

# Quick Reference Travel Request

## Getting Started

1. Log in to **my.university-name.edu**
2. Click QuickLinks and Select **UNIVERSITY-NAME CONCUR**
3. You will be taken to the Concur home page.
4. If you are booking travel for another user, verify you have delegated in as them, and their name appears in the upper right.

NOTE: Your concur **Profile** must be completely set up prior to creating Requests or booking Travel. Refer to the Profile Quick Reference Guide or the Concur User Guide for instructions.

## Create a Travel Request

Create a **Request** in Concur, when an approved travel request is required before booking travel and to ensure that sufficient funds are approved and available on your Travel Card prior to booking any travel or paying any fees.

1. Click **Requests** along top of screen in black bar.
2. Select **Create New** then **New Request**.
3. In the **Request Header**, complete all required fields (red bar).
4. If cash advance is required for trip you will enter amount and reason in the comment back before moving to next step.
5. Click the **Segments** tab to outline your trip segment costs for any Airfare, Rental Cars, or Hotel stays during your trip. If exact costs are not known, you can enter estimated amounts. Click **Save**.
6. Click the **Expense** tab to add all other estimated expenses you will incur during your trip (i.e. meals, fuel, fees, parking, tolls, etc). Click **Save**.
7. When finished click **Submit Request**.
8. Click **Accept & Submit**.

## Recall a Request

You cannot change, cancel, or delete a Request that has been submitted unless you **Recall** it first.

1. Click **Requests, Manage Requests**. Click the **Request Name**.
2. Click **Recall**, then **Yes** to confirm the recall.
3. **Cancel Request**, or make necessary changes, **Save**, and **Submit**.

## Close or Inactivate an Approved Request

1. Click **Requests, Manage Requests**.
2. Click **View**, then **Approved Requests**.
3. Click the **Request Name**.
4. Click **Close/Inactive Request** (orange button).

## For further assistance:

Contact **UNIVERSITY-NAME Travel Office**:

- Phone: 555.555.5555
- Email: [travel@university-name.edu](mailto:travel@university-name.edu)

Contact **Travel Office Coordinator**:

- Jane Doe
- Phone: 555-555-5555
- Email: [jane@university-name.edu](mailto:jane@university-name.edu)

Contact **Travel Agent**:

- **Corporate Travel Planners (CTP)**
- Online Assistance: 877-727-5188
- Full-Service Assistance: 855-838-3245
- After Hours Toll Free: 800-358-1229