



THE UNIVERSITY OF  
**WESTERN  
AUSTRALIA**

# Concur User Guide

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The purpose of this User Guide is to provide general information and instructions for the end user to complete travel arrangement in the UWA Travel Management system (Concur).

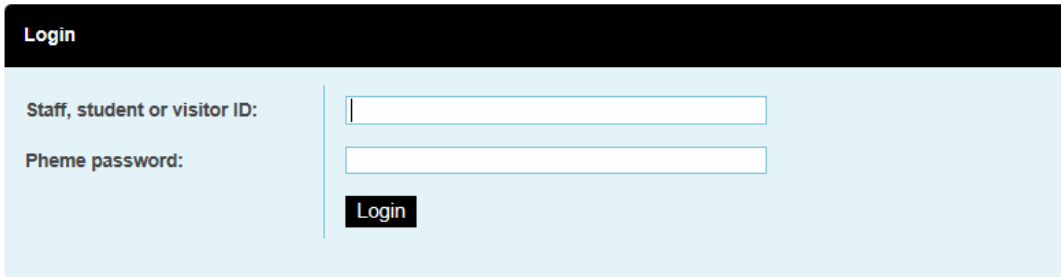
## Disclaimer

The information contained within the user guide is for guidance and correct as of date of issue. If you have any recommended changes to the “User Guide” please email [procurement@uwa.edu.au](mailto:procurement@uwa.edu.au)

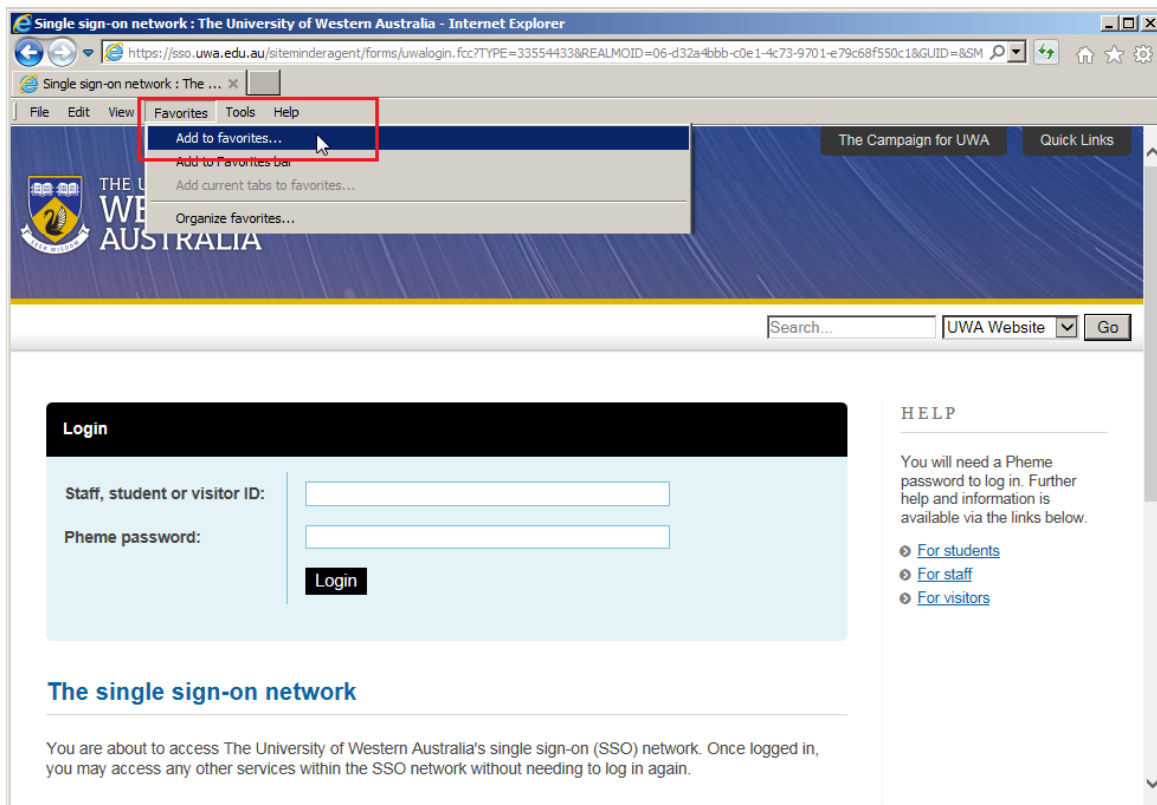
## Concur Login

Navigate to UWA Concur Single Sign-On (SSO) Login - <http://concurso.webservices.uwa.edu.au/>

Enter your PHEME login ID and PHEME password.



If you use Concur regularly, you can save the UWA Concur SSO webpage address above on your browser favourite.



### Note:

- Prior to using Concur, you will need to have your **PHEME account and UWA Email service** activated.
- For best user experience, Concur recommends the use of Internet Explorer version 10 or later; Google Chrome version 30 or later; or Mozilla Firefox version 25 or later.
- Ensure pop-ups are enabled.
- Any communications from the Concur Travel Management System will be sent to your UWA email address.

## Login Warning – UWA Terms of Use

### Login Warning



#### UWA Terms of Use

PLEASE NOTE: Some high risk destinations may not have UWA corporate cover, if you are travelling to a high risk destination, which has been approved by the University, please check about [UWA Insurance](#) before travelling.

By logging in and using the Concur platform you acknowledge that you comply with:

- The [University Travel Policy](#).
- The [University Corporate Travel Insurance Policy](#).
- the [University Finance Manual Travel Policy](#).
- The [Travel FBT Policy](#) and you understand that the University will not contribute to the private portion (if any) of your travel. In the event that your travel booking requires a Travel Diary, you agree to complete this within 30 days of your return.

Auto-approval facility (for domestic travel booked in Concur TRAVEL) may be revoked in the case of misuse and the traveller may be liable for additional costs.

Please read and be aware of the UWA Terms of Use.

**By logging in and using the Concur Travel Management System, you acknowledged your compliance to the UWA Terms of Use.**

To continue, click on **OK**.

OK

Concur Homepage

Depending on user access level, you may see the following options on your Homepage.

CONCUR

RequestsTravelExpenseApp Center

SupportHelp

THE UNIVERSITY OF WESTERN AUSTRALIA

Hello, Never

New

02

Authorization Requests

00

Available Expenses

00

Open Reports

TRIP SEARCH

ALERTS

Prior to booking in Concur, please ensure you have discussed and agreed your travel plans with your supervisor or manager

Flight Search

Round TripOne WayMulti City

From @

Departure city, airport or train station

Find an airport | Select multiple airports

To @

Arrival city, airport or train station

Find an airport | Select multiple airports

Search

Show More

Or, tell us in your words what you want to do

e.g. flight from New York to Paris on Tuesda

Search

The University of Western Australia is giving TripIt Pro to all employees. [Activate Subscription](#) [No thanks](#)

You haven't signed up to receive e-receipts. [Sign up here](#)

TripIt Pro

Keeps track of reward-program points and miles in one spot.

Get Started

COMPANY NOTES

Getting started

Please verify that the information in your Profile is up to date and all mandatory fields are filled in. Please also ensure you have selected the correct time zone in Profile Settings, System Settings.  
[Click here](#) to view a list of brief tutorials on how to get started using this online booking tool.

MY TRIPS (1)

MY TASKS

NOV 01-04

Trip from Perth to London

One Segment needing Approval

More

02

Open Requests

19/12 2 segments syd conference

AUD 1,250.00 — Travel

01/11 Trip from Perth to London

AUD 3,166.16 — Travel

00

Available Expenses

You currently have no available expenses.

00

Open Reports

You currently have no open reports.

Begin by reviewing and completing your Traveller Profile.

Concur User Guide

7 | Page

## Profile Settings

Logging-in for the first time?

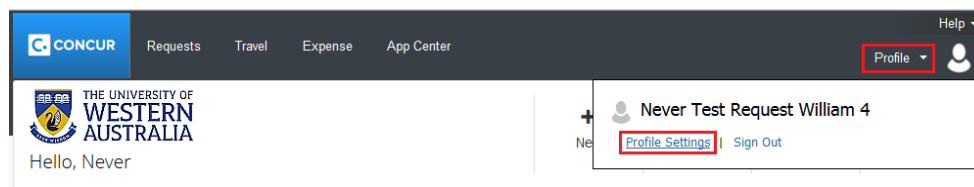
### Traveller MUST review and confirm their profile information!

Traveller Profile Information must be kept up-to-date with details in accordance with your current travel document (e.g. passport that you will be using for travel). Traveller may be turned down at the gate if the name on the travel document used (e.g. passport or any other travel identification) does not match the name on the ticket issued by the Travel agent.

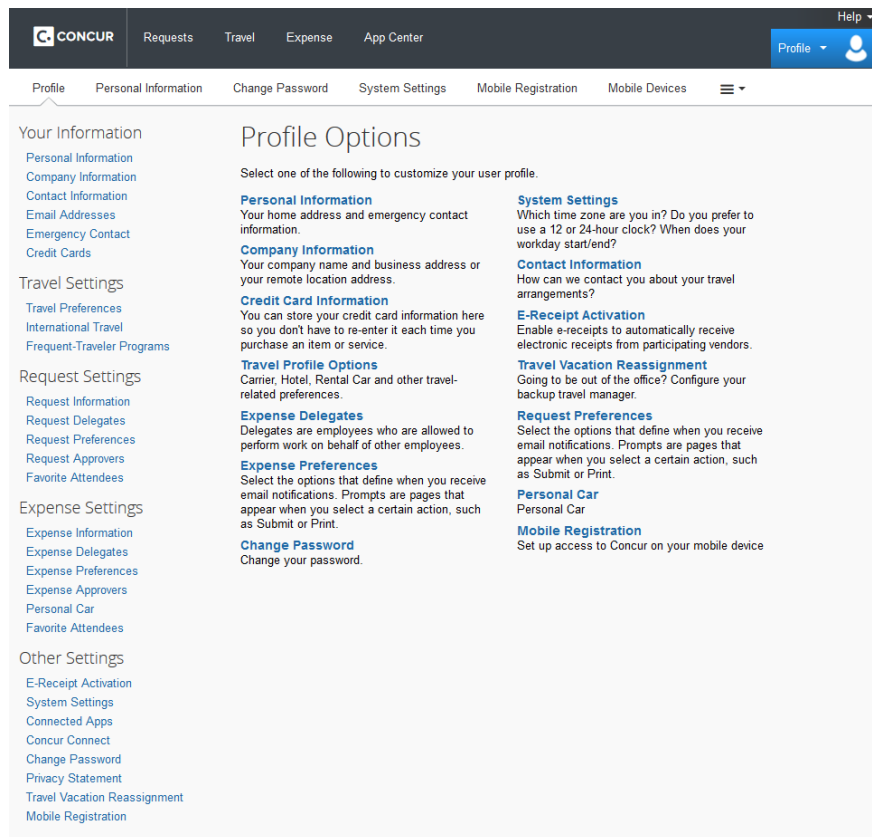
Traveller must update their profile whenever the information has changed.

It is the **Traveller's responsibility** to ensure that Profile Information is up-to-date with details according to their current travel document.

**If you are arranging travel on behalf of a traveller, please ensure you have confirmed with the traveller that their profile is up-to-date.**



To update Traveller's profile, click on **Profile** and select **Profile Settings**.



Traveller will be required to **review** and **complete** the following Profile Options menu item:

### Your Information

- **Personal Information**
- **Contact Information**
- **Email Addresses**
- **Emergency Contact**

### Travel Settings

- **Travel Preference**
- **International Travel**
- **Frequent – Travel Programs**

### Other Settings

- **System Settings**



## My Profile – Personal Information

### Important Notice:

Due to increased airport security, traveller may be turned down at the gate if the name on the travel document (e.g. passport) or any other travel identification used does not match the name on the ticket issued by the Travel agent (TMC).

It is the **Traveller's responsibility** to ensure that Profile Information is up-to-date and matches their travel documentation.

If you are completing the Profile Information for the first time, **complete all the required information first** and click on **SAVE at the end.**

### My Profile - Personal Information

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required\*\*]** (validated and required) must be completed to save your profile.

[Change Picture](#)



#### Important Note

**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

**Please make sure you update your System Settings [HERE](#)**

System Settings determine;

\* Your Timezone

\* Your preferred date/time format

\* Your preferred distance term (km/mile)

Title **[Required]** First Name **[Required]** Middle Name Nickname Last Name **[Required]** Suffix  
Mr  Never    William G

☐ No Middle Name

#### Company Information

[Go to top](#)

Employee ID Cost Center  
Testuser6   
Manager Employee Position/Title  
Never William 11   
Profilegate ID (TMC profile code)

[Save](#)

Review and complete all the required fields.

**CHECK and ENSURE** that **First Name, Middle Name and Last Name** shown on My Profile – Personal Information page are **identical to the name on the traveller's travel document.**

If you have no middle name, **indicate** by selecting the 'No Middle Name' tick-box.

Click **Save** to confirm details.

## Contact Information

Contact Information

Go to top

Work Phone[Required\*\*] 6488 6000 Work Extension Work Fax

2nd Work Phone/Remote Office Home Phone[Required\*\*] 6488 1111

Pager Other Phone

Mobile Devices

Register and manage your mobile devices here.

Device Name

Device Type Unknown

Mobile Phone Number Australia (+6) 0415888666

☒ Primary Mobile Phone

☒ Use for Safety and Business Text Message Alerts

OK Cancel

\*\*You must specify either a home phone or a work phone.

Save Cancel

Complete the following Contact Information:

- **Work Phone**
- **Home Phone**
- **Mobile Devices**

To add a Mobile Device:

- Enter a **Device Name** (e.g. mobile phone 1)
- Select a **Device Type** from the drop down menu
- Select **Country code** from the drop down menu and **enter mobile phone number**
- Click **OK** (must click on OK, prior to Save)

Traveller can add multiple mobile devices as required however, please be aware that:

**Travel alerts and risk messaging notices from the Concur Risk Management tool will ONLY be sent to the Primary Mobile Phone number.**

**If a different mobile number is used while travelling, please ensure Primary Mobile Phone is updated on your profile.**

Click **Save** to confirm details.

## Email Addresses

Email 1 is the **Traveller's primary email address**. It is used for all Concur related communication.

**Travel alerts and risk messaging notices from the Concur Risk Management tool will ONLY be sent to the Traveller's primary email address - Email 1.**

Email verification is required for the system to link the information forwarded from the email address to the associated account.

**Traveller will be required to verify every email addresses listed on this section.**

Email Addresses

Go to top

Please add at least one email address.

[How do I add an email address?](#)

[Travel Arrangers / Delegates](#)

[Why should I verify my email address?](#)

[How do I verify my email address?](#)

[+] Add an email address

Email Address	Verification Status	Verify	Contact?	Actions
Email 1	traveltest-finserv@uwu.edu.au	Not Verified	Verify	Yes

**To verify email address:**

1. Once you have saved an email address, click the "Verify" link.
2. Check your email for a verification message from Concur.
3. Copy the code from the email message into the "Enter Code" box next to the Email address.
4. Click "OK" to submit the code and complete verification.

Additional email address can be added by clicking on **[+] Add an email address**.

## Emergency Contact

Emergency Contact Go to top

Name **[Required]** Relationship **[Required]**

Street **[Required]**

2 DEARL RD ☒ Address same as employee

City **[Required]** State/Province/Region Postal Code **[Required]**

BYFORD WA 6122

Country **[Required]** Phone **[Required]** Alternate Phone

United States of America

Save

Complete Emergency Contact information.

Country default is noted as United States of America. To update country, **un-tick the "Address same as employee"** and select a Country from the drop down list.

Click **Save** to confirm details.

## Travel Preference

For seat-related preferences, please note that:

- not all airlines support all listed seat preferences
- in some cases, frequent flyer status may determine if seat preferences can be honoured
- some airlines will charge an additional fees on selected seats (e.g. exit rows, etc.)

Concur can collect your preferences and provide them to airlines or travel agencies, but cannot guarantee these preferences will be honoured for every reservation.

Travel Preferences Go to top

Air Travel Preferences

Seat Seat Section Special Meals Ticket Delivery

Don't Care Don't Care Regular Meal E-ticket when possible

Preferred Departure Airport Other Air Travel Preferences

Medical Alerts

Hotel Preferences

Room Type Smoking Preference Message to Hotel Vendor

Don't Care Non-smoking

I prefer hotel that has:

☐ a gym ☐ a pool ☐ a restaurant ☐ room service ☐ Early Check-in

Accessibility Needs

☐ Wheelchair access ☐ Blind accessible

Car Rental Preferences

Car Type Smoking Preference Car Transmission

Any Car Class Don't Care Don't Care ☐ In-car GPS system

Message to Car Rental Vendor

Indicate your Air Travel, Hotel and Car Rental Preferences as required.

**Frequent-Traveler Programs**

Your Frequent Traveler, Driver, and Hotel Guest Programs [+] Add a Program

No programs defined

To enter Frequent-Traveller programs click on the **[+] Add a Program**.

#### Add Travel Programs

**i** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system.  
For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
1	Select a carrier		<input checked="" type="checkbox"/>
2	Select a carrier		<input checked="" type="checkbox"/>
3	Select a carrier		<input checked="" type="checkbox"/>
4	Select a carrier		<input checked="" type="checkbox"/>
5	Select a carrier		<input checked="" type="checkbox"/>

A pop-up window will appear where traveller can enter 5 travel programs at a time.

