

# Linking Travel Request

These instructions will include how to link a Travel Request to a Travel Expense Report.

*Click on any of the link below to skip ahead to that section.*

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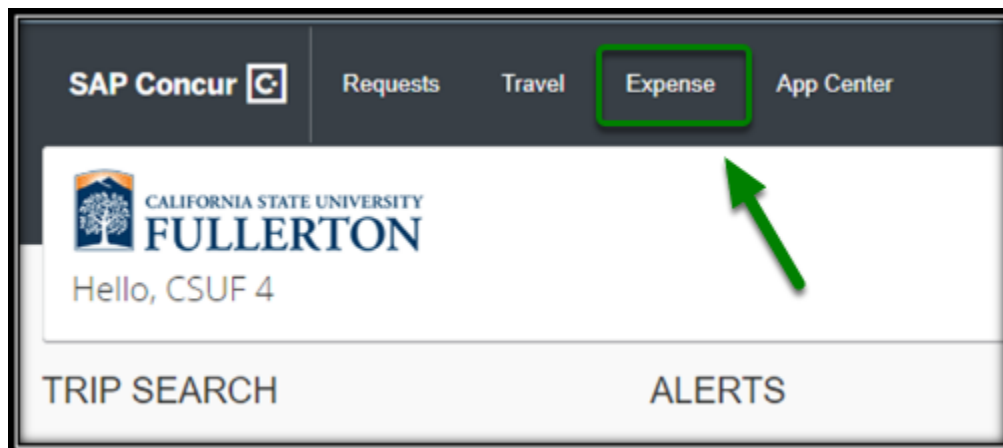
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💡 If you need assistance with logging into Concur, please go to [Logging into Concur](#).

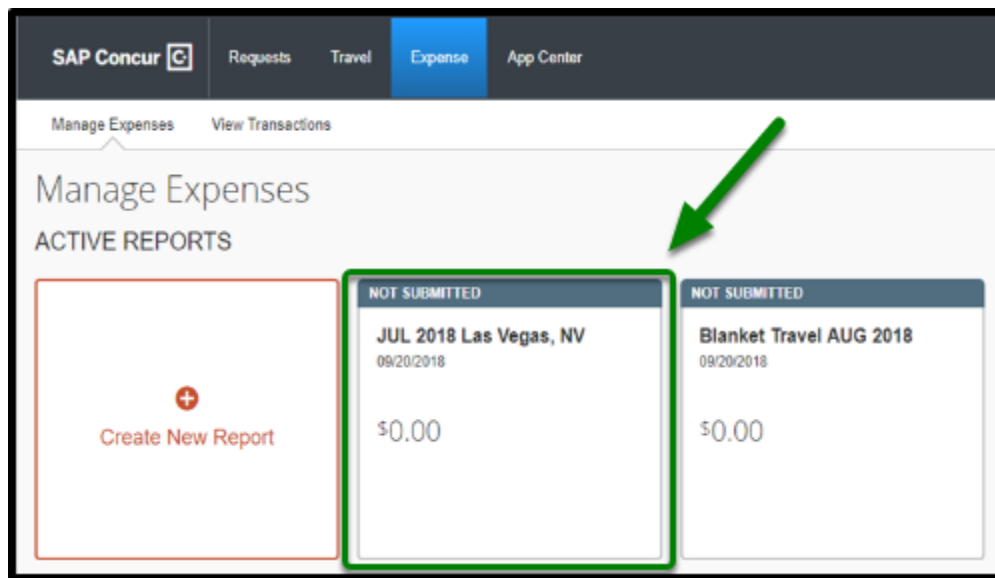
## Linking Online Travel Request with existing Expense Report

- ❗ With these simple steps, you will be able to link your Travel Request with your existing Expense report. Be sure to select the appropriate Travel Request when linking to your Expense Report.
- ❗ You may link more than one travel request to a corresponding expense report. For example, when linking an amended request to your expense report, please make sure to link both the original request and the amended request.

