

Concur How-to: Requesting Travel Pre-Approval ^[1]

All domestic and international travel must be approved prior to booking a trip. It is recommended that domestic travel be approved using Concur Request, however and department can elect to use an internal travel pre-approval process. Please defer to your department to determine what domestic pre-approval process is appropriate for you. All international travel must be approved using Concur Request and you will need to enter your Request ID to finalize your international reservation.

Changes to your travel itinerary will require a new, approved travel request prior to booking your airfare per the following guidelines:

- A change in routing/destination. *You should enter all legs of your trip in the travel request.*
- A change in travel days by more than one day for departure and/or return.

You can recall, modify, and resubmit your original travel request, as long as it is done prior to the trip start date.

Read the procedures

1. In Concur, hover over the **New** button and select **Start a Request**.
Delegates can submit a request on behalf of an employee. If you are entering this international travel request on someone's behalf, you must first act as that person's Delegate ^[2].
2. Complete the required fields on the **Request Header** tab.
 - 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**. You'll identify the other cities/countries later.
 - 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.
 - 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.
 - Use Concur or CBT to obtain your desired travel itinerary and quote. You'll need this to complete the Estimated Amount for each of the Expected Expenses entered on Travel Pre-Approval Request.
 - Select the appropriate reviewer under **Submit Requests to**.
If you select *HR Supervisor*, this request will route to the individual to whom you report.
If you select *SpeedType*, this request will route to an approver with a Finance Fiscal Role on the SpeedType.
 - For trips that will be paid for by another entity, enter your department's default

operating **SpeedType**.

- Use the **Attachments** dropdown to select **Attach Documents**. Attach your documentation file by clicking **Browse** and **Attach**.

A trip budget is required support for your request. Additional documents may be attached to your request, even after it has been submitted.

Click **Create Request**

3. Select the **Segments** tab. Airfare information is required for international travel and impacts approval flow for your request. Click the plane icon and select **Air Ticket**.
 - 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 **Air Travel** section and provide the transportation mode in the comments.

Note: Car Rental and Hotel Reservation segments are optional.

4. Review the **Approval Flow** tab.
 - Your request will first route to your HR supervisor or a SpeedType approver, depending on which you selected on the Request Header.
If you selected SpeedType approver, type an asterisk (*) in the first approval box to see a list of available approvers and select one from that list.
 - For international travel requests, the request then routes to the designated officer (or their delegate) for your HR organizational unit and then (for high-risk destinations) to the appropriate chancellor/president for approval.
 - If you need to add an additional approver, click the + icon to search for the approver.

5. Click **Submit Request**

Note: If you prepared this request on behalf of the traveler and you'd like them to review and submit the request, click **Notify**.

The Final Review window opens. To review the export control and regulatory compliance information, click the link for your campus. Click **Accept & Submit**.

6. 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.
 - 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.

Links

[1] <https://www.cu.edu/psc/training/booking-travel/requesting-approval-travel>

[2] <https://www.cu.edu/psc/training/booking-travel/acting-delegate-or-travel-arranger>