Concur Request
User Guide
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What is Concur?

Concur is a web-based tool that fully integrates travel reservations and expense reporting data into one application. Concur allows for electronic processing of the following:

- P-Card Transactions – Travel and Non-Travel
- Travel Reimbursements
- Miscellaneous Reimbursements
- Payments to Vendors
- International Travel Approvals

Concur Modules

Concur is made up of four modules: Request, Travel, Expense and Invoice.
Request
Concur Request should be used to notify appropriate parties of international travel. For more information on Concur Request, please see concur.ua.edu/request.

Travel
Concur Travel should be used to reserve airfare, rental cars, and hotels through the University’s travel management company (TMC). For more information on the Concur Booking Tool, please see concur.ua.edu/travel.

Expense
Concur Expense must be used by UA employees to reconcile P-Card charges and to request reimbursements for UA employees. Concur Expense includes the following policies:

  P-Card Non-Travel
  All P-Card Non-Travel expenses should be reconciled using the P-Card Non-Travel Policy.

  Travel, Entertainment, and Reimbursements
  The Travel, Entertainment, and Reimbursements Policy should be used by UA employees to request reimbursement for travel expenses and to reconcile any travel related P-Card transactions. Travel for UA guests or students paid for by a UA P-Card should be reconciled in Concur Expense. This policy should also be used for any entertainment and/or relocation related charges and for any other miscellaneous reimbursements to UA employees.

  For more information, please see concur.ua.edu/expense.

Invoice
Concur Invoice must be used to submit Payment Requests to reimburse non-UA individuals and to process payments to vendors. For more information, please see concur.ua.edu/invoice.
Logging on to Concur

Users will access Concur through myBama by navigating to the Employee Tab and clicking on the Concur link. Users must complete the Concur Travel and Expense training available on UA Skillport. Your account will not be activated unless the required training has been completed.
### Exploring the Home Page

The home page contains the following sections. To return to the home page from any other page, click the Concur logo on the top left of the screen.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
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| **Trip Search**  | This section provides the tools you need to book a trip with any or all of these: **Flight**: Use to book a flight. You can also book hotel and reserve a car at the same time.  
**Car, Hotel, or Rail**: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (**Flight** tab). |
| **Alerts**       | This section displays informational alerts about Travel features.                                                                                           |
| **Company Notes**| Content is provided by Procurement Services.                                                                                                           |
| **My Trips**     | This section lists your upcoming trips.                                                                                                                                 |
| **My Tasks**     | This section lists **Required Approvals, Available Expenses, and Open Reports**.                                                                              |
**International Travel Requests**

All UA related international travel for faculty and staff must be submitted using the Concur Request Module as an International Travel Request. The International Travel Request should be submitted prior to booking travel in order to provide notification to applicable departments on campus. With Concur Request, the University can consistently and thoroughly assess the risk and benefit of international trips in order to enhance the safety of university travelers.

**Entering an International Travel Request**

1. Access Concur Travel and Expense using your myBama user name and password. You can also access Concur through the Employee tab of myBama.ua.edu.

2. From the Concur home page, select Request from the menu row at the top of the screen.

4. The **Request Header** tab appears. Complete all required fields.

![Request Header Tab](image)

The Request Policy will default to International Travel Request. Enter the following fields:

- **Trip Name** – Enter a meaningful trip name, similar to a name given to a travel expense report. Your department may implement a standard naming protocol.
- **Trip Start Date**
- **Trip End Date**
- **Destination City** – If you anticipate travelling to more than one city and/or country, enter where you plan to spend the majority of your travel time.
- **Destination Country** – The country will pre-populate based on the destination city selected.
- **Business Purpose** – Select from the drop-down list.
- **P-Cardholder Name** – If using a p-card to book any arrangements or pay for any expenses while travelling, enter the name of the P-Cardholder.
- **Business Purpose Explanation** – Enter a brief explanation regarding how this trip will advance the University’s missions and goals.
- **Banner FOAP** – Enter the primary Banner FOAP that will fund the trip. Do not enter an amount or comment in the Cash Advance Section.

