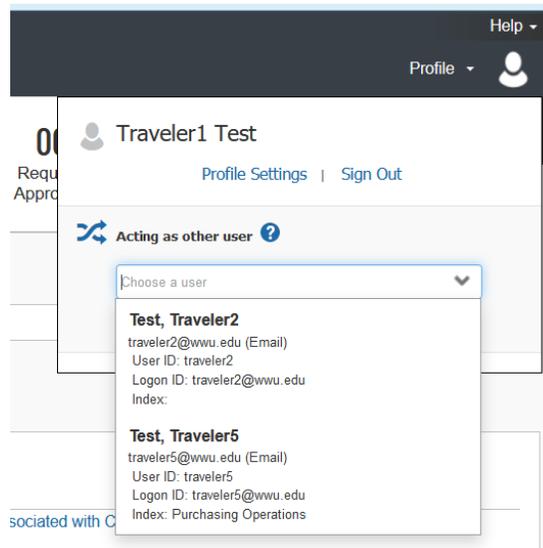
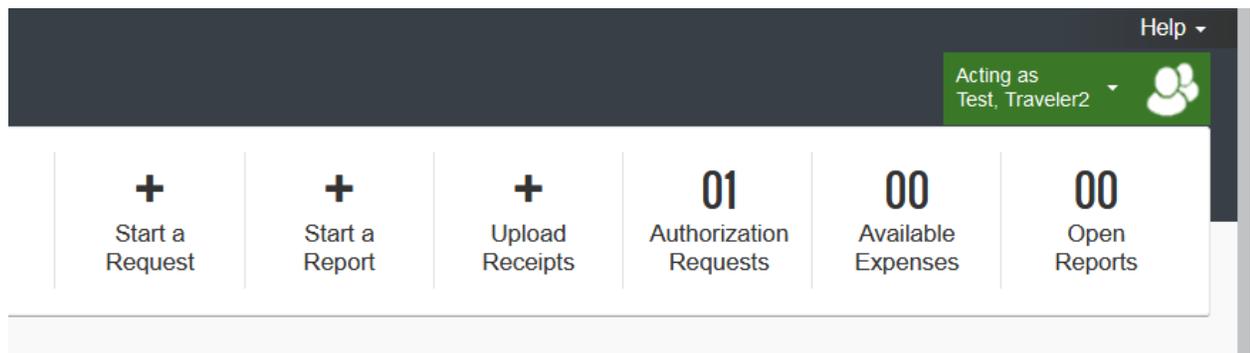


Create a Travel Authorization Request

1. Log in to [Concur](#)
 - **Travelers skip to #2**
 - **Delegates Only:** Click **Profile** on the upper-right of your dashboard and begin typing the traveler's name to search and select from the list field under **Acting as other user**:

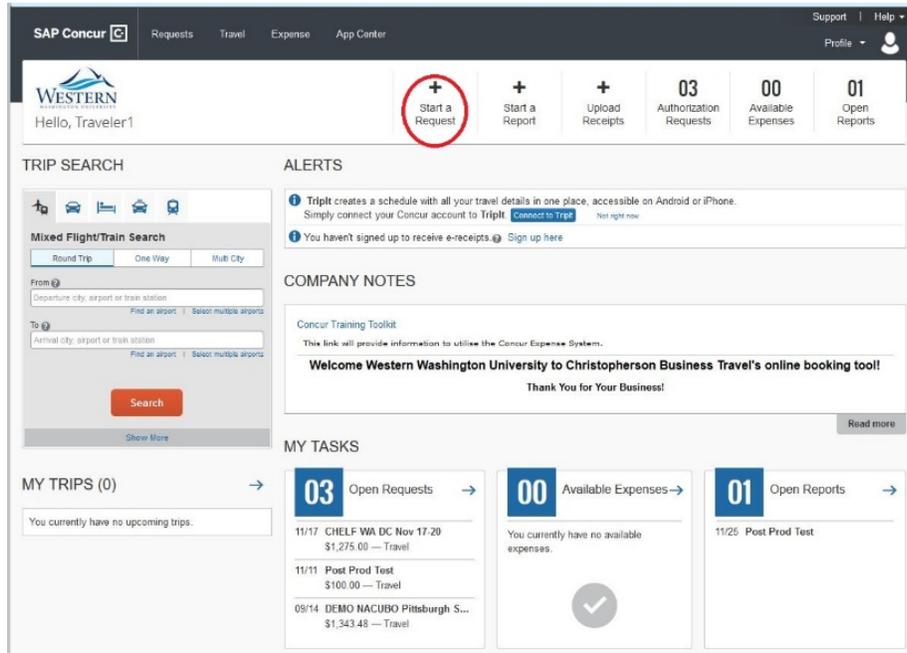


- **If you do not have** the Acting as other User option or the traveler's name does not come up in the search, **the traveler must assign you as a delegate** in their Profile Settings. Travel Services can also enable delegate permissions.
- Click **Start Session**. You are now acting as a delegate for this user, shown by the green label "Acting as (Traveler's Name) ."





2. Click **Start a Request**:



3. Complete all required Request Header fields marked with a red bar.

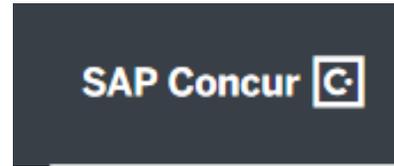
- ✓ **Trip Name:** Recommended naming convention: Event Name + Destination City, State or Nation + Month + Dates + Year
- ✓ **Travel Justification:** spell out event acronyms and clearly state how the travel relates to your work assignment:

Request 367F Cancel Save Attach

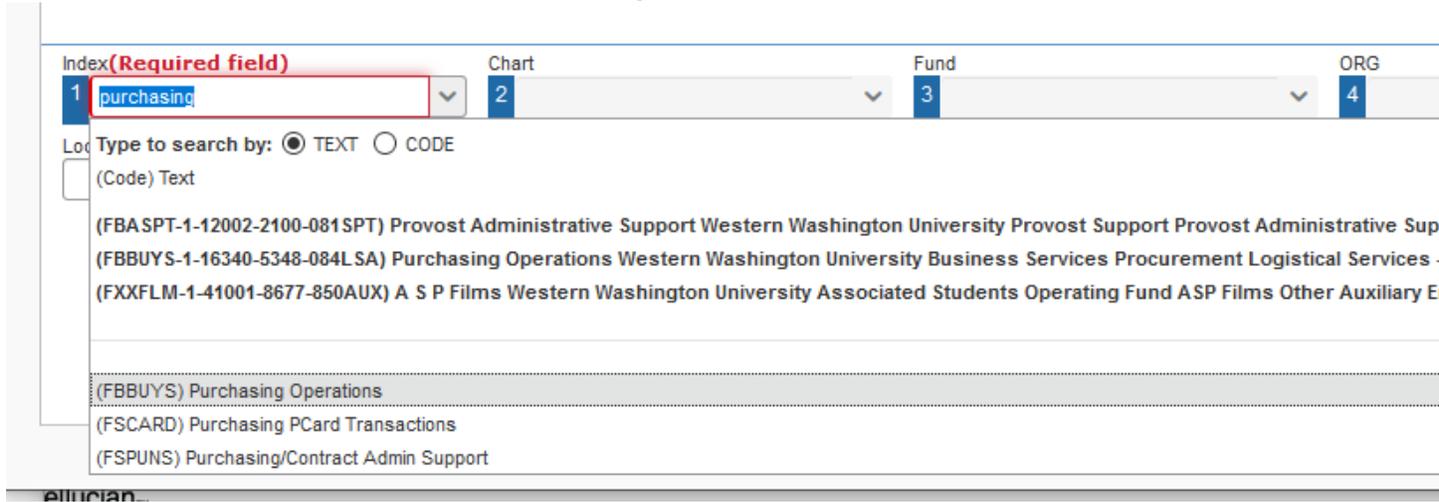
Trip Name: CHELF Mar 1-5 WA DC
Travel Justification and Additional Information: Concur Higher Ed Leadership Foru...