To add details:

1. Select the type of travel program (carrier name, car, rental or hotel) by clicking on the radio button underneath the icon.
2. Select the name of the company from the drop-down list.
3. Enter the program number.
4. Click **Save**.



#### Unused Tickets

##### TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender: ☒ Male ☐ Female Date of Birth (dd/mm/yyyy):  DHS Redress No.:  TSA Pre✓ Known Traveler Number:

Click **Save** to confirm updates made on Travel Preferences setting.

## International Travel : Passports and Visas

**International Travel: Passports and Visas** Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

**Passports** [+] Add a Passport

☒ I do not have a passport

**International Visas** [+] Add a Visa

Click on **[+] Add a Passport** to complete passport details. This will open up the Passport details section.

Complete all the required fields.

Indicate by selecting the tick-box 'I do not have a passport' where applicable.

#### Add a Passport

Passport Nationality **[Required]** 
 Passport Number **[Required]** 
 Passport Date Issued (dd/mm/yyyy) **[Required]**

Passport Expiration (dd/mm/yyyy) **[Required]** 
 Passport Place Issued (City, State) 
 Passport Place Issued (Country)

**International Visas** [+] Add a Visa

To complete Visa details, click on **[+] Add a Visa**.

Click **Save** to confirm details.

## System Settings

### System Settings

#### Regional Settings and Language

Default Language English (Australia)

Number Format 1,000.00

Placement of Currency Symbol Before the amount

Negative Number Format (100)

Negative Currency Format (100)

mile/km km

Date Format dd/mm/yyyy

Time Format H:mm

Hour/Minute Separator : 01/04/2016 5:48

Time zone (local time) (UTC+08:00) Perth

#### Calendar Settings

Start week on Monday

Start Day View At 8:00

End Day View At 20:00

Default View month

#### Other Preferences

Home Page

Rows per page 25

#### Other Settings

☐ Run in Concur Accessibility Mode

#### Email Notifications

- ☒ Send an email every time something is put in or removed from my approval queue
- ☒ Send a daily summary of items in my queue
- ☐ Let me know when one of my requests is approved or denied
- ☒ Send Confirmation Emails
- ☒ Send Trip-on-Hold Reminder Emails
- ☒ Send Ticketed Travel Reminder Email
- ☒ Send Cancellation Emails

[Save](#) [Reset](#) [Cancel](#)

Update Date Format and Time Format to your preference.

Ensure Time Zone (local time) is set to **(UTC+8:00) Perth**.

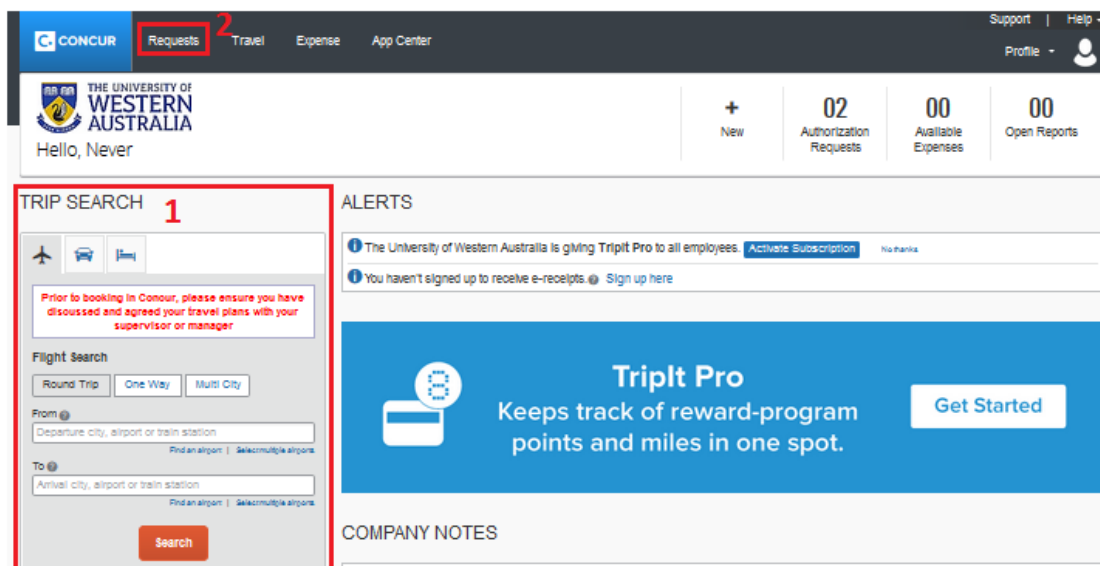
Failure to update the Time Zone means that your booking deadline may not be showing in the correct local date and time which could result in cancellation of reservation.

Click **Save** to confirm details.

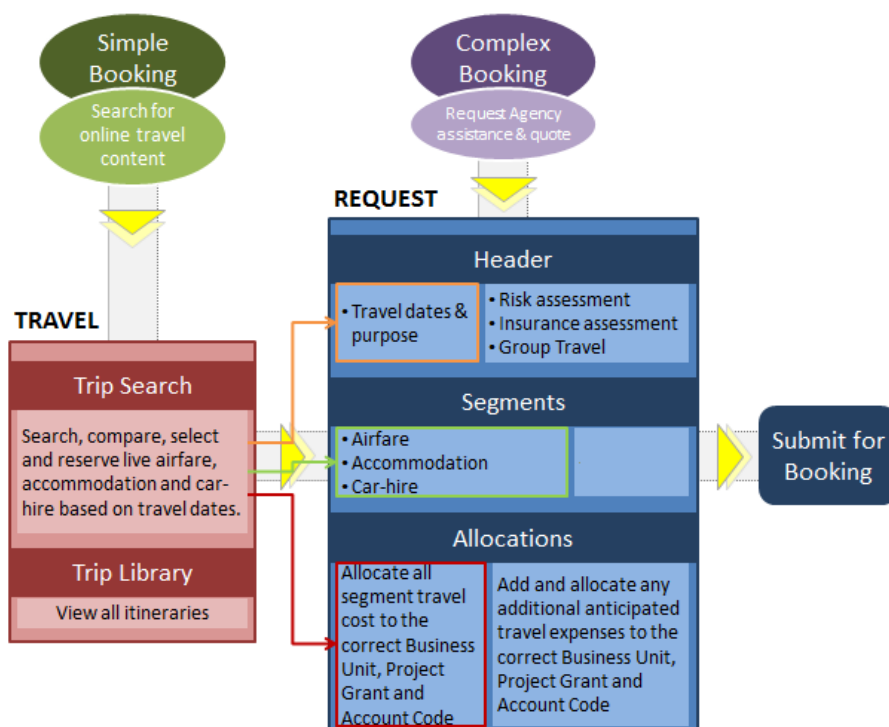
## Overview

In Concur there are two ways in which travel booking can be made:

1. Online **Trip Search\***; or
2. **Requests** (Agency Assistance and quotation).



**\*Note:** Some users may not have access to the Online Trip Search functionality. To obtain quotes from a Travel Agent, click on Requests. Further information on user access can be found in **Identify Traveller** section below.



For further explanation of this figure refer to <https://youtu.be/rVivDkGgbTY>

## Identify the Traveller

Depending on the access level, Traveller may have access to begin their travel booking from:

- Requests (Agency Assistance and quotation) only; or
- Both Requests and Online Trip Search

### Staff:

- Depending on staff HR status, traveller may have access to both Requests and Online Trip Search. Some exception applies e.g. Casual/ Adjunct/ Honorary staff have access to book travel via **Requests only** (Agency Assistance and quotation).

### Students:




- Higher Degree Research (HDR) students have access to **Requests only** (Agency assistance and quotation).
- All other students (Non-HDR) have access to Trip Library functionality only. This access requires the Traveller (Non-HDR students) to book travel directly with the UWA Preferred Travel Agent (Campus Travel, STA Travel or Tertiary Travel) and Traveller **must** use their verified UWA primary email address\* to forward their confirmed travel itinerary to [plans@concur.com](mailto:plans@concur.com). This is to ensure travel plans are captured within the UWA Travel Risk Management Tool in case of travel emergency/ evacuation. \*Note: To verify your UWA primary email address, refer to – Traveller Profile Settings – Email Addresses section).

### Guest Traveller (Non- Profiled Traveller):

- Guest Traveller is defined as a person who is external from UWA, hence do not have a profile identifier with UWA (Non-profiled).
- Guest Traveller will not have access to login to Concur therefore their travel must be arranged by a Travel Arranger.
- Guest travel booking can only be made via Requests (Agency Assistance and quotation).
- Refer to Guest Traveller section for instruction on how to arrange travel for a guest (Non-profiled Traveller).

## Trip Search

## TRIP SEARCH

**Prior to booking in Concur, please ensure you have discussed and agreed your travel plans with your supervisor or manager**

### Flight Search

Round Trip
One Way
Multi City

From ?  
  
Find an airport | Select multiple airports

To ?  
  
Find an airport | Select multiple airports

Outbound ?  

depart
09:00 am
± 3

Return ?  

depart
03:00 pm
± 3

☐ Pick-up/Drop-off car at airport  
☐ Find a Hotel

Search by  
Price

☐ Specify a carrier ?



Search

Or, tell us in your words what you want to do  

Search

To search for online live fare, begin your search from **Trip Search**.

Trip search can be performed for **Flights** (round trip, one way or multi city), **Hotel** and **Car Rental**.

When booking is required for hotel or car hire only, **but not airfare**, use the Hotel  tab or Car hire  tab.

Enter the departure and arrival city or airport (**From** and **To**). When a specific airport destination is required, select from the dropdown list.

From ?

MEL Melbourne Area Airports  
Melbourne, Australia

MEL Tullamarine Arpt  
Melbourne, Victoria, Australia

MEB Essendon Arpt  
Melbourne, Victoria, Australia

MLB Melbourne Regional  
Melbourne, FL, United States of America

Enter the **date** and **time** of outbound and return.

Use the check box options to add hotel or car rental reservations.

Click **Search**.

If you do not have Flight Search on your homepage, you may have access to Agency Proposal and quotation only via Requests. Refer to the Requests section for more information.






## Select Flights

PERTH, WESTERN AUSTRALIA , AUSTRALIA TO MELBOURNE, VICTORIA ,  
AUSTRALIA  
MON, 3 OCT - SUN, 16 OCT

Print / Email

Hide matrix




All 47 results	 Qantas Airways	 Virgin Australia	 Jetstar Airways
Nonstop 4 results	2 results	1 results	1 results
1 stop 33 results	25 results	8 results	--
2 stops 10 results	8 results	2 results	--

Available airlines and the number of stop over matrix will be displayed.

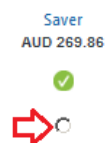
Click on the airline logo to sort results by specific airline or click on the appropriate text on the left side of the grid to sort by stops.

### Baggage Fee Policies

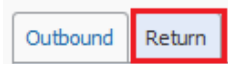
Show fare display legend

Outbound	Return	Sorted By: Stops
Fares may not include all taxes and fees. You will be shown the total price paid when you click the reserve button.		
Perth, Western Australia , Australia - Mon, 3 Oct		
Displaying: 48 out of 48 results.		
<< Previous 1 2 3 4 5 Next >>   All		
Most Restricted Restricted Flexible		
<div>  #762 PER → MEL 8:00 &gt; 14:30 Qantas Airways Airbus Industrie A330-200 Stops: 0 / 3h 30m Preferred 3h 30m; 297 kg CO<sub>2</sub> (Galileo) <a href="#">Fare Rules</a> </div>		
<div>  #682 PER → MEL 9:45 &gt; 16:15 Virgin Australia Airbus Industrie A330-200 Stops: 0 / 3h 30m Preferred 3h 30m; 297 kg CO<sub>2</sub> (Galileo) <a href="#">Fare Rules</a> </div>		
<div>  #772 PER → MEL 10:05 &gt; 16:35 Qantas Airways Airbus Industrie A330-200 Stops: 0 / 3h 30m Preferred 3h 30m; 297 kg CO<sub>2</sub> (Galileo) <a href="#">Fare Rules</a> </div>		

To select an outbound flight for booking, click on the radio button associated with the fare.

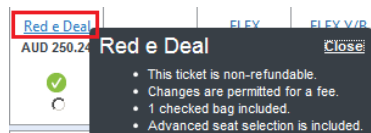


If a return flight is requested, a selection of the Return flights will be displayed (alternatively you can click on the **Return** bar).



Select a Return flight by clicking on the radio button associated with the fare.

For more information about Baggage Fee Policies, Fare Rules or ticketing conditions click on the displayed text.



### Travel Policy Violation

This flight is not in compliance with the following travel rule(s):

⚠ Log For Reports: Air Fare is greater than the least cost logical airfare plus 40 %

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable.

This reason applies to this entire trip.

-- Please Choose a Reason --



Please explain why you have chosen this flight. NOTE: We will log flights which you did not take.

Save Cancel

The estimated selected fare was: \$500.48 (Quoted fare: \$585.57)

The estimated least cost logical fare was: \$415.91

Chosen:

Cost: \$585.57					
Outbound Flight					
	762	Perth Arpt (PER)	03/10/2016 8:00 AM	Tullamarine Arpt (MEL)	03/10/2016 2:30 PM Airbus A330-200
Return Flight:					
	481	Tullamarine Arpt (MEL)	16/10/2016 5:45 PM	Perth Arpt (PER)	16/10/2016 6:50 PM Boeing 737-800

### Note:

Depending on the type of fare selected, a Travel Policy Violation pop-up window may appear and you will be required to provide a reason for the chosen flight.

Select a reason from the drop down list, provide a brief explanation and click on **Save**.

**Chosen Carriers**

**Outbound**

#682	PER	→	MEL	09:45a >	04:15p		Saver		Flexi	Flexi Y/B
Virgin Australia	Airbus Industrie A330-200			Stops: 0 / 3h 30m			AUD 224.41		AUD 524.41	AUD 969.86
3h 30m; 297 kg CO <sub>2</sub> (Galileo)							✓	✓	✓	
<a href="#">Fare Rules</a>							○	○	○	

[Remove](#)

**Return**

#691	MEL	→	PER	05:35p >	06:55p		Saver		Flexi	Flexi Y/B
Virgin Australia	Airbus Industrie A330-200			Stops: 0 / 4h 20m			AUD 224.41		AUD 524.41	AUD 969.86
4h 20m; 297 kg CO <sub>2</sub> (Galileo)							✓	✓	✓	
<a href="#">Fare Rules</a>							○	○	○	

[Remove](#)

[Select](#)

Selected outbound and/or return flights will be displayed in the Chosen Carriers section.

To confirm selected flight/s, click on **Select**.

## Fare Quote

Flt#	From	To	Depart	Arrive
VA 682	PER	MEL	2016-10-03 09:45:00	2016-10-03 16:15:00
VA 691	MEL	PER	2016-10-16 17:35:00	2016-10-16 18:55:00

Number of Passengers **1**

### Fare Summary

Base Fare **1939.72**

### Taxes, Fees and Charges

OR **25.50**

WG **7.50**

UO **197.27**

### Total Est. Cost

**AUD 2169.99**

[Cancel](#)

[Reserve](#)

Click on **Reserve** to confirm selections.

## Review and Reserve Flight

**Trip Summary**

**Flights Selected**

Round Trip

PER - MEL

Outbound: Mon, 03/10/2016

Return: Sun, 16/10/2016

**Select a Hotel** [Remove](#)

Nights: 13

Melbourne, Victoria

Check-in: Mon, 03/10/2016

Check-out: Sun, 16/10/2016

**Finalize Trip**

**Review and Reserve Flight**

**REVIEW FLIGHTS**

Outbound flight: Perth, Western Australia, Australia (PER) - Melbourne, Victoria, Australia (MEL) Mon, 3 Oct

Virgin Australia #682	Perth Arpt (PER) Depart: Monday, 09:45a	Tullamarine Arpt (MEL) Arrive: Monday, 04:15p
Stops: 0 Duration: 3h 30m Flexi Y/B: B Airbus Industrie A330-200		

Return flight: Melbourne, Victoria, Australia (MEL) - Perth, Western Australia, Australia (PER) Sun, 16 Oct

Virgin Australia #691	Tullamarine Arpt (MEL) Depart: Sunday, 05:35p	Perth Arpt (PER) Arrive: Sunday, 06:55p
Stops: 0 Duration: 4h 20m Flexi Y/B: B Airbus Industrie A330-200		

**ENTER TRAVELER INFORMATION**

Ensure all traveler information below is correct. [Edit](#) | [Review all](#)

**Primary Traveler**

Name: Never Test Request William G Phone: 123456 [traveltest-finserv@uwa.edu.au](#)

**Frequent Flyer Programs** [Add a Program](#)

For Virgin Australia

No Program selected

**SEAT ASSIGNMENT**

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats](#)

**REVIEW PRICE SUMMARY**

Description	Fare	Taxes and Fees	Charges
Airfare	AUD 1,939.72	AUD 230.27	AUD 2,169.99
<b>Total Estimated Cost:</b>		<b>AUD 2,169.99</b>	
<b>Total Due Now:</b>		<b>AUD 2,169.99</b>	

**SELECT A METHOD OF PAYMENT**

How would you like to pay?

