

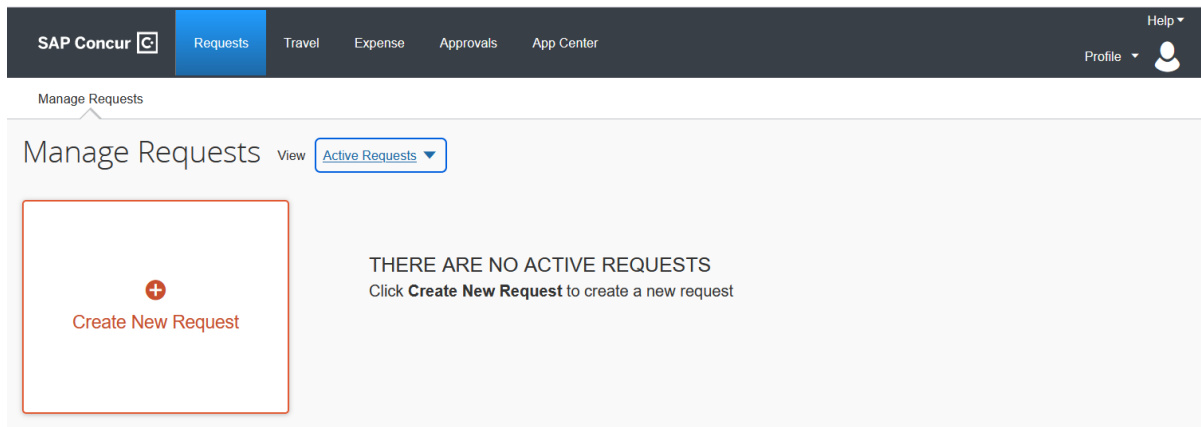
Concur Request is used to create, prepare, and submit a request for approval, including Pre-Trip Travel Requests. Pre-trip requests are required for all travel extending beyond a single day.

Creating a Pre-Trip Travel Request

There are two ways to create a travel request.

Pre-Trip Travel Request Creation #1

You can click on the **Requests** tab from the Concur home page. Then, click **+ Create New Request**.



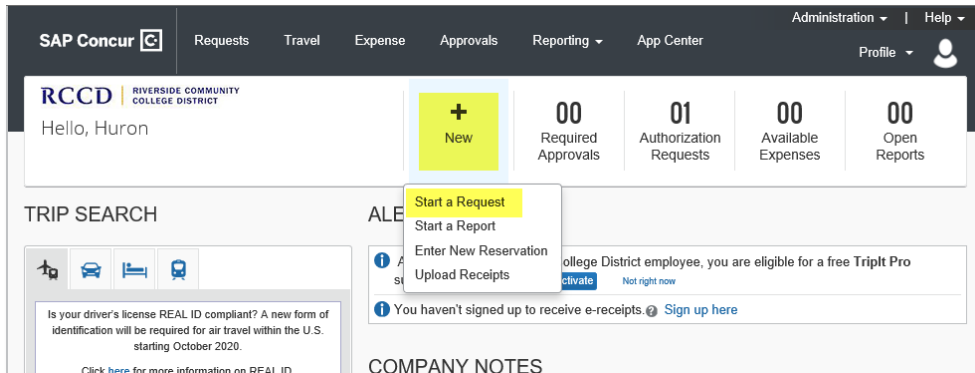
OR

Pre-Trip Travel Request Creation #2

From the Concur home page, hover over **+ New** and select **Start a Request** from the dropdown menu.

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL



Completing the Request Header

Update all relevant and required fields on the **Request Header** page. Required Fields are identified by a * (red asterisk) on the right side of the field name. Requests cannot be submitted if there is data missing for required fields.

