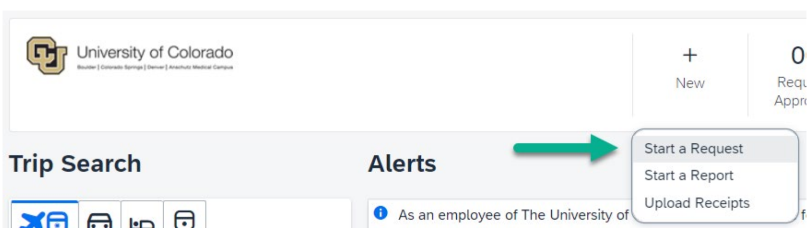
Concur Request (Creating and Submitting Travel Pre-Approval Requests)

Effective 1/1/2024, the ME departmental travel authorization (TA) form via Docusign is no longer required. All domestic and international travel is now **required** to be approved using the **Concur Request** process (Concur Request will replace TA for all travel types). All domestic and international travel must be approved via **Concur Request** prior to booking a trip. The user will need to enter the approved Request ID to finalize an international reservation.

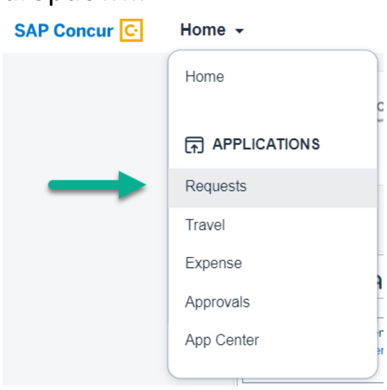
Step by Step Guide to Create a New Concur Request

1. New Request:

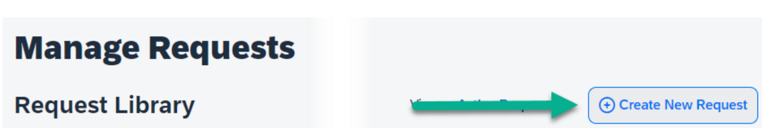
To start creating a new Request, select **New** and then **Start a Request** from the home page:



Alternatively, view your requests by selecting the **Request** option from the **Home** page dropdown:



Select **Create New Request** at the top of the **Request Library**:



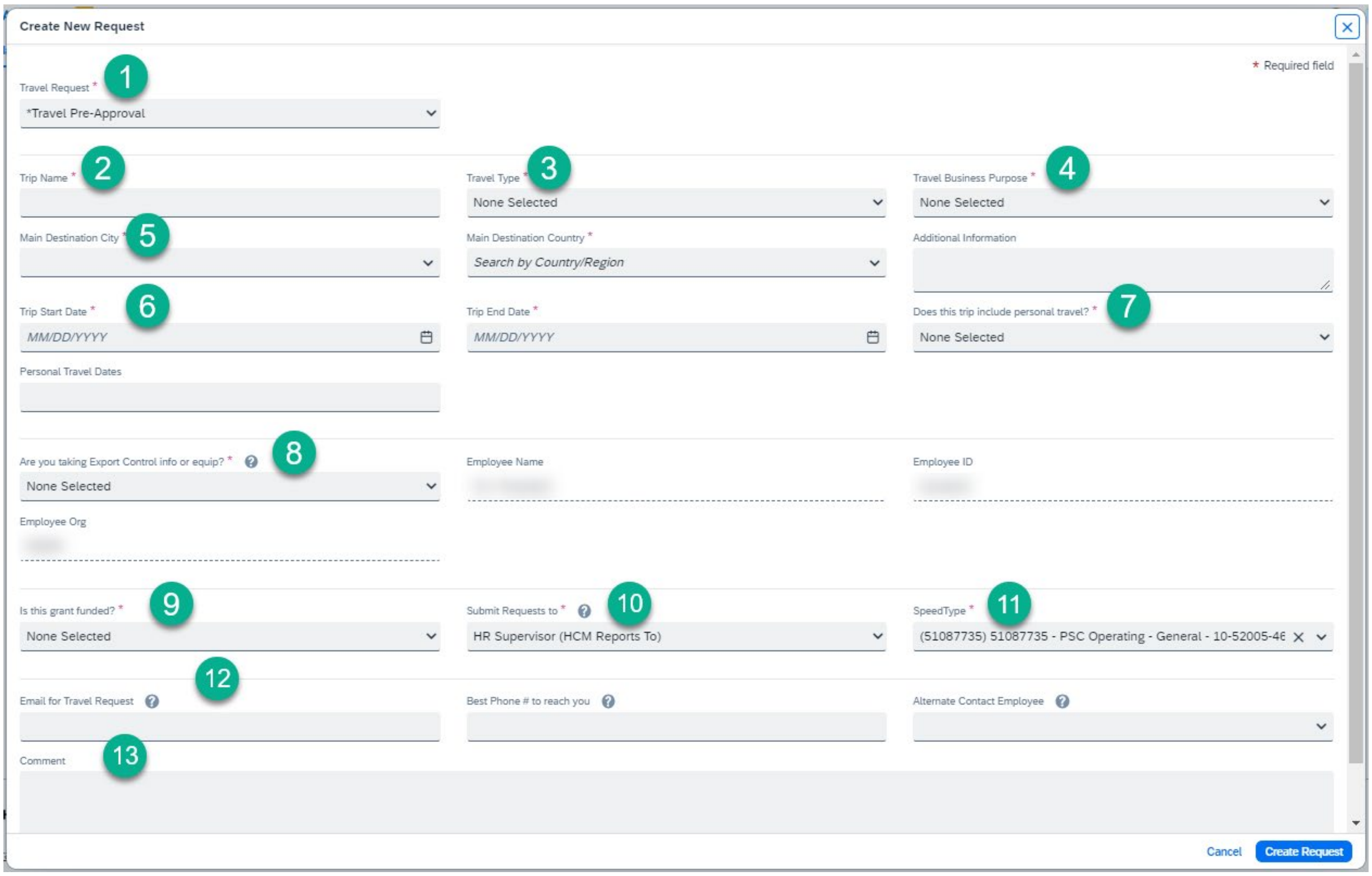
2. Request Header:

