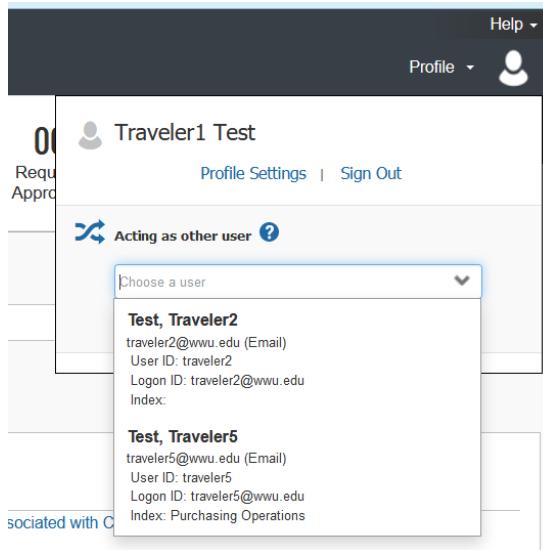


Create a Blanket Travel Request

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) ."



SAP Concur

Travel Services

A screenshot of the SAP Concur Travel Services interface. At the top right, there's a green bar with the text "Acting as Test, Traveler2" and a user icon. Below the header, there are six main navigation items: "Start a Request" (with a plus sign), "Start a Report" (with a plus sign), "Upload Receipts" (with a plus sign), "Authorization Requests" (showing 01), "Available Expenses" (showing 00), and "Open Reports" (showing 00). A "Help" dropdown menu is also visible at the top right.

2. Click **+New**, then **Start a Request** at top of screen
3. Complete all required header fields marked with a red bar
 - ✓ **Trip Name:** include date span authorized for travel; ex: Blanket 2020 or Blanket Travel Spring Quarter 2020
 - ✓ **Trip Start/End Dates:** ex: 01/01/2020-12/31/2020
 - ✓ **Trip Purpose:** select Blanket Travel Request
 - ✓ **Main Destination City:** choose most common destination, or Bellingham
 - ✓ **Travel Justification:** describe the business need for the Blanket Travel Request, i.e. Teaching weekend MBA classes at a satellite site. **One-time events, such as conferences, require a separate Request.**
 - ✓ **Confirm default funding is correct.** Update if needed. Funding can be edited for individual expenses on that tab in a later step. Search by TEXT (ex: purchasing) or CODE (ex: FBBUYS). Grant funds: use GRANT as index.
1. **Click the blue Save button**
2. **Click the Expenses tab to add at least one anticipated expense.** Choose the expense type most likely to be reimbursed, such as Personal Vehicle Mileage Estimate
3. **Split or change funding for an expense:** click **Allocate**, select the expense and **Add New Allocation**.
4. **Review the Approval Flow tab** and add approvers as necessary
5. **To attach documents,** click the blue Attachments button
6. **Click the orange Submit Request button.** You'll receive a notice when your Request is approved.
7. You can **Recall a Request** if editing is needed and the document has not been fully approved by navigating to Requests, clicking on the document and selecting the Recall button



Travel Services

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Sally Parsons | [Travel Services](#)
sally.parsons@wwu.edu | 360.650.6640

Devlin Sweeney | [Business & Financial Systems](#)
devlin.sweeney@wwu.edu | 360.650.4550