

Concur – Creating a Travel Request

For Concur Home Page and training resources: <http://www.uc.edu/af/travel/concur-training.html>

If you are traveling overnight on behalf of the University of Cincinnati, you will need to create a Travel Request in Concur and have the request approved before your dates of travel. Below are the steps to do so for any Biological Sciences faculty or staff member:

1. Logon to your Concur profile here by using your UC logon credentials:
<https://login.uc.edu/idp/profile/SAML2/Unsolicited/SSO?execution=e1s1>
2. From your home page, click “Requests” at the top left of the page.
3. The Requests page will show any past travel requests you have created and the status of those Requests. To create a new Travel Request, click “New Request” on the top left of the page.
4. Fill out the required information on the title page of your new Request:
 - a. **Trip Name** – Choose a title that includes where you are going and the month and year of travel. A good example is “Denver research October 2017” or “NAFA conference Sept 2017.”
 - b. **Trip Type** – Choose whether your trip is domestic or international travel.
 - c. **User Type** – Choose what type of user you are at the university.
 - d. **Trip Start Date** – Choose the first date of travel.
 - e. **Trip End Date** – Choose the last date of travel.
 - f. **Request Policy** – As a staff or faculty member, you will always leave “*UC-General Request Policy” in this area.
 - g. **Destination City, State** – Start to type the city to which you are traveling and the options in Concur will start to pop up. If the city you are traveling to is not an option, please choose the closest option that is listed in Concur. This area is to figure in the per diem rate of travel. For example, if Pacifica, California is not listed in Concur, please choose San Francisco, California.
 - h. **Destination Country** – This will automatically populate once the correct city is chosen.
 - i. **Request/Trip Purpose** – Choose the correct reason for your travel.
 - j. **How will you book your travel?** – Choose the correct method you will be making your travel arrangements.
 - k. **Does this trip contain personal travel?** – Choose yes or no.
 - l. **Comment** – In this area you should include where your funding will be coming from. The business manager will adjust your account string information according to what you write in this area. For example “NSF grant” or “Faculty Development Funds” There should always be a comment in this section.
 - m. **Additional information** – This area can include any further information you think would be helpful to know. For example “Personal travel dates 10/5/2017 – 10/6/2017.”
 - n. **Fund/Cost Center/Functional Area/ Grant/Internal Order** – Please use the following account string information for these areas UNLESS you know your account information. The correct account string will be filled in according to what is written in the comment section.
Fund – A10001 Cost Center – 715030000 Functional area – 0 Grant – Not relevant

5. Next, you are required to fill out an estimated budget how you will be using your funds during travel. To do this, click the “Segments” tab at the top left of the screen under the Title of the Report.
6. The Segments tab includes the large expense items of airfare, lodging, rental car, and other transportation. Click the icon you will be including in your budget to add details. For example, if you will be flying to your destination, click the airplane icon to add details about your flight to calculate the cost. Fill in the information needed to calculate an estimated cost. This does not have to be exact, as it is only as estimate needed for approval of travel.
7. Include any other segments that you will be using during your travel.
8. Click the “Expenses” tab at the top left of the page under your title.
9. Expenses are all other costs you may be spending funds on during your travel. Items such as baggage, parking, and per diem meals can be included in this tab with an estimated cost.
10. You will have to include an expense of “Travel Expenses – Miscellaneous” in every travel request. The system will not let you submit your travel request unless this is included. You can estimate the cost at \$0.00.
11. The “Approval Flow” tab will show who will be approving your Travel Request. This should be your manager in the UC Flex system.
12. When your title page, segments, and expenses are complete, you will submit your Request by clicking the orange “Submit” button at the top right of the page.

NEXT STEPS:

- After your dates of travel, you will need to submit a Travel Expense Report if you are seeking reimbursement for travel costs. This process is detailed in the “Travel Expense Report” page.
- You are also able to create a Travel Expense Report before dates of travel for two reasons.
 1. Travel expense items that are purchased on a p-card and need to be allocated in the month of purchase.
 2. Items, like airfare and registration, that can be reimbursed before dates of travel.
- **Please call the Biology Department office if you have any questions about this process at 556-9700.**