Clicking on the **Create New Request** button opens the **Create New Request** page, which will serve as the **Request Header** once completed. Complete the required fields on this page.

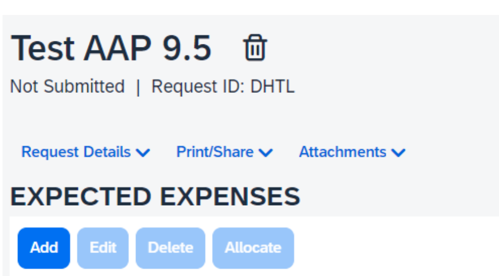
1) Choose **Travel Pre-Approval**.
2) Create a **Trip Name** by following the naming convention: **"Last name_Trip destination_MonYear"** (Example: **Smith_Denver_Jan2024**).
3) Choose the **Travel Type** for the request - domestic trips will be *In-State* or *Out-of-State*, or you may choose *International*.
4) Choose the **Business Purpose** for the travel that most closely matches the purpose of your trip (Example: **Meeting/conference-research duties**).
5) If you anticipate traveling to more than one city and/or country, enter where you plan to spend the majority of your travel time as the **Main Destination City** and **Country**. You'll identify the other cities/countries later.
6) Enter the **Trip Start** and **End Dates**.
7) Declare whether the trip will include **Personal Travel**. If it will, make sure to review CU Travel: Combined Business & Personal Travel Overview.
8) For international trips, if you are unsure of whether you are taking information or equipment subject to export control, select **Yes** so your campus' Export Control office will be notified about your trip.
9) Enter whether the trip is grant-funded.
10) Select the appropriate reviewer under **Submit Requests to**. Select **SpeedType**, this request will route to an approver with a Finance Fiscal Role on the SpeedType (**ME Finance Manager**). (Do not select HR Supervisor as your funding will need to be verified and your trip will need to be approved by the Finance Team.)
11) Enter the **SpeedType** that will fund the trip.
12) If additional employee's should receive contact regarding this trip, enter that contact individual here.
13) Fully explain the reason for your trip in the **Comments** area. If grant funds are being used for the trip, also explain **how this trip relates to the grant** (Required information in Comment area includes: **How this trip supports the objective of the sponsored project**, **Conference/event name**, **Conference date**, **title of the paper/talk/poster presented**-if applicable):

> This trip is to present the project's work at IEEE's RoboSoft conference. This will support the project objectives by highlighting how HASEL actuators can be used in robotic applications, and how the work we are doing makes the development of HASEL driven robots more approachable to non-experts. The RoboSoft conference is April 4th-8th 2022, in Edinburgh Scotland, and I will be presenting our paper titled "Simulating Electrohydraulic Soft Actuator Assemblies Via Reduced Order Modeling".

