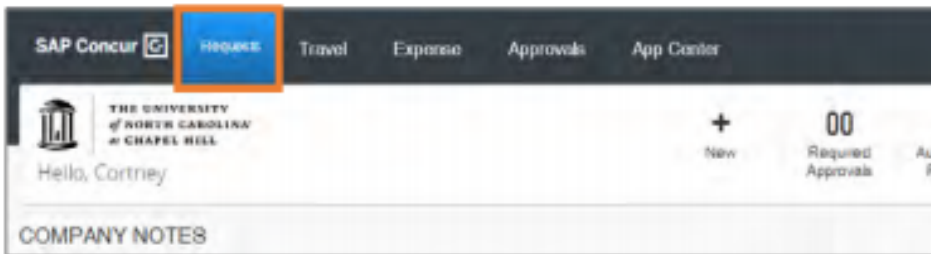


In advance of any University business travel which includes airfare, lodging, and/or meal per diem, **you must create and submit a travel request PRIOR to making any travel arrangements.** You can also manage travel requests and cancel any request.

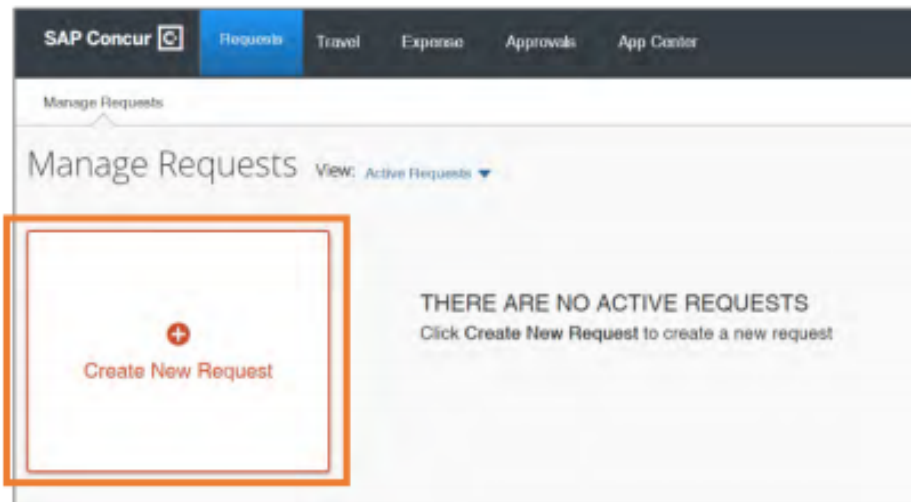
Creating a New Travel Request

Follow these steps to create and submit a travel request:

1. From the Concur home page, click the **Requests** tab.



2. Click the **Create New Request** tile.



3. Enter the required (noted by red asterisks) and necessary optional fields.

- The Traveler Type, Business Unit, and Department ID fields will automatically populate based on your ONYEN and user profile
- Enter the funding source (indicate grant, trust, program, etc.) in the Additional Information
- Enter the trip purpose (detailed description) in the Comments To/From Approvers/Processors

The screenshot shows a 'Create New Request' form with the following fields and their current values:

- Request Name: [Empty]
- Traveler Type: Faculty/Staff
- Request/Trip Purpose: None Selected
- Request/Trip Start Date: MM/DD/YYYY
- Request/Trip End Date: MM/DD/YYYY
- Request/Trip Type: None Selected
- Destination City: [Empty]
- Destination Country: [Empty]
- Does this trip include personal travel?: None Selected
- Dates of personal travel: [Empty]
- Is this request/trip federally funded?: None Selected
- Additional Information: [Empty] (highlighted with an orange box)
- Business Unit: (JUNCCH) UNC Chapel Hill
- Dept ID: (34010) School of Education
- Fund: Search by Code
- Source: Search by Code
- Project ID: Search by Code
- PC Business Unit: [Empty]
- PC Activity ID: [Empty]
- Program: Search by Code
- Cost Code 1: Search by Code
- Cost Code 2: Search by Code
- Cost Code 3: Search by Code
- Comments To/From Approvers/Processors: [Empty] (highlighted with an orange box)