There are no credit cards defined. [Add credit card](#)

\* Indicates credit card is a company card

By completing this booking, you agree to the [fare rules and restrictions](#).

[Back](#) [Reserve Flight and Continue](#)

Validate flights information.

Ensure Traveller Information is correct.

Where applicable, frequent flyer program can be entered here.

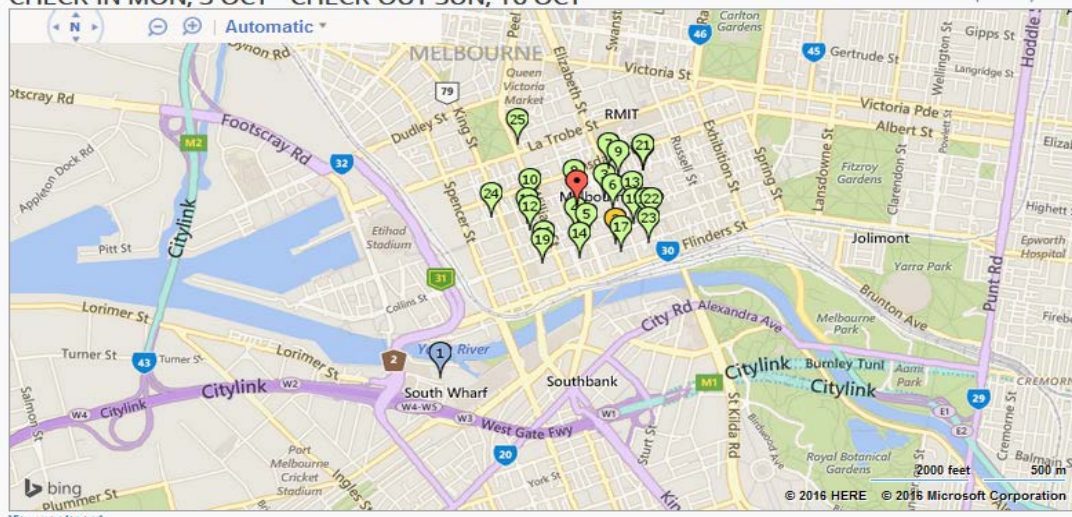
Click on **Select Seats** to request seat allocation.

Review the *Fare rules and restrictions*. To continue, click on **Reserve Flight and Continue** button.

## Select a Hotel

CHECK-IN MON, 3 OCT - CHECK-OUT SUN, 16 OCT

[Hide Map](#) [Print](#) / [Email](#)



If hotel booking is requested, a selection of hotels will be displayed.

On the displayed map, the reference point is indicated by the red icon. The numbered icons are the hotels located within the specified search radius.

Change Search

Check-in Date

03/10/2016

Check-out Date

16/10/2016

Find hotels within

5

Distance Units

km

of

☐ Airport
 ☐ Address

☐ Company Location
 ☒ Reference Point / Zip Code

Reference Point / Zip Code

(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

Melbourne, Victoria

With names containing:

Search

Price

AUD139 - AUD751

Hotel chain

☒ Chain
 ☐ Superchain

☐ Ascend (1)
 ☐ Best Western (3)
 ☐ Clarion (1)
 ☐ Crowne Plaza (1)
 ☐ Design Hotels (1)
 ☐ Doubletree (1)




Check All | Reset

Hotel Amenities

☐ Breakfast (25)
 ☐ Broadband Internet (99)
 ☐ Business center (61)
 ☐ Convention center (0)
 ☐ Dry cleaning (92)
 ☐ Fitness center (68)

Hotel amenities may change over time and without notice. Not all hotels have provided their amenities list.

Where necessary, hotel search criteria can be updated from the left side panel.

Sorted By: <span>Price - Low to High</span> With names containing: <input type="text"/>	
<div>Expand All Details</div> <div>Displaying: 100 out of 100 results</div> <div>&lt;&lt; Previous 1 2 3 4 Next &gt;&gt;   All</div>	
<div>1. Causeway Inn On The Mall</div> <div>  <div>327 Bourke St Mall Melbourne, Victoria 3000</div> <div>0.17 km   <a href="#">view map</a></div> </div> <div> <div>★★★★★</div> <div>rate this hotel</div> </div> <div> <a href="#">more info</a>   <a href="#">compare</a> </div>	<div>from</div> <div>AUD 139</div> <div><a href="#">choose room</a></div>
<div>2. Metro Apartments on Bank Place</div> <div>  <div>18 Bank Place Melbourne, Victoria 3000</div> <div>0.18 km   <a href="#">view map</a></div> </div> <div> <div>★★★★★</div> <div>rate this hotel</div> </div> <div> <a href="#">more info</a>   <a href="#">compare</a> </div>	<div>from</div> <div>AUD 145</div> <div><a href="#">choose room</a></div>
<div>3. Treasury on Collins</div> <div>  <div>394 Collins Street Melbourne, Victoria 3000</div> <div>0.23 km   <a href="#">view map</a></div> </div> <div> <div>★★★★★</div> <div>rate this hotel</div> </div> <div> <a href="#">more info</a>   <a href="#">compare</a> </div>	<div>from</div> <div>AUD 168</div> <div><a href="#">choose room</a></div>

Review the hotel search results.

To filter results, use the “Sorted By” or “With names containing”.

To view hotel details, click on more info. To compare hotels, click on compare.

To select a specific room type, click on **choose room**.

AUD 249 For Official Government Travel King Hilton Guestroom Plus 1k City Vw Lv5-6 38m2 Lux Bed Fir-ceiling Wndw (Rate Code: A00A0X) (Galileo)

AUD 279 For Official Government Travel King Hilton City View 1k City Vw Lv7-15 38m2 Lux Bed Fir-ceiling Wnd (Rate Code: A02A0X) (Galileo)

AUD 340 For Official Government Travel King Hilton Executive Room 1k Exec City Or Bay View 38m2 High Fir Lod Tv (Rate Code: A04A0X) (Galileo)

Rate details / Cancellation policy

Select

Hotel rates indicated in green are within UWA recommended range.

When selecting a hotel rate which is outside the UWA recommended range, you will be required to provide a reason.

Click on **Select** to confirm.

## Review and Reserve Hotel

**Trip Summary**

**Flights Reserved**

Round Trip  
PER - MEL  
Outbound: Mon, 03/10/2016  
Return: Sun, 16/10/2016

**Hotel Selected**

Nights: 1  
Melbourne, Victoria, Australia  
Check-in: Mon, 03/10/2016  
Check-out: Tue, 04/10/2016

**Finalize Trip**

**Review and Reserve Hotel**

**REVIEW HOTEL ROOM**  
Causeway Inn On The Mall  
Room Only Rate Room With 1 Queen Bed Ensuite W Shower Lcdtv Inroomsafe Fridge Free Newspaper  
1 Night | 1 Guest\*

Check-in	Check-out	Address	Phone
Monday, 03 October, 2016	Tuesday, 04 October, 2016	327 Bourke St Mall Melbourne, Victoria 3000 Australia	3-9550-0680

\* We reserve every hotel room for 1 guest only, regardless of the number of actual travellers sharing the room. The primary traveller's name is attached to the reservation for hotel check-in.

**PROVIDE HOTEL ROOM PREFERENCES**  
Your preferences and comments will be passed to the hotel.  
Comments (20 character max)

**ENTER HOTEL GUEST INFORMATION**  
Ensure the name below matches the I.D. shown on the day of check-in. @

**Hotel Guest**  
Name: Never Test Request William S Phone: 123456  [Edit](#) | [Review all](#)

**Hotel Program** [Add a Program](#)

**REVIEW PRICE SUMMARY**

Description	Average Nightly Rate	Dates	Total
Causeway Inn On The Mall	~AUD 139.00	03 Oct - 04 Oct	AUD 139.00
<b>Total Estimated Cost:</b>			<b>AUD 139.00*</b>
<b>Total Due Now:</b>			<b>AUD 0.00**</b>

\* Rate changes over duration of stay. Amount shown is the average nightly rate.  
\* Does not include taxes or additional fees incurred during time of stay.  
\*\* Remaining amount due at hotel location.

**SELECT A METHOD OF PAYMENT**  
The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

[Add credit card](#)

\* Indicates credit card is a company card

Review selected hotel details.

Provide Hotel Room Preferences where applicable.

Enter/ verify guest information.

Review the price summary.

**Hotel reservation will require a credit card details to be entered. Credit card details will be used to confirm your hotel reservation.**

Click on **"Add credit card"** to open the pop-up window and complete all the required fields.

To add a credit card details:

**Add a Credit Card**

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction. **All fields are required.**

Display Name (e.g., My Corporate Card)

Card Type  Expiration Date

Use this card as the default card for:  
☐ Hotel Reservations

**Billing Address:** Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. **Your credit card may be declined if your billing address is inaccurate.**

**Note:** Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street  Use this address

City  State, Territory  Zip/Postal Code

Country

[Save](#) [Reset](#) [Cancel](#)

**All fields in this section are required and must be completed.**

Click **Save**.

## ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Causeway Inn On The Mall 

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

TOTAL RATE: 139 AUD

CXL: CXL WITHIN 72 HRS OF ARRIVAL INCURS CXL FEE OF 1NT ACCOM

COST

☐ I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#)

[Reserve Hotel and Continue](#)

Review the rate details and cancellation policy provided by the hotel.

Select the check-box to indicate **“I agree to the hotel’s rate rules, restrictions and cancellation policy”**.

Click **Reserve Hotel and Continue**.

## Travel Details

### Trip Summary



#### Finalize Trip

[Review Travel Details](#)  
[Enter Trip Information](#)  
[Submit Trip Confirmation](#)

### Travel Details

#### TRIP OVERVIEW

I want to...

[Print Itinerary](#)

[Email Itinerary](#)

[Clean up Outlook](#)

[View Trip History](#)

[Create Template](#)

[Close Trip](#)

[Share Trip](#)

Trip Name: Trip from Perth to Melbourne [Edit](#)

Start Date: 03 October, 2016

End Date: 16 October, 2016

Created: 19 February, 2016, Never William 6 (Modified: 19 February, 2016)

Description: (No Description Available) [Edit](#)

Agency Record Locator: LCZD36

Passengers: Neverma William

Total Estimated Cost: \$2,169.99 AUD [Details](#)


 Airfare must be ticketed by an agent by: 02/10/2016 4:30 AM Eastern

[Change frequent flyer program](#)

Review Travel Details.

### RESERVATIONS

Monday, 03 October, 2016

**Flight** [Change](#)

**Perth, Western Australia (PER) to Melbourne, Victoria (MEL)**

**Virgin Australia 682**

**Departure: 09:45 AM**

**Seat: 25A (Confirmed)** [Change Seat](#)

**Confirmation: PTRLDQ**

**Perth Arpt (PER)** [Status: Confirmed](#)

**Arrival: 04:15 PM**

**Tullamaine Arpt (MEL)**

**Additional Details**

Distance: 2600 kilometers

Emissions: 296.3 kg CO<sub>2</sub>

Cabin: Flexi Y/B (B)

**TravelCLICK** [Change](#)

**Checking In: Mon 3 Oct**

**Days 1**

**Confirmation: 274227851**

**Checking Out: Tue 4 Oct**

**Status: Contact travel agent**

**Additional Information**

Daily Rate:

**Room Details**

Room Description: RoomDescriptionCodeB1QPR

[Add to your itinerary](#)

Sunday, 16 October, 2016

**Flight** [Change](#)

**Melbourne, Victoria (MEL) to Perth, Western Australia (PER)**

**Virgin Australia 691**

**Departure: 05:35 PM**

**Seat: 25A (Confirmed)** [Change Seat](#)

**Confirmation: PTRLDQ**

**Tullamaine Arpt (MEL)** [Status: Confirmed](#)

**Arrival: 06:55 PM**

**Perth Arpt (PER)**

**Additional Details**

Distance: 2600 kilometers

Emissions: 296.3 kg CO<sub>2</sub>

Cabin: Flexi Y/B (B)

[Add to your itinerary](#)

### TOTAL ESTIMATED COST

Air	
Airfare quoted amount:	\$1,939.72 AUD
Taxes and fees:	\$230.27 AUD
Total Estimated Cost:	\$2,169.99 AUD
TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.	

If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

[Next >>](#)


[Cancel](#)

Review Reservations details.

Where necessary, booking can still be amended by clicking on “Change” and/or additional booking can be made by clicking “Add to your Itinerary”.

Click **Next** to continue.

## Trip Booking Information

**Finalize Trip**

✓ Review Travel Details

**Enter Trip Information**

Submit Trip Confirmation

### Trip Booking Information

The trip name and description are for your record keeping convenience.

**Trip Name**  
This will appear in your upcoming trip list.

**Trip Description** (optional)  
Used to identify the trip purpose

Attending Universities Australia Higher Education Conference 2016

Guest speaker at the Universities Australia Higher Education Conference 2016

Send a copy of the confirmation to:

Send my email confirmation as  
☒ HTML ☐ Plain-text

With my email confirmation...

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip

<< Previous

Next >>

Cancel

Enter **Trip Name**. Be specific, this description will appear on your homepage upcoming trip list.

Add a **Trip Description** to further define the purpose of travel.

At this point of the process, travel bookings are not yet finalised. If you close at this point, your reservation may be cancelled.

Click **Next**.

## Trip Confirmation

**Finalize Trip**

✓ Review Travel Details

✓ Enter Trip Information

**Submit Trip Confirmation**

### Trip Confirmation

To **COMPLETE BOOKING**, please press the "Confirm Booking" Button after reviewing this page.  
To **CANCEL**, press the Cancel button.

**TRIP OVERVIEW**

Trip Name: Attending Universities Australia Higher Education Conference 2016

Start Date: 03 October, 2016

End Date: 16 October, 2016

Created: 19 February, 2016, Never William 6 (Modified: 19 February, 2016)

Description: Guest speaker at the Universities Australia Higher Education Conference 2016

Agency Record Locator: LCZD36

Passengers: Neverma William


Total Estimated Cost: \$2,169.99 AUD

 Airfare must be ticketed by an agent by: 02/10/2016 4:30 AM Eastern

Review information.

**RESERVATIONS**

Monday, 03 October, 2016

**Flight Perth, Western Australia (PER) to Melbourne, Victoria (MEL)**

Virgin Australia 682

Departure: 09:45 AM  
Seat: 26A (Confirmed)  
Perth Appt (PER)

Arrival: 04:15 PM  
Tullamarine Appt (MEL)

Additional Details  
Distance: 2099 kilometers  
Emissions: 295.3 kg CO<sub>2</sub>  
Cabin: Flexi Y/B (R)

**TravelCLICK**

Checking In: Mon 3 Oct  
Days: 1


Confirmation: 274227851  
Status: Contact travel agent

Checking Out: Tue 4 Oct

Additional Information  
Daily Rate:

Room Details  
Room Description: RoomDescriptionCodeB1QP6R

Sunday, 16 October, 2016

**Flight Melbourne, Victoria (MEL) to Perth, Western Australia (PER)**

Virgin Australia 691

Departure: 05:35 PM  
Seat: C26A (Confirmed)  
Tullamarine Appt (MEL)

Arrival: 06:55 PM  
Perth Appt (PER)

Additional Details  
Distance: 2099 kilometers  
Emissions: 295.3 kg CO<sub>2</sub>  
Cabin: Flexi Y/B (R)

Check your Reservations.



TOTAL ESTIMATED COST	
<b>Air</b>	
Airfare quoted amount:	\$1,939.72 AUD
Taxes and fees:	\$230.27 AUD
<b>Total Estimated Cost:</b>	<b>\$2,169.99 AUD</b>
<b>TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.</b>	

Almost done... Please confirm this itinerary.

**Note:**

At this point of the process, ticket is reserved but **not yet** issued to the Traveller. Bookings can only be submitted when all the required information regarding risk and expenses allocation have been completed. Proceed to the next section.

Click on **Confirm Booking** to proceed.

## Request Header

Information previously entered will be pre-populated here:

- Booking Type (**Concur TRAVEL – DO NOT UPDATE TO ANY OTHER BOOKING TYPE**)
- Trip Name
- Departure and Return Date
- Number of Travel Days
- Travel Service Provider (**Campus travel is the default Travel Agent for Concur Travel online booking reservation – DO NOT CHANGE TO OTHER TRAVEL AGENTS**)

Request 33WR

Status: Not Submitted  
To be approved before: 07/04/2016 14:30  
Amount: AUD 1,713.36

Trip Name: Trip from Perth to Melbourne

Trip Description:

Request Header Segments Expenses Approval Flow Audit Trail

Missing required field: Travel Purpose, Are you aged 80 or over at time of travel?, Do you have a pre-existing medical condition?, Indicate the main high-risk activity.  
 You are required to fill in and attach a UWA Travel Risk Assessment Form at [Hyperlink TBC](#)

Booking Type Concur TRAVEL	Trip Name Attending ANZUIAG Conference	Departure Date 03/10/2016	Return Date 16/10/2016
Number of Travel Days 14	Number of Private Days 0	Private Days - Travel Date Ranges	Travel Service Provider Campus Travel
Travel Purpose	Trip Description		

**Request can only be submitted once all the required mandatory fields are completed.**  
Mandatory fields are indicated by red coloured side bar.


**Complete the following fields:**

Number of Private Days 0	Private Days - Travel Date Ranges
-----------------------------	-----------------------------------

Where applicable, enter the **Number of Private Days** and indicate your Private Days – **Travel Date Range** in the text-box.

