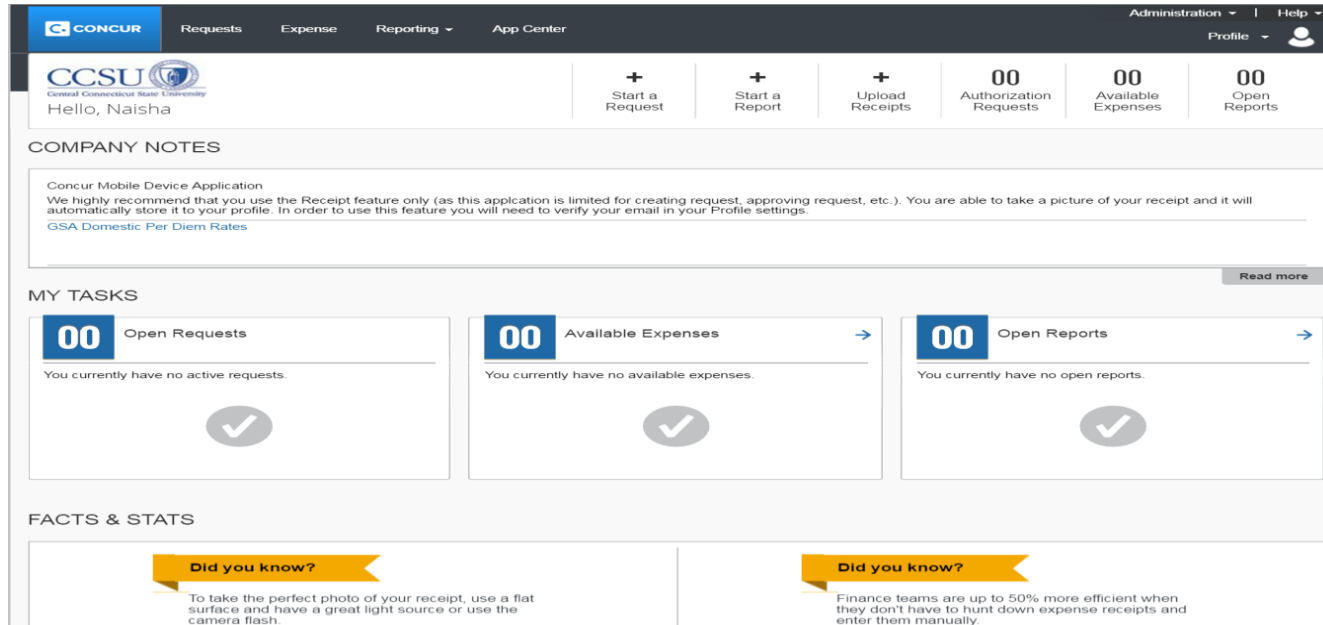


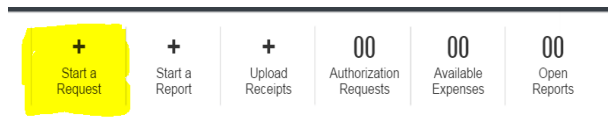
Concur Travel Request Training Manual

Request Module (Travel Authorization):

1. Sign into your Concur profile (you should see something similar below):



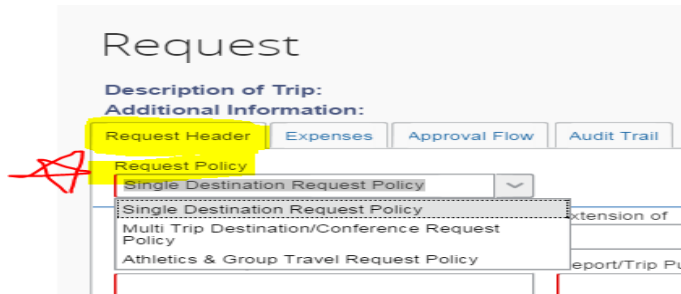
2. For 1st time users click on +Start a Request.



