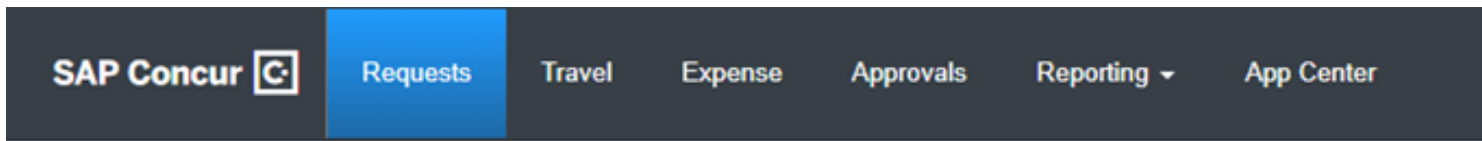


USER TRAVEL REQUEST GUIDE



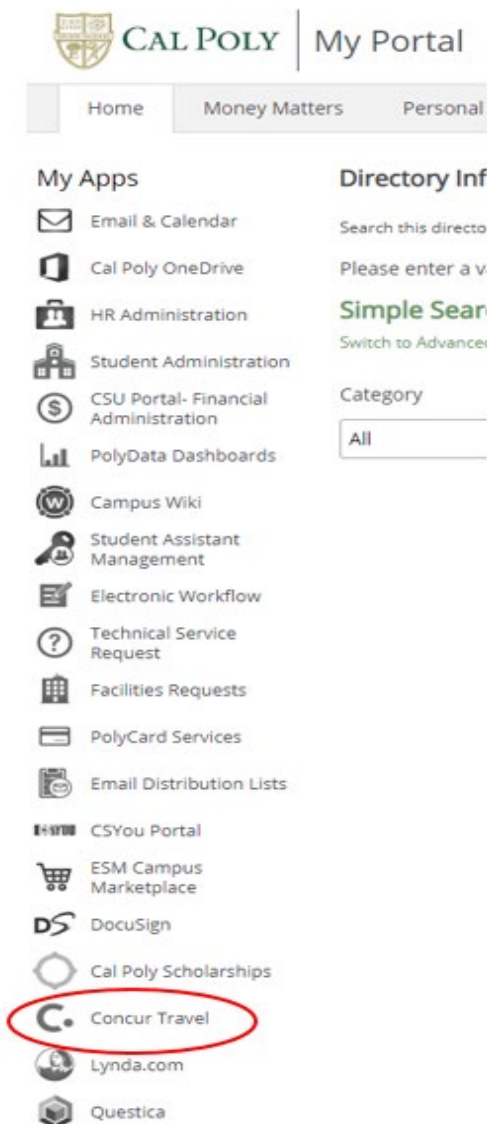
CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

Logging on to Concur

Staff and faculty of the University will have access to the Concur travel and expense management tool.

Users will access Concur through My Cal Poly homepage via single sign on (SSO). Navigate to Concur Travel under My Apps and click on the Concur link. Additional training materials can be found on the Cal Poly Travel page. afd.calpoly.edu/travel/concur

1. Go to my.calpoly.edu.
2. Enter your University User name, and password.
3. Click the link **Concur Travel**.
4. You will be taken to the Concur home page.



Travel: Create a Request

All Cal Poly faculty and staff traveling on University business must get pre-authorization for travel using the Concur **Request** module. **The Request should be submitted and approved prior to committing any funds, booking any travel, or submitting an Expense Report.**

Note: Per CSU Travel Procedures, Section IX.A *"Travel Expense Claim must be submitted to the campus Travel Reimbursement office within 60 days of the end of a trip unless there is recurrent local travel, in which case Claims may be aggregated and submitted monthly."*

Please be aware an Approved Request will automatically close and disappear from your Manage Request queue 60 days after the travel end date. If you haven't started an Expense Report with that Approved Request prior to those 60 days, you will need to request access from the Travel Program Analyst to get access to the Approved Request to open and submit the Expense Report.

