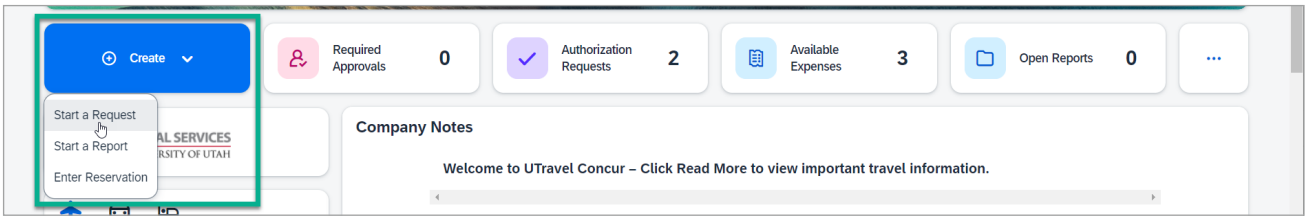
Request Travel

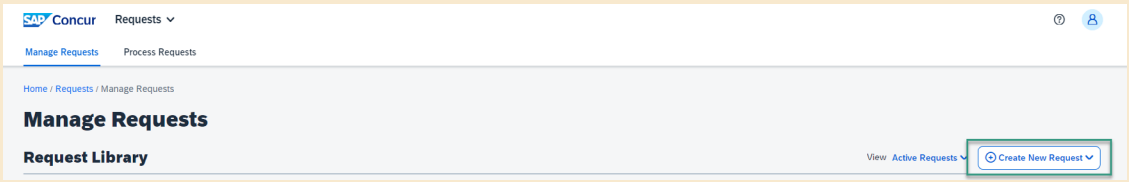
Submit a Pre-Trip Request

1 From the homepage, hover over the "+ Create" button and click "Start a Request".

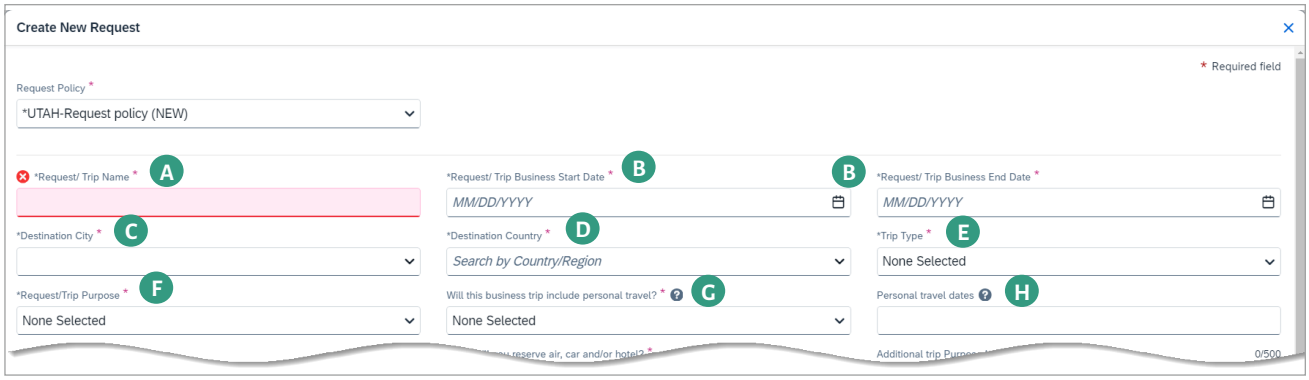


Quick Tip

A new request can also be created from the *Request Library* by clicking the "Create New Request" button.



2 Complete all required fields (indicated with a red asterisk).



A **Request/Trip Name:** enter a description of the trip that will make it easy to find after the request is submitted. Some departments may have their own naming convention.

B **Request/Trip Start & End Date:** enter/select the start and end date of the trip by clicking the calendar icon and selecting the date or typing the date in the MM/DD/YYYY format.

C **Destination City:** search for and select the destination of the trip. Note that the results are set to show "All" countries and regions by default and can be updated to filter results.

D **Destination Country:** select the country of the destination.

E **Trip Type:** select the type of business trip (e.g., domestic out-of-state, international, etc.).

