This QRC provides the steps for creating a travel request in Concur Travel and Expense for travel booked outside of the Concur Travel and Expense system.

**NOTE:** If booking travel via telephone directly with ALTOUR, the Travel Request Header must first be completed prior to calling.

### Log In To Concur

Go to the [Employee Portal](http://www.purdue.edu/employeeportal) page.

Choose **Travel System (Concur)** to log in to Concur using Purdue Career Account and password.

Enter Career Account ID and password.

Click **Login**.

If completing on behalf of another traveler, click **Yourself**.
From the drop-down list, select the individual on whose behalf you are booking.

Create Travel Request

At the top of the My Concur screen, click Request → New Travel Request.

NOTE: This can also be done by clicking New Request in the Active Work pane.

Complete Request Header

Complete Required Fields
*Highlighted with red line or heavy left bar.
### Request Name
Name trip according to the naming convention that has been designated by your business office. This should be a name that helps you, your delegate and/or your business office find and report cost associated with the trip.

### Request Policy
Defaults to Purdue Travel Request Policy.

### Traveler Type
Select one: Employee (EMP), NonEmployee (NE), Student, Team Travel (Team).

### Travel Type

**NOTE:** If travelling travel type is International or International – Under Warning, list all cities and countries that will be visited in the Comment box.

For a list of countries with travel warnings, visit the Department of State website at: [http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html](http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html).

Risk Management provides insurance for all International travel.
| Purpose of Travel | Select best option from drop-down menu.  
**NOTE:** When option related to research is selected, the purpose of research is required in the Comment box. |
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Is this trip being paid for by Purdue?</td>
<td>Select yes or no.</td>
</tr>
</tbody>
</table>
| Preapproval Required | Default selection is **None**.  
**NOTE:** When selecting None and the trip does not include a flight upgrade or cash advance, the request is auto-approved.  
Most trips do NOT require pre-trip approval. However, if funding for your trip is from any of the areas listed or is mandated by your department head, select the appropriate item.  
If travelling internationally on ARO, AID, EPA, USDA, State Sponsored or Foreign Gov’t funds, select appropriate drop-down.  
If travelling on DOE Lab or funds that have been defined by the sponsor as requiring pre-trip approval, select appropriate drop-down.  
**Note:** When selecting all other options:  
1. The fiscal approver is required to approve the travel event.  
2. A report notification is provided to Sponsored Programs outlining travel details. Sponsored Programs will notify fiscal |
Create and Submit Travel Requests for Trip Booked Outside of Concur® Travel and Expense

For a list of Sponsor Defined pre-trip approval requirements, see Active Sponsored Programs with Travel Restrictions.

<table>
<thead>
<tr>
<th><strong>Approver</strong></th>
<th><strong>Travel Request</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval within 48 hours, if alterations are required for travel arrangements or travel should be cancelled.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th><strong>Departure Date</strong></th>
<th>Type date or choose the date from the calendar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Image](Departure Date.png)</td>
<td>12/15/2012</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Return Date</strong></th>
<th>Type date or choose the date form the calendar.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Image](Return Date.png)</td>
<td>12/16/2012</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>If personal travel is included, list dates.</strong></th>
<th>List any dates to be used as personal time.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>If anyone is traveling with you, provide names/relationship.</strong></th>
<th>List names of other employees, spouse, or other individuals who will be traveling with you.</th>
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</thead>
</table>

| **Requesting Flight Upgrade** | | |
|-------------------------------|-------------------|
| **Defaults to No; if Yes, select reason from drop-down.** | |
| Selecting a flight upgrade requires the employee’s direct supervisor’s approval. | |
| For more pre-trip approval details see Approval Workflow. | |
**Note:** If selecting Medical Disability or Medical Need, ensure approved exception is on file in the Business Office.

I will use/am qualified to use this vehicle type on my trip.

Select one from drop-down list.

Account Assignment is a required field.

Click in the **Account Assignment** text box.

The **CODE** radio button is selected by default.

Type an asterisk (*), followed by the account number.

or

Search by **TEXT**

Change the radio button to **TEXT** and type an asterisk (*) followed by the account name (Football).

**Note:** When travel is paid by more than one source of funds, Use the primary (most restrictive) account assignment. If

**Tips:**

Use as many digits of the account assignment as possible.

Use scroll bar at bottom of window to see account assignment name.
all accounts are equally restrictive, list the account that is paying for majority of cost. Multiple funding sources are identified using allocations when entering estimated expenses.

Choose the correct fund/cost center combination from list generated by Concur.

If you don’t know the correct account assignment, click *Save* and refer to your business office or the job aid they provided.

<table>
<thead>
<tr>
<th>Extension of</th>
<th>Select other Travel Request name if this request is in addition to another.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comment</strong></td>
<td>Enter any comments relevant to this request.</td>
</tr>
</tbody>
</table>

**Cash Advance**

If you are requesting a cash advance greater than the $500 available through Visa Travel Card, type the amount of the cash advance in the *Cash Advance Amount* text box.