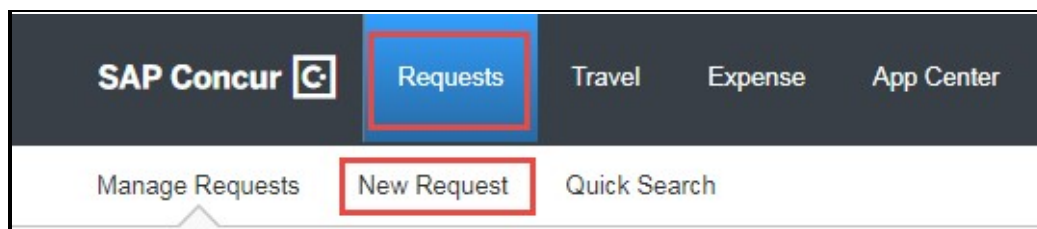
Entering a Travel Request

To create a request:

1. Either:

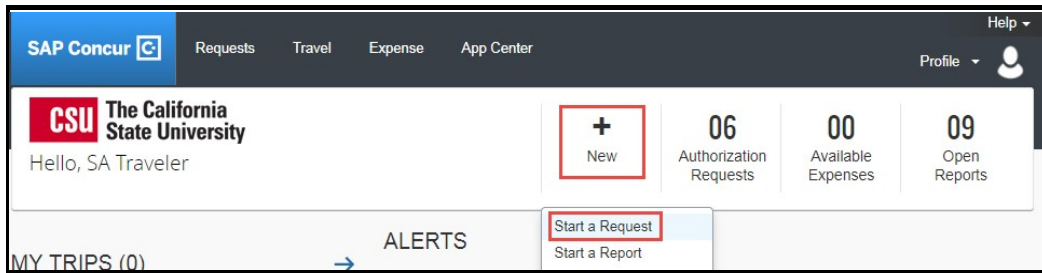
- Click **Request** on the header toolbar, and then select **New Request** on the request page.

- or -



- On the home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.

- or -



2. The **Request Header** tab appears. Complete all required fields with red mark.

Request/Trip Name:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name Trip Type Travel Start Date Travel End Date

Traveler Type Trip Purpose If Faculty, is class covered? Personal Dates of Travel-If none enter NA Destination City/State Final Destination Country

Are you travelling to a banned state? Comments To/From Approvers/Processors

Business Unit Fund Department Program Class Project

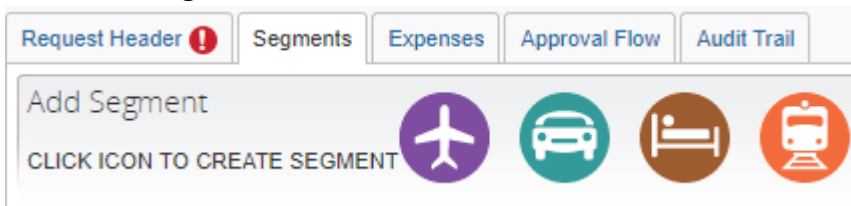
Enter the following fields:

	Field Name	Description
1	Request/Trip Name	Enter a meaningful trip name, similar to a name given to a travel expense report. Your department may implement a standard naming protocol. City, State and dates of Travel (ex. Long Beach, CA 5/18-5/21)
2	Trip Type	Select from the drop-down list
3	Travel Start Date	Date <u>business expenses start</u> . If personal days precede business dates, please set travel start date to the date you leave for the trip.
4	Travel End Date	Date <u>business expenses end</u> . If personal days are after business dates, please set travel start date to the date you return from the trip.

5	Traveler Type	Select from the drop-down list
6	Trip Purpose	Select from the drop-down list
7	If Faculty, is class covered?	Only Required for Faculty. Select from the drop down list.
8	Personal Date of Travel	Enter all dates which are personal. If none, place NA in field.
9	Destination City/State	If you anticipate travelling to more than one city and/or country, enter where you plan to spend the majority of your travel time.
10	Final Destination Country	The country will pre-populate based on the destination city selected.
11	Are you traveling to a banned state?	Select from the drop-down list. Enter justification in Comments area (see #13)
12	Comments To/From Approvers/Processors	Enter any comments to Approvers or Processors, including justification to travel to a banned state
13	Chart String	Chart field string will pre-populate based on your department. If necessary, changes can be made by traveler or approver. <u>Best to search by code (#s).</u>

3. Select **Save** in the top right-hand corner of the screen.

4. Select the **Segments** tab.



Here you can enter all travel itinerary information related to your trip including Air, Car, Hotel and Rail information.

5. Use the radio buttons along the top of the section to select whether your trip is Round Trip, One Way or Multi-Segment.