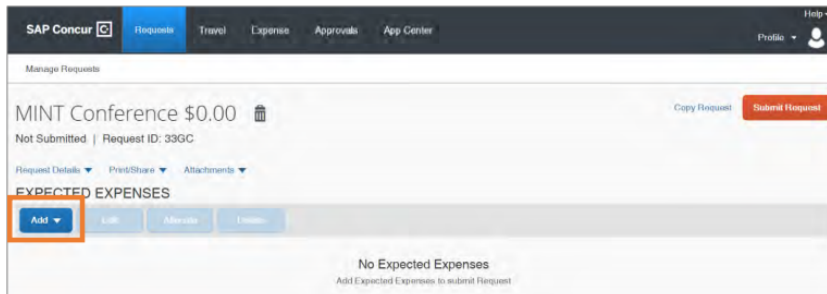
At the bottom right, there are 'Cancel' and 'Create' buttons. The 'Create' button is highlighted with an orange box.

4. Click the **Create** button.

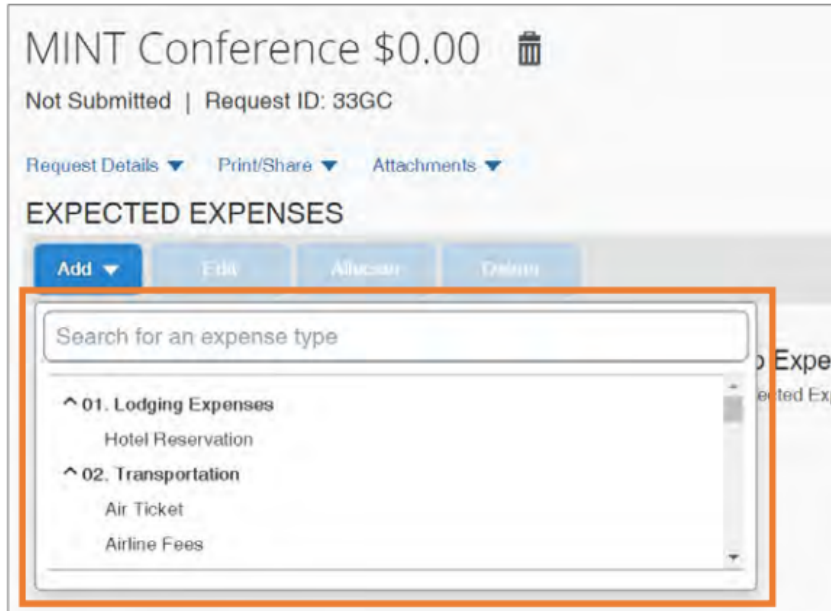
Adding Expenses to a Travel Request

After creating the Travel Request you can add airfare, lodging, or other anticipated expenses. At least one expense must be added to the request before it can be submitted. Follow these steps to add expenses to a travel request:

1. Open the travel request and click the **Add** button.

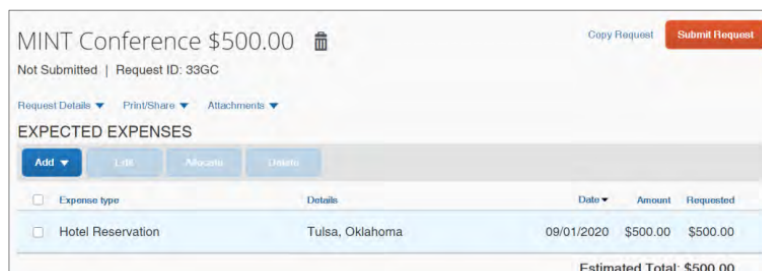


2. Select the type of expense you need to add.



3. Enter the required (noted by red asterisks) and necessary optional fields.
4. Click the **Save** button.

Result: The expense is added to the listing of expected expenses.



5. If you need to add another anticipated expense, click the **Add** button. If you are done adding anticipated expenses, click the **Submit Request** button.