Make sure **USD** is in the currency dropdown.

Provide an explanation in the *Cash Advance Comment* box regarding the use of the funds.

See QRC [Request Cash Advance for Travel in Concur Travel and Expense](#).
**NOTE:** Cash Advance requires fiscal approval of the cost center indicated in the Account Assignment. For more pre-trip approval details see [Approval Workflow](#).

If contacting ALTOUR for travel arrangements, click **Save** and refer to the 4 character request name assigned by Concur.

Call ALTOUR at 1-855-512-7955.

### Complete Segments
Segments include any arrangements such as hotel, car rental and airfare reservations made outside Concur.

Select the **Segments** tab.

<table>
<thead>
<tr>
<th>Select segment to add:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Air Travel</td>
</tr>
<tr>
<td>B. Car Rental</td>
</tr>
<tr>
<td>C. Lodging</td>
</tr>
<tr>
<td>D. Taxi Fare</td>
</tr>
<tr>
<td>E. Car Service Reservation</td>
</tr>
<tr>
<td>F. Railway Ticket</td>
</tr>
</tbody>
</table>

### Travel Request 333J
- **Request Name:** Test for Request
- **Segments** tab:
- **Add Segment**
- Click icon to create segment

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Complete all required information, noted with a red bar.

Click **Save**.

Repeat steps above to add all additional segments.

**Complete Estimated Expenses**

Select the Expenses tab to add estimated expenses; this provides a total estimated cost of trip.

Expenses may include:
- Mileage
- Fixed Meals
- Registration Fees
- Taxi
- Shuttle
Select the correct Expense Type from the drop down list. Complete all required fields.

Click Save.

Enter additional Estimated Expenses.

**Note:** All anticipated expense must be entered prior to submitting your travel request.

**Allocations**

In order for all funding source Cheifs, Co-PI and Fiscal Approvers to receive appropriate notifications, all additional funding sources must be identified by allocating expenses. Not providing allocations will result in lack of notification to other funding sources.
Click **Allocate** to apply allocations necessary to any estimated expenses.

Allocate by **Percentage** or **Dollar Amount** and enter appropriate account assignments for each allocation.

Click **Save**.

**Attach Additional Documentation**

If you have documentation that needs to be included attach it to the travel request.
Create and Submit Travel Requests for Trip Booked Outside of Concur® Travel and Expense

Select **Attach Documents** from the Attachments drop down box.

<table>
<thead>
<tr>
<th>Cancel</th>
<th>Save</th>
<th>Attachments</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click **Browse**...

![Document Upload and Attach](image)

You may attach scanned images.
You may choose up to 10 files to attach to the travel request.

For best results, scan images in black & white with a resolution of 300 DPI or lower. Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

**Files Selected for uploading:**

No files selected

**Browse...**

[Image of Document Upload and Attach dialog box]

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Select your document from the **Choose File to Upload** window

Click **Open**

Click **Upload**

Click **Close**

**NOTE:** Any documentation that is required at reimbursement must be attached to the Expense Report. Those may include Drive vs. Fly, Cost Comparison.

Submit Travel Request
Create and Submit Travel Requests for Trip Booked Outside of Concur® Travel and Expense

<table>
<thead>
<tr>
<th>If you are arranging travel for yourself, click <strong>Submit Travel Request.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Submit Travel Request" /></td>
</tr>
<tr>
<td><strong>NOTE:</strong> The traveler must submit his/her own <strong>Travel Request.</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If you are arranging travel on behalf of someone else, click <strong>Notify Employee.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image2" alt="Notify Employee" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Review the <strong>Request Submit Agreement.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>Accept &amp; Submit.</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Programs will review funding source report within two business days of receipt.</td>
</tr>
<tr>
<td>To deny travel on specified funds, notification is given to the fiscal approver of the funding source listed in the header <strong>Account Assignment.</strong></td>
</tr>
<tr>
<td>SPS approval is required for foreign travel on all SPS funds except NSF and NIH. SPS also reviews and approves funding if one of the following applies to travel request:</td>
</tr>
</tbody>
</table>
• ARO (International Only)
• DOE Lab
• EPA (International Only)
• Sponsor Defined
• State Sponsor (International Only)

SPS approval of foreign travel on NIH and NSF funds has been delegated to the fiscal approver.

Risk Management will view reports for all international travel and process appropriate insurance forms.

Traveler will receive Insurance Identification Card, if travelling outside the 50 region United States.

Card is delivered by email prior to travel.

If card is not received within one day prior to departure, contact Risk Management Department.

**Notification**

A Concur generated email request for approval is immediately sent when pre-trip approval is required. Once approved, a notification report is generated outlining trip details and forwarded to:

- Traveler’s supervisor
- Chief of all funding sources
- Co-PI of all funding sources
- Fiscal Approver of all funding sources
- Traveler/Travel Assistant/Delegate