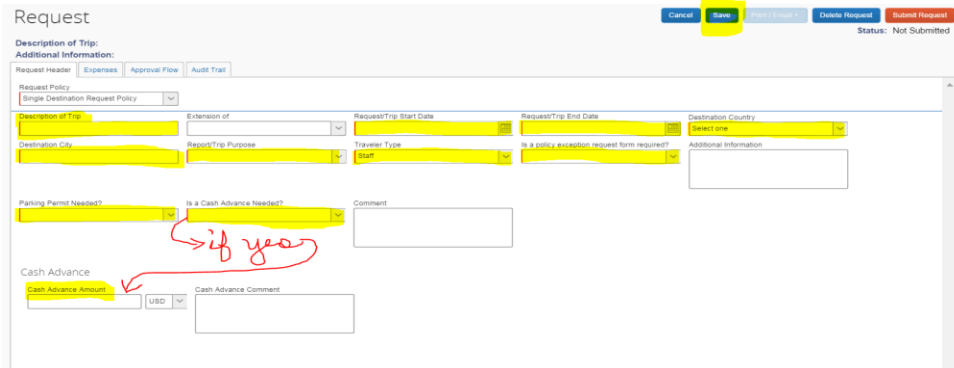
3. For returning users click on the +New tab to create a new request. Then select Start a Request, the system will bring you to the next screen.



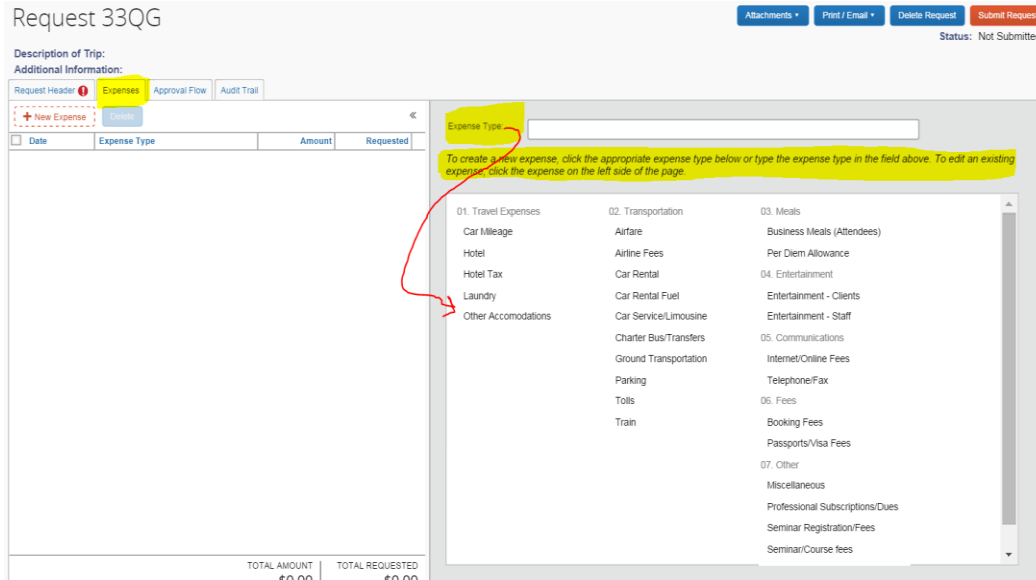
- 4. The system brought you to the Request Header. There are 3 different policies: if the traveler is doing research and has lodging per diem or going to a conference but is not staying at the conference hotel, select the 1st policy “Single Destination Request policy”. If the traveler has a multi-trip destination (visiting multiple cities/towns/states/countries) or is attending a conference and will be staying at the conference hotel, select the 2nd policy “Multi Trip Destination/Conference Request Policy”. The 3rd policy is for Athletics & Group Travel – this policy is for Athletics and travel with student Groups (CIE) and the TA is in the name of a CCSU employee.



- 5. You must fill in every required Red field. If requesting a parking permit, a caution flag will appear to let you know that you need to update it with the Travel office. If a Cash Advance is needed, you must answer Yes and enter a dollar amount. Please note, that when the Request comes to the Travel office, the advance can be lowered due to the systems inability on the Request side, to deduct meals, personal time or anything that is P-Card paid. After you’ve entered the required information click the “Save” button.



6. The system now takes you to the Expense tab, this is where you will select each expense type and the dollar amount.



7. When you select your expense type, complete each red field, then hit the “Save” button. Repeat for every expense type claimed on Request.

The screenshot shows a web form for entering travel request details. The following fields are highlighted in yellow:

- Expense Type: Airfare
- Trip Start Date: 07/04/2016
- Trip End Date: 07/07/2016
- Description: (empty text box)
- Transaction Amount: 550.00 USD
- Personal Travel?: No
- Flight Start Date: (empty text box)
- Flight End Date: (empty text box)
- Comment: (empty text box)
- Payment Method: CCSU P-Card

At the bottom right, there are three buttons: Save (highlighted in yellow), Allocate, and Cancel.