F **Request/Trip Purpose:** select the reason for the business trip (e.g., professional development).

G **Will the business trip include personal travel?:** select "Yes" or "No" if the trip includes personal travel days.

H **Personal travel dates:** if "Yes" was selected in the previous field, enter the date range of the personal travel in MM-DD-YY - MM-DD-YY format.

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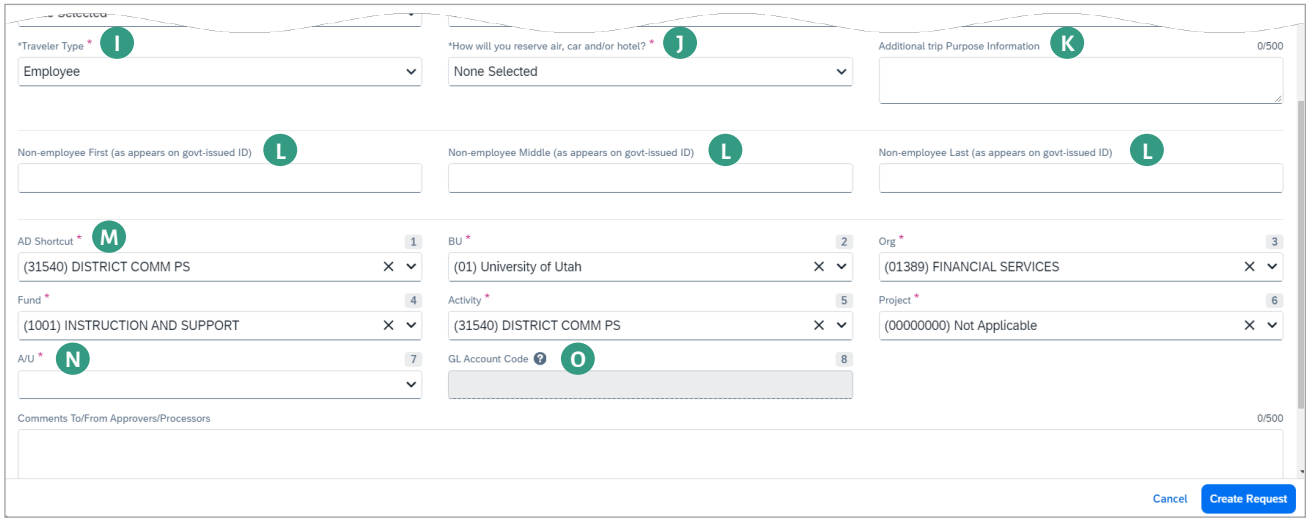
2 Complete all required fields (indicated with a red asterisk) and click the "Create Request" button.



I **Traveler Type:** this field will default to "Employee". To change, select a value from the drop down (i.e. "Group Travel", "Non-employee", or "Student").

J **How will you reserve, air, car, and/or hotel?:** select how travel will be booked.

- **Book online - Concur Travel**: select if planning to book via the Concur booking tool or Concur mobile app.
- **Book with Agent - (CBT) Christopherson Business Travel**: book with the assistance from a CBT agent.
- **Book outside of Concur Travel and CBT**: book using a third-party tool. The university strongly encourages the use of the Concur booking tool or CBT for booking travel.

LEARN MORE

See the *Booking Methods* guide on the Financial Services Training site for more information about how to determine the best travel booking method for university business: Concur booking tool or Christopherson Business Travel (CBT).

K **Additional Trip Purpose Information:** add any additional details about the trip.

L **Non-employee First, Middle, & Last:** enter the name of the non-employee as it appears on their government-issued ID that will be used at the airport.

M **AD (Account Distribution) Shortcut:** the Activity or Project is used as a shortcut to populate the rest of the elements of the Chartfield string (i.e., Business Unit, Org, and Fund). This value will default from the user's profile but can be updated.

QUICK TIP

To update the Chartfield string, start with the "AD Shortcut" and update fields in numerical order. The number is located in the upper left-hand corner of each field. This information will be carried over to the expense report and can be updated before submitting the report.

N **A/U:** select whether the travel is allowable ("1") or unallowable ("0").

O **G/L Account Code:** select the appropriate travel expense type. See a list of travel-related account codes here.