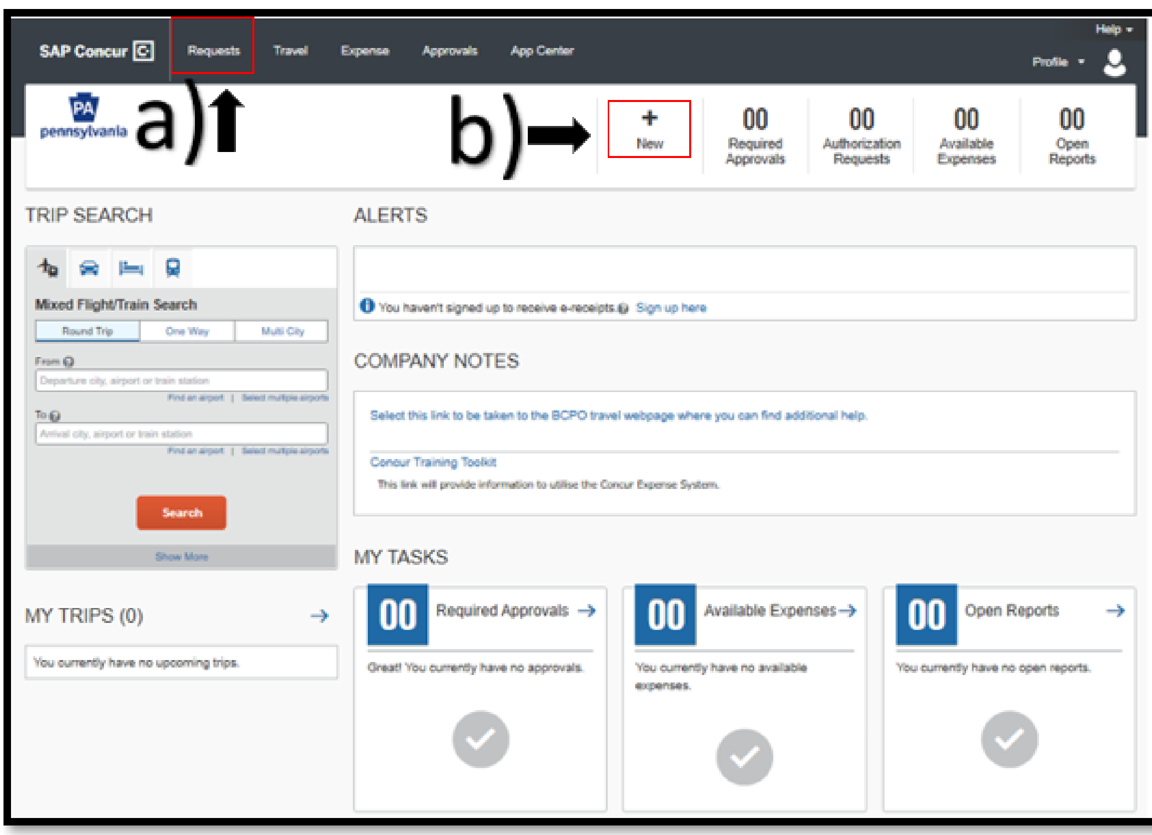
Last Update: 12/3/2019

User Guide – Creating a New Travel Request

This guide is intended to walk employees through the basics of how to create a travel request in SAP Concur. Creating a travel request is an optional feature within SAP Concur that may be used to obtain pre-authorization from a supervisor.

