Travel Services

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 . . ."
2. Click **+New, then Start a Request** at top of screen
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
   - ✓ **Funding (Fast Index)** Add or update as needed. Search by TEXT (ex: purchasing) or CODE (ex: FBBUYS). Grant funds: search by CODE: use GRANT as the fast index. Individual expense funding can be edited on that tab in a later step if needed.
   - ✓ **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.

4. Click the **blue Save** button
5. Click the **Segments tab** to add estimated airfare information (round trip or multiple legs)
6. Click the **Expenses tab** to add estimated expenses like Registration, Parking, Personal Vehicle Mileage, and estimated Meals and Lodging Per Diem. Add all anticipated travel expenses and include comments as needed to clarify
7. **Split funding or choose different funding** for an expense: click Allocate, select the expense and Add New Allocation
8. Review the **Approval Flow tab** and add approvers as necessary
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.
11. You can **Recall a Request** if editing is needed and the document has not been fully approved. Navigate to Requests, click on the document and select the Recall button.

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