

April 21, 2014


Issue 3

Per YSU Guidelines, travel must be pre-approved prior to reservations or expenses being incurred. Please follow these procedures for travel.

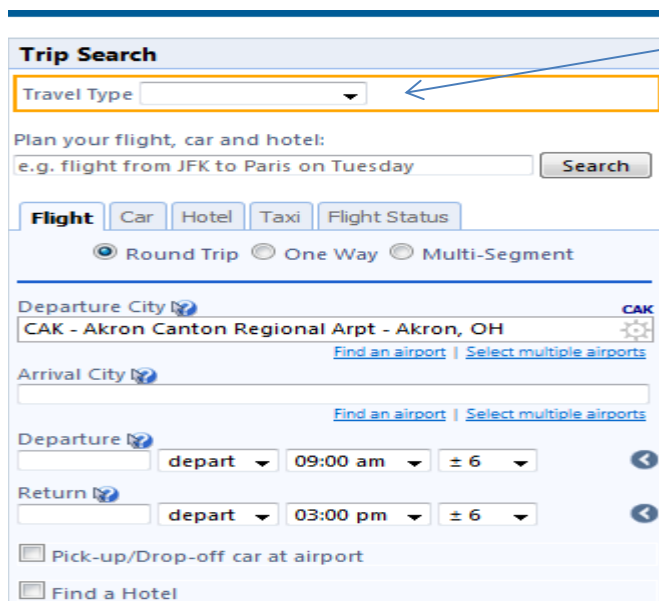
1. Prepare a **Request** in Concur

Complete the Request information. Remember the request is to ask permission to travel and estimate your expenses. Make sure any necessary supporting documentation is attached to your Request. The Request will generate a Request ID, which you will need to book any reservations (flight, car, hotel, etc.) When you open the Request the number will appear at the top or if you are looking at your active work – you will see the Request ID.

Requests (3) | Expense Reports (4) | Cash Advances (0)

Request Name	Request ID	Status	Request Dates	Total	Expense Report?
new business	33RY	Not Submitted	04/26/2014 04/29/2014	\$350.00	
test test	33R9	Not Submitted	04/17/2014 04/25/2014	\$150.00	
sample sample	33PK	Approved	04/14/2014 04/14/2014	\$1.00	

2. **Once the Request is approved**, book your trip in Concur or agent direct by calling Traveline at x2391. You will need to choose the travel type first.





Trip Search


Travel Type ▼



Plan your flight, car and hotel:
e.g. flight from JFK to Paris on Tuesday



Flight | Car | Hotel | Taxi | Flight Status

Round Trip One Way Multi-Segment

Departure City  CAK - Akron Canton Regional Arpt - Akron, OH 
[Find an airport](#) | [Select multiple airports](#)

Arrival City 
[Find an airport](#) | [Select multiple airports](#)

Departure  depart ▼ 09:00 am ▼ ± 6 ▼ 


Return  depart ▼ 03:00 pm ▼ ± 6 ▼ 

Pick-up/Drop-off car at airport

Find a Hotel

3. Go on the trip
4. Prepare your **Expense Report** in Concur after the trip

When the Request is completed, a “paper with a green arrow” appears under Expense Report? Click on this green arrow to begin your Expense Report. This ties your Request to your Expense Report.

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You will enter your final trip expenses and attach all required receipts. Under the payment type drop-down on each expense category is out-of-pocket (default) or YSU Prepaid, where you can add your prepaid flight or car rental to your Expense Report to show a more accurate picture of your total expenses. Be sure you pick the correct payment type. Even though the YSU prepaid amount shows in the total at the bottom of the Expense Report, it will not be reimbursed to the traveler.

New Expense Receipt Store

Expense Type Airfare	Transaction Date 04/01/2014	Business Purpose sample	Ticket Number
Vendor American Airlines	Airline Travel Service Code Select one	City of Purchase Youngstown, Ohio	Payment Type YSU Prepaid
Amount 300.00 USD	<input type="checkbox"/> Personal Expense (do not reimburse)		Out of Pocket YSU Prepaid
Comment			

Detailed step-by-step instructions for preparing a Request or an Expense Report are contained in the YSU/Concur T&E Procedures for Travelers guide located on the [Travel Services](#) website.