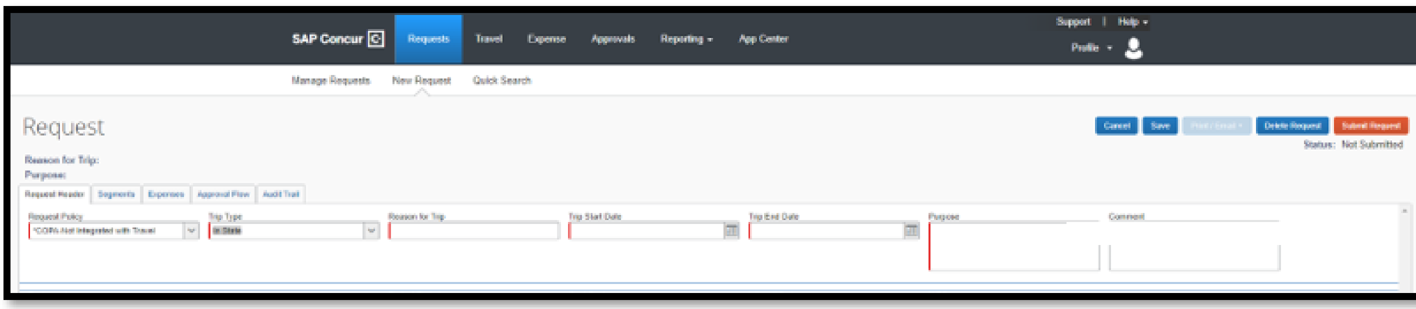
Creating a New Travel Request

1. Sign into SAP Concur to access the home page. [Reference: SAP Concur User Guide – Signing In]
2. There are a few options for creating a new request from the home page. They are:
   a. Select the **Request** tab on the top menu bar, then select the **New Request** tab from the submenu on the resulting screen; or
   b. Select the **+ New** button and click the **Start a Request** link in the dropdown list.

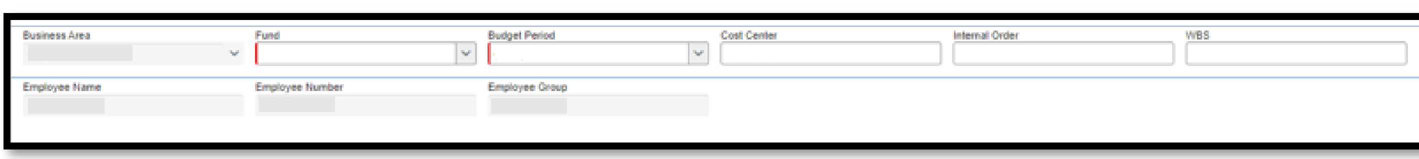


Completing the Request Header Tab

1. On the new Request page, you will start on the Request Header tab. Complete the required fields and any optional fields as needed. The available fields on the Request Header tab include:
    a. **Request Policy** – this field is populated with a system generated default and cannot be changed.
    b. **Trip Type** – select In State, Out of State, or International.
    c. **Reason for Trip** – A unique entry should be entered in this field so it can be easily identified among all trip entries. A recommended format is “Reason for Trip–Destination–Trip Start Date” (i.e. Inspection-Harrisburg-10/31/19). Note: there is a 32-character limit.
    d. **Trip Start Date** – Enter the trip start date.
    e. **Trip End Date** – Enter the trip end date.
    f. **Purpose** – Enter the reason for the travel.
    g. **Comment** – Use this optional field for additional info that the supervisor needs to approve the request.



2. The New Request page also displays employee specific information. All fields are defaulted with data from your master record in SAP. Only certain fields can be edited.
    a. **Business Area**
    b. **Fund** – can be edited.
    c. **Budget Period** - can be edited
    d. **Cost Center** – can be edited
    e. **Internal Order** – can be edited
    f. **WBS** – can be edited.
    g. **Employee Name**
    h. **Employee Number**
    i. **Employee Group**

