



Concur Travel Request Quick Guide

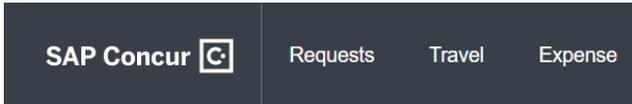
What is Concur?

Concur is a comprehensive web based tool that integrates travel request and expense reporting with a complete travel booking solution for higher education business travel. Concur allows for the electronic processing of the following:

- Travel Reimbursements via EFT or Mail
- US Bank Travel Ghost Card Transactions (airfare)
- Domestic & International Travel Approvals

Concur Modules

Concur includes three modules which should be used to perform different types of activities in the system.



Travel Request is required to obtain preapproval of your travel prior to making any travel reservations and complete an Expense Report.

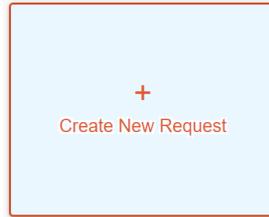
Concur Travel should be used to book airfare, car rental reservations, and hotel reservations through the University’s travel management company (TMC), Christopherson Business Travel (CBT) by using the online booking tool or booking directly with a CBT agent.

Expense Report is required to request reimbursement for out-of-pocket expenses, and to reconcile any university paid transactions including US Bank Travel Ghost Card transactions.

Creating a Travel Request

An approved Travel Request using the Concur Request Module is required for anyone traveling on university business prior to booking any travel reservations and completing an Expense Report.

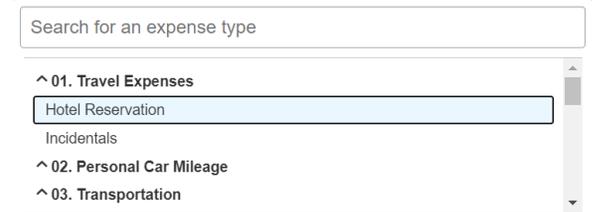
To create a new Travel Request, in Concur click on **Requests > Create New Request**.



- Request Header** – fill in all required fields (boxes with red asterisks) related to your travel. Most fields have you make selections from a drop-down list.
 - **Request/Trip Name:** Enter Conference/workshop name if applicable.
 - If you indicated **Traveler Type: 1-Faculty**, the **Box If Faculty, is class covered?** is a required field. This is asking if you have a substitution/plan for your courses while you are away travelling.
 - Add Comments if there is anything else you want your approvers to know in regards to your travel. Indicate appropriate chartfield information for your Travel Request. Please see **Allocations** section for more information.
 - Once header is complete, it will prompt you into the request and expected expense.



- Expenses** – Click on the Add button and selected the anticipated travel expenses. For each item provide estimates for the anticipated cost.



- When choosing either **Meals & Incidentals – International, Alaska & Hawaii** or **Meals –Domestic** Expense Types, the system will calculate the max daily rate by the number of days of travel. This is only for estimates and you will indicate the actual amounts on the Expense Report.
- Since not all expense types are available in Request, use Expense Type- **Other Expense** to enter an estimate for those expenses you don’t see listed. Add a comment of what the estimate is for.

Allocation

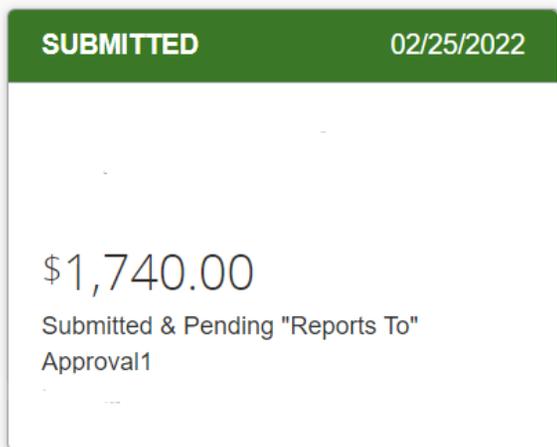
Your default chartfield will appear on each Travel Request Header. The default fund is 48500. Your Dept. ID will default to your Dept. ID from HR. You can edit the chartfield at the Request Header.

- If you need to allocate an expense to a different chartfield than indicated on the Request Header:
- Note you will only be able to select One chartfield string for the request, you can allocate on the expense report.

Approval Flow

To see who is approving your Travel Request or to see where your Request is in the workflow, open the **Travel Request**.

- You can see the status for example pending "reports To" Approval 1
- Budget Approver Name will not populate until it looks for a Budget Approver after your "Reports to" Approver approves.
- Approvers have 6 calendar days to approve a Travel Request. Otherwise it will move on to another Approver.



Audit Trail

By clicking on the **Audit Trail** Tab of the Travel Request, it will show you all actions including a description of the action for that particular Travel Request. This includes any changes made to the Travel Request as well as all approvals.

Adding an Attachment

If you need to attach a document to your Travel Request, you can do so using the Adding an Attachment option.

Click on the **Attachments > Attach Documents**

Click **Browse** to find your file/s and attach any documentation you want to include with your Travel Request. Once you found your file, click **Open**.

Then click **Upload**.

- Please note: Your Attachments will not copy over to your Expense Report so you will need to attach again to your Expense Report if needed.

Submitting Travel Requests for Approval

After you have completed the Request Header, Segments and Expenses tabs, you can submit your request by clicking orange Submit Request button.

- You can also click on **Print/Email** a Travel Request. A PDF version will pop up and you can make your selection to print or email a copy. It will ask you for an email address.
- it is best to wait till the Travel Request is fully approved, to have the full approval flow documented.
- Approved Travel Requests will automatically close 60 days after the travel end date.

Recalling/Canceling a Travel Request

1. Click on **Requests** > then click on the name of your Request.
2. Click **Recall**. Then, **Yes** to confirm.
3. Once recalled, you can make changes, then submit again for approval.
4. Once **Travel Request** is fully approved, you can no longer recall. But you can cancel the request at anytime. If you need to make changes to a fully approved Travel Request, you will need to cancel the Travel Request and then start a new one.

Creating a Blanket Travel Request

A Blanket Travel Request is acceptable for local travel (mileage only) with no overnight stay.

- Your Blanket Travel Request can be on a fiscal year basis and you must complete an Expense Report each month when there is travel from your approved Travel Request.
- **Travel Request/Trip Name** should indicate Blanket Travel and the Fiscal Year.
- Choose **Multiple Locations (Mileage Only), California** as your Destination City/State.

❖ For Questions:

Please email: traveloffice@csusm.edu