Request Type *	Request Name *	Business Travel Start Date *
<input type="text" value="Pre-Trip Request"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>
Business Travel End Date *	Trip Purpose *	Destination City *
<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="None Selected"/>	<input type="text"/>
Destination Country *	Detailed Trip Purpose	
<input type="text" value="Search by Country/Region"/>	<input type="text"/>	
Traveler Type *	Trip Type *	Will this trip include personal travel? *
<input type="text" value="Employee"/>	<input type="text" value="None Selected"/>	<input type="text" value="None Selected"/>
Personal Travel Dates	How will you book travel? *	Index * 2
<input type="text"/>	<input type="text" value="None Selected"/>	<input type="text" value="Search by Code"/>
Activity Code		
<input type="text"/>		

Request Type

From the **Request Type** dropdown menu, select **Pre-Trip Request**.

Request Name

The **Request Name** should be descriptive enough for you and your budget authorities to know the purpose of the request. Best practices include using the location and dates of your travel in the

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

Request Name field (*i.e.*, “Sao Paulo Brazil 09/23-09/30/21” or “Dallas, TX December 6-8, 2021”). This field is limited to 32 characters.

If there isn't enough space in the **Request Name** box, additional information can be provided under **Detailed Trip Purpose** or **Comments** sections.

Business Travel Start/End Dates

These dates should include all travel dates, both personal and business.

Destination City

If the location you are traveling to is not available, use the closest location that is loaded into Concur. The [Travel and Expense Office](#) can add locations upon request.

Will this trip contain personal travel?

If travel contains personal days, select **Yes** which will then require the **Personal Dates of Travel** field to be populated (*i.e.*, 9/20-9/23/2021).

Requestors will be required to select **Booked with Agent** – OSU's contracted vendor Corporate Travel Planners (CTP) to ensure incremental costs associated with the personal portion of the travel are paid for by the traveler via personal credit card.

How will you book your travel?

Booked outside Concur & Agent

This option is used when the travel requestor has independently made travel arrangements, and those travel arrangements are managed by another organization or travel arrangements are not required.

Booked with Agent

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

The approved request will be available to CTP. Once the request is approved, the traveler can reach out to CTP to make travel arrangements. This option should be used for complicated trips with multi-segments, travelers who require specific accommodations, or when adding personal travel to the business trip.

Booked with Concur Online

This option will require at least one segment of your travel (Airline, Hotel, Car Rental, Train) to be added and booked within Concur. You will be unable to complete this step until the request is fully approved. The status of the request will update to **Pending Booking**.

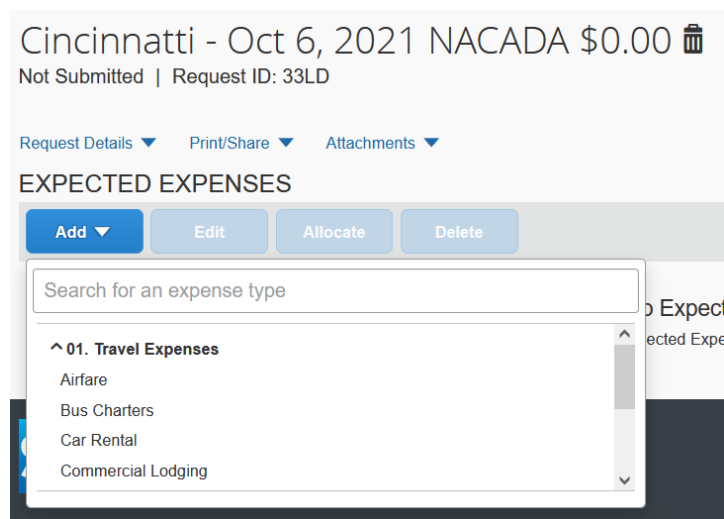
Index and Activity Code

Provide funding information for the upcoming trip. If multiple funding sources will be used, expenses should be allocated after clicking **Save**.

Estimating Trip Cost

Add Expected Expenses

Expected expenses must be added before the request can be submitted. Under **Expected Expenses**, click **Add** and select the expense type(s) you would like to provide an estimate for.



Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

The **Estimated Amount** and **Currency** are mandatory fields. The comments section is helpful for approvers to know any relevant information about your trip and how the expense was estimated.