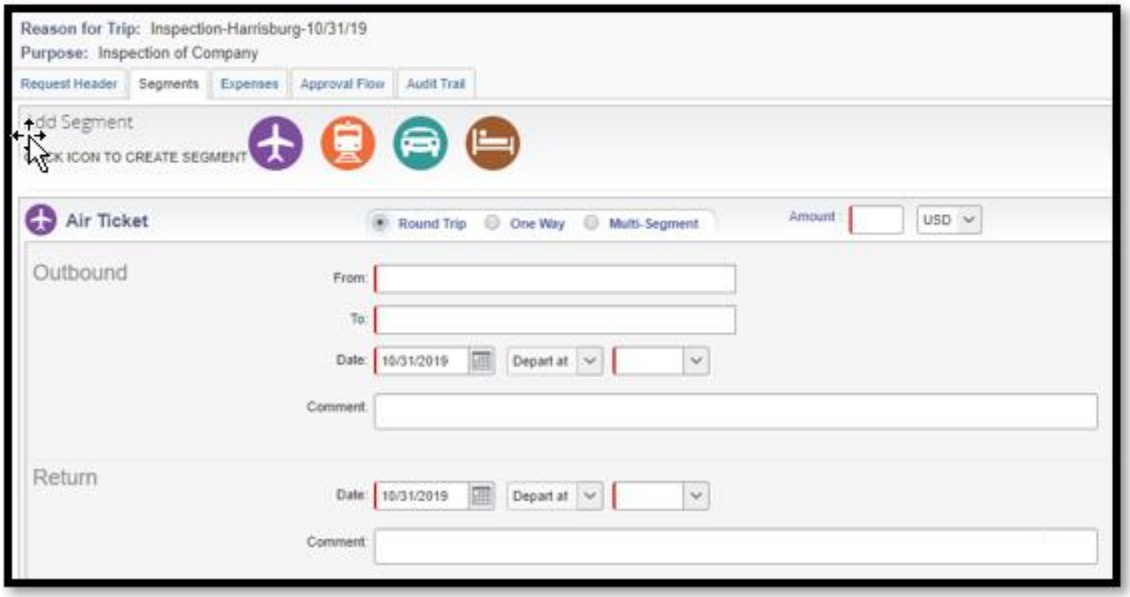


3. When finished, click the **Save** button to proceed to the **Segments** tab.

Completing the Segments Tab

1. On the **Segments** tab, you can enter the travel itinerary and estimated cost information for air, hotel, rental car and rail.

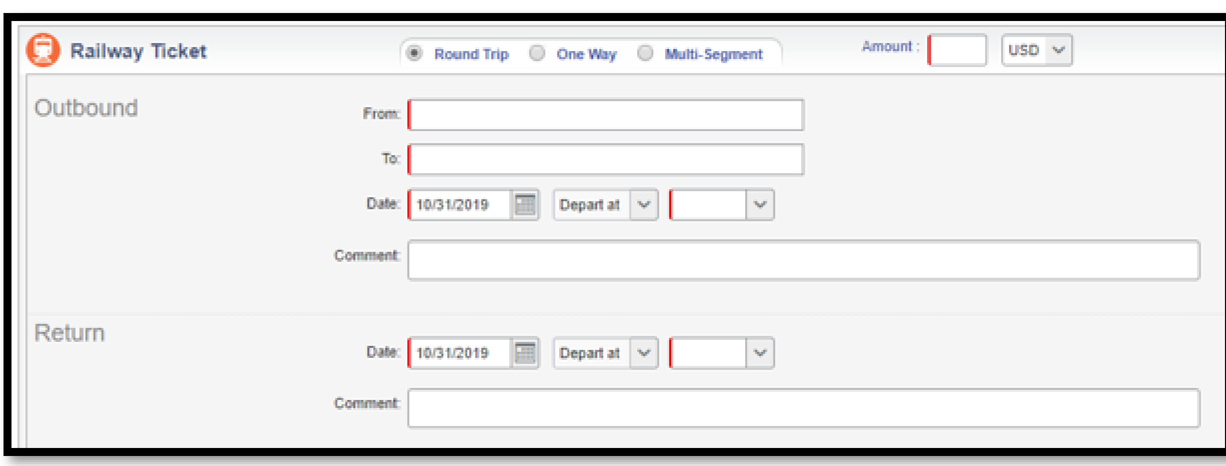
   Click on the Air Ticket button/icon to enter any flight information.



   a. Select the Round Trip, One Way or Multi-Segment **Radio Button**.
   b. **Amount** - Enter the estimated cost of your airfare. This field is only for the ticket cost and applicable taxes and fees. Any estimated baggage check fees will be entered in another area of the request.
   c. **From** – Enter the departure airport.
   d. **To** – Enter the destination airport.
   e. **Outbound Date** – Enter the date you are departing and the estimated time of departure.
   f. **Outbound Comments** – Enter any additional info that your supervisor may need to approve the request.
   g. **Return Date** – Enter the date of your return flight and the estimated time of departure.
   h. **Return Comments** – Enter any additional info that your supervisor may need to approve the request.

   Click on the **Save** button when you are finished with your flight information.