## UWA Employee:

Entering private days here does not automatically update your leave on the HR Employee Self Service (ESS) system. Private travel days will need to be booked through the ESS system as annual recreation leave (or other as advised by HR) but also include time taken in lieu or through accumulated flexi time.

Hover around  icon to look up for definition of Business and Private Days.

Travel Purpose

Trip Description

Select from the drop down list, your **Travel Purpose**.

Enter a **Trip Description**.

Are you aged 80 or over at time of travel?

Do you have a pre-existing medical condition?

Questions about age and pre-existing medical conditions are required for insurance purposes.

Failure to disclose could result in insurance cover being declined.

**Traveller** is responsible to complete and attach the [UWA Travel Risk Assessment Form](#) when:

- Main Destination Country is indicated as High or Extreme Risk and/or
- Travel Activity is indicated as High Risk Activity

**Failure to complete and/or to provide the required information may result in travel request being rejected by your Travel approver.**

UWA Travel Risk Assessment (destination and activity) Template can be found on

<http://www.staff.uwa.edu.au/procedures/risk/management>

## Main Destination City and Country Risk Level

Main Destination City

Main Destination Country

Travel risk advisory - Low (Level 1)

Main Destination City and Country Risk Level information will be displayed here.

Main Destination Risk Level

Highest Location Risk Level

Click on the **Travel Risk Advisory** to view details of the country's summary and risk information.

## High- Risk Activity

Indicate the main high-risk activity

Other high-risk activities

Select from the drop down list, your travel **Main high-risk activity**.

Where applicable, specify any other high-risk activities.

Are you returning to your home country?

Indicate if you are returning to your home country.



Are you leading a group?[?](#)

Travel parties

A risk assessment has already been completed by another traveler?[?](#)

Request 33WR

Trip Name: Test Travel Diary

Trip Description:

Request Header [Segments](#) [Expenses](#) [Approval Flow](#) [Audit Trail](#)

Cancel **Save** Attachments Print / Email Delete Request Submit Request

Status: Not Submitted

Indicate if you are leading a group and enter your Travel parties in the available text box.

Click on **Save**.

Continue to the next section by clicking on the **Segments** tab.

## Segments

Travel segments previously selected via Trip Search (e.g. Air Ticket, Car Rental and/or Hotel reservation) will be displayed here.

Request 33WR

Trip Name: Trip from Perth to Melbourne

Trip Description:

Request Header [Segments](#) [Expenses](#) [Approval Flow](#) [Audit Trail](#)

Add Segment

CLICK ICON TO CREATE SEGMENT

PNR JG7XP9  
View Itinerary  
View request

**Air Ticket (Self-booked segment)** Amount: AUD 1,713.36

From: Perth (Airport - PER), Perth, Western Australia  
To: Tullamarine (Airport - MEL), Melbourne, Victoria  
Depart at: Monday, 3 October, 2016 At 8:00  
Arrive at: Monday, 3 October, 2016 At 14:30  
Flight: QF762  
Class: B  
Duration: 03h30  
Travel risk advisory - Low (Level 1)

**At least one segment in the trip is out of policy**

From: Tullamarine (Airport - MEL), Melbourne, Victoria  
To: Perth (Airport - PER), Perth, Western Australia  
Depart at: Sunday, 16 October, 2016 At 17:45  
Arrive at: Sunday, 16 October, 2016 At 18:50  
Flight: QF481  
Class: B  
Duration: 04h05  
Travel risk advisory - Low (Level 1)

**At least one segment in the trip is out of policy**

Allocate Modify

If further amendment is required, click on Modify and follow the prompt. Modifying the trip at this point will bring you to the Travel details page (where travel segments can be added/change).

Continue to the next section by clicking on the **Expenses** tab.

## Expenses

Previously selected segments (e.g. Airfare, Accommodation or Car Rental) will be displayed on the left.

Request 344K

Attachments ▾ Print / Email ▾ Delete Request Submit Request

Trip Name: Test Status: Not Submitted  
Trip Description: Amount: AUD 2,050.00

Request Header ⚠ Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/> 03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/> 03/10/2016	Car Rental	AUD 500.00	AUD 500.00

TOTAL AMOUNT AUD 2,050.00 TOTAL REQUESTED AUD 2,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

- Conference & Course fees
- Meals Overnight Travel
- Non Car Rental (Taxi)
- Other
- Per Diem
- Staff Training
- Travel Document Costs
- Travel Grants

Any other Expenses associated to this travel should now be added.

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

- Conference & Course fees
- Meals Overnight Travel
- Non Car Rental (Taxi)
- Other
- Per Diem
- Staff Training
- Travel Document Costs
- Travel Grants

To create a new expense type, select an **Expense Type** from the list.

Expense Type:  Transaction Date:

Conference & Course fees

Description:

Amount:  AUD

Comment:

Save Allocate Cancel

Complete the following information:

- **Transaction Date** (can be entered as travel date)
- **Amount** (*indicate* the total amount for this expense type)
- Add any Description or Comment.

Click **Save**.

To create another expense type, select an Expense Type from the list and repeat the above steps.

Once added, all the Expense Types will be listed on the left panel.

Request Header

Segments

Expenses

Approval Flow

Audit Trail

New Expense

Delete

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/>	03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/>	03/10/2016	Car Rental	AUD 500.00	AUD 500.00
<input type="checkbox"/>	03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
<input type="checkbox"/>	03/10/2016	Per Diem	AUD 400.00	AUD 400.00

TOTAL AMOUNT

AUD 3,050.00

TOTAL REQUESTED

AUD 3,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

Conference & Course fees

Meals Overnight Travel

Non Car Rental (Taxi)

Other

Per Diem

Staff Training

Travel Document Costs

Travel Grants

To Allocate funding, select Expense Type by **ticking the box** and click on **Allocate**.

Request Header

Segments

Expenses

Approval Flow

Audit Trail

New Expense

Delete

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/>	03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/>	03/10/2016	Car Rental	AUD 500.00	AUD 500.00
<input type="checkbox"/>	03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
<input type="checkbox"/>	03/10/2016	Per Diem	AUD 400.00	AUD 400.00

TOTAL AMOUNT

AUD 3,050.00

TOTAL REQUESTED

AUD 3,050.00

Expense Type

Airfare

Amount

750.00

AUD

Allocate

View segment detail

The system will automatically group and select all the listed segment components together.

Allocations for Request : Test

Request List

Allocate Selected Expenses

Clear Selections

Summary

Select Group

<input checked="" type="checkbox"/>	Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	28/06/2016	Car Rental		AUD 500.00
<input checked="" type="checkbox"/>	27/06/2016	Airfare		AUD 750.00
<input checked="" type="checkbox"/>	27/06/2016	Accommodation		AUD 800.00
<input checked="" type="checkbox"/>	27/06/2016	Conference &...		AUD 600.00
<input checked="" type="checkbox"/>	27/06/2016	Per Diem		AUD 400.00

Allocations

Total: AUD 3,050.00

Allocated: AUD 3,050.00 (100%)

Remaining: AUD 0.00 (0%)

Allocate By:

Add New Allocation

Delete Selected Allocations

Favorites

Add to Favorites

<input type="checkbox"/>	Percentage	Funded By (If...)	Business Unit	Project Grant	Account Categ...	Account Code	CF Bus
<input type="checkbox"/>	100						

Save

Cancel

**EACH Expense Type must be ALLOCATED SEPERATELY using the most appropriate ACCOUNT CATEGORY and ACCOUNT CODE.**

To allocate expenditure:

**Step 1 – Decide the number of lines required for each segment allocation and create the lines by clicking on the “Add New Allocation” button.**

Allocations for Request : Test

Request List

Allocate Selected Expenses Clear Selections Summary

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference & ...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Total: AUD 3,050.00 Allocated: AUD 3,050.00 (100%) Remaining: AUD 0.00 (0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage	* Funded By (If...	Business Unit	Project Grant	Account Categ...	Account Code	CF
20						
20						
20						
20						
20						

Save Cancel

In this example, segment allocations are required for car rental, airfare, accommodation, conference & course fees and per diem. Therefore, a minimum of five individual lines for each segment component is required.

If only one segment is listed (e.g. just for Airfare), you do not need to add new line for allocation as the first line has automatically been created).

**Step 2 – Complete each line allocation details.**

Complete the Allocation line details based on the amount noted on the left.

Allocations for Request : Test

Request List

Allocate Selected Expenses Clear Selections Summary

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference & ...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Total: AUD 3,050.00 Allocated: AUD 3,050.00 (100%) Remaining: AUD 0.00 (0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage	* Funded By (If...	Business Unit	Project Grant	Account Categ...	Account Code	CF
20						
20						
20						
20						
20						

Save Cancel

### Allocate By

Allocate By: Percentage Amount

Select your preferred method of allocation, by **Percentage** or **Amount** (system default is Percentage). **Allocation By Amount** is the recommended method.

## Amount

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group \*

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference &...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Allocate By: \* Add New Allocation

Amount	* Funded By (If... Bu
AUD 500.00	
AUD 750.00	
AUD 800.00	
AUD 600.00	
AUD 400.00	

Update the **Amount** for each segment allocation (based on the amount noted on the left).

## Funded By

Indicate the "Funded By" arrangement for each line, i.e. **Externally Funded**, **Self-Funded** or **UWA**.

\* Funded By

Externally Funded

Self Funded

UWA

Allocations

Allocate By: \* Add New Allocation

Amount	* Funded By
AUD 750.00	UWA
AUD 800.00	UWA
AUD 500.00	UWA

- ❖ UWA Funded - will require BU/PG/Account code allocation.
- ❖ Externally Funded will require BU/PG/Account code allocation. Amount will be recouped from the external party by UWA.
- ❖ Self-Funded – no allocation required (Travel Agent will contact the Traveller to finalise payment).

## Business Unit

Business Unit Project Grant Account

Type to search by: TEXT CODE

(Code) Text

(00010) Indigenous Studies

(00012) Microscopy & Characterisation

(00109) Faculty Office Arts

(00120) Humanities

(00125) School of Social Sciences

(00140) Psychology

(00190) Music

(00200) Faculty of Law

(00230) Computer Science&Software Eng

(00250) Fac Archit Landscape Vis Arts

(00300) Faculty of Education

(00310) Sport Science, Exercise&Health

Update **Business unit** for each required allocation line.

Use the scroll-bar or the search functionality:

- Select **Text** and type in **Business Unit name**; or
- Select **Code** and type in **Business Unit number**

Allocations

Allocate By: \* Add New Allocation Delete Selected Allo

Amount	* Funded By	Business Unit
AUD 750.00	UWA	(00550) Centre for Fo...
AUD 800.00	UWA	(00550) Centre for Fo...
AUD 500.00	UWA	(00550) Centre for Fo...

## Project Grant

Project Grant Account Cate... Account

Type to search by: TEXT CODE

(Code) Text

(10302001) Ad Hoc Scholarships

(63001031) ADAMS AD-HOC

(17701001) Asia Pacific Food Inovat Conf

(63001021) Burke Consultancy

(10993000) Cash Advance Clearing

(10100001) Centre Administration

(10100004) Chair in Food Science

(10201009) Dadour - Student Research

(63001032) Dadour Ad Hoc

(63001020) Dadour Consultancy

(10900000) EMS Credit Card Control

(10999010) Expenditure Target

(10994000) Facil Mngt & Central Charges

(68000002) Fish Prov Project-IMD Sharif

(10100002) Forensic Sci Re R Napper

The list of Project Grants within the selected Business Unit will now be listed.

Select **Project Grant** for each allocation line.

Use the scroll-bar or use the search functionality:

- Select **Text** and type in **Project Grant name/description**; or
- Select **Code** and type in **Project Grant number**

Allocations

Allocate By: \* Add New Allocation Delete Selected Allocations Favorites \*

Amount	* Funded By	Business Unit	Project Grant
AUD 750.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...
AUD 800.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...
AUD 500.00	UWA	(00550) Centre for Fo...	(10201002) Leighton S...

## Account Category and Account Code

**Account Category and Account Code are inter-related fields.**

In this example, based on the Account Category of Airfare, indicate whether the expense (Account Code) relates to Airfare for:

- Domestic Trip
- International Trip; or
- Visitor Related

Select an **Account Category** and the appropriate **Account Code** for each allocation line.

Allocations Total: AUD 2,050.00

Amount	Funded By	Business Unit	Project Grant	Account Category	Account Code
AUD 750.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...	Airfare	(601) Domestic Trip
AUD 800.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...	Accommodation	(608) Domestic Trip
AUD 500.00	UWA	(00550) Centre for Fo...	(10201002) Leighton S...	Car-Hire	(606) Car-Hire

## Class Field – optional (Only to be used by those Faculties using Class Field)

Class Field information is not mandatory.

Allocations Total: AUD 2,050.00 Allocated: AUD 2,050.00 (100%) Remaining: AUD 0.00 (0%)

Amount	Funded By	Business Unit	Project Grant	Account Category	Account Code	CF Business U...	Class Field
AUD 750.00	UWA	(00550) Centre...	(10100002) Fo...	Airfare	(601) Domestic...	(00550) Centre...	(062) Alison Pitt
AUD 800.00	UWA	(00550) Centre...	(10100002) Fo...	Accommodation	(608) Domestic...	(00550) Centre...	(062) Alison Pitt
AUD 500.00	UWA	(00550) Centre...	(10201002) Lei...	Car-Hire	(606) Car-Hire	(00550) Centre...	(062) Alison Pitt

To enter a Class Field:

1. Select Business Unit under **CF Business Unit** field (the selected CF Business Unit must be the same as the selected Business Unit).
2. Select the appropriate Class Field from the drop down list.

Click **Save** when segment allocation lines are completed.

## Allocations for Request : Test

Request List

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference &...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations Total: AUD 3,050.00 Allocated: AUD 3,050.00 (100%) Remaining: AUD 0.00 (0%)

Amount	Funded By...	Business Unit	Project Grant	Account Category	Account Code	CF
AUD 500.00	UWA	(00550) Centr...	(10100002) Fo...	Car-Hire	(606) Car-Hire	
AUD 750.00	UWA	(00550) Centr...	(10100002) Fo...	Airfare	(601) Domestic Trip	
AUD 800.00	UWA	(00550) Centr...	(10201002) Le...	Accommodation	(608) Domestic Trip	
AUD 600.00	UWA	(00550) Centr...	(10100002) Fo...	Other	(611) Conference &...	
AUD 400.00	UWA	(00550) Centr...	(10100002) Fo...	Other	(553) Per Diem	

**Save** Cancel

An expense line which has been fully allocated is indicated with the "Fully Allocated" symbol

<input type="checkbox"/>	Date	Expense Type	Amount	Requested		
<input type="checkbox"/>	27/06/2016	Airfare	AUD 750.00	AUD 750.00		
<input type="checkbox"/>	27/06/2016	Accommodation	AUD 800.00	AUD 800.00		
<input type="checkbox"/>	28/06/2016	Car Rental	AUD 500.00	AUD 500.00		
<input type="checkbox"/>	27/06/2016	Fully Allocated				
<input type="checkbox"/>	27/06/2016	Allocations				
	Percentage	Funded By (If...)	Business Unit	Project Grant	Account Categ...	Account Code
	16.39344262	(UWA) UWA	(00550) Centre...	(10100002) For...	(Car-Hire) Car...	(606) Car-Hire
	24.59016393	(UWA) UWA	(00550) Centre...	(10100002) For...	(Airfare) Airfare	(601) Domestic...
	26.2295082	(UWA) UWA	(00550) Centre...	(10201002) Lei...	(Accommodation...	(608) Domestic...
	19.67213115	(UWA) UWA	(00550) Centre...	(10100002) For...	(Other) Other	(611) Conferen...
	13.1147541	(UWA) UWA	(00550) Centre...	(10100002) For...	(Other) Other	(553) Per Diem

An expense line with partial allocation is indicated with the "Partially Allocated" symbol

<input checked="" type="checkbox"/>	03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00				
<input type="checkbox"/>	03/10/2016	Allocations						
		Partially Allocated						
					</			

## Attachments

### Requirements for the images

- **ONLY scanned images, saved images, or PDFs can be attached to requests** (Word and excel document must be saved as PDF before it can be attached here).
- Before images are scanned, note the following:
  - The images should be scanned at 300 DPI or lower to reduce file size.
  - The file format must be PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF.
  - There is a size limit for each image file – generally 3 or 5 MB
  - The limit is noted in the image upload window.
  - No more than 10 files may be uploaded in a single session.

Request 337G

Trip Name: conference sydney  
Trip Description:

Status: Not Submitted  
Amount: AUD 2,000.00

To attach an image to a request, click on **Attachments** and select **Attach Documents**.

## Document Upload and Attach



You may attach scanned images.

You may choose up to 10 files to attach to the request.

For best results, scan images in black & white with a resolution of 300 DPI or lower.

Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading:

Browse...

Upload

No files selected

Close

The file format must be  
.png, .jpg, .jpeg, .pdf,  
.html, .tif or .tiff.

5MB limit per file.

1. In the window that appears, click on **Browse** and navigate to the location of the saved images and select the file to upload.
2. Select file and click **Open**. The file is added to a list under **Files Selected for uploading**.
3. Repeat the process until all files (up to 10) are listed under Files Selected for uploading.
4. Click Upload.
5. Click Close when done uploading.