5. Select Save in the top right-hand corner of the screen.
6. Select the **Segments** tab.

![Segments tab](image)

Here you can enter all travel itinerary information related to your trip including Air, Rail, Car, and Hotel information.

7. Use the radio buttons along the top of the section to select whether your trip is Round Trip or One Way.

8. Enter your anticipated departure and destination airports, as well as your departure date. Continue entering your air itinerary details to completely document your air travel, including your return flights.

Enter any Rail, Car, and Hotel reservations applicable to the trip.

9. Select the **Expenses** tab to enter estimates of the travel expenses related to your trip.

![Expenses tab](image)

10. Select the **Approval Flow** tab to see the routing of your International Travel Request.

![Approval Flow tab](image)

All requests will route initially to the employee’s supervisor. Based on the Banner FOAP entered on the Request Header tab as well as any additional FOAPs allocated at the individual line item level on the Expenses tab, the report will route to the applicable Banner Org Approver(s) to approve the funding. If any Foundation funds or Contract and Grant funds are being used, the report will also route to Financial Accounting & Reporting and/or Contract and Grant Accounting for further review.

Following these reviews, the International Travel Request will route to the Capstone International Center (CIC). The CIC will review the destination for any applicable travel advisories or warnings.
Once all approvals are completed, P-Card Services will be notified in order to remove any international restrictions from the P-Card noted in the Request Header.

**Attaching Supporting Documentation**

There are no required attachments for International Travel Requests. The system allows for attachments at the discretion of the traveler. You can attach any necessary supporting documentation to your International Travel Request.

1. With the request open, select Attachments and then Attach Documents.

2. In the window that appears, click Browse and navigate to the desired folder (wherever you saved the scanned or saved images). Select a file and click Open. The file is added to a list under Files Selected for uploading. Repeat the process until all files (up to 10) are listed under Files Selected for uploading. Click Upload. Click Close when finished uploading.
**Request Delegates**

Delegates are employees who are allowed to perform work on behalf of other employees. Note that Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

**Traveler**

A traveler can set up a delegate to enter the International Travel Request. Once the Request is built, the Delegate can use the “Notify Employee” button to let the traveler know the Request is ready to submit.

*The Traveler must certify and submit their own travel request.*

**Approver**

An approver can also set up a delegate to approve International Travel Requests.

1. On the Concur home page, select Profile in the top right corner and then select Profile Settings.

2. Under Request Settings, select Request Delegates.

3. Click the Add button to add a Delegate. Only active Concur users with approval rights can be added.

4. Select from the listed permissions to assign the applicable rights.
   - **Can Prepare** – Delegate can create expense reports and requests on your behalf.
   - **Can View Receipts** – Delegate can view receipt images on your behalf.
   - **Receives Emails** – Delegate receives a copy of each Expense or Request related email that you receive, except for approval emails.
   - **Can Approve** – Delegate can approve expense reports and requests on your behalf without date constraints.
• **Can Approve Temporary** – Delegate can approve expense reports and requests on your behalf but only for the specified option. If you select this option, you must select a beginning and ending date.

• **Can Preview for Approver** – Delegate can preview each report/request in the approver's approval queue. This delegate cannot approve the report/request – instead, the delegate's task is to ensure that the report/request is ready for the approver to review and approve.

• **Receives Approval Emails** – Delegate receives a copy of each Expense approval related email that you receive.
Frequently Asked Questions

How will a non-employee/student request travel overseas?

International travel pre-approval through the Concur Request module applies to faculty and staff only.

Does the new process apply to blended trips where personal travel is blended with university business travel?

Yes, an International Travel Request is required for blended trips. A comment should be included to explain which parts of the trip are personal and which are for business.

Can a traveler’s delegate enter the International Travel Request?

The Delegate can build the Request for the traveler. Once the Request is built the Delegate can use the “Notify Employee” button to let the traveler know the Request is ready to submit. The Traveler must certify and submit their own travel request.

How do I complete the International Travel Pre-Approval in Concur for group travel?

All faculty/staff within the group will need pre-approval through an International Travel Request. Comments should be added to explain the trip is for group travel.

Will there be any need to keep a paper copy of the approval with the trip folder?

No, approved Requests will remain in Concur for 120 days after the trip end date.