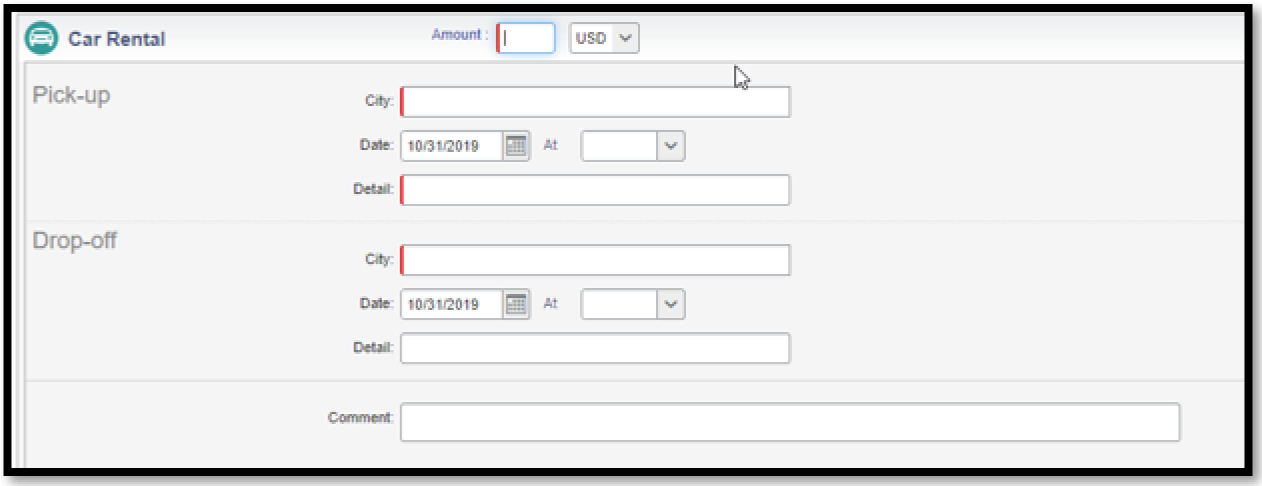
2. Click on the Railway Ticket button/icon to enter any train information.



a. **Amount** – Enter the estimated cost of the train ticket.
b. **From** – Enter the departure city.
c. **To** – Enter the arrival city.
d. **Outbound Date** – Enter the date and time you plan to depart.
e. **Outbound Comments** – Enter any additional info that your supervisor may need to approve the request.
f. **Return Date** – Enter the date and time you plan to return.
g. **Return Comments** – Enter any additional info that your supervisor may need to approve the request.

Click on the **Save** button when you are finished entering train information.

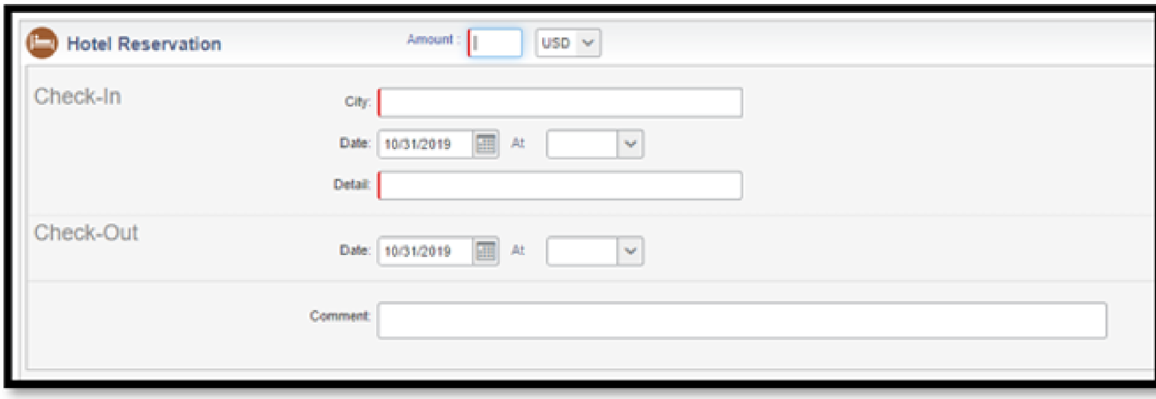
3. Click on the Car rental button/icon to enter any rental car information.



a. **Amount** – Enter the estimated cost of the rental car.
b. **Pick Up City** – Enter the city where you will pick up the car.
c. **Pick Up Date** – Enter the date and time you will pick up the car.
d. **Pick Up Detail** – Enter the Car Rental Vendor (i.e. Enterprise)
e. **Drop Off City** – Enter the city where you will drop off the car.
f. **Drop Off Date** – Enter the date and time you will drop off the car.
g. **Comments** – Enter any additional info that your supervisor may need to approve the request.

Click on the **Save** button when you are finished entering rental car information.

