

Objective: This section will cover the steps for creating a Travel Request for Domestic and Foreign

1. Hover your cursor over the '+ New' button located at the top of the screen and **select** *Start a Request* from the dropdown menu.

Concur Home 🗸				
SLAC NATIONAL ACCELERATOR LABORATORY			+ New	1 Requ Appro
My Trips (0)	→	Ale	Start a Request Start a Report Enter New Rese	rvation

2. In the *Create New Request* screen, **choose** either 'Foreign' or 'Domestic' from the dropdown menu under the 'Request Policy' field. Then, proceed to complete all the required fields marked with a red asterisk (\*).

cleate New Request					×
					* Required field
Request Policy * 🕜		Name Your Request *		Request/Trip Start Date *	
*SLAC-Domestic Travel	~			MM/DD/YYYY	Ë
equest/Trip End Date *		*Trip Type		*Trip Type2	
MM/DD/YYYY	₿	Domestic	~	Domestic	~
tusiness Purpose * 🚱	0/500	Will you be attending a conference? *		Will this include personal travel? *	
		None Selected	~	None Selected	~
		Local Travel? * 🚱			
		None Selected	~		
roject *	1	Activity	2	WBS	3
	~				
und	4	Org		Location	
und	4	Org (10047030) BSD Controllers Office		Location SLAC	
und 	4	Org (10047030) BSD Controllers Office		Location	

**Note**: Ensure that the 'Request Policy' field matches the 'Trip Type' and 'Trip Type 2' fields (e.g., for SLAC – Foreign Travel, select 'Foreign' as the trip types, and for SLAC – Domestic Travel, select the 'Domestic' trip type).

Request Policy * 🚱		Name Your Request *		Request/Trip Start Date *	
*SLAC-Domestic Travel	~			MM/DD/YYYY	Ë
Request/Trip End Date *	1	*Trip Type		*Trip Type2	
MM/DD/YYYY	Ë	Domestic	-	Domestic	~





**Note**: If your travel involves attending a conference, ensure that you select *Yes* in the *Will you be attending a conference?* field. Even if you are unsure whether the event qualifies as a conference, it is advisable to select Yes, and the travel office will review and validate the event for you.

/es, attending in person	~
None Selected	
No	
Yes, attending in person	_
Yes, attending virtually	
00000	~ ~



**Note**: If the travel is being funded by non-SLAC sources, use *OFund* as the project number for domestic travel, and *FFund* as the project number for foreign travel.

(OFUND) Other Funded         X         00000         X         00.00.00.00           Fund*         4         Org         Location		2 WBS	1 Activity	Project *
Fund * 4 Org Location	× ×	× v 00.00.00.00	✔ 00000	(OFUND) Other Funded
		Location	4 Org	Fund *
000000000 X V (10047030) BSD Controllers Office Remote		Remote	✓ (10047030) BSD Controllers Offic	00000000



**Note**: When a project number is selected, the dropdown options for 'Activity,' 'WBS,' and 'Fund' will be narrowed down to show only the applicable choices for the selected project.

3. After completing the request header, click Create Request at the bottom of the screen.





4. Next, you will need to add your expected expenses for the travel. Start by **clicking** *Add*, which will display all the available expense types for the trip.

inade Requests Process Requests	Add expected expenses and/or travel plans	×
and reduces reducers	Search for an expense type	
ome / Requests / Manage Requests / Domestic Travel		
Domestic Travel 🗎 🦯	Trip Segment(s) [*REQUIRED]	
ot Submitted   Request ID: 7VCT	✓ 01. Trip Expenses	
Request Details V Print V Attachments V	CERN - Meals and Incidentals	
	CERN Lodging (allowable up to \$150/night)	
XPECTED EXPENSES	Lodging (If Over Per Diem)	
Add Edit Delete Allocate	Lodging - Multiple Locations	
	Lodging - Single Location	
	Manual Adjustment	
	Meals - Multiple Locations	
	Meals - Single Location	I
	Personal Trip Dates	
	✓ 02. Transportation	
	Airfare	
	Con Doubel	*



**Note**: It is recommended that you add the *Trip Segment(s)\** [*REQUIRED*] expense first, as it is a mandatory expense type, and you will not be able to submit your request without it.



