



CONCUR QUICK GUIDE: REQUEST & TRAVEL

NOTE: Your Concur **Profile** must be completely set up prior to creating Requests or booking Travel.

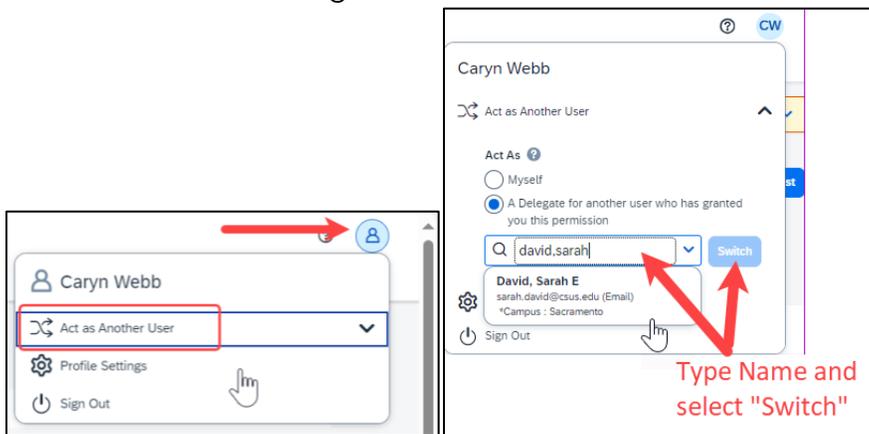
GETTING STARTED

Log in to [Concur](#) (available via myCI as CSUCI Travel)

1. You will be taken to the Concur home page
2. If you are booking travel for another user, verify you have delegated in as them, and their name appears in the upper right. Example pictured here:

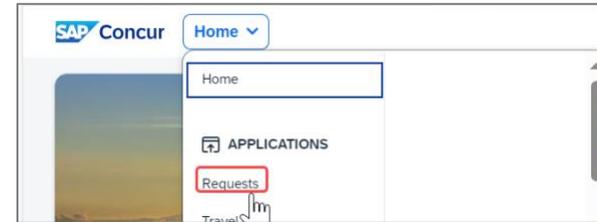


The following shows how to update your profile to act as another user. In this example Caryn Webb is the delegate and Sarah David is the delegator.



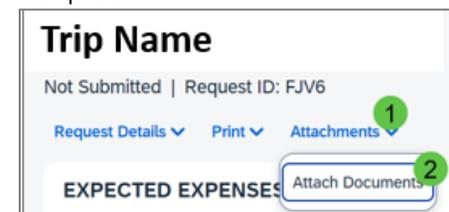
CREATE A TRAVEL REQUEST

1. Click **Requests, New Requests**



2. In the **Request Header**, complete all required fields and add a travel justification in the comments field. In total there are 20 fields.
3. Click **Save**, a Request ID number is generated
4. Enter **Segments** (airfare, car rental, hotel), or other anticipated **Expenses** on the lower part of the screen by selecting +Add. If exact costs are not known you should enter accurate estimated or not-to-exceed amounts, click **Save**.
5. Reconcile all **Alerts**. Select "View" to access the Request Headers (e.g., Comments).
6. When finished click **Submit Request**
7. Click **Accept & Submit**

The following shows how to attach documents to the Travel Request.



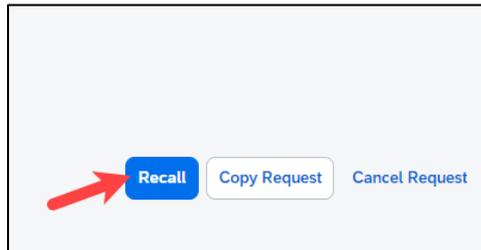


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RECALL A REQUEST

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

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 Travel@csuci.edu