4. Click on the Hotel Reservation button/icon to enter hotel reservation information.

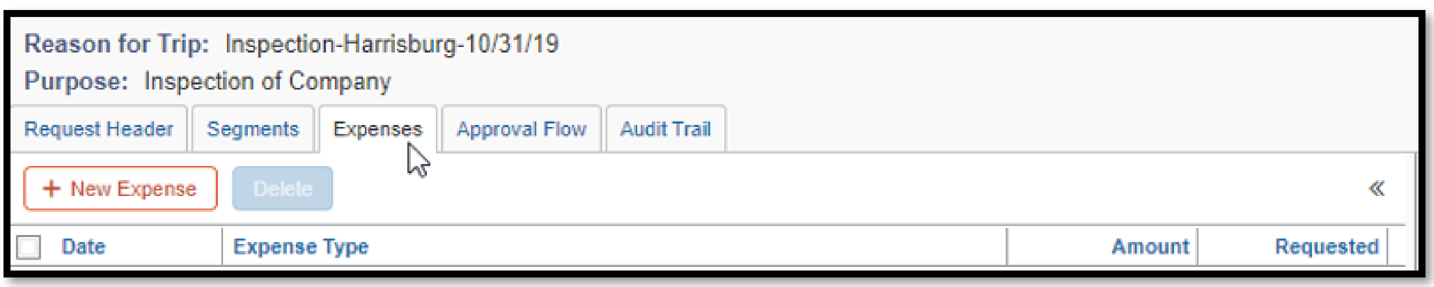


a. **Amount** – Enter the estimated cost of your lodging. This cost should include all fees, taxes, parking, etc.
b. **Check-In City** – Enter the city in which the hotel is located.
c. **Check-In Date** – Enter the date and time of check-in.
d. **Check-In Detail** – Enter the name of the hotel you wish to book.
e. **Check-Out Date** – Enter the date and time of check-out.
f. **Comments** – Enter any additional info that your supervisor may need to approve the request.

Click on the **Save** button when you are finished entering lodging information.