### NOTE:

- All attachments are combined into a single PDF.
- You can delete the PDF if the request has not yet been submitted or if the request has been returned to you by your approver.
- To delete images from a request, select Attachments > Delete Documents. The entire set of attachments (the single PDF) will be removed from the request. You cannot delete individual attachments.

## Submit Request

Once all the Expense Types are fully allocated, the requisition can be submitted.

### Request 344K

Attachments

Print / Email

Delete Request

Submit Request

Status: Not Submitted  
Amount: AUD 3,050.00

Trip Name: Test  
Trip Description:

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense

Delete

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/> 03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/> 03/10/2016	Car Rental	AUD 500.00	AUD 500.00
<input type="checkbox"/> 03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
<input type="checkbox"/> 03/10/2016	Per Diem	AUD 400.00	AUD 400.00
TOTAL AMOUNT		AUD 3,050.00	TOTAL REQUESTED AUD 3,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Conference & Course fees

Meals Overnight Travel

Other

Per Diem

Rail/Bus

Staff Training

Click on **Submit Request**.



## Approval Flow

### Request 33JX

Trip Name: Trip from Perth to Sydney  
Trip Description:

Attachments

Print / Email

Cancel Request

Recall

Status: Pending Manager (L1 & L2) Approval  
To be approved before: 23/05/2016 14:30

Request Header Segments Expense Summary Approval Flow Audit Trail

Approver - Level 1 & 2:

▲ Test (Test): Approver, Level 2

Approver, Level 1

(13/06/2016 Approved)

Approver, Level 2

The system has been configured to identify requisitions which are requiring travel approval.

When travel approval is applicable, the Approval Flow tab displays the Approver name/s and the status of the approval at each level.

Bookings that are auto-approved will not be showing any approval workflow here.

## Audit Trail

### Request 33JX

Trip Name: Trip from Perth to Sydney  
Trip Description:

Attachments

Print / Email

Cancel Request

Recall

Status: Pending Manager (L1 & L2) Approval  
To be approved before: 23/05/2016 14:30

Request Header Segments Expense Summary Approval Flow Audit Trail

#### Request Level

Date/Time	Updated By	Action	Description
20/05/2016 13:24	System, Concur	Segments update	Self-booked segments have been updated
20/05/2016 13:24	System, Concur	Segments update	Self-booked segments have been updated
20/05/2016 13:28	William 1, Never	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
20/05/2016 13:28	William 1, Never	Approval Status Change	Status changed from Submitted to Pending Manager (L1 & L2) Approval Comment:
13/06/2016 11:32	Approver, Level 1	Approval Status Change	Status changed from Pending Manager (L1 & L2) Approval to Approved Comment:

#### Entry Level

Date/Time	Updated By	Action	Description
-----------	------------	--------	-------------

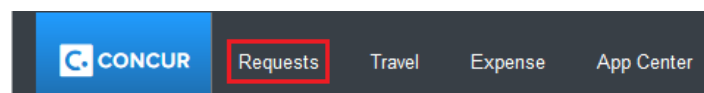
#### Segment Level

Date/Time	Updated By	Action	Description
-----------	------------	--------	-------------

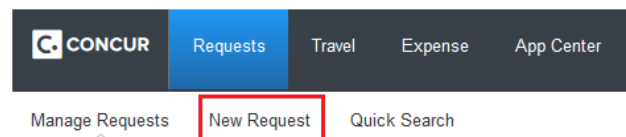
The Audit Trail tab displays actions/changes relating to this requisition.

# Requests – Agency Assistance & Quotation

## Requests



To create an Agency Assistance and quotation request, click on **Requests**.



Click on **New Request**.

## Request Header

Request can only be submitted once all the required mandatory fields are completed. Mandatory fields are indicated by red coloured side-bar.

Request

Cancel Save Print / Email + Delete Request Submit Request

Status: Not Submitted

Trip Name:  
Trip Description:

Request Header Segments Expenses Approval Flow Audit Trail

Booking Type  
Concur REQUEST

Number of Private Days  
0

Private Days - Travel Date Ranges

Travel Service Provider

Travel Purpose

Trip Description

Additional Comments

Main Destination City

Main Destination Country  
Select one

Main Destination Risk Level

Highest Location Risk Level

Are you aged 80 or over at time of travel?  
No

Do you have a pre-existing medical condition?  
No

Indicate the main high-risk activity

Other high-risk activities

Are you returning to your home country?

Are you leading a group?  
No

Travel parties

A risk assessment has already been completed by another traveler?  
No

Complete the following fields:

Booking Type  
Concur REQUEST

Select **Concur REQUEST** from the Booking Type drop down menu.

Trip Name  
[Empty text box]


Enter a **Trip Name** (Limit 32 characters).

Further description/ explanation of your trip can be entered on the Trip Description)

Departure Date  
[Empty date picker]

Return Date  
[Empty date picker]

Enter **Departure** and **Return Date**.

Number of Travel Days 

0


The number of Travel Days will automatically be calculated based on Departure and Return Date input.

Number of Private Days 

0

Where applicable, enter the **Number of Private Days** and indicate your Private Days – Travel Date Range on the text-box.

Private Days - Travel Date Ranges

Hover around  icon to look up for definition of Business and Private Days.

#### UWA Employee :

Entering private days here does not automatically update your leave on the HR Employee Self Service (ESS) system. Private travel days will need to be booked through the ESS system as annual recreation leave (or other as advised by HR) but also include time taken in lieu or through accumulated flexi time.

Travel Service Provider

Campus Travel

STA Travel

Tertiary Travel

No Quote Required

From the drop down list select a **Travel Service Provider**.

Each request can only be sent to **ONE** selected Travel Service Provider.

If you require quotations from more than one Travel Service Provider, you will need to copy this requisition and re-submit the request to another Travel Service Provider.

Select **No Quote Required** when a quotation is not required from UWA Travel Service Provider. For instance, when travel has been organised and booked by an external organisation and this requisition is created for the purpose of obtaining travel approval from your manager/supervisor and attaching travel itinerary for UWA risk management and insurance.

Travel Purpose



Trip Description

Select from the drop down list, your **Travel Purpose**.

Enter a **Trip Description**.

**Traveller** is responsible to complete the **Travel Risk Assessment** when:

- Main Travel Destination city and/or country is indicated as High or Extreme
- Travel Activity is indicated as High Risk Activity

**Failure to do so may result in travel not being approved.**

UWA Travel Risk Assessment (destination and activity) Template can be found on <http://www.staff.uwa.edu.au/procedures/risk/management>

#### Main Destination City and Country Risk Level

Main Destination City

Enter your **Main Destination City and Country**.

The Country Travel Risk Advisory will be displayed.

Main Destination Country

Select one

Click on the hyperlink to view details of the country's summary and risk information.

Main Destination City

Tirinkot, AFGHANISTAN

Main Destination Country

AFGHANISTAN

[Travel risk advisory - Extreme \(Level 5\)](#)

## High- Risk Activity

Indicate the main high-risk activity

Select from the drop down list, your travel **main high-risk activity**.

Other high-risk activities

Where applicable, specify any other high-risk activities.

Are you returning to your home country?

Indicate if you are returning to your home country.

Are you aged 80 or over at time of travel?

Question about age and pre-existing medical conditions is required for insurance purposes.

Do you have a pre-existing medical condition?

Failure to disclose could result in insurance cover being declined.

Are you leading a group?

Indicate if you are leading a group and enter your Travel parties in the available text box.

Travel parties

If you are leading a group to (or through) a city with high risk location rating and/or performing high-risk activity, a risk assessment must be completed.

A risk assessment has already been completed by another traveler?

**UWA Travel Risk Assessment (destination and activity) Template can be found on**  
<http://www.staff.uwa.edu.au/procedures/risk/management>

## Segments

Segments consist of Air Ticket, Car Rental and Hotel Reservation. Complete segment information as required and indicate on each segment whether a quotation from the selected Travel Agent is required.

Request 344K

Attachments

Print / Email

Delete Request

Submit Request

Status: Not Submitted

Trip Name: Test

Trip Description:

Request Header

Segments

Expenses

Approval Flow

Audit Trail

Add Segment

CLICK ICON TO CREATE SEGMENT



Click on the icon to create the required segment





## Air Ticket segment

The screenshot shows the 'Air Ticket' form with the 'Round Trip' option selected. The 'Outbound' section includes fields for 'From', 'To', 'Date' (03/10/2016), 'Depart at', 'Quote Required?' (checked), 'Travel Class', 'Airline', and 'Comment'. The 'Return' section includes fields for 'Date' (16/10/2016), 'Depart at', 'Travel Class', 'Airline', and 'Comment'. 'Save' and 'Cancel' buttons are at the bottom right.

Complete the following information:



### Air Ticket

☒ Round Trip ☐ One Way ☐ Multi-Segment

Select flights options - **Round Trip**; **One Way**; or **Multi-Segment**.

### Round Trip/ One way

The screenshot shows the 'Outbound' section of the form with fields for 'From', 'To', 'Date' (03/10/2016), 'Depart at', 'Quote Required?' (checked), 'Travel Class', 'Airline', and 'Comment'.

Complete the following mandatory fields:

- **From and To**
- **Date and Time**
- **Travel Class.**

**Quote Required?** – Tick the box when requiring a quotation from the selected Travel Agent. Un-tick this box when quote is NOT required for this particular segment.

Use the Airline dropdown list to request for a particular airline and use the Comment box to add comments regarding flights to the Travel Agents.

The screenshot shows the 'Return' section of the form with fields for 'Date' (16/10/2016), 'Depart at', 'Travel Class', 'Airline', and 'Comment'. 'Save' and 'Cancel' buttons are at the bottom right.

When a Round trip is selected, complete the Return flight details:

- **Date and Time**
- **Travel Class**

Scroll down and click on **Save**.


Without saving, the data input will not be retained.

## Multi-Segment

For Multi-Segment flights, complete all the required information on each of the additional air-segments.

To add/ remove air segment, scroll down and click on the appropriate button.

The “**Add Segment**” button will allow traveller to create/ add up-to six destinations.

If you need to add more than six destinations, click on the air segment icon  again and select Multi-segment on the flight option to open-up another set of input fields.

Scroll down and click on **Save** when data input has been completed.



## Car Rental segment

Complete the following information from the Pick-up and Drop-off fields:

- **City and Date.**
- **Quote Required?** – Tick the box when requiring a quotation from the selected Travel Agent. Un-tick the box when quote is NOT required for this particular segment.
- Select **Type of Car** required (Automatic/ Manual, etc. Default selection is Automatic-Compact).
- Use Detail or Comment text box to add comments about car hire to the Travel Agent.
- Select a particular Vendor from the drop-down list if required.


Click on **Save** once the car rental segment is completed.



## Hotel Reservation segment

### Complete the following information:

- Check-in mandatory fields **City** and **Date**.
- **Quote Required?** – Tick the box when requiring a quotation from the selected Travel Agent. Un-tick box when quote is NOT required for this particular segment.
- Use Detail or Comment text box to add comments about car hire to the Travel Agent.
- Select a particular Vendor from the drop down list if required.

To add multiple hotel reservation in different city/location, click on the hotel reservation  icon again and complete the next reservation information.

Click on **Save** once the hotel reservation segment is completed.

**When Hotel Reservation is booked outside Concur (e.g. as part of a Conference package deal), un-tick Quote Required option and complete the hotel reservation detail for the purpose of risk management. Your travel details will then be stored in the Concur System.**

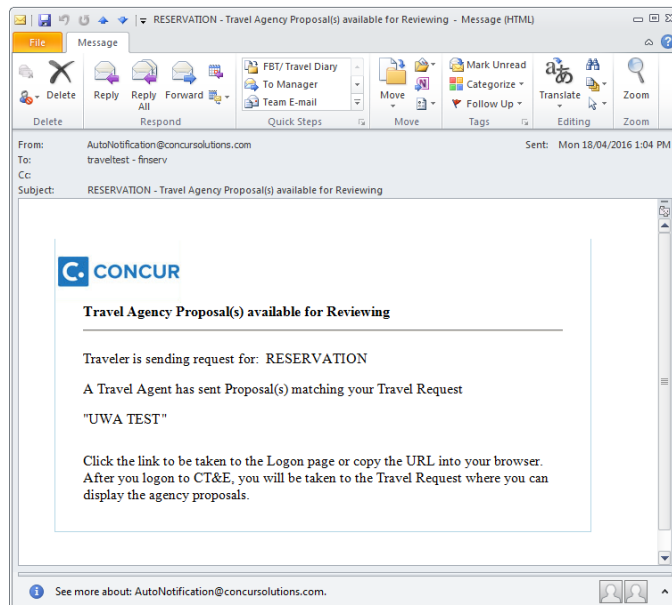
## Submit Request

Once you have completed all the required segments for air ticket/ car rental/ hotel reservation in which you require quotation for, click on the **Submit Request** button. At this stage of the requisitioning process, clicking the “Submit Request” button will send the request to the selected Travel Agent to provide quotation/s.

If you do not require quotation from the Travel Agents for any travel segments, skip this section and continue by clicking on to the Expenses tab (and see note below on Expenses).

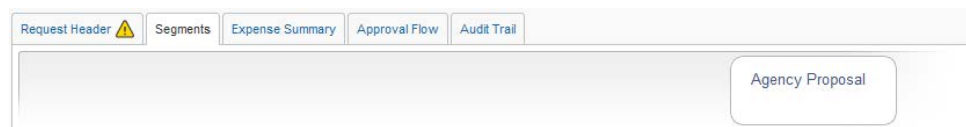
## Email Notification from Travel Agent – Proposals available for Reviewing

When Travel Agent proposal is available for review, an email notification will be sent to the Traveller/ Travel Arranger. Example of the email notification:



To view Travel Agency Proposal, login to Concur.

## Review and select Proposal



To review the Travel Agent's Proposal, go to the Segments tab and click on **Agency Proposal**.

Proposal comparison screen

	Request	Proposal 1 Policy Compliant	Proposal 2 Policy Compliant
<b>Air Ticket</b>			
<b>Reservation price</b>			
Amount	AUD 224.00	AUD 224.00	AUD 267.50
<b>Leg</b>			
From	Perth (Airport - Perth), PER	Perth (Airport - Perth), PER	
To	Sydney Kingsford Smith (Airport - Sydney), SYD	Sydney Kingsford Smith (Airport - Sydney), SYD	
Date	02/11/2016	02/11/2016	
Depart at	10:35	10:35	09:20
Date	02/11/2016	02/11/2016	
Arrive at	17:45	17:45	16:30
Vendor Name	Virgin Australia	Virgin Australia	Qantas Airways
Flight Number	556	556	642
Travel Class	Economy Class	Economy Class	
Comment			
Quote Required?	Yes	Yes	
Policy Compliant	Compliant	Compliant	
<b>Leg</b>			
From	Sydney Kingsford Smith (Airport - Sydney), SYD	Sydney Kingsford Smith (Airport - Sydney), SYD	
To	Perth (Airport - Perth), PER	Perth (Airport - Perth), PER	
	Select a proposal	Selected	Select

Review the Agents' proposals.

To view additional information click on the Travel Agent's comments icon

Indicate your selection by clicking on the **Select** button at the bottom of your preferred Proposal.



## Expenses

Once the Travel Agent proposal has been selected (where applicable), continue by clicking on the **Expenses** tab.

Selected segments' proposal (e.g. for Airfare, Accommodation or Car Rental) will be displayed on the left.

Request 344K

Attachments Print / Email Delete Request Submit Request

Trip Name: Test  
Trip Description:

Request Header Segments **Expenses** Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
03/10/2016	Airfare	AUD 750.00	AUD 750.00
03/10/2016	Accommodation	AUD 800.00	AUD 800.00
03/10/2016	Car Rental	AUD 500.00	AUD 500.00

TOTAL AMOUNT AUD 2,050.00 TOTAL REQUESTED AUD 2,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

- Conference & Course fees
- Meals Overnight Travel
- Non Car Rental (Taxi)
- Other
- Per Diem
- Staff Training
- Travel Document Costs
- Travel Grants

Any other Travel Expenses associated to this travel should now be added.

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

- Conference & Course fees
- Meals Overnight Travel
- Non Car Rental (Taxi)
- Other
- Per Diem
- Staff Training
- Travel Document Costs
- Travel Grants

To create a new expense type, select an **Expense Type** from the list.

Expense Type: Conference & Course fees

Transaction Date: 03/10/2016

Description:

Amount: 0.00 AUD

Comment:

Save Allocate Cancel

Complete the following information:

- **Transaction Date** (can be entered as travel date)
- **Amount** (*indicate* the total amount for this expense type)
- Add any Description or Comment if required.

Click **Save**.

To create another expense type, select an Expense Type from the list and repeat the above steps.

Once added, all the Expense Types will be listed.

Request Header
Segments
Expenses
Approval Flow
Audit Trail

+ New Expense
Delete

Date	Expense Type	Amount	Requested
03/10/2016	Airfare	AUD 750.00	AUD 750.00
03/10/2016	Accommodation	AUD 800.00	AUD 800.00
03/10/2016	Car Rental	AUD 500.00	AUD 500.00
03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
03/10/2016	Per Diem	AUD 400.00	AUD 400.00

TOTAL AMOUNT  
AUD 3,050.00
TOTAL REQUESTED  
AUD 3,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

- Conference & Course fees
- Meals Overnight Travel
- Non Car Rental (Taxi)
- Other
- Per Diem
- Staff Training
- Travel Document Costs
- Travel Grants

To Allocate funding, select Expense Type by **ticking the box** and click on **Allocate**.