Allocate Expected Expenses

To allocate an expense to a funding source different than the index you initially provided on the Request Header, select the box next to the expense you would like to change and click **Allocate**. By selecting multiple expenses, you can change the allocation for multiple expenses at once.

Cincinnati - Oct 6, 2021 NACADA \$2,215.00 Copy Request [Submit Request](#)

Not Submitted | Request ID: 33LD

Request Details Print/Share Attachments

EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Commercial Lodging	Cincinnati, Ohio	10/05/2021	\$1,000.00	\$1,000.00
<input type="checkbox"/>		Airfare	Portland (PDX) - Cincinnati (CVG) : Round Trip	10/05/2021	\$500.00	\$500.00
<input checked="" type="checkbox"/>		Conference Registration Fees		10/05/2021	\$415.00	\$415.00
<input type="checkbox"/>		03. Meals		10/05/2021	\$300.00	\$300.00

Estimated Total: \$2,215.00

The default allocation will be visible at the top of the screen for your reference. Allocate lets you choose to allocate an expense by **Percent** or by **Amount**. Select the allocation method and then **Add**.

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

Allocate ✕

Expenses: 1 | \$415.00

Percent	Amount	
Amount \$415.00	Allocated \$415.00 100%	Remaining \$0.00 0%

Default Allocation

Code	Percent %
INDEX	100

Add Edit Remove Save as Favorite

No Allocations

This expense is assigned to your default allocation shown above. Click the allocate button to allocate part or all of this expense differently.

You can then provide another funding source to be used.

Add Allocation ✕

+ New Allocation **★** Favorite Allocations

Index * Required field

1 **Search for indexes** 2 *Activity Code **Search by Code**

Cancel **Add to List**

Complete this step as many times as necessary to continue adding funding sources, and once your amounts and funding sources are correct, click **Save**.

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

Allocate ✕

Expenses: 1 | \$415.00

Amount \$415.00 | Allocated 100% \$415.00 | ✔ Remaining 0% \$0.00

Default Allocation

Code **INDEX #1** Amount USD \$315.00

*Index *Activity Code Code ▲ Amount USD

NAME OF INDEX #2 **INDEX #2**

Once the allocation has been updated, select **Save**.

Add a Cash Advance

If a cash advance is needed for the upcoming travel, it can be added to the pre-trip request before submission. Under **Request Details**, select **Add Cash Advance**.

Cincinnati - Oct 6, 2021 NACADA \$2,215.00 Copy Request

Not Submitted | Request ID: 33LD

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

Header

Request Timeline

Audit Trail

Allocation Summary

Linked Add-ons

EXPENSES

Expense type	Details	Date ▼	Amount	Requested
Commercial Lodging	Cincinnati, Ohio	10/05/2021	\$1,000.00	\$1,000.00
Travel	Portland (PDX) - Cincinnati (CVG) : Round Trip	10/05/2021	\$500.00	\$500.00
<input type="checkbox"/>	Conference Registration Fees	10/05/2021	\$415.00	\$415.00 <small>Allocated</small>
<input type="checkbox"/>	03. Meals	10/05/2021	\$300.00	\$300.00

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

In the **New Cash Advance** pop up, indicate the amount of the request. The amount of the cash advance cannot exceed the estimated expenses. *Note: Cash advance amounts must be over \$250.00.*

New Cash Advance ×

Cash Advance Amount *

Currency * ▼

[Cancel](#) [Add Cash Advance](#)

Select **Add Cash Advance** to add the amount to your pre-trip travel request.

Cincinnati - Oct 6, 2021 NACADA \$2,215.00  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33LD

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

CASH ADVANCES: 1

Amount

\$75.00

\$75.00

EXPECTED EXPENSES

[Add](#) ▼ [Edit](#) [Allocate](#) [Delete](#)


<input type="checkbox"/>	Alerts	Expense type	Details	Date ▼	Amount	Requested
<input type="checkbox"/>		Commercial Lodging	Cincinnati, Ohio	10/05/2021	\$1,000.00	\$1,000.00
<input type="checkbox"/>		Airfare	Portland (PDX) - Cincinnati (CVG) : Round Trip	10/05/2021	\$500.00	\$500.00


Review Alerts

An **Alerts** section will appear near the top of the screen to notify traveler of potential errors or information relevant to the upcoming trip. To view the alert, expand the **Alert** box for additional information. Make any necessary corrections before submitting the request.