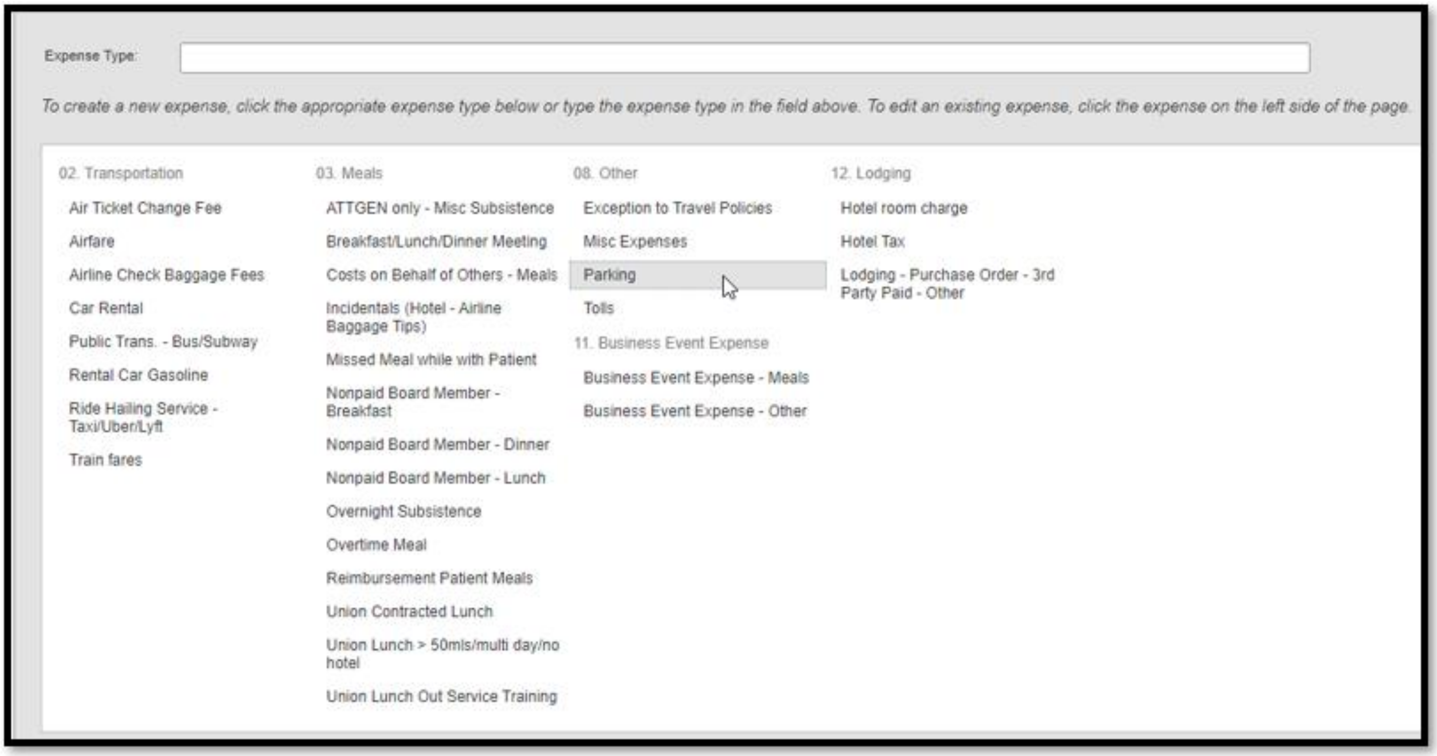
Completing the Expenses Tab

1. Select the Expenses tab to enter estimates of other travel expenses for your trip, such as tolls, parking, or meals.

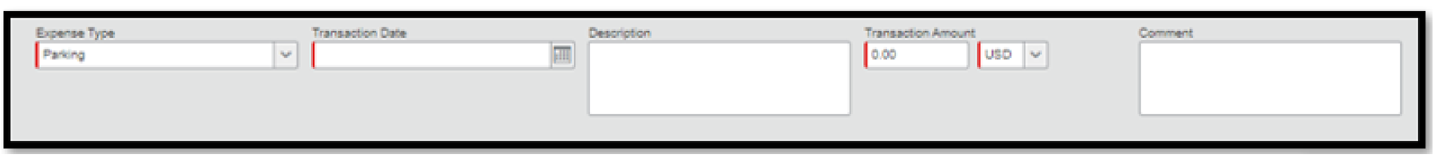


The window on the right side of the page will display a list of available expenses to choose from.

2. An Expense Type edit field allows you to search for an applicable expense type, then select an expense type from the list below or you can click on an expense type in the list without performing a search. Once an expense type is selected, the list is replaced with the corresponding data fields used to enter details about the expense. For this example, Parking is selected.



3. Complete the required fields and any optional fields as needed.

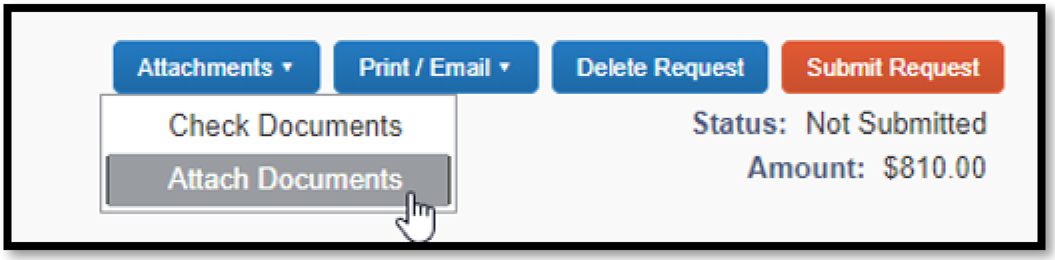


Click the **Save** button after the information is completed. Repeat the above steps for all expense types that you estimate will be incurred on your trip.

