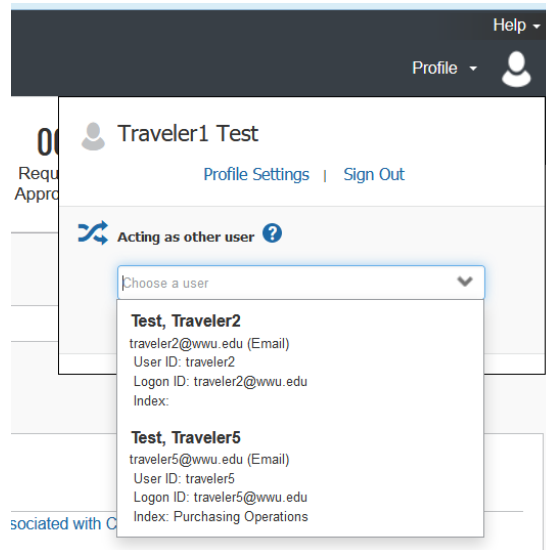
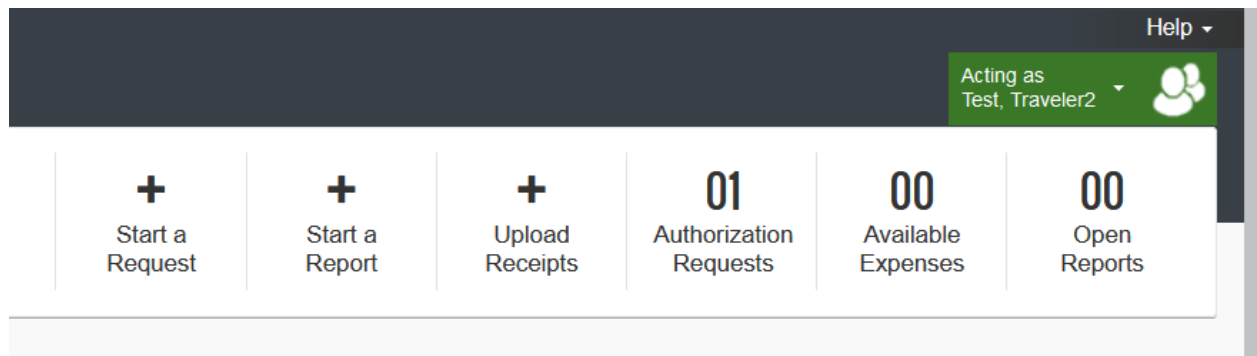


Create a Travel Authorization Request

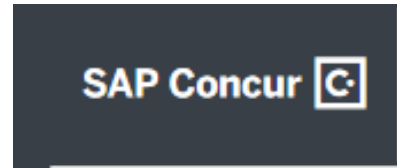
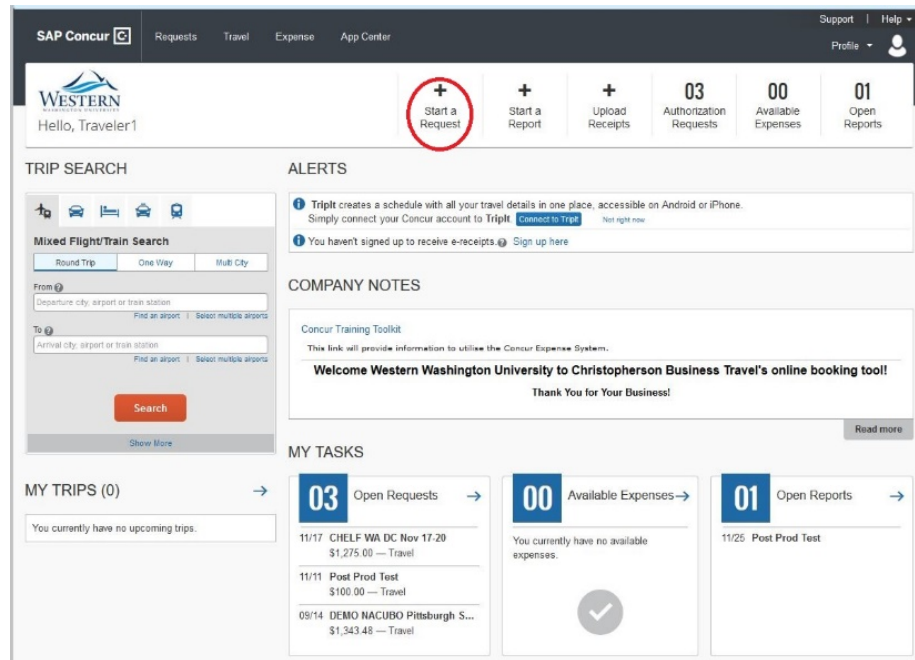
1. **Log in to [Concur](#).** You may need to log in through [MyWestern](#) with your universal ID first.
 - **Travelers skip to #2**
 - **Delegates Only:** Click **Profile** on the upper-right of your dashboard and begin typing the traveler's name to search and select from the list field under **Acting 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**:

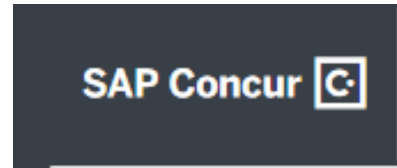
The screenshot shows the SAP Concur user interface. At the top, there are navigation tabs for Requests, Travel, Expense, and App Center. A user profile is visible in the top right. Below the navigation, there are several key metrics: 'Start a Request' (circled in red), 'Start a Report', 'Upload Receipts', '03 Authorization Requests', '00 Available Expenses', and '01 Open Reports'. The main content area is divided into sections: 'TRIP SEARCH' with filters for Round Trip, One Way, and Multi City; 'ALERTS' with messages about Triptit and e-receipts; 'COMPANY NOTES' with a welcome message; and 'MY TASKS' with three cards for '03 Open Requests', '00 Available Expenses', and '01 Open Reports'. The 'Open Requests' card lists three items: '11/17 CHELF WA DC Nov 17-20 \$1,275.00 — Travel', '11/11 Post Prod Test \$100.00 — Travel', and '09/14 DEMO NACUBO Pittsburgh S... \$1,343.48 — Travel'.

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

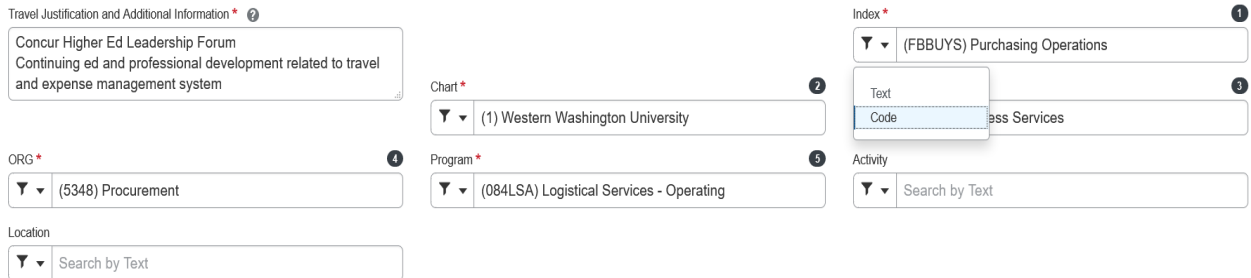
- ✓ **Trip Name:** Recommended naming convention: Event Name + Destination City, State or Nation + Month + Dates + Year
- ✓ **Travel Justification:** spell out event acronyms and clearly state how the travel relates to your work assignment:

Create New Request

Request Policy *	Trip Name *	Trip Start Date *
*TEST-Employee Travel	CHELF August 1 - 5 WA DC	08/01/2021
Trip End Date *	Trip Purpose *	Main Destination City *
08/05/2021	Conference	Washington DC, District of Columbia
Main Destination Country *		
UNITED STATES		
Traveler Type *	Trip Type *	Does this trip include personal travel? *
Individual Faculty/Staff	Out-of-State	No
Personal Travel Dates	Will you receive an honorarium or payment from other sources? ⓘ	Will you be missing classes? ⓘ
Travel Justification and Additional Information ⓘ	Chart *	Index *
Concur Higher Ed Leadership Forum Continuing ed and professional development related to travel and expense management system		(FBBUYS) Purchasing Operations
	Fund *	