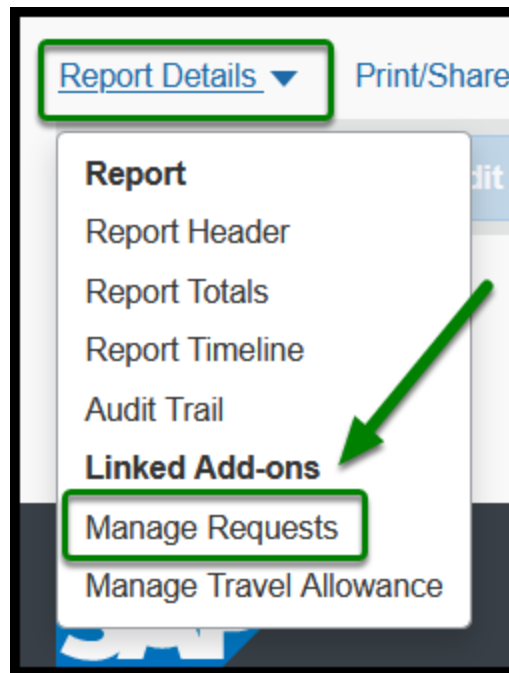
**Step 1:** Begin by clicking on **Expense**.



**Step 2:** Click on the appropriate Expense Report. For example, we will select the Expense Report "JUL 2018 Las Vegas, NV."



**Step 3:** Your screen will refresh. Once you are on this page, head to **Report Details**. After you click on **Report Details**, select **Manage Requests**.

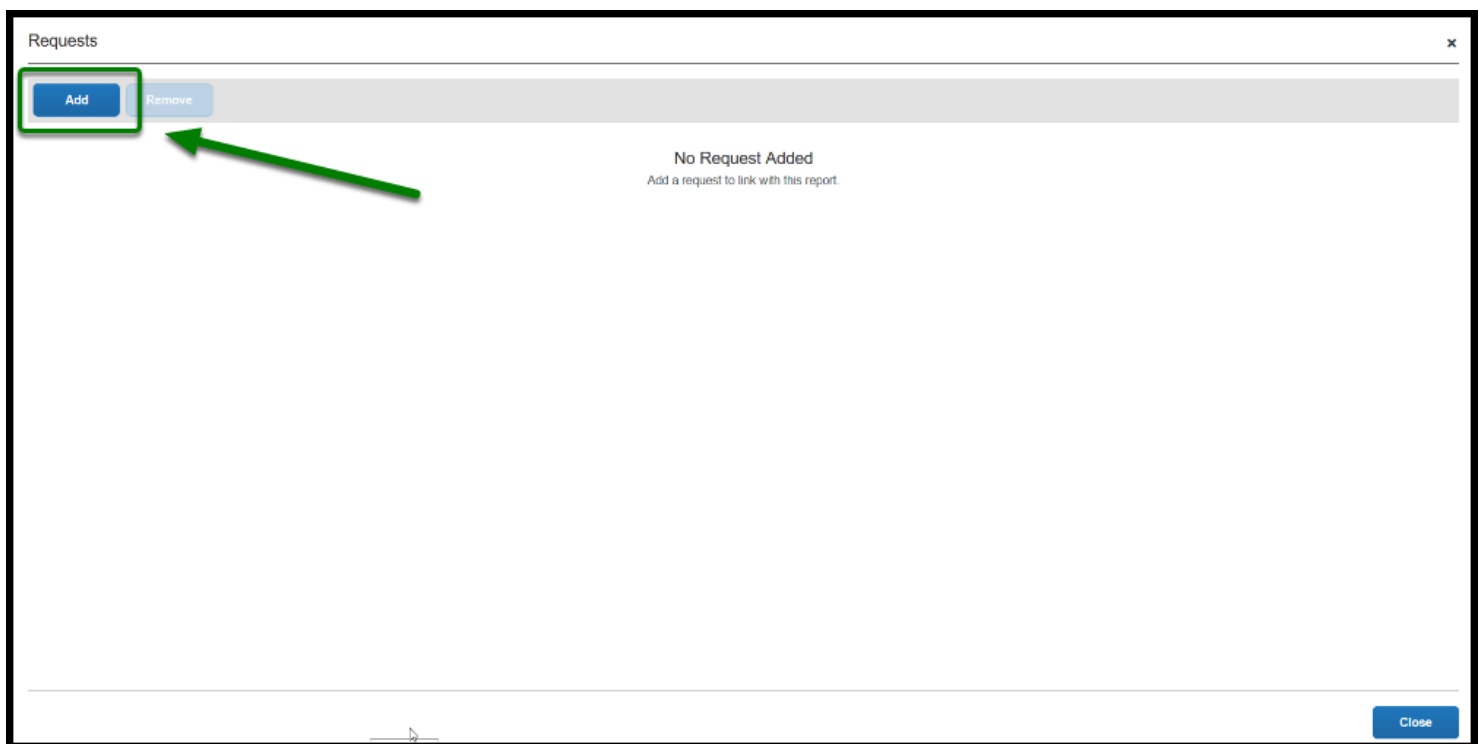


**Step 4:** After you have selected the **Manage Requests**, this pop-up will emerge.



**Step 5:** We will need to add a Travel Request that we had made previously, in order to create a link with our Expense Report.