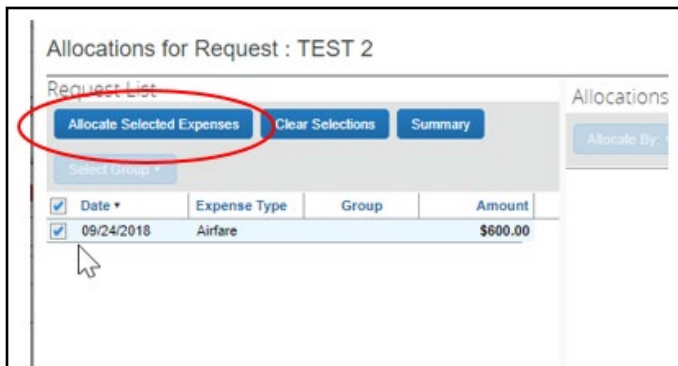
6. Enter your anticipated departure and destination airports, as well as your departure date. Continue entering your air itinerary details to completely document your air travel, including your return flights and estimated expense amount. Click **Save**.

Enter any Rail, Car or Hotel reservations applicable to the trip.

7. Select the **Expenses** tab to enter estimates of the travel expenses related to your trip.

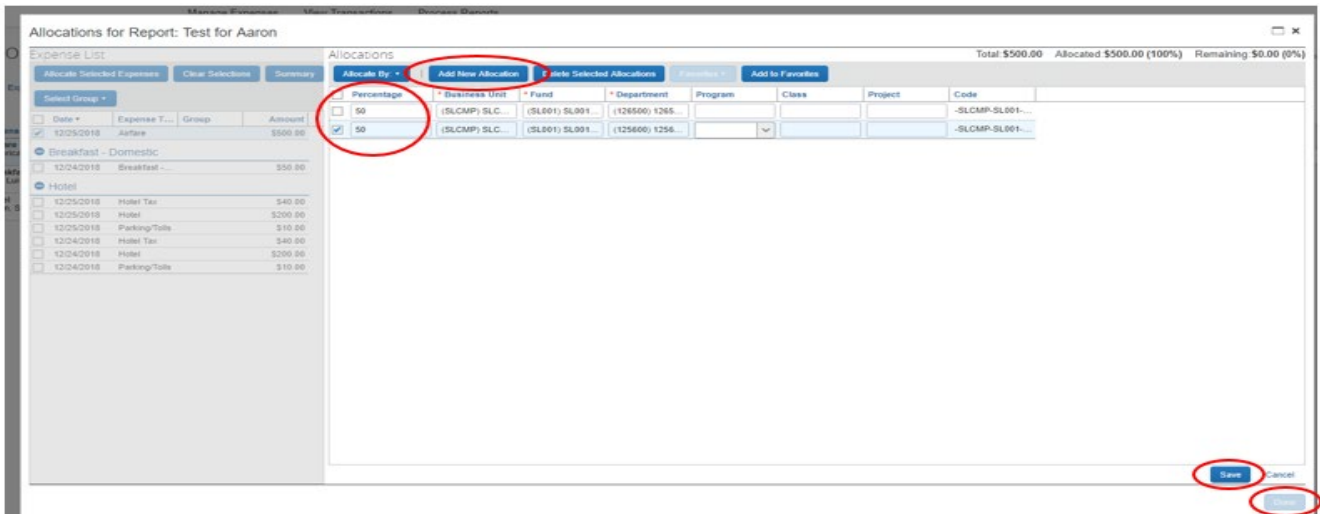
Request Header	Segments	Expenses	Approval Flow	Audit Trail
01. Travel Expenses	03. Transportation	05. Hospitality		
Other Accommodation	Ground Transportation	Hospitality		
Team/Group Travel	04a. Meals & Incidentals - International, Alaska & Hawaii	09. Other		
02. Personal Car Mileage	04b. Meals - Domestic	Other Expense		
		Registration/Fees		

8. To **Allocate** expenses, select the expenses you want to allocate, then click on **Allocate Selected Expenses**. If you want to allocate the entire Expense Report, select all expenses