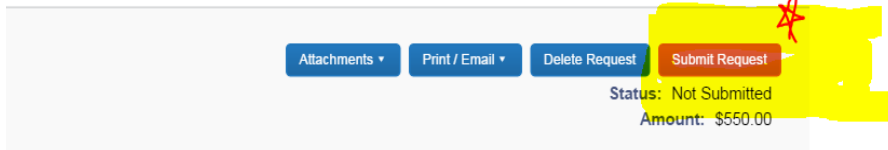
- Once you have finished entering all of the expense types, click on the “Attachments” button and select Attach Documents. This is where you will attach all supporting documentation pertaining to this travel (I.E. airfare, conference registration, conference program/schedule/agenda, lodging, airline fees – baggage, etc.). You will not need to attach a MapQuest on the Request side, simply put the total miles and a description in the comment box. You will complete the mileage in detail on the Expense Report/Module.

This screenshot shows a portion of the Concur interface. The 'Attachments' button is highlighted in yellow. Below it, a dropdown menu is open, showing 'Check Documents' and 'Attach Documents' options. To the right, there are buttons for 'Print / Email', 'Delete Request', and 'Submit Request'. Below these buttons, the status is shown as 'Status: Not Submitted' and 'Amount: \$550.00'.

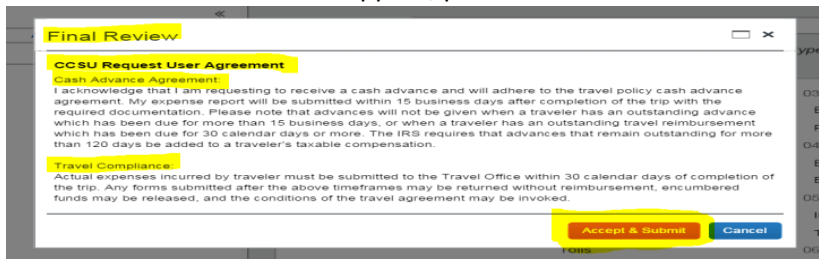
- The attachment screen will appear – 1st click on Browse, locate the files in relation to the travel and double click. 2nd click the Upload button. When you have attached all necessary documentation click the Close button.

The screenshot shows a dialog box titled 'Document Upload and Attach'. It contains instructions for uploading files, including a note about file resolution and a 5 MB limit per file. The 'Files Selected for uploading:' section is empty. The 'Browse' button is highlighted in yellow and labeled with a red '1'. The 'Upload' button is highlighted in yellow and labeled with a red '2'. The 'Close' button is highlighted in yellow and labeled with a red '3'.

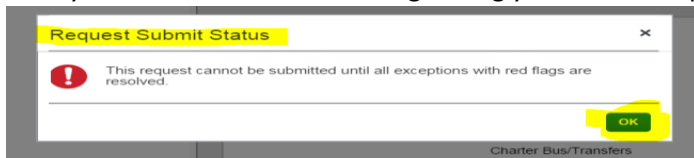
10. After you have attached the supporting documentation, click the “Submit Request” button.



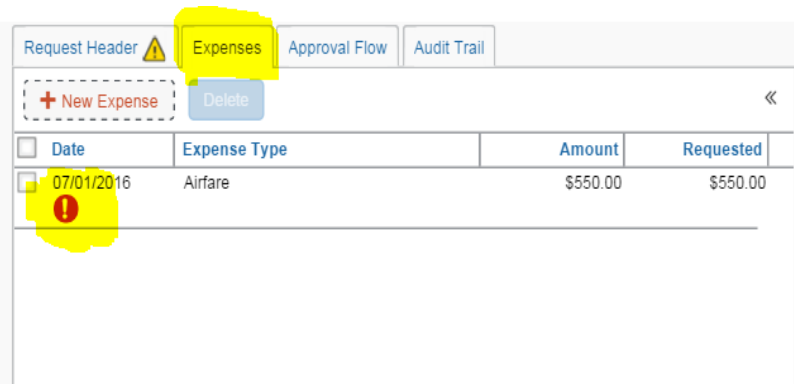
11. The Final Review screen will appear, please make sure to read the terms that you are agreeing to, and then click on “Accept & Submit”.



