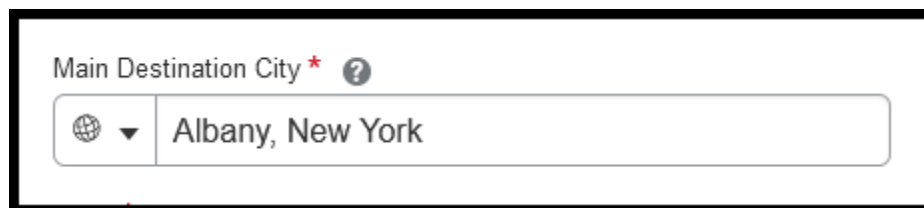


Purpose *


Attending Adobe Conference to learn about how to build forms and streamline paper process.


 Include as much information as possible.

Step 12: For **Main Destination City** field, enter in the appropriate location of your trip. If traveling to multiple destinations, enter all destinations in the **Comment** box.



Main Destination City * ?

 Albany, New York

 Make sure to select the correct City and State. If traveling to multiple destinations, enter all destinations in the **Comment** box.

Step 13: For **State** dropdown, select the appropriate State for your trip.

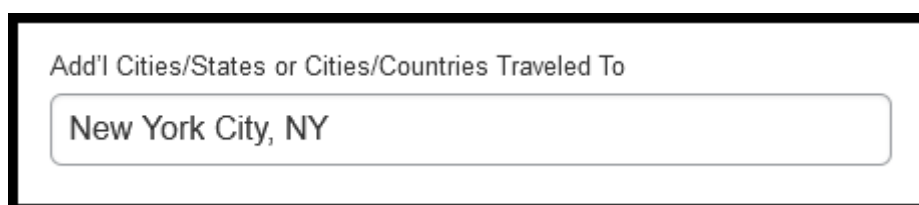


State *

New York

💡 If you are traveling internationally, please see the [International Travel Request](#) guide.

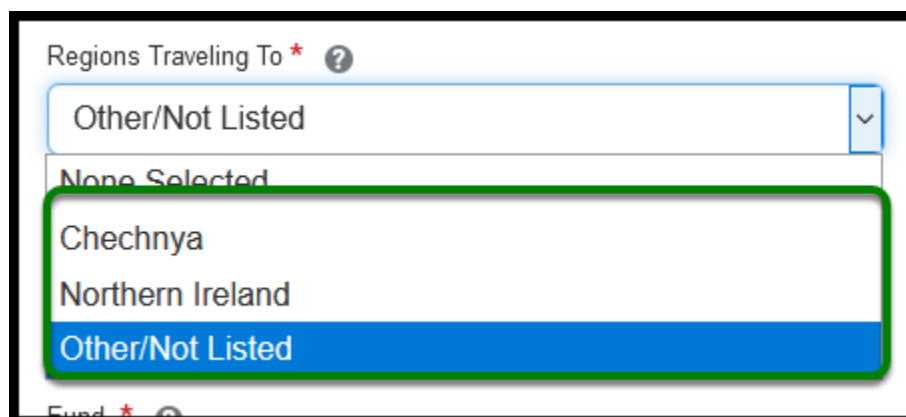
Step 14: For **Add'l Cities/States or Cities/Countries Traveled To** field, type in the name of the cities that you anticipate that you will also be traveling to during your trip.



Add'l Cities/States or Cities/Countries Traveled To

New York City, NY

Step 15: For **Regions Traveling To** dropdown, select the appropriate option for your trip.



Regions Traveling To * ?

Other/Not Listed

None Selected

Chechnya

Northern Ireland

Other/Not Listed

Step 16: For **Does this trip contain personal travel?** dropdown, select the appropriate option for the trip.

| | |
|---|---|
| <p>Does this trip contain personal travel? *</p> <div> <div>Yes</div> <div>None Selected</div> <div>No</div> <div>Yes</div> <div>(10238) VP Administration & Finance</div> </div> | <p># of personal day</p> <div>1</div> |
| | <p>Department ID *</p> <div> <div>(10147) Adm & Finance IT</div> </div> |

! If you select **Yes**, you must specify the number of days in the **# of personal day** field.

Step 17: Enter personal travel dates and locations in the **Personal Dates and Locations** field (include dates, city, state).

Personal Dates and Locations

New York City on 8/13

Step 18: **Division** and **Department ID** will automatically default to your Division and Department. Make sure these are correct or adjust as appropriate.

Then, input the **Fund** code.

| | | |
|--|--|---|
| <p>Division *</p> <div>(10238) VP Administration & Finance</div> | <p>Department ID *</p> <div>(10147) Adm & Finance IT</div> | <p>Fund *</p> <div>thefd</div> |
| <p>Class</p> <div></div> | <p>Programs</p> <div></div> | <p>(THEFD) THEFD:CSU Operating Fund</p> |

! Verify the **Division**, **Department ID**, and **Fund** with your approver and/or budget coordinator.

Step 19: Fill out the **Class** and **Programs** if these fields are applicable to your department.

| | |
|---|--|
| <div style="display: flex; justify-content: space-between; align-items: center;"> Class <div style="border: 1px solid #ccc; padding: 2px 5px; display: flex; align-items: center;"> ▼ <input style="margin-left: 5px;" type="text" value="Search by Code"/> </div> </div> | <div style="display: flex; justify-content: space-between; align-items: center;"> Programs <div style="border: 1px solid #ccc; padding: 2px 5px; display: flex; align-items: center;"> ▼ <input style="margin-left: 5px;" type="text" value="Search by Code"/> </div> </div> |
|---|--|

Step 20: If you have any additional information that you want to provide regarding your trip, please enter it in the **Comment** field.

Comment

From 8/2-8/8 in Albany, NY and 8/8-8/13 in New York City, NY.

Step 21: Once all the applicable fields are filled in, click on the **Create** button at the bottom right-hand corner.

1 Department ID *

▼

2 Fund * ?

▼

Programs

▼


Cancel

Create

[back to top](#)

Entering Expenses into the Travel Request

For a Travel Request, you are able to add multiple expenses.

 For instructions on how to enter expenses, click on [Adding Expenses to a Travel Request](#).

Travel Request Checklist



If you would like to use a checklist, click on [Travel Request Checklist](#).

Need more help?



Contact Concur Support at concur@fullerton.edu or at 657-278-3600.