Request Header
Segments
Expenses
Approval Flow
Audit Trail

+ New Expense
Delete

Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/> 03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/> 03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/> 03/10/2016	Car Rental	AUD 500.00	AUD 500.00
<input type="checkbox"/> 03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
<input type="checkbox"/> 03/10/2016	Per Diem	AUD 400.00	AUD 400.00

TOTAL AMOUNT  
AUD 3,050.00
TOTAL REQUESTED  
AUD 3,050.00

Expense Type  
Airfare
Amount  
750.00 AUD

Allocate
View segment detail

The system will automatically **group and select** all the listed segment components together.

Allocations for Request : Test

Request List

Allocate Selected Expenses
Clear Selections
Summary

Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/> 28/06/2016	Car Rental		AUD 500.00
<input checked="" type="checkbox"/> 27/06/2016	Airfare		AUD 750.00
<input checked="" type="checkbox"/> 27/06/2016	Accommodation		AUD 800.00
<input checked="" type="checkbox"/> 27/06/2016	Conference &...		AUD 600.00
<input checked="" type="checkbox"/> 27/06/2016	Per Diem		AUD 400.00

Allocations
Total: AUD 3,050.00 Allocated: AUD 3,050.00 (100%) Remaining: AUD 0.00 (0%)

Allocate By:
Add New Allocation
Delete Selected Allocations
Favorites
Add to Favorites

Percentage	Funded By (If...)	Business Unit	Project Grant	Account Categ...	Account Code	CF Bus
<input type="checkbox"/> 100						

Save
Cancel

**EACH Expense Type must be ALLOCATED SEPERATELY using the most appropriate ACCOUNT CATEGORY and ACCOUNT CODE.**

To allocate expenditure:

**Step 1 – Decide the number of lines required for each segment allocation and create the lines by clicking on the “Add New Allocation” button.**

Allocations for Request : Test

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group +

Date ▼	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference & ...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Total: AUD 3,050.00 Allocated: AUD 3,050.00(100%) Remaining: AUD 0.00(0%)

Allocate By: ▼ Add New Allocation Delete Selected Allocations Favorites + Add to Favorites

Percentage	* Funded By (If...	Business Unit	Project Grant	Account Categ...	Account Code	CFI
20						
20						
20						
20						
20						

< >

Save Cancel

In this example, segment allocations are required for car rental, airfare, accommodation, conference & course fees and per diem. Therefore, a minimum of five individual lines for each segment component is required.

If only one segment is listed (e.g. just for Airfare), you do not need to add new line for allocation as the first line has automatically been created).

**Step 2 – Complete each line allocation details.**

Complete the Allocation line details based on the amount noted on the left.

Allocations for Request : Test

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group +

Date ▼	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference & ...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Total: AUD 3,050.00 Allocated: AUD 3,050.00(100%) Remaining: AUD 0.00(0%)

Allocate By: ▼ Add New Allocation Delete Selected Allocations Favorites + Add to Favorites

Percentage	* Funded By (If...	Business Unit	Project Grant	Account Categ...	Account Code	CFI
20						
20						
20						
20						
20						

< >

Save Cancel

## Allocate By

Allocate By: ▼

Percentage

● Amount

Select your preferred method of allocation, by **Percentage** or **Amount** (system default is Percentage). **Allocation By Amount** is the recommended method.

## Amount

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group +

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference &...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Allocate By: + Add New Allocation

Amount	* Funded By (If...)	Bu
AUD 500.00		
AUD 750.00		
AUD 800.00		
AUD 600.00		
AUD 400.00		

Update the **Amount** for each segment allocation (based amount noted on the left).

## Funded By

Indicate the "Funded By" arrangement for each line, i.e. **Externally Funded**, **Self -Funded** or **UWA**.

\* Funded By

Externally Funded

Self Funded

UWA

Allocations

Allocate By: + Add New Allocation

Amount	* Funded By
AUD 750.00	UWA
AUD 800.00	UWA
AUD 500.00	UWA

- ❖ UWA Funded - will require BU/PG/Account code allocation.
- ❖ Externally Funded will require BU/PG/Account code allocation. Amount will be recouped from the external party by UWA.
- ❖ Self-Funded – no allocation required (Travel Agent will contact the Traveller to finalise payment).

## Business Unit

Update Business unit for each allocation line.

Use the scroll-bar or the search functionality:

- Select **Text** and type in **Business Unit name**; or
- Select **Code** and type in **Business Unit number**

Business Unit Project Grant Account

Type to search by: TEXT CODE

(Code) Text

(00010) Indigenous Studies

(00012) Microscopy & Characterisation

(00109) Faculty Office Arts

(00120) Humanities

(00125) School of Social Sciences

(00140) Psychology

(00190) Music

(00200) Faculty of Law

(00230) Computer Science&Software Eng

(00250) Fac Archit Landscape Vis Arts

(00300) Faculty of Education

(00310) Sport Science, Exercise&Health

Allocations

Allocate By: + Add New Allocation Delete Selected Allo

Amount	* Funded By	Business Unit
AUD 750.00	UWA	(00550) Centre for Fo...
AUD 800.00	UWA	(00550) Centre for Fo...
AUD 500.00	UWA	(00550) Centre for Fo...

## Project Grant

The list of Project Grants within the selected Business Unit will now be listed.

Select **Project Grant** for each allocation line.

Use the scroll-bar or the search functionality:

- Select **Text** and type in **Project Grant name/description**; or
- Select **Code** and type in **Project Grant number**

Project Grant Account Cate... Account

Type to search by: TEXT CODE

(Code) Text

(10302001) Ad Hoc Scholarships

(63001031) ADAMS AD-HOC

(17701001) Asia Pacific Food Inovat Conf

(63001021) Burke Consultancy

(10993000) Cash Advance Clearing

(10100001) Centre Administration

(10100004) Chair in Food Science

(10201009) Dadour - Student Research

(63001032) Dadour Ad Hoc

(63001020) Dadour Consultancy

(10900000) EMS Credit Card Control

(10999010) Expenditure Target

(10994000) Facil Mngt & Central Charges

(68000002) Fish Prov Project-IMD Sharif

(10100002) Forensic Sci Re R Napper

Allocations

Allocate By: + Add New Allocation Delete Selected Allocations Favorites +

Amount	* Funded By	Business Unit	Project Grant
AUD 750.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...
AUD 800.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...
AUD 500.00	UWA	(00550) Centre for Fo...	(10201002) Leighton S...

## Account Category and Account Code

Account Category and Account Code are inter-related fields.

In this example, based on the Account Category of Airfare, indicate whether the expense (Account Code) relates to Airfare for:

- Domestic Trip
- International Trip; or
- Visitor Related

Select an **Account Category** and the appropriate **Account Code** for each allocation line.

Allocations Total: AUD 2,050.00

Amount	Funded By	Business Unit	Project Grant	Account Category	Account Code
AUD 750.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...	Airfare	(601) Domestic Trip
AUD 800.00	UWA	(00550) Centre for Fo...	(10100002) Forensic S...	Accommodation	(608) Domestic Trip
AUD 500.00	UWA	(00550) Centre for Fo...	(10201002) Leighton S...	Car-Hire	(606) Car-Hire

## Class Field – optional (Only to be used by those Faculties using Class field)

Class Field information is not mandatory.

To enter a Class Field:

1. Select Business Unit under **CF Business Unit** field (the selected CF Business Unit must be the same as the selected Business Unit).
2. Select the appropriate Class Field from the drop down list.

Allocations Total: AUD 2,050.00 Allocated: AUD 2,050.00 (100%) Remaining: AUD 0.00 (0%)

Amount	Funded By	Business Unit	Project Grant	Account Category	Account Code	CF Business U...	Class Field
AUD 750.00	UWA	(00550) Centre...	(10100002) Fo...	Airfare	(601) Domestic...	(00550) Centre...	(062) Alison Pitt
AUD 800.00	UWA	(00550) Centre...	(10100002) Fo...	Accommodation	(608) Domestic...	(00550) Centre...	(062) Alison Pitt
AUD 500.00	UWA	(00550) Centre...	(10201002) Lei...	Car-Hire	(606) Car-Hire	(00550) Centre...	(062) Alison Pitt

Click **Save** when segment allocation lines are completed.

## Allocations for Request : Test


Request List Total: AUD 3,050.00 Allocated: AUD 3,050.00 (100%) Remaining: AUD 0.00 (0%)

Date	Expense Type	Group	Amount
28/06/2016	Car Rental		AUD 500.00
27/06/2016	Airfare		AUD 750.00
27/06/2016	Accommodation		AUD 800.00
27/06/2016	Conference &...		AUD 600.00
27/06/2016	Per Diem		AUD 400.00

Allocations

Amount	Funded By...	Business Unit	Project Grant	Account Category	Account Code	CF
AUD 500.00	UWA	(00550) Centr...	(10100002) Fo...	Car-Hire	(606) Car-Hire	
AUD 750.00	UWA	(00550) Centr...	(10100002) Fo...	Airfare	(601) Domestic Trip	
AUD 800.00	UWA	(00550) Centr...	(10201002) Le...	Accommodation	(608) Domestic Trip	
AUD 600.00	UWA	(00550) Centr...	(10100002) Fo...	Other	(611) Conference &...	
AUD 400.00	UWA	(00550) Centr...	(10100002) Fo...	Other	(553) Per Diem	

**Save** Cancel

An expense line which has been fully allocated is indicated with the "Fully Allocated" symbol 

<input type="checkbox"/> Date	Expense Type	Amount	Requested		
<input type="checkbox"/> 27/06/2016	Airfare	AUD 750.00	AUD 750.00		
<input type="checkbox"/> 27/06/2016	Accommodation	AUD 800.00	AUD 800.00		
<input type="checkbox"/> 28/06/2016	Car Rental	AUD 500.00	AUD 500.00		
<input type="checkbox"/> 27/06/2016	Fully Allocated				
<input type="checkbox"/> 27/06/2016	Allocations				
Percentage	Funded By (If...)	Business Unit	Project Grant	Account Categ...	Account Code
16.39344262	(UWA) UWA	(00550) Centre...	(10100002) For...	(Car-Hire) Car...	(606) Car-Hire
24.59016393	(UWA) UWA	(00550) Centre...	(10100002) For...	(Airfare) Airfare	(601) Domestic...
26.2295082	(UWA) UWA	(00550) Centre...	(10201002) Lei...	(Accommodation...	(608) Domestic...
19.67213115	(UWA) UWA	(00550) Centre...	(10100002) For...	(Other) Other	(611) Conferen...
13.1147541	(UWA) UWA	(00550) Centre...	(10100002) For...	(Other) Other	(553) Per Diem

An expense line with partial allocation is indicated with the "Partially Allocated" symbol 

<input checked="" type="checkbox"/>	03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00				
<input type="checkbox"/>	03/10/2016	Allocations						<input type="checkbox"/>
		Partially Allocated						

## Attachments

### Requirements for the images

- **ONLY scanned images, saved images, or PDFs can be attached to requests** (Word and excel document must be saved as PDF before it can be attached here).
- Before images are scanned, note the following:
  - The images should be scanned at 300 DPI or lower to reduce file size.
  - The file format must be PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF.
  - There is a size limit for each image file – generally 3 or 5 MB
  - NOTE: The limit is noted in the image upload window.
  - No more than 10 files may be uploaded in a single session.

Request 337G

Trip Name: conference sydney  
Trip Description:

Status: Not Submitted  
Amount: AUD 2,000.00

To attach an image to a request, click on Attachments and select Attach Documents.

## Document Upload and Attach



You may attach scanned images.

You may choose up to 10 files to attach to the request.

For best results, scan images in black & white with a resolution of 300 DPI or lower.

Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading:

Browse...

Upload

No files selected

Close

The file format must be  
.png, .jpg, .jpeg, .pdf,  
.html, .tif or .tiff.

5MB limit per file.

1. In the window that appears, click on **Browse** and navigate to the location of the saved images and select the file to upload.
2. Select file and click **Open**. The file is added to a list under **Files Selected for uploading**.
3. Repeat the process until all files (up to 10) are listed under Files Selected for uploading.
4. Click Upload.
5. Click Close when done uploading.

### NOTE:

- All attachments are combined into a single PDF.
- You can delete the PDF if the request has not yet been submitted or if the request has been returned to you by your approver.
- To delete images from a request, select Attachments > Delete Documents. The entire set of attachments (the single PDF) will be removed from the request. You cannot delete individual attachments.

## Submit Request

Once all the Expense Types are fully allocated, the requisition can be submitted for approval.

### Request 344K

Attachments

Print / Email

Delete Request

Submit Request

Status: Not Submitted  
Amount: AUD 3,050.00

Trip Name: Test  
Trip Description:

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense

Delete

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 03/10/2016	Airfare	AUD 750.00	AUD 750.00
<input type="checkbox"/> 03/10/2016	Accommodation	AUD 800.00	AUD 800.00
<input type="checkbox"/> 03/10/2016	Car Rental	AUD 500.00	AUD 500.00
<input type="checkbox"/> 03/10/2016	Conference & Course fees	AUD 600.00	AUD 600.00
<input type="checkbox"/> 03/10/2016	Per Diem	AUD 400.00	AUD 400.00
TOTAL AMOUNT		AUD 3,050.00	TOTAL REQUESTED AUD 3,050.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Conference & Course fees  
Meals Overnight Travel  
Other  
Per Diem  
Rail/Bus  
Staff Training

Click on **Submit Request**.

The requisition is now  
pending approval.

## Approval Flow

### Request 33JX

Attachments Print / Email Cancel Request Recall

Trip Name: Trip from Perth to Sydney

Status: Pending Manager (L1 & L2) Approval

Trip Description:

To be approved before: 23/05/2016 14:30

Request Header Segments Expense Summary Approval Flow Audit Trail

Approver - Level 1 & 2:

▲ Test (Test): Approver, Level 2

Approver, Level 1

(13/06/2016 Approved)

Approver, Level 2

The Approval Flow tab displays the Approver name/s and the status of the approval at each level.

## Audit Trail

### Request 33JX

Attachments Print / Email Cancel Request Recall

Trip Name: Trip from Perth to Sydney

Status: Pending Manager (L1 & L2) Approval

Trip Description:

To be approved before: 23/05/2016 14:30

Request Header Segments Expense Summary Approval Flow Audit Trail

#### Request Level

Date/Time	Updated By	Action	Description
20/05/2016 13:24	System, Concur	Segments update	Self-booked segments have been updated
20/05/2016 13:24	System, Concur	Segments update	Self-booked segments have been updated
20/05/2016 13:28	William 1, Never	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
20/05/2016 13:28	William 1, Never	Approval Status Change	Status changed from Submitted to Pending Manager (L1 & L2) Approval Comment:
13/06/2016 11:32	Approver, Level 1	Approval Status Change	Status changed from Pending Manager (L1 & L2) Approval to Approved Comment:

#### Entry Level

Date/Time	Updated By	Action	Description
-----------	------------	--------	-------------

#### Segment Level

Date/Time	Updated By	Action	Description
-----------	------------	--------	-------------

The Audit Trail tab displays actions/changes relating to this requisition.



## Copy Request

Only Booking Type – Concur REQUEST can be copied.

The screenshot shows the 'Request Header' tab selected. Below it, the 'Booking Type' dropdown menu is open, showing 'Concur REQUEST' as the selected option. The dropdown is highlighted with a red border.

To check, select the requisition you wish to copy and ensure the Booking Type noted on the Requisition Header is Concur REQUEST.

The screenshot shows the Concur 'Active Requests' page. The 'Copy Request' button is highlighted with a red border. The page displays a table of active requests with columns for Request Name, Request ID, Status, Request Dates, Date Submitted, and Total.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input checked="" type="checkbox"/>	Test MJ	33CP	Sent Back to Employee - William TR11, Never T.	03/10/2016 16/10/2016	28/04/2016	AUD 1,840.00

To copy a request:

On the Manage Request page, select the desired request.

Click on **Copy Request**.

The selected request with appropriate request entries will be copied.

### Existing Request:

We have provided a default name. Change the name if desired.

Request Name:

Last Date of Source Request:

### New Request:

You can change the start date of the new request.

If you provide a date below, the request start date or the earliest request entry on the new request will be given that date and dates for all other request entries will be adjusted based on that. Otherwise, the start date will be defined as Last date of source request +1.

Starting date for New Request:

☒ Expected Expenses

☒ Segments

*Warning: If the source request contains self-booked segments, please start your booking in Concur Travel. All copied segments are booked by the Travel Agency.*

Enter a new **Request Name**.

By default, the system sets the start date of the resulting request to be the source request end date plus one day. Update the start date, if desired.

Click **OK**.

Continue by completing necessary Request details.

