CONCUR quick guide: REQUEST & TRAVEL

GETTING STARTED

1. 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.

CREATE A TRAVEL REQUEST

1. Click **Requests**, **New Requests**
2. In the **Request Header**, complete all required fields (red bar) For the field, "How will you book your trip?":
   a. Option 1 – Book via Concur Travel means that you will have segments fulfilled by our travel agent (airline, rental car)
      i. Note: if a request is approved within 24 hours you will be able to choose "book travel" in Concur, reserving those segments without any further action.
   b. Option 2 – Book outside of Concur Travel means that you will have segments that may not be booked by our travel agent and reservations were made elsewhere outside of Concur
3. Click **Save**, a request number is generated
4. Enter **Segments** (airfare, car rental, hotel), or other anticipated **Expenses.** If exact costs are not known you should enter accurate estimated or not-to-exceed amounts, click **Save.**
5. When finished click **Submit Request**
6. 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**

TRAVEL RESERVATION FROM AN APPROVED REQUEST

This option is only available if you chose Option 1 – Book via Concur Travel when the request was submitted

1. Click **Requests**, **Manage Requests**
2. Requests that have a status of **Pending Online Booking** are ready to begin the booking process
3. Click the **Request name**, or the **Book** link found under **Action**
4. Click **Book**
5. On **Your Itinerary** page, change departure/pickup time, if needed
6. Click **Proceed to Booking**

COMPLETING RESERVATION (APPROVED REQUEST)

1. On the **Travel Details** page, review the details of your reservation and the **Total Estimated Cost**, click **Next**
2. On the **Trip Booking** information page, the **Trip Name** and **Trip Destination** fields will be populated from the **Request Header**
3. Click **Next** if you are ready to purchase the trip or select **Hold Trip**, if you are not ready to purchase the trip
4. Click **Confirm Booking**
5. Once you receive the **Finished Page**, scroll to the bottom for the option to print or email your itinerary

CANCEL A TRAVEL RESERVATION

1. Click **Travel** > **Upcoming Trips**
2. Click on the trip to be canceled and choose **Cancel Trip** from the list of **Trip Actions**

QUESTIONS?

CONTACT BUSINESS SERVICES:

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