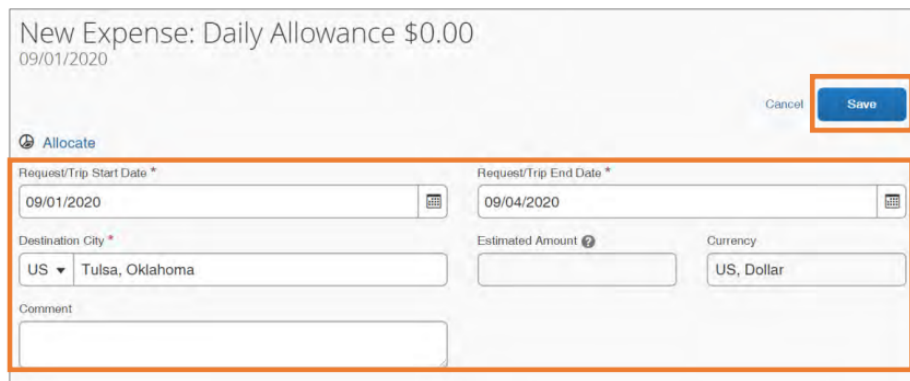
Adding Daily Allowance as an Expense to a Travel Request (optional)

If you selected Daily Allowance Meals from step 8, the Travel Request must include Federal Funding (or an approved exception). The Federal per diem rates may be utilized in place of the North Carolina per diem Rates. To add the Federal per diem rates, follow the steps below to add “Daily Allowance” to your Travel Request:

- Enter the required (noted by red asterisks) and necessary optional fields.

Note: The Trip Start Date, Trip End date, and Destination City will automatically be added based on the Request Header. Also, the Estimated Amount will automatically calculate once you click the Save button. The Estimated Amount is pulled in from the current GSA, Department of Defense, or Department of State rates. This amount represents the maximum Daily Allowance which you are eligible to request and will be updated when submitting your Expense Report for reimbursement.

- Click the **Save** button.



The screenshot shows a web form titled "New Expense: Daily Allowance \$0.00" with a date of "09/01/2020". At the top right, there are "Cancel" and "Save" buttons, with the "Save" button highlighted by an orange box. Below the title, there is an "Allocate" link. The main form area is enclosed in an orange border and contains several fields: "Request/Trip Start Date *" with the value "09/01/2020", "Request/Trip End Date *" with the value "09/04/2020", "Destination City *" with a dropdown menu set to "US" and the text "Tulsa, Oklahoma", "Estimated Amount" (empty), and "Currency" with a dropdown menu set to "US, Dollar". There is also a "Comment" field at the bottom.

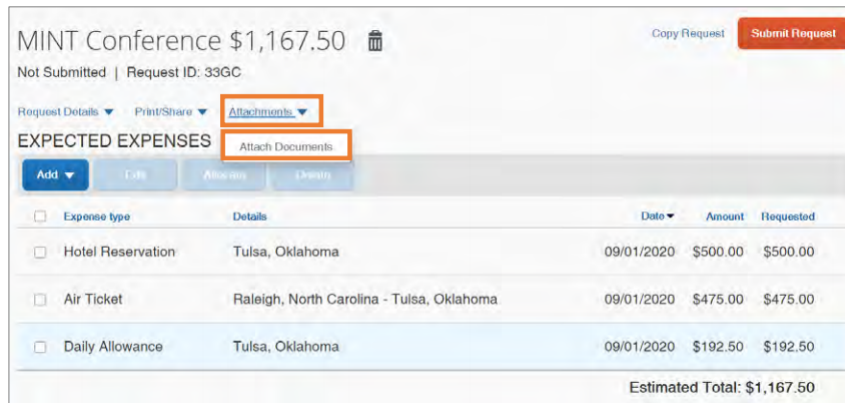
Result: The Daily Allowance is automatically calculated and added as an Expense. The first and last day of travel are calculated at 75% of the day’s total allowance (including incidentals) per Federal policy. The expense is added to the listed of expected expenses.

Adding Attachments to a Travel Request

Some travel will require documentation to be submitted along with a travel request.