Click **Create Request** once all header information is entered:

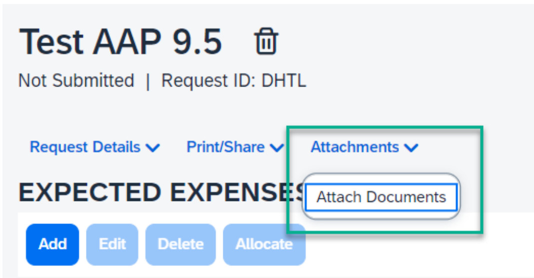


This will create the Request where additional information may be added:

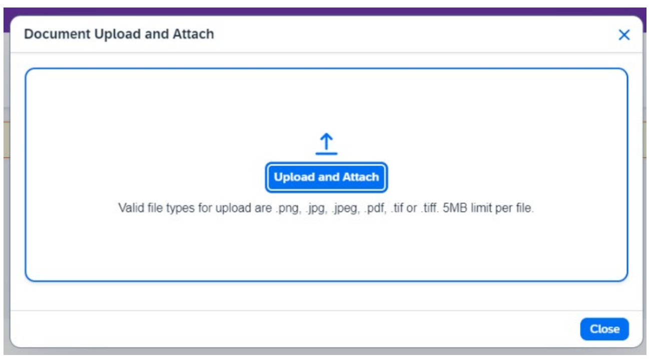


3. Attachments:

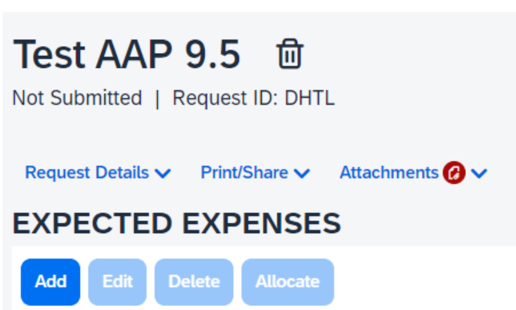
Use the **Attachments** dropdown to select **Attach Documents**:



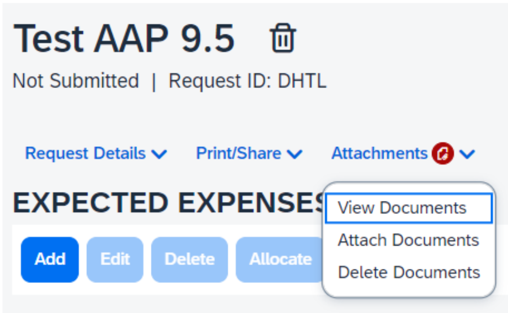
Clicking **Attach Documents** opens the **Document Upload and Attach** dialogue. Click **Upload and Attach** to add an attachment to the Request such as a Concur price comparison for your Combined Business & Personal Travel:



After adding an attachment to a Request, the attachments icon, , is displayed next to the **Attachments** menu to indicate that the Request has attachments:

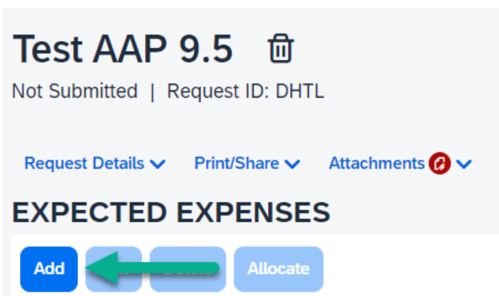


You can view, delete, or add additional attachments from the **Attachments** menu:

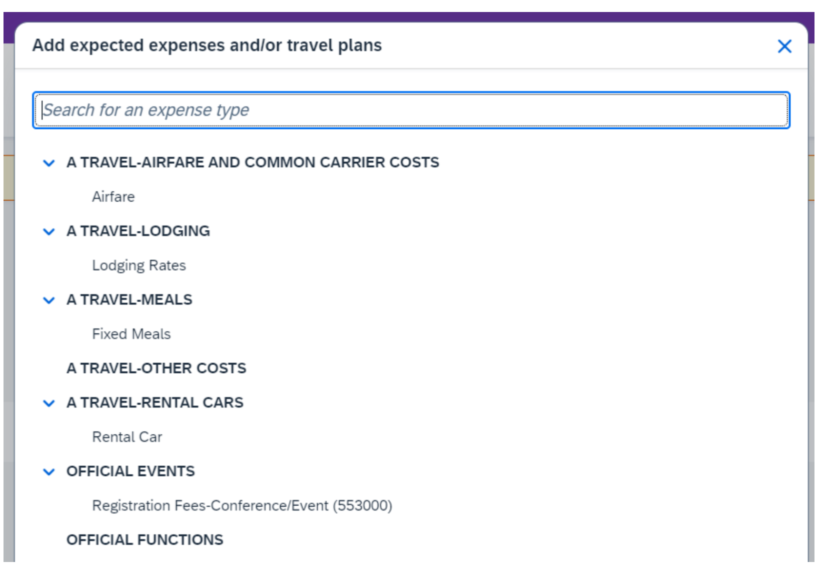


4. Segments:

To add **expected expenses**, click **Add** in the request home:



This will bring up the Travel expected expense types:

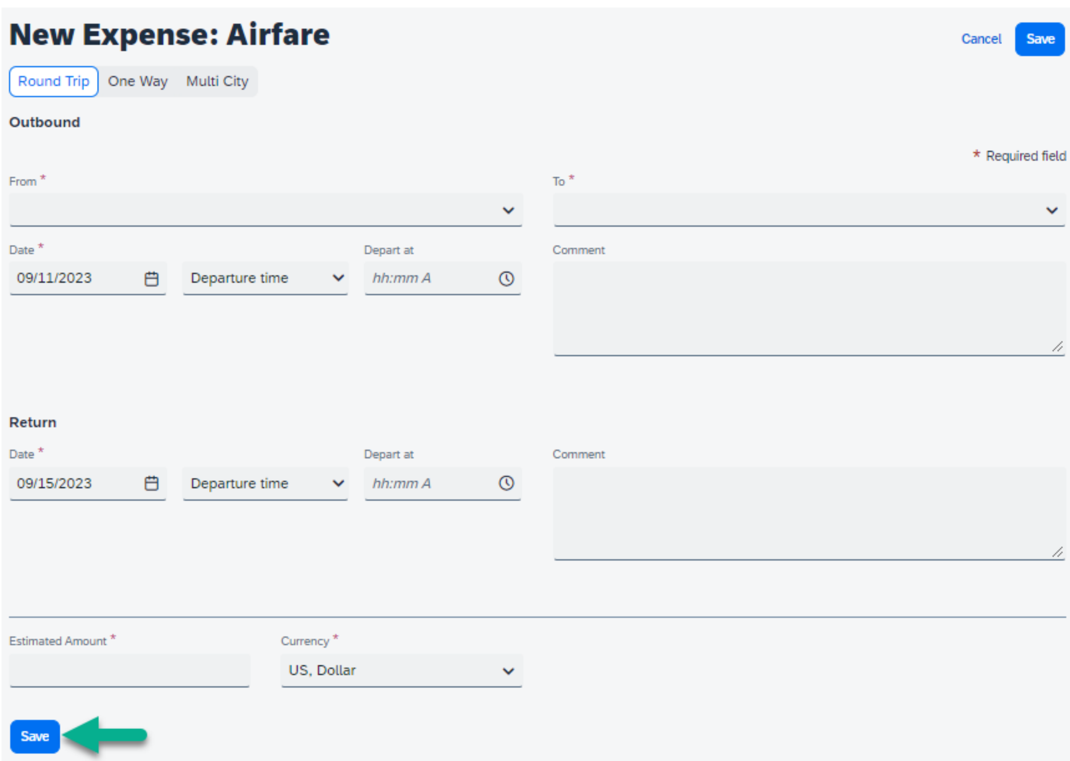


NOTE: In the search box at the top of the list, you can enter all or part of a segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.

