Create a Travel Authorization Request

1. Log in to Concur. You may need to log in through MyWestern with your universal ID first.
   - 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 asterisk.

- **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:
4. **Funding information:** Filter by Text (ex: Purchasing) or Code (ex: FBBUY). Use Index Code GRANT for grant funds. Click in the boxes to select the drop-down option:

5. **Click the blue Create button at the bottom right.**

6. **Click the Add drop-down button** to add Expected Expenses such as Airfare, Lodging and Meals Per Diem, Registration, and Personal Vehicle Mileage. Add all anticipated travel expenses:
7. Complete required fields and add comments if needed to clarify:

```
    Registration $500.00
    08/01/2020
    Event Start Date: 08/01/2021
    Are you presenting? Male
    Transaction Amount: $500.00
    Currency: US, Dollar
    Comment: Lunches covered daily
    will be paid by department PCard
```

8. To Change or Split Funding:
   a. From the Add Expense Screen, check the box of the Expense(s) and click the Allocate Button above, or use the Allocate link found in the expense.

   ![Hotel $895.00](image)

   - Destination City: US, Washington DC, District of Columbia
   - Description: Lodging Exception to Maximum SAAM 10.3
   - Amount will auto calculate when you hit save
   - # of nights: 5
   - Comment:

   b. Use the Add button to enter one or more funding sources.
   c. If needed, split by Percent or Amount:
9. **Review Request Details** and edit if necessary
   a. Request Header
   b. Request Timeline to view Approval Flow
10. **To attach** documents, click **Attachments > Attach Documents**
11. **Click the orange Submit Request button.** (Delegates will see a **Notify Employee** button instead.)
    You’ll receive a notice when your Request is approved.
12. 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.

*Cash Advance*: If you need to request an advance for per diem expenses, click the **Request Details** drop down menu and select **Add Cash Advance**. If you do not see this selection and need an advance, contact Travel Services before submitting your Request.