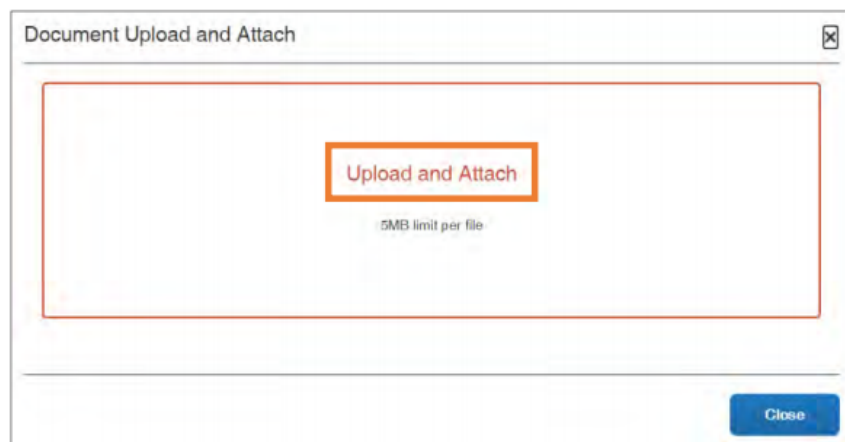
Follow these steps to add an attachment to a travel request:

1. Open the Travel Request if it is not already selected.
2. Click the **Attachments** drop-down link.
3. Click **Attach Documents** from the drop-down options.



Result: A pop-up window will appear for you to add the attachment.

4. Click the **Upload and Attach** link.



5. Select the file you want to attach.

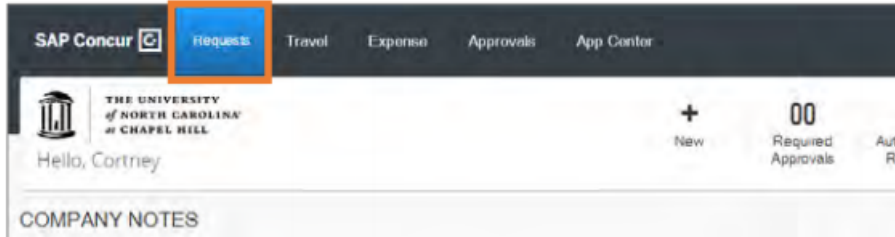
Result: The attachment will upload and an attachment icon will appear.

Note: Once a document is attached, click on the **Attachments** drop-down link to view, delete, or attachment more documents. If attaching multiple documents, the files will be merged into one and cannot be separated.

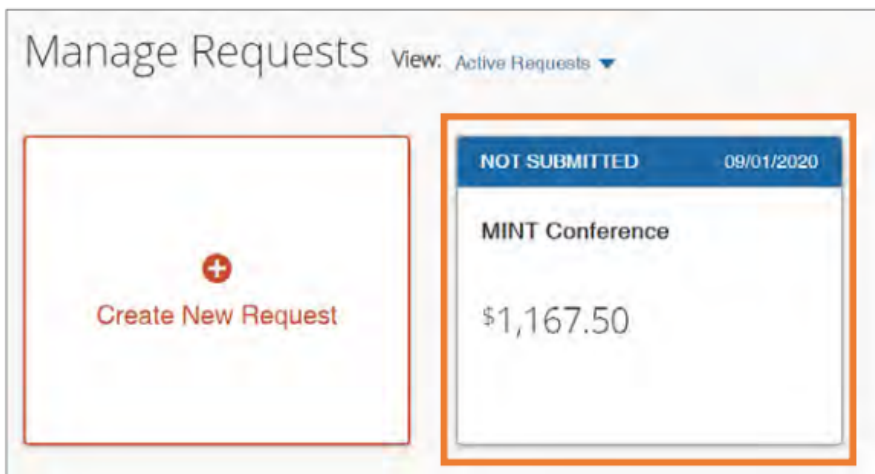
Managing a Travel Request

You can make edits and changes to a travel request. Depending on the type of change you are needing to make, follow these steps to manage a travel request:

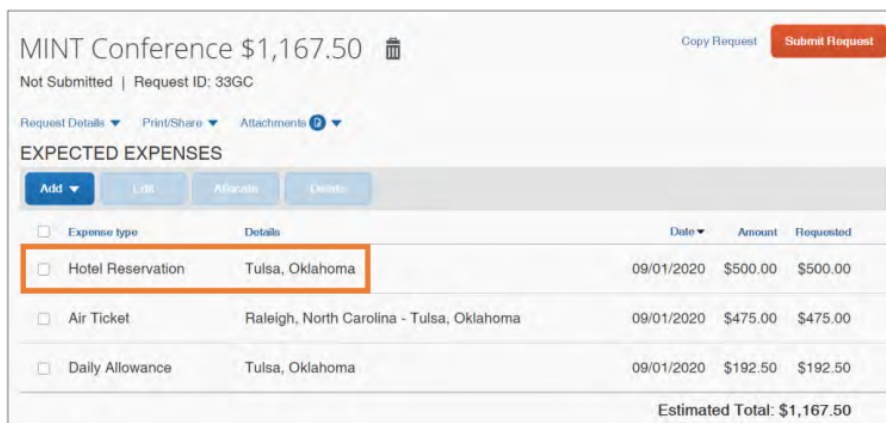
1. From the Concur home page, click the **Requests** tab.



2. Click the travel request you want to manage.



Result: The detail of the travel request will appear.



Editing a Travel Request

You can only edit or delete travel requests that have a status of Not Submitted.

Editing Expected Expenses

3. Make any necessary edits.

Hotel Reservation \$500.00

City * Tulsa, Oklahoma Date 08/03/2020 At hh:mm A

Vendor Marriott Hotels Date 08/06/2020 At hh:mm A

Estimated Amount * 500.00 Currency US, Dollar

4. Click the **Save** button.

Editing the Request Header

3. Click the **Request Details** drop-down link.
4. Click **Edit Request Header** from the drop-down options.

MINT Conference (Carolyn) \$1,167.50

Not Submitted | Request ID: 33GD

Request Details | Request Share | Attachments

Request	Details	Date	Amount	Requested
Request Timeline				
Audit Trail				
Allocation Statement				
Linked Add-ons				
Add Cash Advance				
<input type="checkbox"/> Air Ticket	Raleigh (RDU) - Tulsa (TUL) - Round Trip	08/03/2020	\$475.00	\$475.00
<input type="checkbox"/> Daily Allowance	Tulsa, Oklahoma	08/03/2020	\$192.50	\$192.50

Estimated Total: \$1,167.50

Result: Edit Request Header page will appear.

5. Make any necessary edits.

Edit Request Header

MINT Conference (Carolyn) Request ID: 33GD

Request ID: 33GD

Request Name: MINT Conference (Carolyn) Traveler Type: Faculty/Staff Request Trip Purpose: Conference

Request Trip Start Date: 08/03/2020 Request Trip End Date: 08/06/2020 Request Trip Type: Out-of-State

Destination City: US - Tulsa, Oklahoma Destination Country: US

Does this trip include personal travel? No Dates of personal travel: Is this request for a security benefit? Yes

Additional Information: (UNCCH) University of North Carolina Chu User ID: 1412017 Pediatrics-Infectious Disease

Fund: Search by Code Source: Search by Code

Project ID: Search by Code POC Business Unit: POC Activity ID

Program: Search by Code Cost Code 1: Search by Code Cost Code 2: Search by Code

Cost Code 3: Search by Code

Comments Full text Approval/Permissions

6. Click the **Save** button.

Recalling a Submitted Travel Request

To make edits, a Request can be recalled as long as it is not fully approved. Once a Request is fully approved, Requests can only be recalled if both the start and end dates are in the future and there is no expense report associated with the Request.

The **Recall** button is available in the upper right corner of associated Request.



Result: The Travel Request is now recalled, can be edited, cancelled, and/or resubmitted.

Also, on the Manage Requests page the status of the request has changed from Submitted (green header) to Returned (red header).

Canceling **VS.** Closing/Inactivating a Travel Request

If a travel request is not going to take place it should be cancelled.

Important: Canceling a request is a permanent action that cannot be reversed.

Closing or making a request inactive should be used to closeout a request when it has been fully expensed but still has a remaining balance.

Important: Closing or making a travel request inactive is a permanent action that cannot be reversed.

Cancel Request and **Close/Inactivate Request** options are available under **More Actions** button.



Result: The Travel Request is canceled and is no longer listed as an Active Request.

Result: The Travel Request is closed, made inactive, and is no longer listed as an Active Request.