Note: For travel to a single destination, use the Lodging – Single Location and Meals – Single Location expense types.

For travel to multiple locations or if trip includes personal travel, use *Lodging* – *Multiple Location* and *Meals* – *Multiple Location*, and specify the number of days or nights in each location.

earch for an expense	type	
00. Trip Details		
Trip Segment(s) [*	REQUIRED]	
01. Trip Expenses		
CERN - Meals and	Incidentals	
CERN Lodging (al	owable up to \$150/night)	
Lodging (If Over P	er Diem)	
Lodging - Multiple	Locations	
Lodging - Single L	ocation	
Manual Adjustmer	t	
Meals - Multiple L	ocations	
Meals - Single Loo	ation	
Personal Trip Date	s	
02. Transportation		
Airfare		

## **Creating a Travel Request**





**Note**: If you selected Yes for the *"Will you be attending a conference?"* field in <u>step #2</u>, remember to add the Training/Registration expense type to your travel request.

L	✓ 04. Other	
	Training/Registration	

6. Once you have finished adding all the necessary expenses, click Submit Request.

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Reque	st Details 🗸	Print V Attachments V				
EXP Add	ECTED	EXPENSES Allocate				
	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓₹	Amount↓↑	Requested↓↑
	F	Trip Segment(s) [*REQUIRED]	Batavia, Illinois	05/01/2024		
		Lodging - Single Location	Batavia, Illinois	05/01/2024	\$428.00	\$428.00
		Meals - Single Location	Batavia, Illinois	05/01/2024	\$265.50	\$265.50
		Car Rental		05/01/2024	\$150.00	\$150.00

7. Read the SLAC User Confirmation Agreement, and then click Accept & Continue.

Manage Requests  By clicking on the 'Accept & Submit' button, I certify that:  This is a true and accurate estimation of time and expenses that will be incurred to accomplish official SLAC business, and this request is compliant with SLAC's Travel & Expense policy.  Submit Request  Add Edit C  Add Edit C  Accept & Continue  Requested  Requ	SAP Concur	Requests V SLAC User Confirmation Agreement	0 8
By clicking on the Accept & Submit button, I certify that: This is a true and accurate estimation of time and expenses that will be incurred to accomplish official SLAC business, and this request is compliant with SLAC's Travel & Expense policy. Domesti Not Submitted   R Request Details ~ EXPECTED Add Edit C Alerts J1 ~ Agenuse types	Manage Requests		
Domesti       Submit Request         Not Submitted   R       Request Details ~         EXPECTED       Add Edit D         Add Edit D       Cancel Accept & Continue         Alerts J1       Requested J1	Home / Requests / Ma	By clicking on the 'Accept & Submit' button, I certify that: This is a true and accurate estimation of time and expenses that will be incurred to accom- plish official SLAC business, and this request is compliant with SLAC's Travel & Expense policy.	
Not Submitted   R Request Details ~ EXPECTED Add Edit C Alerts J1	Domesti		Submit Request
Request Details ~         EXPECTED         Add       Edit         D       Alerts J1         Alerts J1       Requested J1	Not Submitted   R		
EXPECTED Add Edit D Alerts J1 Appende types	Request Details 🗸		
Add Edit C Cancel Accept & Continue Alerts J1 Expense types	EXPECTED		
☐ Alerts↓↑ ▲Apense type↓↓↑ Requested↓↑	Add Edit D	Cancel Accept & Continue	
	☐ Alerts↓↑	Expense type+1 Details+1 Dates Annual	l↓↑ Requested↓↑



**Note**: Please be aware that the expense types listed under the request are intended to provide an *estimated projection* of your trip expenses, not the actual amounts. The actual expenses incurred during your travel will be compiled and reported later when you create and submit an expense report.