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



Travel Justification and Additional Information * ¹
 Concur Higher Ed Leadership Forum
 Continuing ed and professional development related to travel and expense management system

Index * ¹
 (FBBUYS) Purchasing Operations

Chart * ²
 (1) Western Washington University

Text ³
 Code Class Services

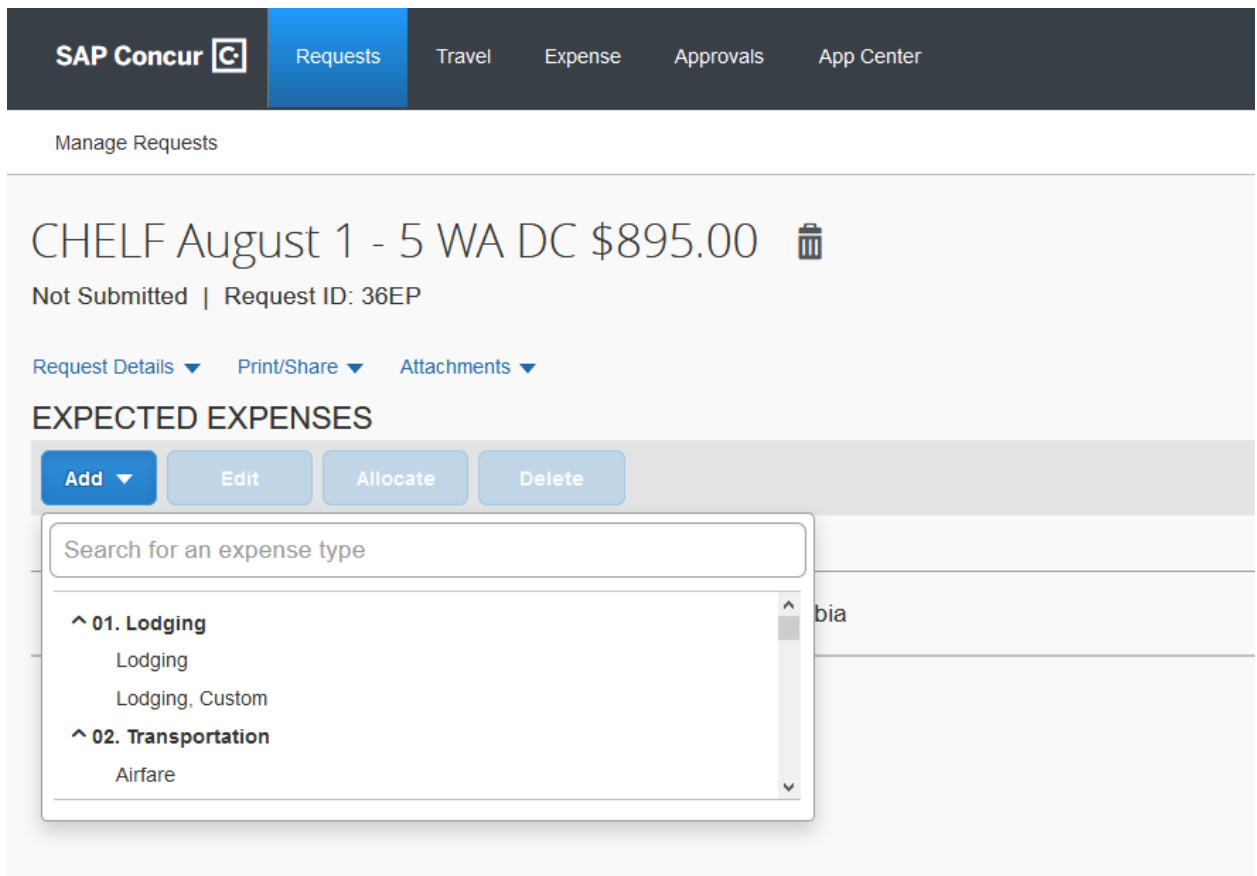
ORG * ⁴
 (5348) Procurement

Program * ⁵
 (084LSA) Logistical Services - Operating

Activity
 Search by Text


Location
 Search by Text

- Click the blue **Create** button at the bottom right.
- 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:



SAP Concur | Requests | Travel | Expense | Approvals | App Center

Manage Requests

CHELF August 1 - 5 WA DC \$895.00 

Not Submitted | Request ID: 36EP

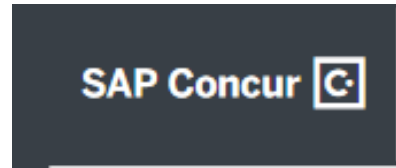
Request Details ▼ | Print/Share ▼ | Attachments ▼

EXPECTED EXPENSES


Add ▼ | Edit | Allocate | Delete

Search for an expense type


- ^ 01. Lodging
 - Lodging
 - Lodging, Custom
- ^ 02. Transportation
 - Airfare





7. Complete required fields and add comments if needed to clarify:

← → Registration \$500.00  Cancel **Save**

08/01/2020

Event start Date * 

Event End Date * 

Are you presenting? 

Description


Transaction Amount * Currency *

Comment

Save Cancel

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 

08/01/2021

Allocate

Destination City

of nights *

Description

Amount will auto calculate when you hit save

Lodging Exception to Maximum SAAM 10.30

Comment

- b. Use the Add button to enter one or more funding sources.
- c. If needed, split by Percent or Amount:

Allocate x

Expenses: 1 | \$456.00

Percent Amount

Amount Allocated 100% Remaining 0%

\$456.00 \$456.00 \$0.00

Default Allocation

Code Amount USD

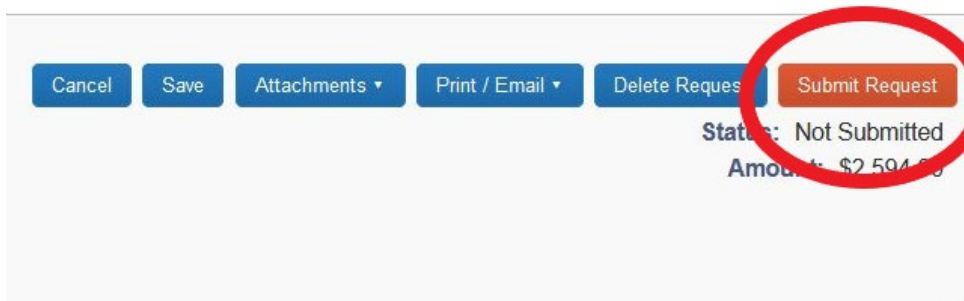
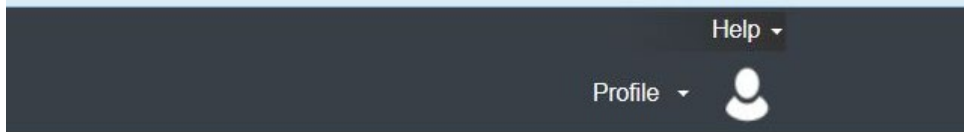
FBBUYS-1-16340-5348-084LSA \$0.00

Add Edit Remove Save as Favorite

<input type="checkbox"/>	Index	Chart	Fund	ORG	Program	Activity	Location	Code	Amount USD
<input type="checkbox"/>	Purchasing Operations	Western Washington University	Business Services	Procurement	Logistical Services - Operating			FBBUYS-1-16340-5348-084LSA	400.00
<input type="checkbox"/>	A S Savings	Western Washington University	Associated Students Reserve Fund	AS Non-Operating	Auxiliary Reserves			FXXSVG-1-41002-8699-850ZAB	56.00


Cancel **Save**

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.





Travel Services

SAP Concur 

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](#).



Travel Services

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