Request Header Segments Expenses Approval Flow Audit Trail

Request Policy *TEST-Employee Travel	Trip Name CHELF Mar 1-5 WA DC	Trip Start Date 03/01/2020	Trip End Date 03/05/2020	Trip Cc
Main Destination City Washington DC, District of Columbia	Main Destination Country UNITED STATES	Travel risk advisory - Medium (Level 3)		
Highest Location Risk Level Medium (Level 3)	Traveler Type Individual Faculty/Staff	Trip Type Out-of-State	Does this trip include personal travel? No	Per
Will you receive an honorarium or payment from other sources? ?	Will you be missing classes? ?	Travel Justification and Additional Information Concur Higher Ed Leadership Forum Best practices and professional development for higher ed travel and expense	Comments To/From Approvers/Processors	



4. **Confirm Default Funding is correct.** Add or update as needed. Search by TEXT (ex: purchasing) or CODE (ex: FBBUYS): (use Index GRANT for grant funds)



Index **(Required field)** 1 purchasing Chart 2 Fund 3 ORG 4

Loc Type to search by: TEXT CODE

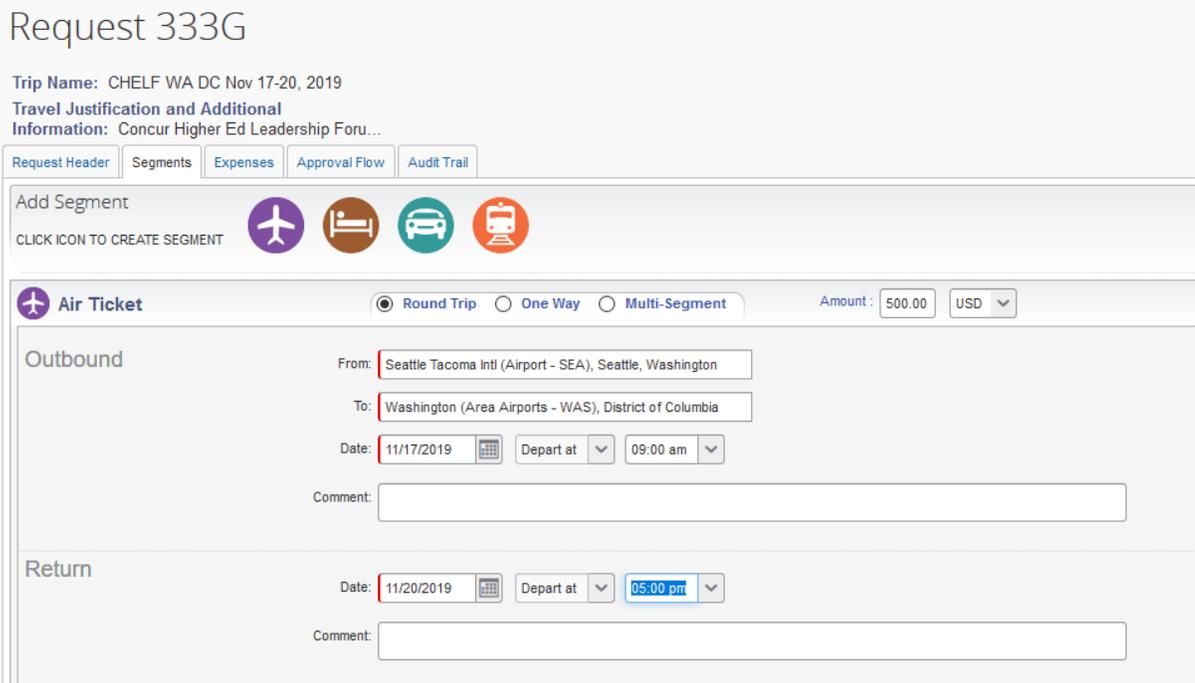
(Code) Text

(FBASPT-1-12002-2100-081SPT) Provost Administrative Support Western Washington University Provost Support Provost Administrative Support
 (FBBUYS-1-16340-5348-084LSA) Purchasing Operations Western Washington University Business Services Procurement Logistical Services
 (FXXFLM-1-41001-8677-850AUX) A S P Films Western Washington University Associated Students Operating Fund ASP Films Other Auxiliary Expenses

(FBBUYS) Purchasing Operations
 (FSCARD) Purchasing PCard Transactions
 (FSPUNS) Purchasing/Contract Admin Support

Cash Advance: If you would like to request an advance for per diem expenses: enter the amount, comment and your initials in the Cash Advance section at the bottom of the Request Header. If you do not see this section and need an advance, contact Travel Services before submitting your Request.