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

 Alerts: 2 ▼

Cincinnati - Oct 6, 2021 NACADA \$2,215.00  [Copy Request](#) [Submit Request](#)


Not Submitted | Request ID: 33LD

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼


CASH ADVANCES: 1


Amount
\$75.00
\$75.00


If any items require correction before moving forward, Concur will direct the user to the alert box for their review. Red errors must be corrected before submitting a request. If action is not required by Concur to proceed, the alerts will have a yellow icon next to them.

 Alerts: 2 ^

REQUEST

 Per OSU Travel Policy Cash Advance will not be issued for \$250 or less. Please remove the amount requested [View](#)

 You are traveling to a high risk country. Please review the country details under Request Details>>Travel Advisory. [View](#)

Cincinnati - Oct 6, 2021 NACADA \$2,215.00  [Copy Request](#) [Submit Request](#)

Not Submitted | Request ID: 33LD

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

CASH ADVANCES: 1


Amount
\$75.00
\$75.00

Submit a Request

Once expected expenses have been added and allocated and the alerts have been reviewed and corrected, if needed, the request can be submitted. In the top left corner, click **Submit Request**.

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

 Alerts: 1

Cincinnati - Oct 6, 2021 NACADA \$2,215.00 More Actions Submit Request

Sent Back to User | Request ID: 33LD

[Request Details](#) [Print/Share](#) [Attachments](#)

CASH ADVANCES: 1

Amount
\$255.00
\$255.00

EXPECTED EXPENSES

[Add](#) [Edit](#) [Allocate](#) [Delete](#)

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Commercial Lodging	Cincinnati, Ohio	10/05/2021	\$1,000.00	\$1,000.00
<input type="checkbox"/>		Airfare	Portland (PDX) - Cincinnati (CVG) : Round Trip	10/05/2021	\$500.00	\$500.00

Review the **Pre-Trip User Confirmation** that pops up on your screen and select **Cancel** or **Accept & Continue**.

Pre-Trip User Confirmation ×

By clicking on the 'Accept & Submit' button, I certify that:

- This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official business for Oregon State University.
- This request is in compliance with OSU's Travel policy.

OSU Travel Policy: <https://fa.oregonstate.edu/fiscal-program/travel>

[Cancel](#) [Accept & Continue](#)

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

Request Approvals

Before the traveler can proceed with making travel arrangements, the request must first be approved through the automatic, electronic routing process. If needed, the requestor can recall the request only if the request has not been approved. If the request has been approved, the requestor would have to cancel or close request.

System Generated Notifications

- Travel Approvers will receive email notifications to approve a Request, such as this Pre-Trip Travel Request.
- Requestors will receive email notifications of approval status changes (*i.e. approved or rejected*).

Approvers

- Approvers can delegate the initial review of Requests to a 'Previewer' through the Delegate setup process. Previewers will be able to confirm documentation and approvals are received, then notify the approver that the Request is ready for approval.
- Approvers and Requestors can add additional approvers.

Approval Status

- Not Submitted
- Submitted
- Submitted & Pending Approval
- Cancelled
- Approved
- Sent Back to User
- Pending On-line Booking (*Note: This will only appear when **Booked with Concur Online** option is selected*)
- International Approval (*Note: This will only appear for international travel to select locations only*)

Pre-Trip Travel Request

CREATE, PREPARE, AND SUBMIT A REQUEST BEFORE YOU TRAVEL

Still have questions? Contact us!

Questions related to **travel**:

Travel@oregonstate.edu

Questions related to **credit cards**:

Procurement.Cards@oregonstate.edu

Website: fa.oregonstate.edu/travel-and-expense