Attaching Documents

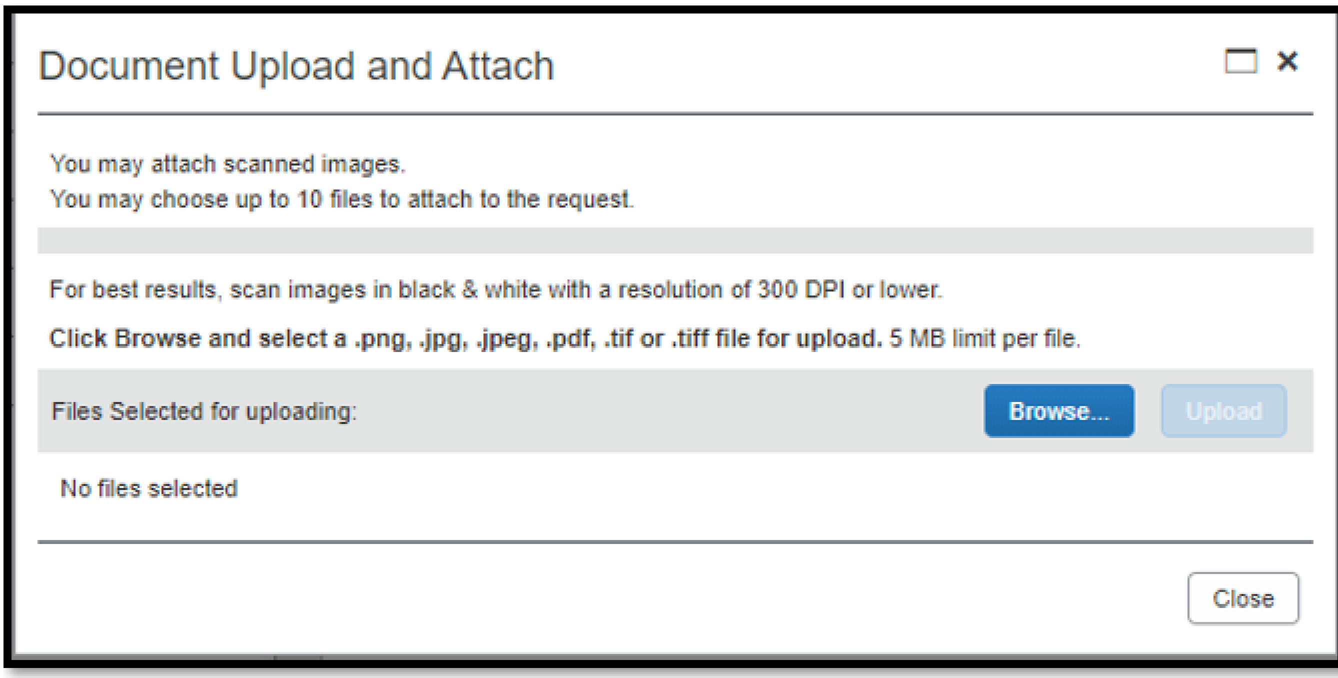
If you need to attach documentation that may be necessary for the supervisor to approve the travel request

1. Select the **Attachments** button and then click on **Attach Documents** link on the resulting list.

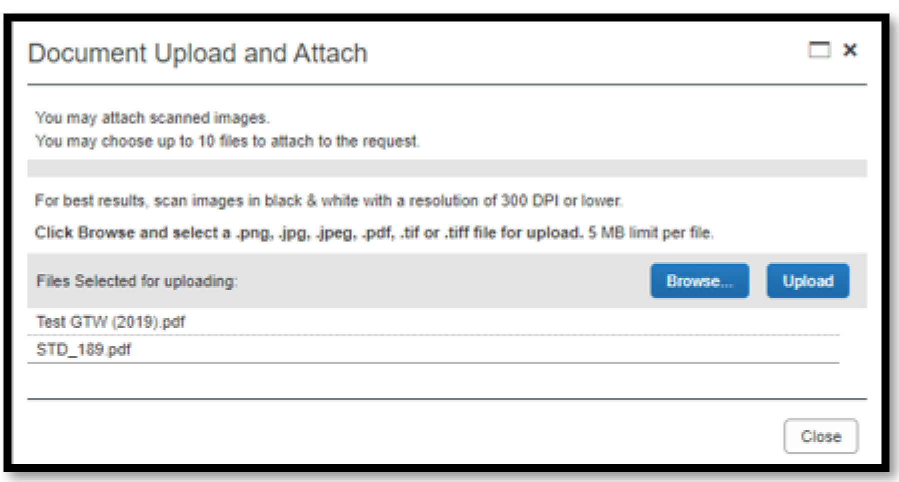


The Document Upload and Attach window will appear. Review the limitations. Only images in a .png, .jpeg, .pdf, .tif or .tiff file format can be attached. There is a 5 megabytes (MB) limit per file. Choose up to 10 files to attach.

2. Click on the **Browse** button to find the files on your computer to upload.

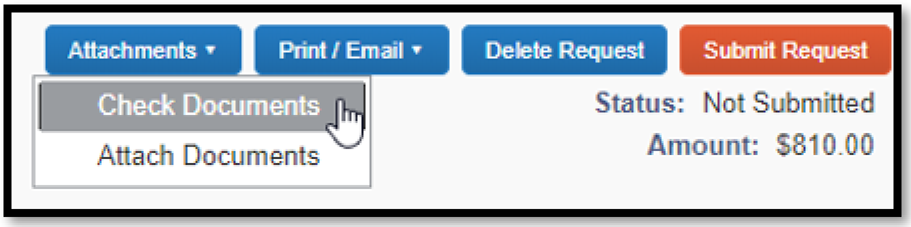


3. Once all of the files have been opened and display in the list on the Document Upload and Attach window, click the **Upload** button. The status of the files will show as Attached. Click on the Close button to exit the Document Upload and Attach window.