Begin by clicking **Add**.



**Step 6:** From there, a pop-up will emerge and you will need to select the appropriate Travel Request that you would want to link. For this example, we will be linking the Nov, 2019 Washington, DC Requests.

Once you have checked the box, click **Add To Report** on the lower right-hand corner.

	Request Name	Request ID ▲	Start Date	End Date	Cancelled	Request Total	Approved	Rem:
<input type="radio"/>	Blanket Travel FY 2019-2020	3G7M	07/01/2019	06/30/2020	No	\$200.00	\$200.00	\$200
<input type="radio"/>	Oct 2019 Los Angeles, CA	3HKY	10/01/2019	10/01/2019	No	\$250.00	\$250.00	\$250
<input checked="" type="radio"/>	Nov 2019 Washington D.C.	3HVT	11/17/2019	11/20/2019	No	\$1,444.60	\$1,444.60	\$967

Cancel Add To Report

**Step 7:** Once you have clicked **Add To Report**, you will be directed back to this pop-up and will notice that the Request that we had chosen had been added.

From here, all you need to do is click **Close**.

Requests

Add

Remove

<input type="checkbox"/>	Request Name	Request ID ▲	Cancelled	Request Total	Approved	Remaining
<input type="checkbox"/>	Nov 2019 Washington D.C.	3HVT	No	\$1,444.60	\$1,444.60	\$967.30

