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:

     ![Profile setting screenshot]

     - 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 +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.