# Arranging Travel on behalf of another Traveller

## Nominate your Travel Arranger

### Traveller – please NOTE:

When the assistance of a Travel arranger is required,

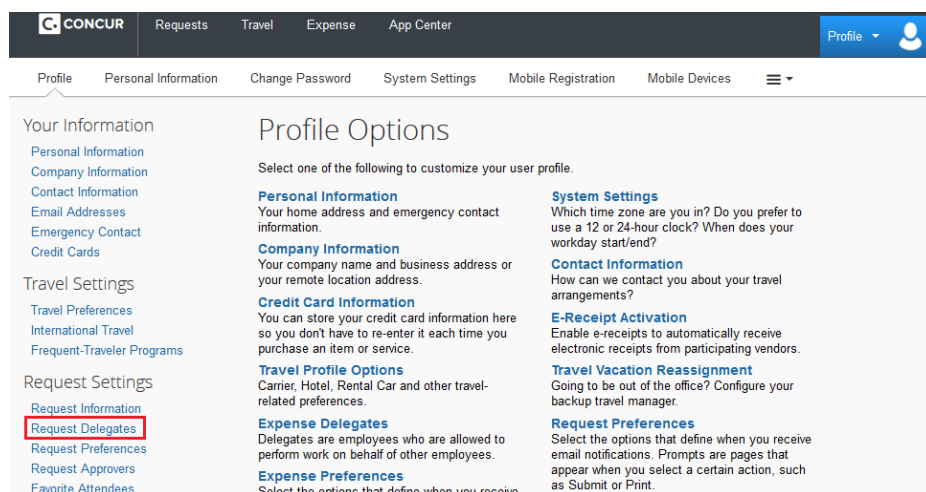
**Traveller will need to login to Concur and nominate another user to be their Travel Arranger.**

**By nominating another user to be your Travel Arranger, you are giving consent and approval for the Travel Arranger to have access to your Profile - Personal Information. This includes your home address, contact number, emergency contact details and Travel documents information (such as passport details).**

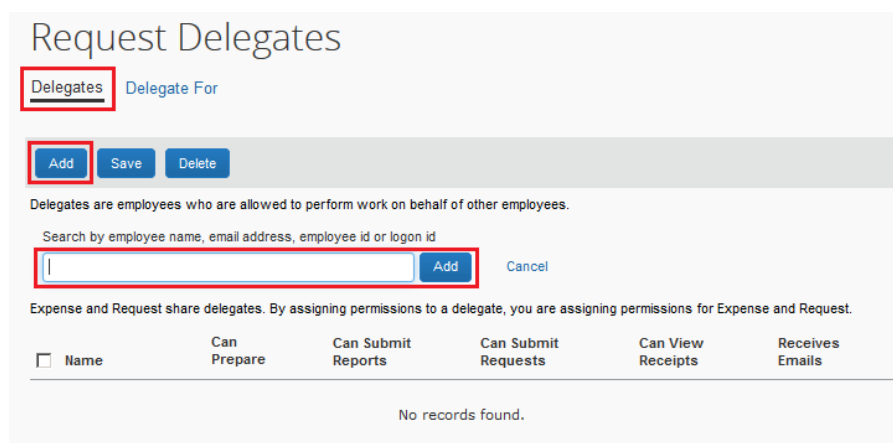
The following steps are to be completed by the Traveller to nominate another user as their Travel Arranger:



Click on **Profile** and **Profile Settings**.



On the left selection options, under Request Settings, click on **Request Delegates**.



On the Delegates' window, click on **Add** and search for the Travel Arranger name/employee ID.

Once a name selected, click on **Add**.

# Request Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input checked="" type="checkbox"/>	Harbers, Susan ps-testing-finserv@uwa.edu.au	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select the following delegate's options:

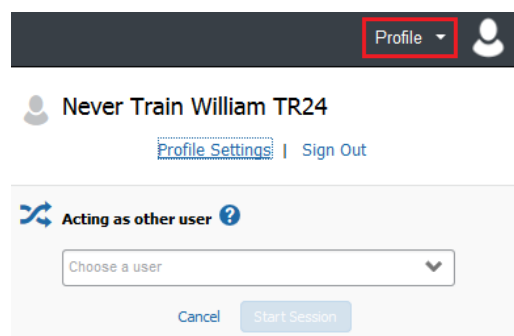
- ✓ Travel Arranger's name
- ✓ Can Prepare
- ✓ Can Submit Reports
- ✓ Can Submit Requests
- ✓ Can View Receipts
- ✓ Received Emails

Click **Save**.

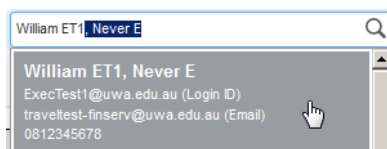
## Arranging Travel on behalf of another Traveller

Once the Traveller has nominated another user as their Travel Arranger in their profile, the Travel Arranger will be able to search for the Traveller and arranger travel on their behalf. In Concur this is referred to as "Acting as other user".

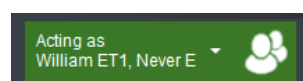
The following steps are to be undertaken by the Travel Arranger to arrange travel on behalf of the Traveller:



- Login to Concur (using your own login ID).
- Click on **Profile**.
- Under Acting as other user, enter the Staff ID or the Traveller's name you wish to arrange travel for. **Select name from the drop down list.**

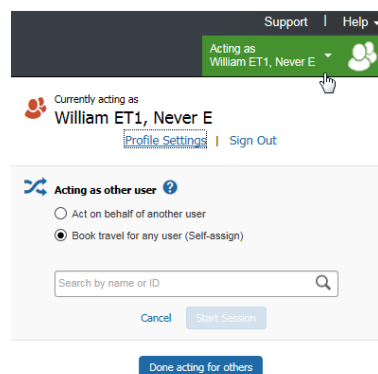


- Click on **Start Session**.



Once Traveller's view is activated, the profile tab will indicate "**Acting as Traveller name**".

Travel arranger can now arrange travel on behalf of the Traveller. Use the Online –Trip Search (where appropriate) or Requests Agency Assistance & Quotation.



When completed, click on **Done acting for others**.

## Guest Traveller (Non-Profiled Traveller)

Steps to be completed when booking travel for Guest Traveller (i.e. external party/ someone without UWA profile):

1. Guest Traveller to complete Section 1 of the UWA Guest Profile Form. Completed form must be return to UWA to enable user profile creation.
2. Create Guest Traveller profile in Concur. ONLY staff member which has been appointed by the Faculty as the Guest Profile Creator and has been granted access can perform the task of creating the Guest User Profile in Concur.
3. Assign Travel Arranger/s for the Guest Traveller.
4. Travel Arranger completes the Guest Profile Information (as per the UWA Guest profile Form) and arranges travel on behalf of the Guest Traveller via Requests (i.e. Agency Assistance and quotation).

### Step 1 – Guest Traveller to complete Section 1 of the UWA Guest Profile Form



#### UWA Guest Traveller Profile Form

##### SECTION 1 - Information to be completed by the Guest Traveller

Please complete the following Traveller's Profile Information to enable UWA Travel Arranger book travel on your behalf.

Personal Information provided on this form must be identical to the Traveller's Travel Document.

Due to increased airport security, Traveller may be turned down at the gate if the name on the travel document (e.g. passport) or any other travel identification used does not match the name on the ticket issued by UWA Travel agent (TMC).

##### Guest Profile Information

##### Personal Information (as per Travel Document)

Title [Required]  ☐ No Middle Name  
First Name [Required]   
Middle Name  ☐ No Last Name  
Last Name [Required]

##### Home Address

Street [Required]   
City [Required]   
State/Province/Region   
Postal Code [Required]   
Country [Required]

##### Contact Information

Work Phone [Required]   
Home Phone [Required]   
Mobile Phone Number [Required]: Country Code +    
☐ Use for Safety and Business Text Message Alerts

##### Email Addresses

Email Address

##### Emergency Contact

Name   
Relationship   
Street [Required]   
City [Required]   
State/Province/Region   
Postal Code [Required]   
Country [Required]   
Phone [Required]

##### International Travel: Passports and Visas

For International Travel, Passport details must be provided.

Passports  
Passport Nationality   
Passport Number   
Passport Date issued (dd/mm/yyyy)   
Passport Expiration (dd/mm/yyyy)   
Passport Place of Issue (City, State)   
Passport Place of Issue (Country)

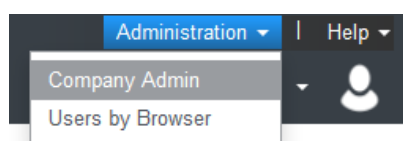
UWA Guest Traveller Profile Form can be found on UWA Financial Services website.

Section 1 of the UWA Guest Traveller Profile Form **MUST BE COMPLETED** by the Guest Traveller.

**Personal information provided on this form must be identical to the Traveller's Travel Document (e.g. passport).**

Completed form must be return to UWA to enable user profile creation.

### Step 2 - Create Guest Traveller's Profile (Task to be performed by Guest Profile Creator)



To create guest profile, click on the **Administration** menu and select **Company Admin** from the drop-down option.

Company Admin

Users by Browser

Company Admin Home

Company Admin

User Administration

User Administration

Add User

Self-Registration Setup

Self-Registration Approval

Send Mobile Instructions

Company Groups

Company Administration

User Administration

Here is where you add, modify and delete users.

Click on the **Add User** menu.

Save

Save and Notify New User

Cancel

☒ Request User

☐ Request Approver

☐ Expense User

☐ Expense Approver

☐ Authorized Support Contact

Employee Group Configuration:

Guest UWA

From this options, **SELECT ONLY:**

✓ **Request User**

You will need to **unselect** all other options if they are pre-filled selected.

General Settings

General Settings

CTE Login Name\*  
*(must be suffixed with a valid domain)*

Password\*

Verify Password\*

Title

First Name\*

Middle Name

Nickname

Last Name\*

Suffix

Account Activation Date  
22/04/2016

Account Termination Date

Employee ID  
*(required for Expense, Invoice or Request User)*

Email Address

Complete the following sections:

CTE Login Name\*  
*(must be suffixed with a valid domain)*

Password\*

Create a CTE Login Name for the guest user.

The following naming convention **MUST** be used:  
guestfirstname.surname\_GUEST@uwa.edu.au

For example, guest name is Joe Blogg, create login name as joe.blogg\_GUEST@uwa.edu.au

Enter a **Password**: UWAGUEST

Verify Password by re-entering the same password used above.

Concur User Guide

53 | Page

#### Verify Password\*

Title

First Name\*

Middle Name

Last Name\*

Account Activation Date

Employee ID

*(required for Expense, Invoice or Request User)*

Email Address

Note:

Guest user will **NOT** be able to use this CTE Login Name and password to login to Concur. This set-up is required only for system profile.

Enter Guest Traveller's details:

- **Title**
- **First Name**
- **Middle Name** (where applicable)
- **Last Name**

**CHECK** and **ENSURE** Guest Traveller's **First Name**, **Middle Name** and **Last Name** are identical to the Guest Traveller's travel document.

Due to increased airport security, traveller may be turned down at the gate if the name on the travel document (e.g. passport) or any other travel identification used does not match the name on the ticket issued by the Travel agent (TMC).

Account Activation Date (Defaulted to guest profile creation date).

Employee ID – enter UWAGUEST\_Surname

For example, guest surname is Blogg, create Employee ID as UWAGUEST\_Blogg.

Enter the **Guest Traveller's email address**.

**This information is required by the Travel Agent for booking purposes.**

#### Request Settings

##### Request Settings

Employee Group

Business Unit

Default Language

##### Request Approvers

Country of Residence

☒ Requires Domestic Approval?

##### Request Preferences

Reimbursement Currency

Employee ID (To Emulate Approval Hierarchy)

##### Request Delegates

☐ Is a Test User?

Complete the following sections:

Employee Group

Employee Group, select **Guest UWA**.

<div>Country of Residence</div> <div>Select one</div>	Select Guest visitor's <b>Country of Residence</b> from the drop-down list.
<div>Reimbursement Currency</div> <div>Select one</div>	For reimbursement currency, <b>Australia, Dollar</b> MUST be selected.
<div>Business Unit</div> <div></div>	Select the Business Unit in which the Guest Traveller will be associated with.
<input checked="" type="checkbox"/> Requires Domestic Approval?	<b>Requires Domestic Approval</b> must be ticked ✓.
<div>Employee ID (To Emulate Approval Hierarchy)</div> <div></div>	Search and select an Employee ID to <u>emulate</u> (or mimic) the Approval Hierarchy from.
<p><b>Type to search by:</b></p> <p> <input type="radio"/> Text             <input checked="" type="radio"/> Code             <input type="radio"/> Either            (Code) Text         </p>	<p>For example, a staff member Adam (00012345) Level 1 approver is Susan, Level 2 approver is Alex. By entering Adam's employee ID's in this box, the Guest Traveller will have the same approver as Adam (i.e. Level 1 approver - Susan and level 2 approver - Alex).</p> <p>Use <b>Code</b> to search for <b>Employee ID</b>, or Text to search for Employee Name.</p>

Save

Click **Save** once all the required information is completed.

Do **NOT** use the Save and Notify New User. New Guest User will not be able to login to Concur without the required PHEME login access.

If you see the following message on Save, click on **OK** to continue.

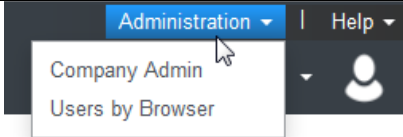
An e-mail address will be required in order to take advantage of many Concur functions.

Are you sure you want to add this user with no e-mail address? Press 'OK' to continue or 'Cancel' to enter an e-mail address.

OK Cancel

### Step 3 – Assign Traveller Arranger for the Guest Traveller (Task to be performed by Guest Profile Creator)

Once a guest Profile is created (step 1 above), assign Travel arranger/s to the Guest Traveller Profile.

	From the Administration drop-down view, select <b>Company Admin</b> .
---	---

Company Admin

Users by Browser

Company Admin Home

Company Administration

Company Admin

User Administration

User Administration

Add User

Self-Registration Setup

Self-Registration Approval

Send Mobile Instructions

Company Groups

Click on **User Administration**.

User Administration

[+] Add New User

User List for company: The University of Western Australia

☒ Show Filters

Filters

Use Travel Advanced Filters

Use Expense Advanced Filters

Manager:

Employee Group Configuration:

Expense Test Users

All Managers

All Users I Can Access

All Users

User Status

Max Results

Active

25

Search Text

Search What

Employee ID (exact match)

Columns To Display

☒ Login ID☒ Manager☒ Employee Group Configuration☒ Email☒ Employee ID

Search

Reset

Search for the Guest Traveller's profile by inputting a Search Text and using the available filter selection.

Search What

Name, Email, Log-in

Name, Email, Log-in

Email (exact match)

Last Name (exact match)

Log-in ID (exact match)

Employee ID (exact match)

XML Profile Sync ID (exact match)

Search Text

Search What

UWAGUEST\_Never

Employee ID (exact match)

Columns To Display

☒ Login ID☒ Manager☒ Employee Group Configuration☒ Email☒ Employee ID

Search

Reset

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

1 Records Found

Get All

Last ▲ / First

Employee Group Configuration

Email

Employee ID

Login ID

Manager

PROFILE

Never, WilliamGuestTestUser

Guest UWA

UWAGUEST\_Never

GuestUserTest\_BU02010@uwa.edu.au

None

Total: 1

Click on the Guest Traveller's Name.

Request Settings

Employee Group

Guest UWA

Default Travel Agency

Select one

Default Language

English (Australia)

Request Approvers

Country of Residence

AUSTRALIA

Business Unit

(02010) Financial Services

Request Preferences

Reimbursement Currency

Australia, Dollar

Employee ID (To Emulate Approval Hierarchy)

(00055099) Rohan, Tommy

Request Delegates

Scroll down to Request Settings and click on **Request Delegates**.

A pop-up window will appear.



Delegates Delegate For

Request Delegates for WilliamGuestTestUser Never

**Add** **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails
No records found.							

On the Delegates' window, click on **Add** to nominate a Travel Arranger who will be organising travel on behalf of the guest traveller.

Delegates Delegate For

Request Delegates for WilliamGuestTestUser Never

**Add** **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Harbers Susan **Add** **Cancel**

Harbers, Susan  
ps-testing-finserv@uwa.edu.au  
Employee ID: 00070747  
Logon ID: 00070747@uwa.edu.au

Can View Receipts Can Use Reporting Receives Emails

Search for the travel arranger name/ ID on the search text box and click on Add.

Delegates Delegate For

Request Delegates for WilliamGuestTestUser Never

**Add** **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails
<input checked="" type="checkbox"/>	Harbers, Susan ps-testing-finserv@uwa.edu.au	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Travel arranger Name**

Select the following delegate's options:

- ✓ Travel Arranger's name
- ✓ Can Prepare
- ✓ Can Submit Reports
- ✓ Can Submit Requests
- ✓ Can View Receipts
- ✓ Received Emails

Multiple Travel Arrangers can be assigned to the Guest Traveller's profile (where necessary) by following the same process above.

Click **Save** and close the pop-up window.

Profile

Susan Harbers **Travel Arranger Name**

Profile Settings | Sign Out

Acting as other user ?