Request added

Close

**Step 8:** After you have clicked **Close**, you are then free to add any expenses that you have.

Report Details ▼

Print/Share ▼

Manage Receipts ▼

Add Expense

Edit

Delete

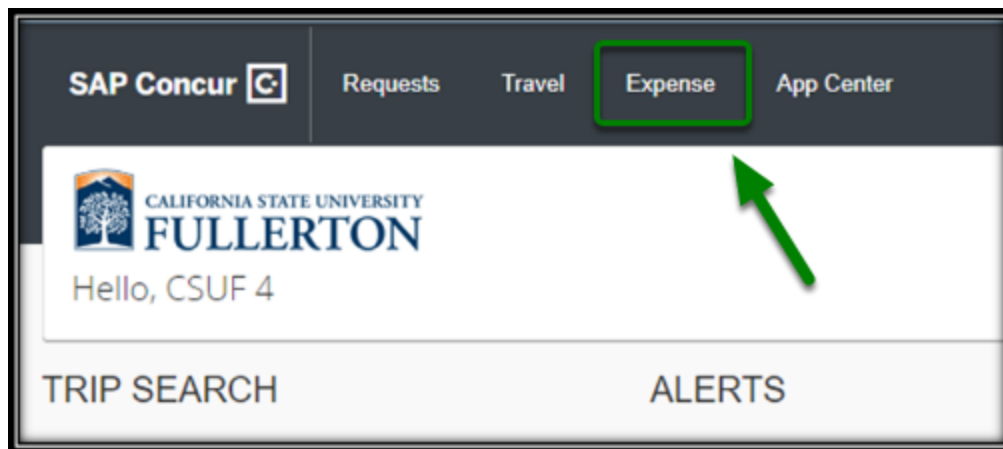
Cancel

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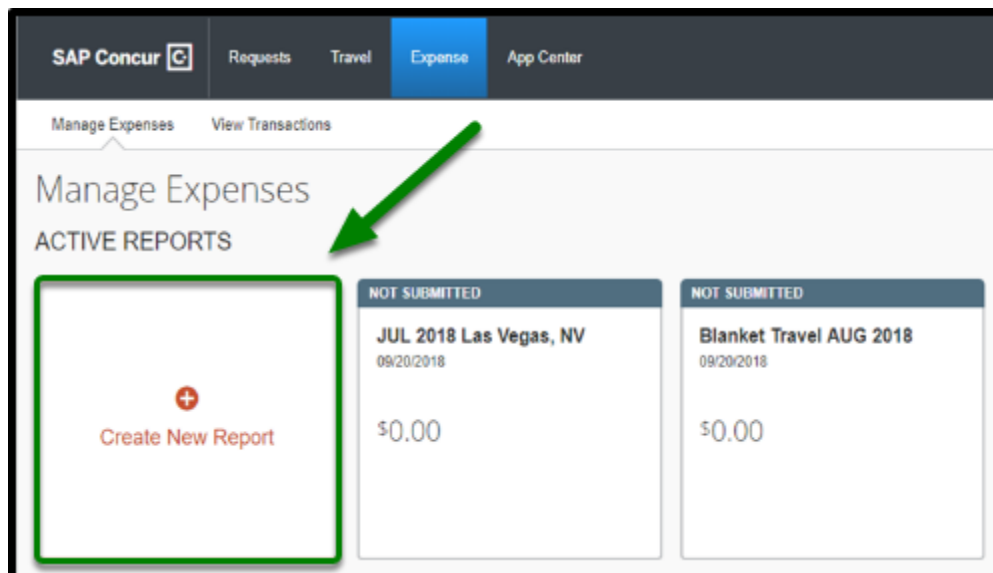
# Linking Online Travel Request with a New Report

- i** By following these simple steps, you will be able to create a new Expense Report and link an existing Travel Request to that new report. By doing so, some of the information from your trip will auto-populate, making it easier to submit your Expense Report.

**Step 1:** Begin by clicking on **Expense**.



**Step 2:** Click on the appropriate Expense Report. For this example, we will be selecting **Create New Report**.





**Step 3:** Your screen will refresh. Once you are on this page, you will notice that you are prompted to fill out your Expense Report as you normally would.

The screenshot shows the 'Create New Report' form. Key fields include:
 

- Policy:** State Travel
- Report/Trip Name:** Nov 2019 Washington, D.C.
- Report Date:** 11/08/2019
- Report/Trip Start Date:** 11/17/2019
- Start Time:** 7:30 AM
- Report/Trip End Date:** 11/21/2019
- End Time:** 5:45 PM
- Trip Type:** Out-of-State
- Main Destination City:** Washington, D.C.
- Report/Trip Purpose:** Conference
- Event Name/Business Purpose:** (empty)
- Does this trip contain personal travel?:** (empty)
- Personal Dates and Locations:** (empty)
- Division:** (10238) VP Administration & Finance
- Department ID:** (10147) Adm & Finance IT
- Fund:** THEFD-CSU Operating Fund (THEFD)
- Class:** Search by Code

 The 'Create Report' button is highlighted in blue at the bottom right.

**Step 8:** Once you have confirmed that all the information was inputted correctly click on **Create Report**.

This close-up shows the bottom right of the form. It includes a 'Code' input field, a 'Cancel' button, and a 'Create Report' button. A green arrow points directly to the 'Create Report' button, which is also highlighted with a green border.

💡 Refer to [Linking Online Travel Request with existing Expense Report Instructions](#) on how to link a travel request to an expense report.

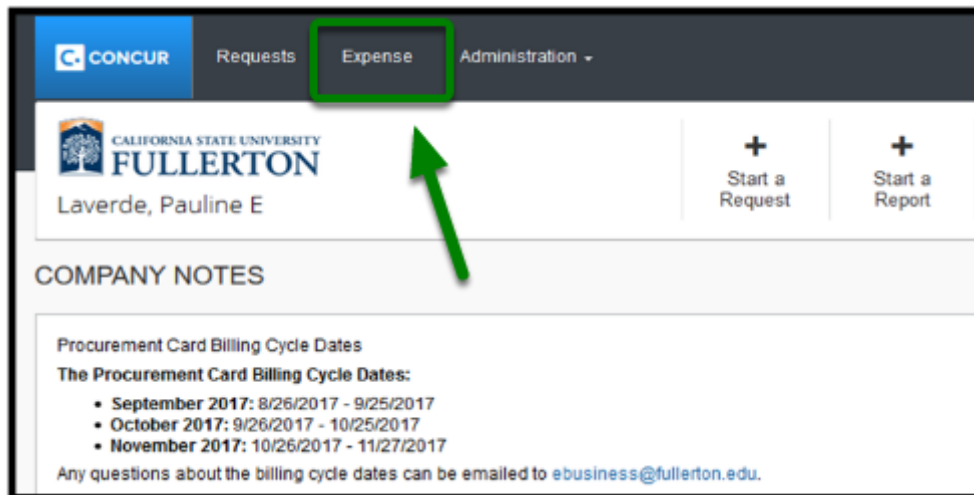
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## Linking Paper Travel Request

