

## Create a Concur Request

1. From the Home page, click the **Requests** tab.
2. Click **New Request**. You must complete all required fields (those with red bar at the left edge of the field).
3. In the **Request Name** field, enter a name for your travel request. The name should help differentiate this request from other travel requests.
4. If the travel is paid with grant funds, select **Yes** in the **Grant-Related** field. If not using Grant Funds, select **No** in this field.
5. Enter the start date of your trip in the **Start Date** field. This should be the departure date of your trip.
6. Enter the end date of your trip in the **End Date** field. This should be the return date of your trip.
7. Enter the business purpose of your trip in the **Purpose** field. Provide enough detail so that all Approvers will know how this trip will benefit EMU and your department.

The remaining fields contain the default values for your FOAPAL within the EMU Chart of Accounts. If you need to charge a different departmental account, you can change the Organization, Fund and Program code fields.

If you need to charge a specific Activity or Location code, enter that code in the appropriate field.

8. Click the **Save** button in the upper-right hand corner to save your changes. You cannot add travel segments to a request without saving your request.

## International Travel

If you need the Provost's office approval for international travel, perform the following steps:

1. When creating your Travel Request, select **\*EMU International Request Policy** from the pull-down menu in the **Request Policy** field.
2. Download the **International Travel Request** Form from the Controller's website (<http://www.emich.edu/controller/forms.php>).
3. Print the form and fill it out.
4. Scan the form and save it as a PDF file.
5. Attach scanned form to your Travel Request (see steps to the right).

## Add Segments to a Travel Request

Once you have saved your request for travel, you can add travel segments to the request. Create a segment for each type of expense you will incur, such as airline, hotel, rental car, etc.

1. From the Request screen, click the **Segments** tab.
2. Click the icon for the type of reservation you need for your trip. The first choice is for standard travel, which most travelers will use.  
There are also choices for **Recruiting** and **Team** travel. For more information on Recruiting or Team travel, contact Accounts Payable at 487-0022.
3. Complete all required fields (those with the red bar at the left edge of the field).  
For date fields use the calendar to select the date for the expense.  
For auto-complete fields, such as destination city, type the first portion of your choice and then select from the list.
4. Click the **Save** button once you have filled in all the required fields for a Segment.

## Add Additional Segments

1. Click the icon for the next type of reservation you need for your trip.
2. Complete all required fields (those with the red bar at the left edge of the field).
3. Click the **Save** button to once you have filled in all the required fields. The new segment fields will appear below the original segment fields.

## Attach Scanned Image

You can attach scanned images to your travel request, to provide additional documentation for your approver.

1. On the **Request** page, select **Attach Documents** from the **Attachments** drop-down menu. The **Document Upload and Attach** window will be displayed
2. Click the **Browse** button to locate the file you want to attach from your hard-drive.
3. Select the file(s) and click the **Open** button.
4. Click the **Upload** button. Once the file name is listed as Attached in the list, you can click the **Close** button to close the window.

You can verify that your image has been attached by following these steps:

1. Select **Check Documents** from the **Attachments** drop-down menu. A new window will be displayed. You will be able to scroll down to view all images you have uploaded.

### Submit Request for Travel

1. From an open **Request**, click the Submit Request button in the upper right-hand corner. The **Final Review** window is displayed.
2. Click the **Accept & Submit** button to submit your request. Your request status will be listed as **Submitted & Pending Approval**.

### Review and Approve a Travel Request

1. From the **My Tasks** section of the **Concur Home** page, click the name of the report or travel request you want to review. The request or report will open.
2. The **Expense Summary** tab is displayed.
3. Click the **Request Header** tab to review the header information.
4. Click the **Segments** tab and review the segments information.
5. When ready to approve click the **Approve** button. The **Final Confirmation** window is displayed.
6. Click the **Accept** button.

The request will move to the next step in the approval process.

### Send a Request Back

1. From the **My Tasks** section of the **Concur Home** page, click the name of the report or travel request you want to review. The request or report will open.
2. The **Expense Summary** tab is displayed.
3. Click **Send Back Request**. The Send Back Request window is displayed.
4. Enter a comment for the employee.
5. Click the **OK** button.

The travel request will be returned to the employee.

### Add an Approval Step

1. From the **My Tasks** section of the **My Concur** page, click the name of the report or travel request you want to review. The request or report will open.
2. The **Expense Summary** tab is displayed.
3. Click **Approve & Forward**. The **Approval Flow** page will be displayed.
4. Click the **User-Added Approver** field, then click the pull-down arrow and select **Last Name** from the list.
5. Type the approver's last name in the **User-Added Approver** field. A list of matching names is displayed.
6. Select the name of the approver from the list. The selected name is displayed in the field.
7. Click the **Approve** button. The **Final Confirmation** window is displayed.
8. Click the Accept button. The **Request** is approved and forwarded.