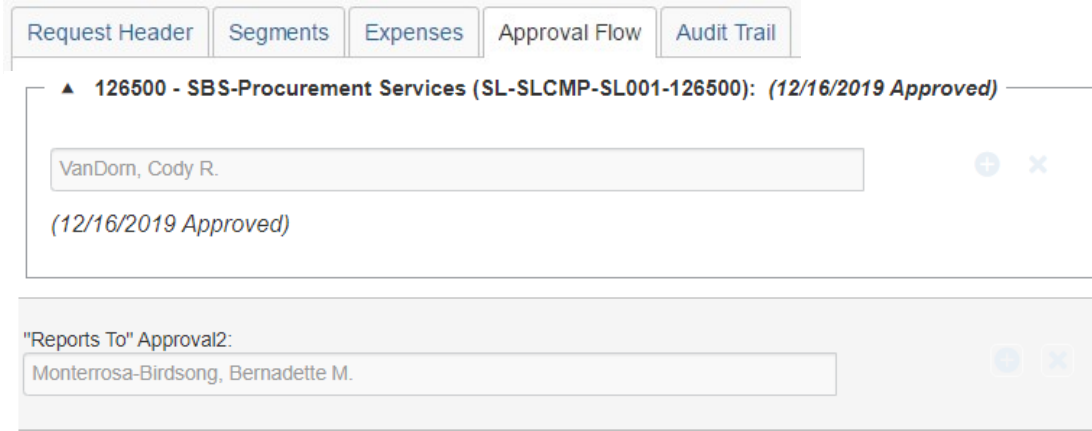


9. Enter the new chart field string(s) and the percentage(s) to allocate that expense. Click on **Add New Allocation** to add more strings. Click **Save, Done**

Please note: Allocation can also be done in **Expense Report**



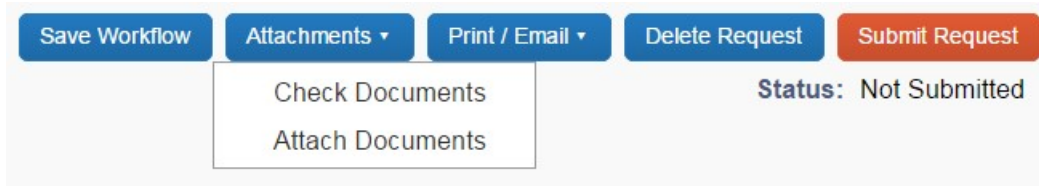
10. Select the **Approval Flow** tab to see the routing of your Travel Request



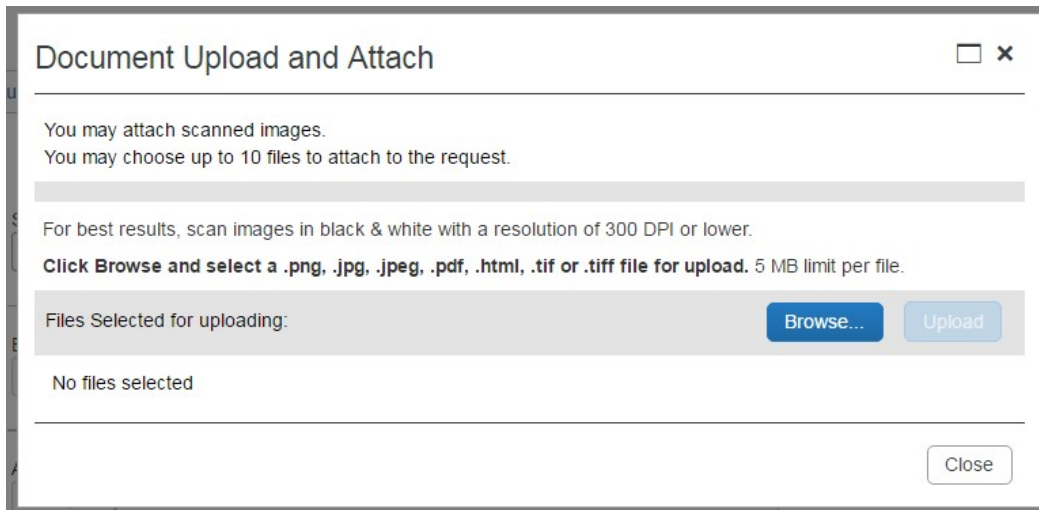
Attach Supporting Documentation

1. With the Request open, select **Attachments** and then **Attach Documents**.

The system allows for attachments at the discretion of the traveler. You can attach any necessary supporting documentation your department may require to your Travel Request.



2. In the window that appears, click **Browse** and navigate to the desired folder (wherever you saved the scanned or saved images). Select a file and click Open. The file is added to a list under Files Selected for uploading. Repeat the process until all files (up to 10) are listed under Files Selected for uploading. Click **Upload**. Click **Close** when finished uploading.



Questions? Please contact Stephanie Albright at polytravel@calpoly.edu