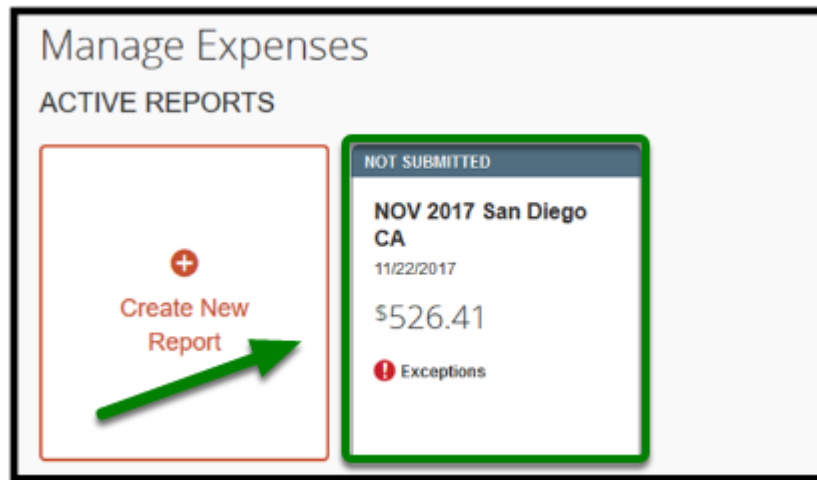
**i** If your Travel Request was done on paper and you are now processing the Travel Expense through Concur, please follow the following steps.

**💡** Keep your TR# at hand as you will need to provide it within your Expense Report.

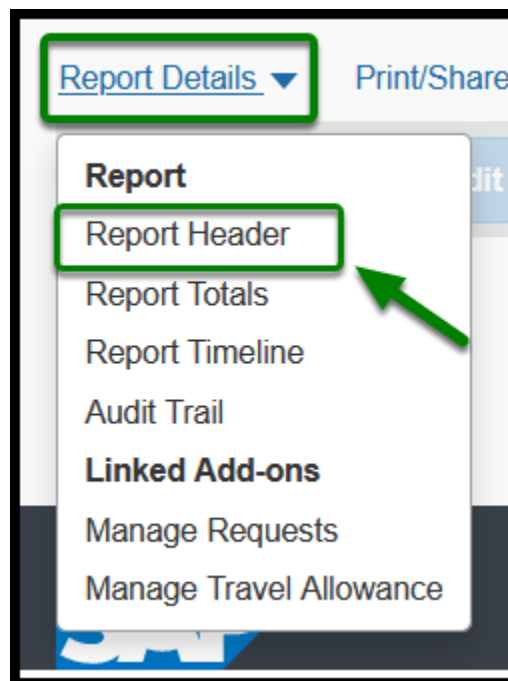
**Step 1:** Start by clicking on **Expense**.



**Step 2:** Next, select the report you need to link a Travel Request to.



**Step 3:** From there, select **Report Details** and **Report Header**.



**Step 4:** Once the Report Header has appeared, add the original TR# into the **Comments** field of the report header.

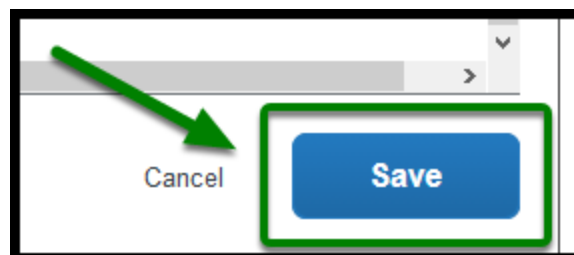
**Report Header**  
Nov 2019 Washington, DC | \$250.00

Report Key 29610	Report Currency US, Dollar	Approval Status Not Submitted
Amount Not Approved 0.00	Amount Approved 250.00	Amount University Paid 0.00
Amount Due University 0.00	Amount Due User 0.00	Amount Due University Card 0.00
Does this trip contain personal travel? * No	Personal Dates and Locations	Division * (10238) VP Administration & Finance
Department ID * (10147) Adm & Finance IT	Fund * THEFD:CSU Operating Fund (THEFD)	Class (10238) VP Administration & Finance
Programs Search by Text	Imported Request ID	