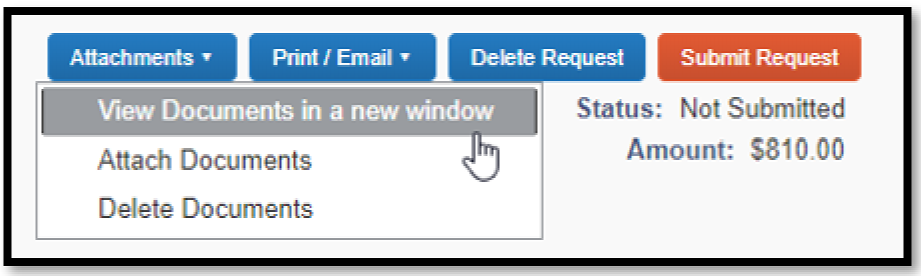


Viewing Attached Documents

1. If you would like to view the documents that are attached to the request, click on the **Attachments** button and select the **Check Documents** link from the dropdown list.



After you have checked the documents, the dropdown list under the **Attachments** button will change and display three link options (View Documents in a new window, Attach Documents, and Delete Documents).



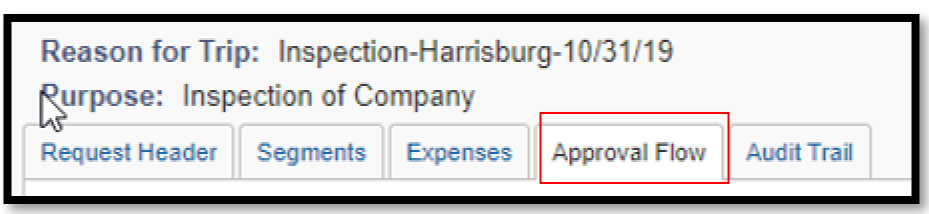
2. If you want to view the attachments again (i.e. after attaching more documents or deleting documents), click on the **View Documents in a new window** link in the dropdown list under the Attachments button.

Submitting the Request

1. After all information is entered on the Request Header, Segments, and Expense tab, and you have attached all required documents, click on the **Submit Request** button. Once you submit a request, you can only recall the request if your approver has not started the approval process.

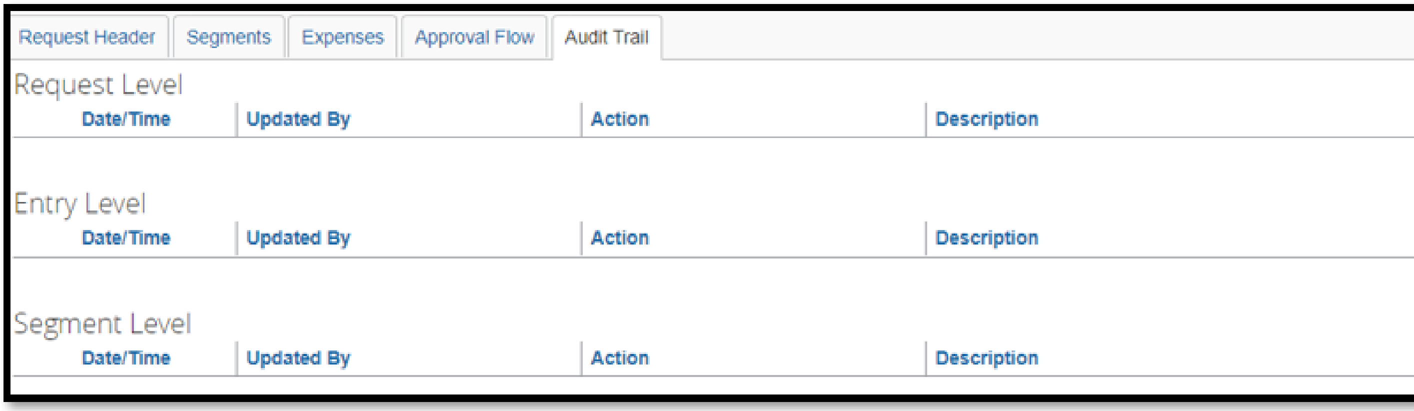
Viewing the Approval Flow Tab

1. You can review the Approval Flow by clicking on the **Approval Flow** link tab within the request.



Viewing Audit Trail Tab

1. You can review the audit trail by clicking on the **Audit Trail** link tab within the request.



Deleting a Request

1. When you have the request open, you can delete the request by clicking on the **Delete Request** button.

2. A confirmation window will appear asking are you sure you want to delete this request. Click the **Yes** button to delete the request.