

HOW TO CREATE A TRAVEL REQUEST

Updated 12/06/16 Business Office ext. 1269, 1346

STEPS	CELL/TAB/BUTTON	ACTION
1	NA	Log into Concur at https://www.concursolutions.com
2	NA	Click on Requests.
3	NA	Click on New Request.
4	REQUEST NAME	Enter City,State of destination/traveler's name/month and 1st day of travel (i.e. Austin,TX/G. Olalde/DEC 05)
5	EXTENSION OF	Leave Blank. No action required.
6	REQUEST POLICY	Travel Request Policy. Leave as is. No action required.
7	START DATE	Enter first date of travel.
8	END DATE	Enter date traveler is returning to Headquarters. (usually last day of travel unless personal time taken)
9	PURPOSE	Enter the purpose of the trip. (i.e. To attend ABC Conference for professional development).
10	DO YOU REQUIRE PRE-PAYMENTS FOR THIS REQUEST?	<p>Answer NO if you are using a DMC credit card to pay for airfare, lodging, car rental, or registration, and enter that information in the comments box (i.e. DMC credit card used to pay registration, hotel, airfare.)</p> <p>Answer YES if you need Accounts Payable (AP) to generate a check, and enter those instructions in the comments box and upload the invoice. AP only pays from invoices. (i.e. Accounts Payable please process registration payment for ABC Conference.)</p>
11	COMMENT	Enter any information pertinent to the trip. (i.e. Lodging, airfare, registration paid on Dept. Credit Card; Traveling with XYZ; Request is for permission to travel with zero expenses,or, if you want Accounts Payable to process a check for registration, this is where you would add that information)
12	FUND CODE	This is the Fund Code source for your trip. [11 = Local funds, 12 = Grant Funds]. Most travel is defaulted to 11. The fund code is dependent on type of funds being used for your trip. You are now able to change this code. This function allows a traveler to change an account number string in case there is a change in funding source.
13	LOCATION	This is the location funding source for the trip. This number is defaulted to your location. You are now able to change this number if another department other than your own is funding your trip and they have another location number.
14	ORG GROUP	This is the org group funding source for the trip. This number is defaulted to your org group. You are now able to change this number if another department other than your own is funding your trip and they have another org group number.

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15	DEPARTMENT CODE	This is the Department Code funding source for the trip. This number is defaulted to your Department. You are now able to change department codes if another department other than your own is funding your trip.
16	OBJECT CODE	All travel is defaulted to object code 55108, unless otherwise specified. Traveler is able to change this object code if needed.
17	SEGMENTS	Enter information for your airfare, car rental, and lodging. This information will flow into the Travel Request Expense section.
18	EXPENSES	Select the expense type you need for your trip. Categories have been added to the Travel Request which aligns with the expense side. (i.e. Breakfast, Dinner, Lunch, Incidentals, Miscellaneous, Registration, Bus, Gasoline, Parking, Shuttle Service, Subway, Taxi, Tolls, Train and Mileage). This should help in estimating a trip expense.
	EXPENSE TYPE	BREAKFAST: If traveler is requesting funding for breakfast, calculate the # of allowable breakfast for the duration of the trip. (i.e. 2 day trip, 2 breakfast allowed, enter \$20 total add comment \$10 breakfast @ 2 days. Only one line item needed, per meal category... no need to break down on a daily basis, this will be done on the expense side.)
	TRANSACTION DATE	Enter the first date of expenses.
	DESCRIPTION	Leave Blank. No action required.
	TRANSACTION AMOUNT	Enter the total \$ amount for breakfast.
	USD	Leave as is. No action required.
	COMMENT	Enter the amount of one breakfast @ the number of allowable days. (i.e. \$10 @ 2 days) This should match the amount on the Breakfast line item. You will follow this same procedure for lunch, dinner and incidentals.
	NA	Click Save.
	NA	Select another category. If requesting Dinner, Lunch and incidentals, follow procedure like step 14.
	MISCELLANEOUS	If requesting incidentals, vehicle rental, fuel for vehicle rental, parking, baggage fees, etc. Traveler will use the miscellaneous expense type to enter these expenses.
	TRANSACTION DATE	Enter the first date of expenses.
	DESCRIPTION	Leave Blank. No action required.
	TRANSACTION AMOUNT	Enter the total \$ amount for expense
	COMMENT	Enter what the miscellaneous expense is for. (i.e. Incidentals \$3 @ 1 day... DMC does not reimburse incidentals on last day of travel).
		FUEL FOR CAR RENTAL: Enter the total estimated fuel needed. (i.e. Fuel for car rental estimated \$50)

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		<p>MILEAGE. If asking for Personal Owned Vehicle Mileage reimbursement, traveler must upload a copy of the Google Maps showing the actual address of the starting and ending destinations of the trip. After trip is taken, traveler needs to provide a receipt showing proof of trip. Receipt can be for lodging, food or fuel.</p> <p>AIRFARE, LODGING and CAR RENTAL expenses will automatically populate into the report as an expense line item from the traveler's segments information.</p> <p>Click Save. Enter all expense categories needed for trip and save as you go.</p>
19	NA	Click Save.
20	APPROVAL FLOW	Shows the name of the traveler's approver (immediate supervisor). Always check to see that travel request is being forwarded to correct supervisor(s). Traveler is now able to add more than one approver at the creation level and/or approval level(s). For instance, You only see the name of your immediate supervisor, but you need to get the Dept. Chair and the Dean's approval for your travel request... you can, and should, add the Dept. Chair and the Dean to the approval flow, so the TR will route to them for approval before routing to Travel back office for final approval. If you do not see your correct immediate supervisor's name listed, contact etravel@delmar.edu for assistance.
21	AUDIT TRAIL	Shows the activity of document. Who has seen the document, what has been done on the document, etc.
22	ATTACHMENTS	Click on down arrow and click on Attach Documents to upload Conference flyer, registration form, invoice or any other documents that will justify the reason for submitting a travel request. Please keep in mind that items attached to a Travel Request DO NOT transfer to the expense report. If TR attached documents are required on the expense side, they need to be uploaded to the report.
23	PRINT/EMAIL	Click on down arrow and click on Copy of Request Printed Report to print a copy of the travel request.
24	DELETE REQUEST	When you click this button, you will be asked "Are you sure you want to delete this request? Yes or No. If yes, report will disappear from queue and you will not be able to locate it again. If no, report will remain active.
25	SUBMIT REQUEST	Only the Traveler should be submitting their own Travel Request.
26	NA	Traveler should receive an email via Concur systems that travel request has been approved. Once approved, Traveler may make their airfare, lodging, and car rental reservations.