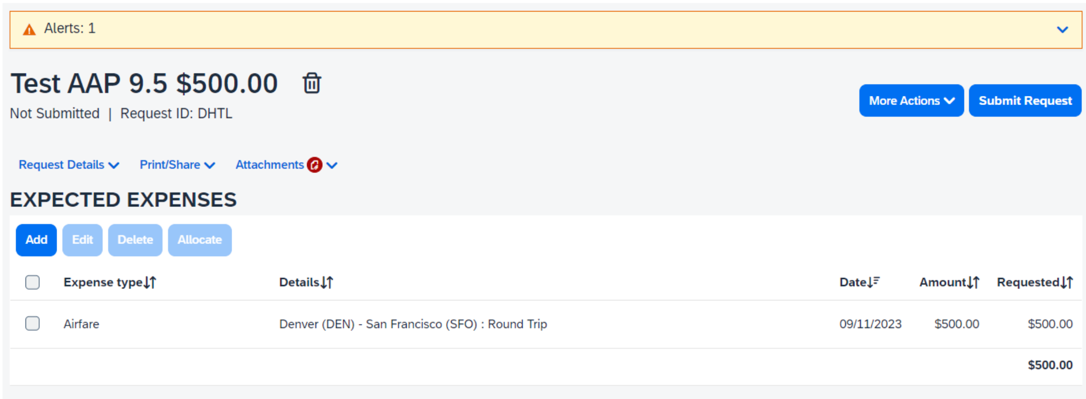
Airfare information is **required** for international travel and impacts approval flow for your request. Clicking a segment type opens the page to enter information for the selected segment type. Enter the necessary info denoted by the asterisks.

- Use the radio buttons to select whether your trip is **Round Trip, One Way,** or **Multi Segment**.
  If there is a layover or plane change at any part of your flight, select **Multi Segment**.
- List the air segments of your trip so they match your preliminary trip itinerary.
- If traveling by a mode of transportation other than flight, still enter the details under the **A TRAVEL-OTHER COSTS** section and provide the transportation mode in the comments.

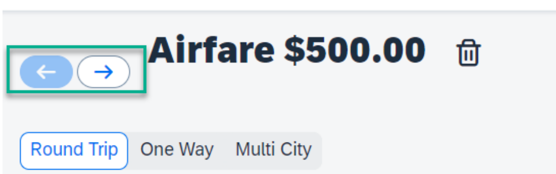
Click **Save** once all required information is entered:



The screen returns to the request home and the segment type is added to the **Expected Expenses** list:



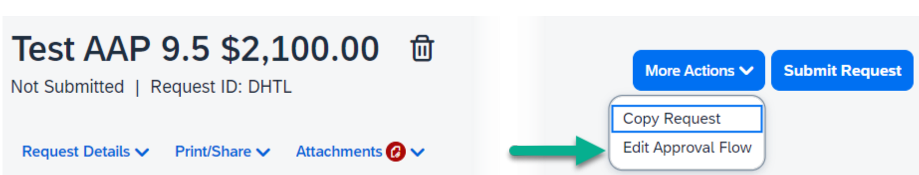
Navigating between Expected Expenses and Segments:
If a Request contains multiple expected expenses, on the expected expense or segment details page, left and right navigation arrows are displayed to the left of each expected expense or segment name in the Request. This navigation allows you to quickly navigate between the expected expenses and/or segments in the Request without having to return to the **Expected Expenses** page:

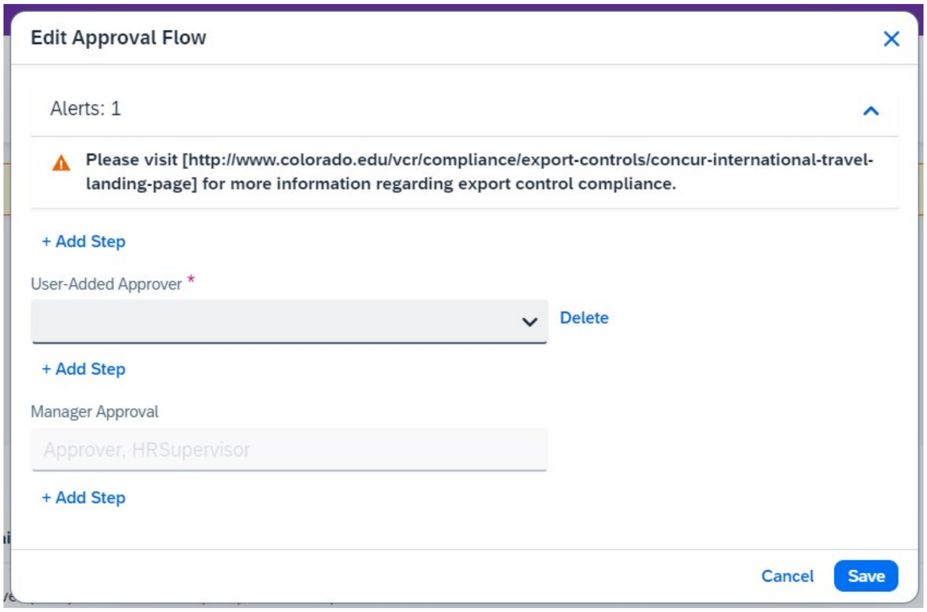


Enter all expected expenses to the page before submitting the request.

5. Approval Flow Review:

Review **Edit Approval Flow** in the request under **More Actions**:

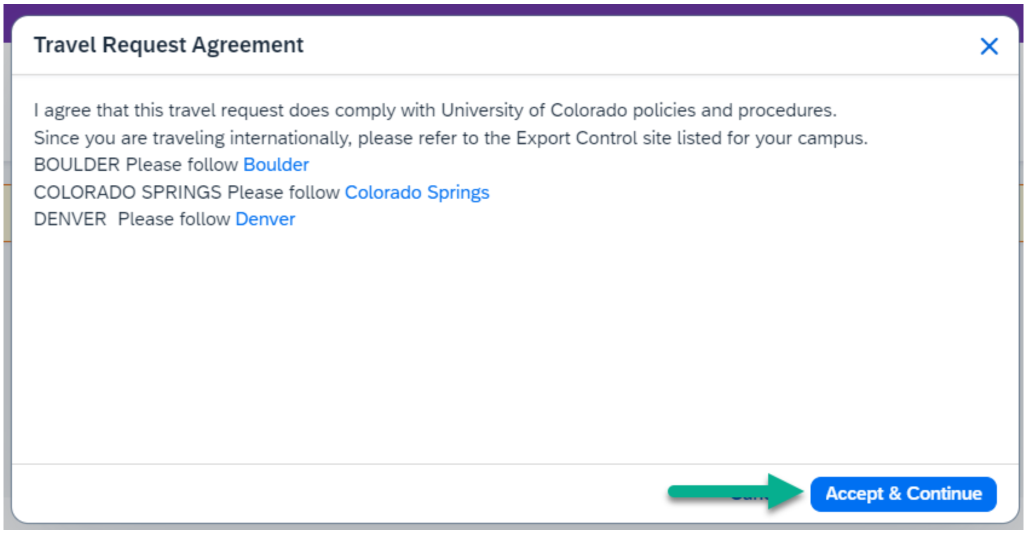




1) The request will route to the **SpeedType Finance Fiscal Roles** as **SpeedType** was selected on the **Submit Request To** field in the **Request Header**. Type an asterisk (*) in the approval box to see a list of available approvers for that speedtype. Then select the **ME Finance Manager (Yumie Smith)**.
2) Add an additional approver in the approval flow before the Finance Manager approval. Click **Add Step** to add your PI/faculty who should approve the use of the Speedtype/Sponsored Project funding.
3) For international travel requests, the request then routes to the designated officer for the HR organizational unit (in this case, **CEAS Dean**) and then for high-risk destinations to the appropriate chancellor/president for approval (this list available at CU Travel: International Travel Overview). This step should be automatically added for all international travel requests.

Once Approval Flow is finalized, click **Submit Request** (note that if you prepared this request on behalf of the traveler and you'd like them to review and submit the request, click **Notify**):

You will need to acknowledge the **Travel Request Agreement** with **Accept & Continue**:



Each approver will need to approve the request before you can proceed with booking travel. When your request is fully approved:

- You'll receive an email notification that includes important information for international trips, such as medical and evacuation insurance. It is at this time that your trip can be booked through Concur or CBT (do not look outside the CU systems).
- If you're booking an international trip in Concur, you'll need to enter the approved Request ID as part of the required information.
- If you're booking an international trip through CBT, your agent will be able to work with you when they receive the automated email.