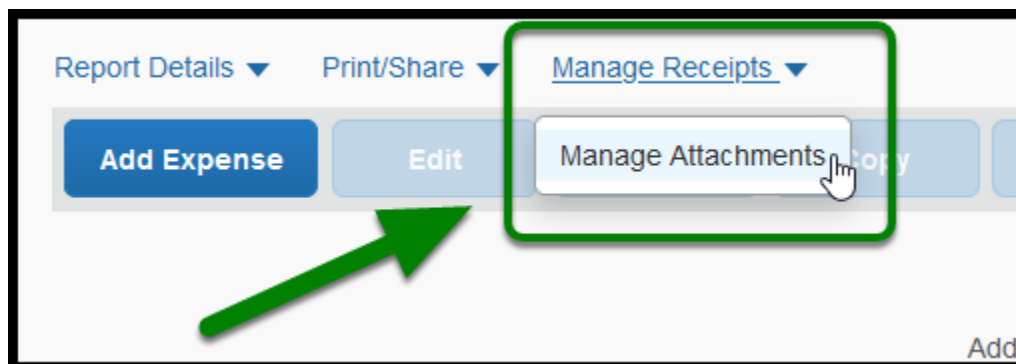
**Comment**  
Original TR# 123456

Cancel Save

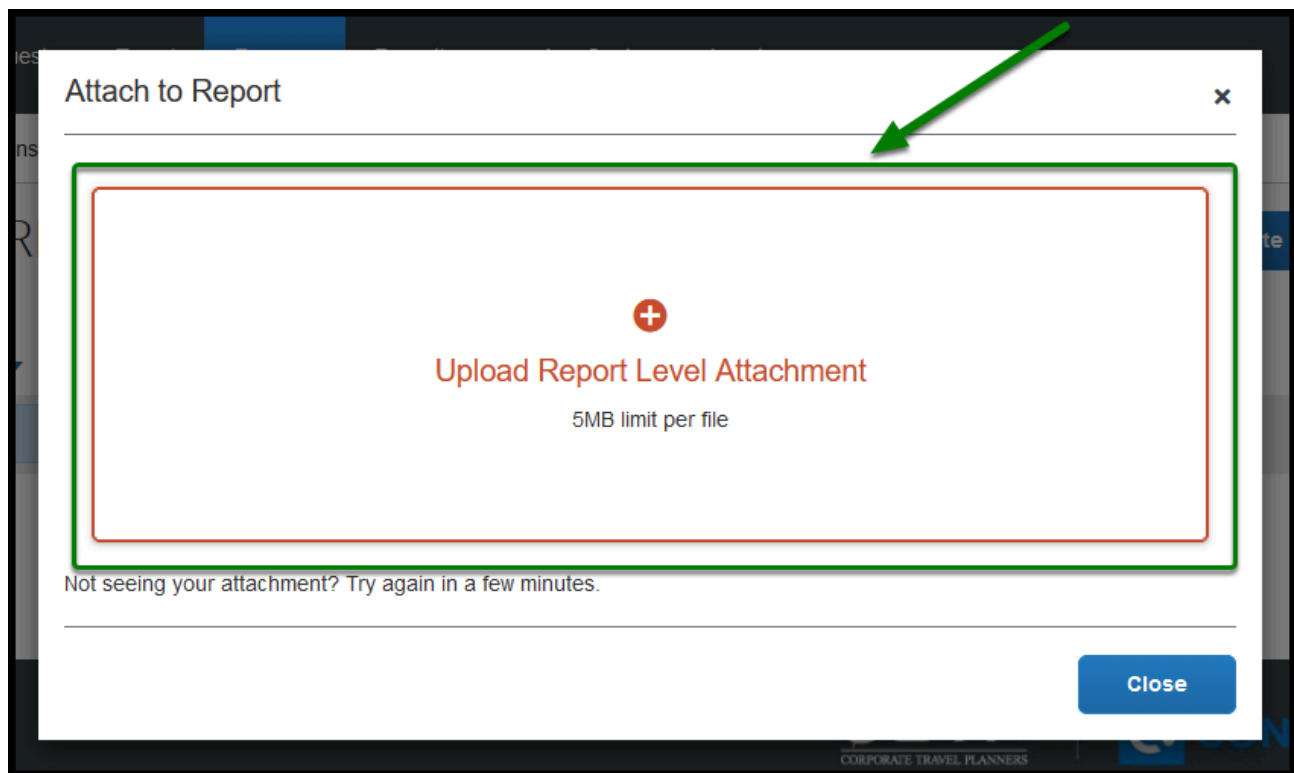
**Step 5:** After you add the TR#, press **Save** in the lower right-hand corner.