5. **Click the Segments tab** to add estimated airfare (round trip or multiple legs):



Request 333G

Trip Name: CHELF WA DC Nov 17-20, 2019
 Travel Justification and Additional Information: Concur Higher Ed Leadership Forum

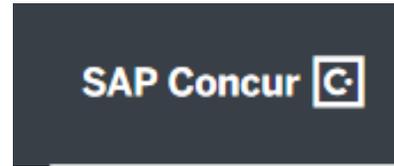
Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
 CLICK ICON TO CREATE SEGMENT    

Air Ticket Round Trip One Way Multi-Segment Amount: 500.00 USD

Outbound
 From: Seattle Tacoma Intl (Airport - SEA), Seattle, Washington
 To: Washington (Area Airports - WAS), District of Columbia
 Date: 11/17/2019 Depart at 09:00 am
 Comment:

Return
 Date: 11/20/2019 Depart at 05:00 pm
 Comment:



6. **Click the Expenses tab** to add estimated expenses like Hotel and Meals Per Diem, Registration, Parking, and Personal Vehicle Mileage. Add all anticipated travel expenses and include comments as needed to clarify:

Request 333G

Trip Name: CHELF WA DC Nov 17-20, 2019
Travel Justification and Additional Information: Concur Higher Ed Leadership Foru...

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 11/17/2019	Airfare	\$500.00	\$500.00
<input type="checkbox"/> 11/17/2019	Personal Vehicle Mileage Estimate	\$119.48	\$119.48
<input type="checkbox"/> 11/17/2019	Registration	\$250.00	\$250.00

Expense Type:

To create a new expense, click the appropriate expense type to the side of the page.

- 03. Meals
 - Meals Per Diem
 - Meals with Meetings, FBA Required
 - Meals, Custom
 - Meals, Day Trip, Taxable

7. If needed, **split funding or choose different funding for an expense**: click **Allocate**, select the expense and **Add New Allocation**:

Expense Type:

Event start Date:

Event End Date:

Are you presenting?

Description:

Transaction Amount:

Save Allocate Cancel

Allocations for Request : CHELF March 1 - 5 WA DC

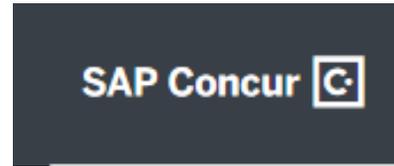
Request List

Allocate By:

Date	Expense Type	Group	Amount
<input type="checkbox"/> 03/01/2020	Airfare		\$550.00
<input type="checkbox"/> 03/01/2020	Ground Trans...		\$50.00
<input type="checkbox"/> 03/01/2020	Meals, Custom	1	\$300.00
<input type="checkbox"/> 03/01/2020	Lodging, Other		\$0.00
<input type="checkbox"/> 03/01/2020	Meals Per Diem		\$76.00
<input type="checkbox"/> 03/01/2020	Personal Vehi...		\$68.00
<input type="checkbox"/> 03/01/2020	Lodging, Other		\$200.00

Allocations Total:\$500.00 Allocated:\$500.00(100)

Percentage	* Index	* Chart	* Fund
<input type="checkbox"/> 100	<input type="text" value="(FBSTAT) Adm..."/>	<input type="text" value="(1) Western W..."/>	<input type="text" value="(17310) Admi..."/>



8. **Review the Approval Flow** tab and add approvers as necessary:

Request 333G

Trip Name: CHELF WA DC Nov 17-20, 2019
 Travel Justification and Additional Information: Concur Higher Ed Leadership Foru...

Request Header Segments Expenses Approval Flow Audit Trail

Travel Services: + x

Supervisory Approver: + x

User-Added Approver: + x
 Test, AA (aa@wwu.edu)
 User ID: Authorizeapp
 Logon ID: aa@wwu.edu
 Search Approvers By

(this step may be skipped)

Cost Object Approval: + x

Grant Approval: + + x
 Test, AA

(this step may be skipped)

9. **To attach** documents, click the blue Attachments button

10. **Click the orange Submit Request button.** You'll receive a notice when your Request is approved.