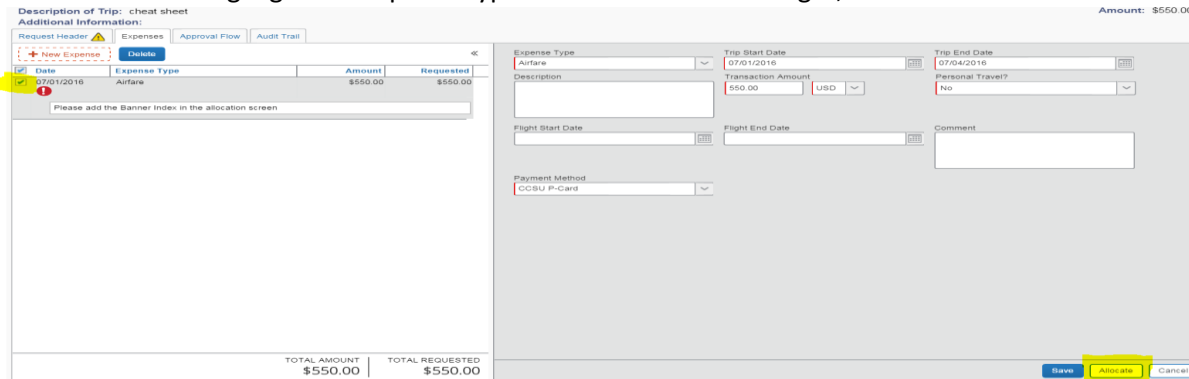
12. The system will throw an audit flag letting you know exceptions need to be resolved. Click OK.



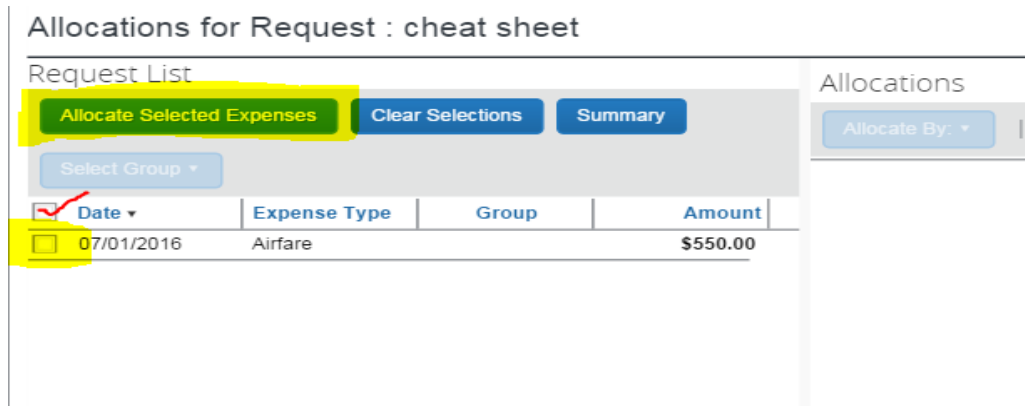
13. If the red flag is under the Expense tab, click on it to see the issue. In this case, the expense type has not been allocated.



14. Check the box to highlight the expense type. Then on the bottom right, click Allocate.



15. The Allocations screen will appear. If all the expense items are being allocated to one Banner index, you can check the box next to date then click on the top button Allocate Selected Expenses. If the expense types are being split up by different banner indexes, check the boxes of the items that are covered by that index then click Allocate Selected Expenses.

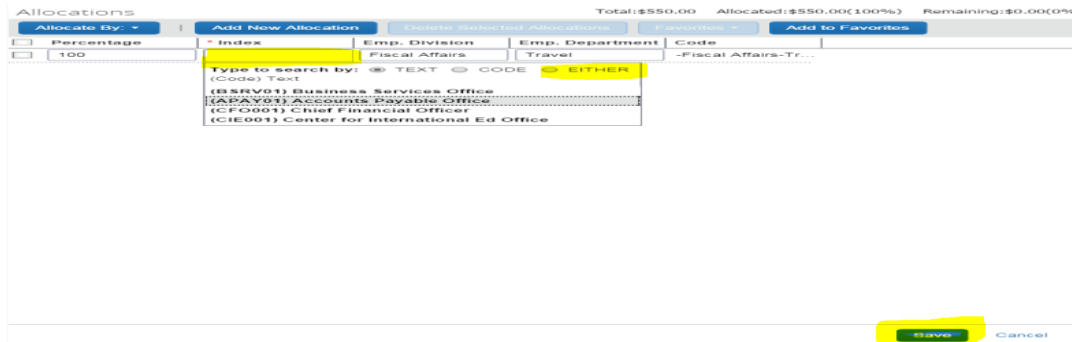


16. The next screen will allow you to allocate by Percentage or Amount – the system will split 50/50 for multiple indexes or however it needs to in order to reach 100%. If there are non-reimbursable expense items, please make sure that you have selected that expense type prior to this screen.



17. Type in the banner index associated with the travel – always search by “Either” just in case you forgot the index; however, when you type the department, it will appear. Then hit save once you’ve selected the correct index.

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18. Now you are all set to "Submit Request".