**Step 6:** Next, to attach the Travel Request, select **Manage Receipts** and **Manage Attachments**.

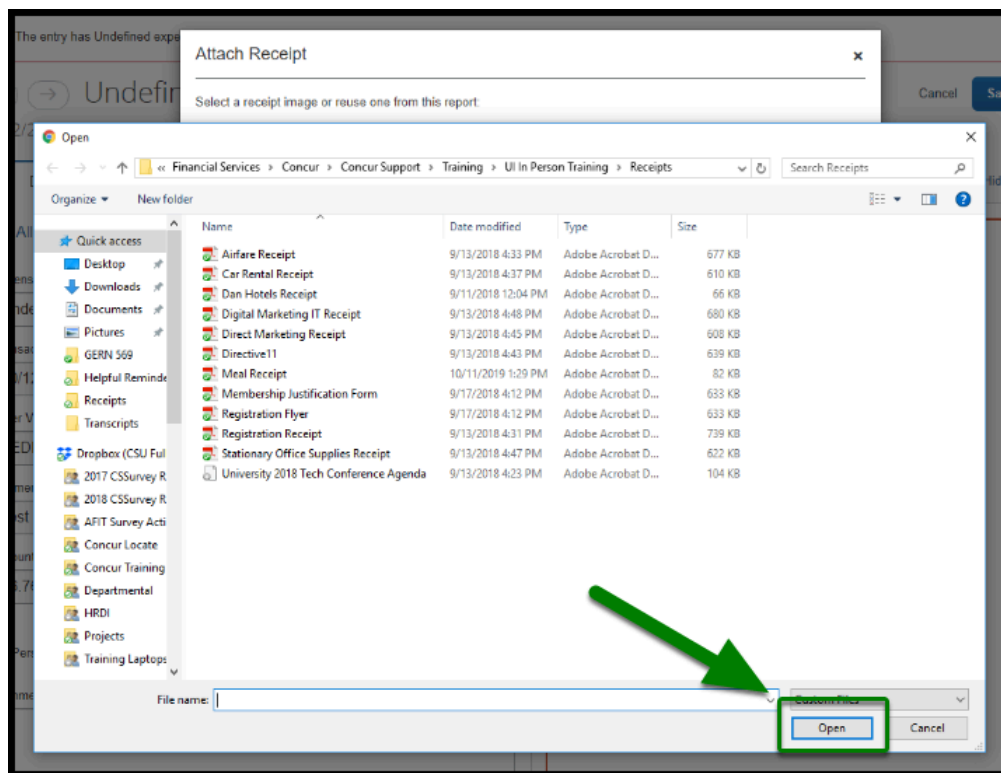


**Step 7:** Select **Upload Report Level Attachment** to attach the document from your computer.



**Step 8:** A pop-up will show and you will need to locate the Travel Request documentation that you saved on your computer.

Once you have found the Travel Request documentation, select it and select **Open**.



**Step 9:** Your screen will refresh and you will see your travel request is attached.

The image shows a screenshot of the "CALIFORNIA STATE UNIVERSITY, FULLERTON BUSINESS TRAVEL AND PREPAYMENT REQUEST" form. The form is divided into several sections: "TRAVELER INFORMATION", "BUSINESS TRIP DETAILS AND PREPAYMENT REQUEST", and "DEPARTMENT ID AND AMOUNT TO BE CHARGED". The "TRAVELER INFORMATION" section includes fields for Traveler's Name, Title, Department Name, Department ID, and E-mail. The "BUSINESS TRIP DETAILS AND PREPAYMENT REQUEST" section includes fields for Trip Destination, Trip Dates, and a section for "Foreign Travel". The "DEPARTMENT ID AND AMOUNT TO BE CHARGED" section includes a table for recording charges by department and fund. The form also includes a "Clear" button and a "Print" button at the top right.

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## Need more help?



Contact Concur Support at [concur@fullerton.edu](mailto:concur@fullerton.edu) or at 657-278-3600.