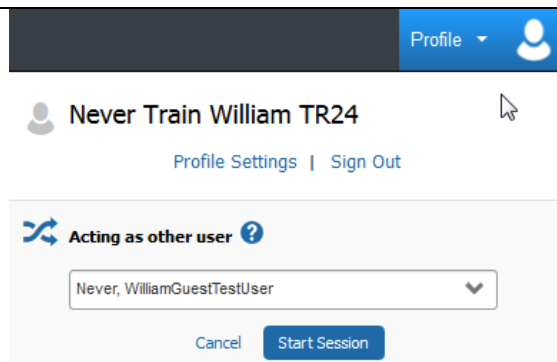
Never, WilliamGuestTestUser  
Employee ID: UWAGUEST\_Never  
Logon ID: GuestUserTest\_BU02010@uwa.edu.au

**Guest Traveller's Name**

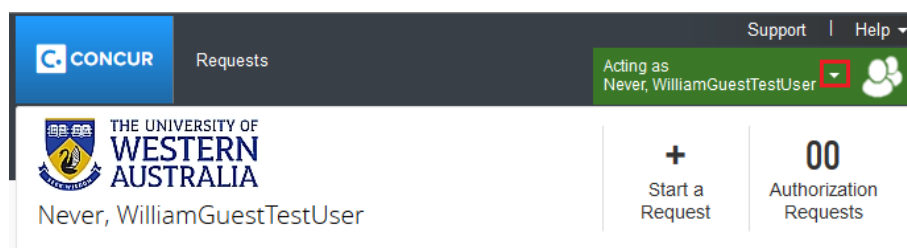
When the assigned Travel Arranger login to Concur, the Guest Traveller's name should be available for selection (under 'Acting as other user' look-up).

## Step 4 – Complete Guest Traveller Profile Information and arranges travel on behalf of the Guest Traveller (Task to be performed by Travel Arranger)


Prior to arranging travel for the Guest Traveller, **review and complete all the required fields on the Guest Traveller's Profile Information.**

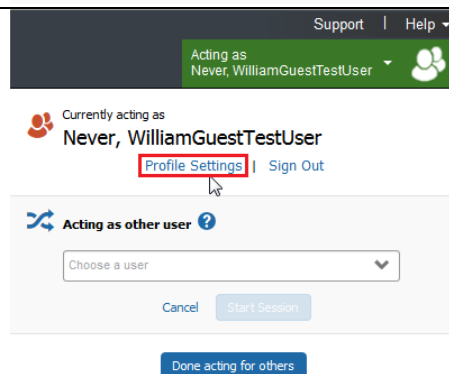


Search and select the Guest Traveller's profile and click on **Start Session**.



This is the Concur Homepage for the Guest Traveller.

Click on the drop down view icon  next to the Guest Traveller's name.

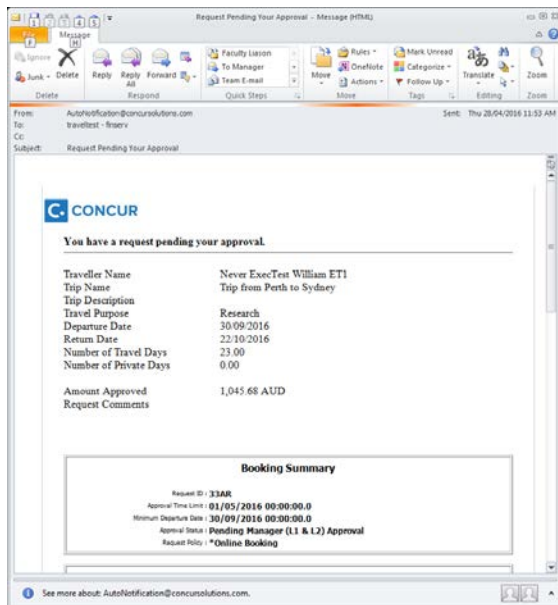


Click on **Profile Settings** and complete all the required fields on behalf of the Guest Traveller (Information as per UWA Guest Traveller Form).

Once Guest Travel Profile is updated, travel can be arranged for the Guest Traveller.

# Reviewing and Approving Travel

## Email notification – Request Pending Your Approval



Travel Approver will receive an email notification when there is a requisition waiting for your approval.

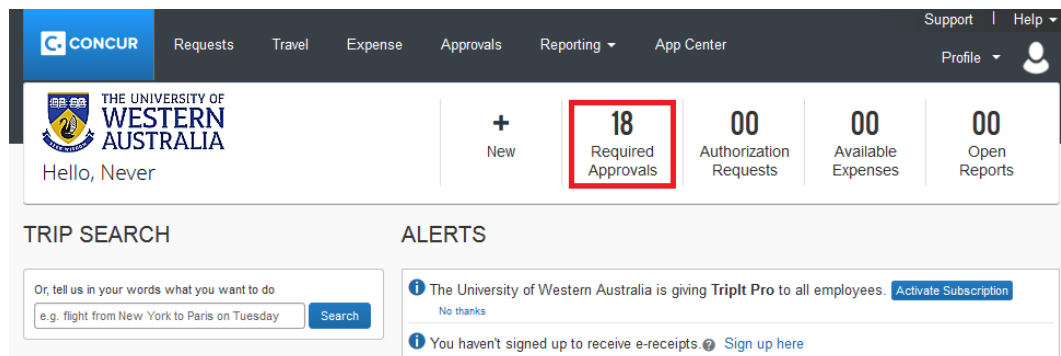
To review the Request, login to Concur (Concur web link address is available at the bottom of the email received).

Note:

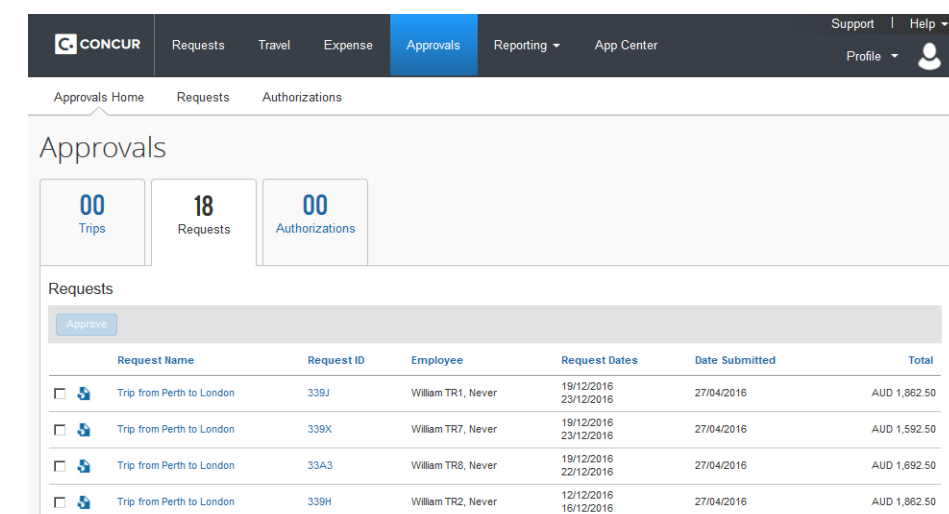
If you are approving Travel on behalf of another Approver, refer to notes under Delegating Approval – Approving Travel as an Approval Delegate.

## Reviewing and Approving Travel Request

To review and approve travel request, login to Concur.



On the Homepage, click on **Required Approvals**.



A list of Requests waiting for your approval will be listed.

To review the travel request, click on the associated Request Name.

## Request Header

**Request 339J** [William TR1, Never] Attachments Print / Email Send Back Request Approve

Status: Pending Manager (L1 & L2) Approval  
To be approved before: 04/05/2016 02:30 pm  
Amount: AUD 1,862.50

Trip Name: Trip from Perth to London  
Trip Description:

Request Header Segments Expense Summary Approval Flow Audit Trail

Booking Type: \*Online Booking Trip Name: Trip from Perth to London Departure Date: 19/12/2016 Return Date: 23/12/2016

Number of Private Days: 0 Private Days - Travel Date Ranges: Travel Service Provider: Campus Travel Travel Purpose: Conference

Trip Description:

Employee last name: William TR1, Never Main Destination City: Gatwick (Airport - LGW), Gatwick (Airport - L Main Destination Country: UNITED KINGDOM Main Destination Risk Level: Moderate (Level 2)  
Travel risk advisory - Moderate (Level 2)

Highest Location Risk Level: Moderate (Level 2)

Are you aged 80 or over at time of travel? No Do you have a pre-existing medical condition? No

Indicate the main high-risk activity: No high-risk activity Other high-risk activities: Are you returning to your home country?

Are you leading a group? Travel parties: A risk assessment has already been completed by another traveler?

Review all the necessary information from the Request Header section, such as:

- Trip Name
- Departure/Return date
- Private Days
- Trip Purpose and Description
- Risk and Insurance related questions:
  - Main Destination Country Risk level
  - Age and pre-existing medical conditions
  - Main High risk Activity
  - Group travel and completion of Risk Assessment Form.

## Segments

**Request 33CL** [William TR24, Never] Attachments Print / Email Send Back Request Approve

Status: Pending Manager (L1 & L2) Approval  
Amount: AUD 1,840.00

Trip Name: Test MJ  
Trip Description:

Request Header Segments Expense Summary Approval Flow Audit Trail

**Air Ticket** Round Trip One Way Multi-Segment Amount: AUD 1,000.00

Outbound

From: Perth (Airport - PER), Perth, Western Australia  
Travel risk advisory - Low (Level 1)

To: Tokyo (Area Airports - TYO), JAPAN  
Travel risk advisory - Low (Level 1)

Date: Monday, 3 October, 2016 Depart at 11:00 am

Quote Required?

Travel Class: Economy Class

Airline:

Comment:

Return

Date: Sunday, 16 October, 2016 Depart at 02:00 pm

Travel Class: Economy Class

Airline:

Comment:

In the Segments tab, review all the necessary information relating to selected:

- Air
- Accommodation
- Car Hire and/or
- Rail.

## Expense Summary

**Request 33CL** [William TR24, Never] Attachments Print / Email Send Back Request Approve

Status: Pending Manager (L1 & L2) Approval  
Amount: AUD 1,840.00

Trip Name: Test MJ  
Trip Description:

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense Type	Amount	Requested
03/10/2016	Airfare	AUD 1,000.00	AUD 1,000.00
03/10/2016	Accommodation	AUD 800.00	AUD 800.00
03/10/2016	Travel Document Costs	AUD 40.00	AUD 40.00

COST OBJECT APPROVED AMOUNT: AUD 1,840.00 TOTAL AMOUNT: AUD 1,840.00 TOTAL REQUESTED: AUD 1,840.00

Expense Type: Travel Document Costs Transaction Date: 03/10/2016

Description: Amount: 40.00 AUD

Comment:

Approved Amount: 40.00

Save Allocate Cancel

In the Expense Summary tab, review the allocation of travel Expenses.

Date	Expense Type	Amount	Requested
03/10/2016	Airfare	AUD 1,000.00	AUD 1,000.00
03/10/2016	Accommodation	AUD 800.00	AUD 800.00
03/10/2016	Travel Document Costs	AUD 40.00	AUD 40.00

Travel Document Costs 03/10/2016


Description Amount

40.00

Comment

**Allocations**

Percentage	Funded By	Business Unit	Project Grant	Account Categ...	Account Code	Class Field	Code
100	(UWA) UWA	(02010) Financi...	(63001001) Ge...	(Other) Other	(600) Internatio...		(UWA) UWA-(0...


To view the expense allocation details (BU/ PG/ Account Code), hover your mouse over the Allocation symbol 

**Request 33CL** [William TR24, Never]

Trip Name: Test MJ  
Trip Description:

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense Type	Amount	Requested
03/10/2016	Airfare	AUD 1,000.00	AUD 1,000.00
03/10/2016	Accommodation	AUD 800.00	AUD 800.00
03/10/2016	Travel Document Costs	AUD 40.00	AUD 40.00

COST OBJECT APPROVED AMOUNT:  AUD 1,840.00 TOTAL AMOUNT: AUD 1,840.00 TOTAL REQUESTED: AUD 1,840.00

Expense Type: Airfare  
Amount: 1,000.00 AUD

Allocate View segment detail

Alternatively, click on the **Print/Email** view and select **UWA Request Printed Report**.

Request - Internet Explorer

https://www.concursolutions.com/Expense/Client/print\_cpr.asp?type=1032&opt=PAR\_REG&dt=ALW\_EXP\_NEV\_ITM&ptCode=RQPF&explodeEmail=y&nd=33CP&prodCode=REC

Travel Advisory: Low (Level 1)

**Segments**

**Air Ticket**  
Amount: AUD 1,000.00  
03/10/2016 Perth (Airport - PER), Perth (AU) - Narita (Airport - NRT), Tokyo (JP) Depart At: 12:00 PM  
Travel Class: Economy Class

16/10/2016 Narita (Airport - NRT), Tokyo (JP) - Perth (Airport - PER), Perth (AU) Depart At: 02:00 PM  
Travel Class: Economy Class

Allocations:  
55.56% (AUD 555.56) 02010-10100001 UWA-Airfare -600  
44.44% (AUD 444.44) 02010-63001001 UWA-Accommodation-607

**Hotel Reservation**  
Amount: AUD 800.00  
03/10/2016 Tokyo (JP) 16/10/2016

Allocations:  
55.56% (AUD 444.44) 02010-10100001 UWA-Airfare -600  
44.44% (AUD 355.56) 02010-63001001 UWA-Accommodation-607

**Expenses**

Transaction Date	Expense Type	Entry Description	Amount	Approved Amount	Amount
03/10/2016	Airfare		AUD 1,000.00	AUD 1,000.00	AUD 1,000.00
	Allocations:	55.56% (AUD 555.56) 02010 10100001 UWA Airfare 600 44.44% (AUD 444.44) 02010 63001001 UWA Accommodation 607			
03/10/2016	Accommodation		AUD 800.00	AUD 800.00	AUD 800.00
	Allocations:	55.56% (AUD 444.44) 02010 10100001 UWA Airfare 600 44.44% (AUD 355.56) 02010 63001001 UWA Accommodation 607			
03/10/2016	Taxi		AUD 40.00	AUD 40.00	AUD 40.00
	Allocations:	100.00% (AUD 40.00) 02010 10100001 UWA Other 600			

Printed on 28/04/2016 04:07 PM

Allocation of expenses including BU/ PG/ Account Code can be viewed from this print layout.

## Attachments

**Request 33CL** [William TR24, Never]

Attachments Print / Email Send Back Request Approve

Trip Name: Test

Status: Pending Manager (L1 & L2) Approval  
Amount: AUD 1,840.00

To view attachment, click on **Attachments**.

## Send Back Request

### Send Back Request

×

#### Comment History

Creation date	Entered By	Comment Text
---------------	------------	--------------

Add a comment to explain why you are returning the request. Then click OK to return the request to the employee.

Comment

OK

Cancel

Use the **Send Back Request**, if you:

- *Require further information* from the traveller or
- *Declining* the travel request.

A **comment** must be provided to explain the reason for returning the request to the traveller.

Click on **OK** to send back your comments.

## Approve

Request 33CL [William TR24, Never]

Attachments ▾

Print / Email ▾

Send Back Request

Approve

Trip Name: Test

Status: Pending Manager (L1 & L2) Approval

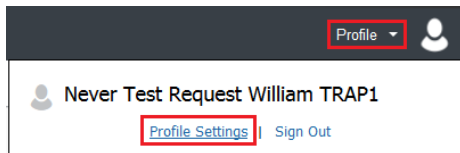
Amount: AUD 1,840.00

To Approve, click on the **Approve** button.

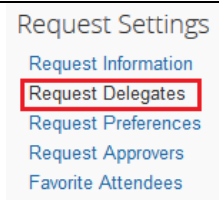
## Delegating Approval

**Travel Approver** – You can nominate another Approver to review and handle travel approvals in your absence.

To select and nominate another Approver to act on your behalf, login to Concur and complete the following steps:



Go to **Profile** and click on **Profile Settings**.



On the left-hand side menu, click on **Request Delegates**.

## Request Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
No records found.								

To add a delegate, click on **Add**.

## Request Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

[Add](#) [Cancel](#)

Search window will appear. Search or enter another approver employee ID.

## Request Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> William TRAP10, Never traveltest-finserv@uwa.edu.au	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <div>15/04/2016 22/04/2016</div>	<input type="checkbox"/>	<input type="checkbox"/>

Once a delegate is selected, the delegate's name will be listed.

Tick the box for “**Can Approve Temporary**” and enter the **date range** of this delegation period.

Click on **Save**.

To cancel a delegate, select the delegate's name and click on Delete.

## Ask a Question

Direct my enquiry to \*

Financial Services

My enquiry is about \*

Travel (Concur/Trobexis)

Subject \*

Request for Temporary Approver Delegate

Question \*

I'll be away on leave from 1/5/2016 to 5/5/2016 and I would like to delegate my Travel Approval to William Never (staff ID 000123456). Please update enable his access as a Temporary Approver during this period.

Attach Documents

Browse...

Note: There is an attachment file size limit of 20MB.

Continue...

### Note:

If the “Can Approve Temporary” section is greyed out and not able for selection, this means the person you want to delegate your approval to is not currently an Approver in Concur. You will need to create an enquiry via **AskUWA** to request for the nominated person to be made available as a Temporary Approver Delegate.

To submit an enquiry via AskUWA, go to <http://www.ask.uwa.edu.au/app/answers/list/>

### Example of AskUWA request to delegate Approval temporarily:

Direct my enquiry to: **Financial Services**  
My enquiry is about: **Travel**  
Subject: **Request for Temporary Approver Delegate**

Question:  
*I'll be away on leave from x/x/2016 to x/x/2016 and I would like to delegate my Travel Approval to xxxxx (staff ID 000123456). Please enable his access as a Temporary Approver during this period.*