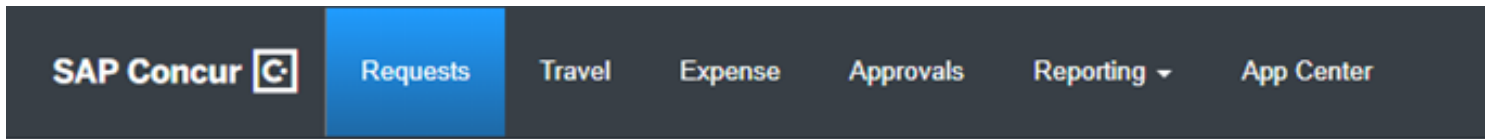


# USER TRAVEL REQUEST GUIDE



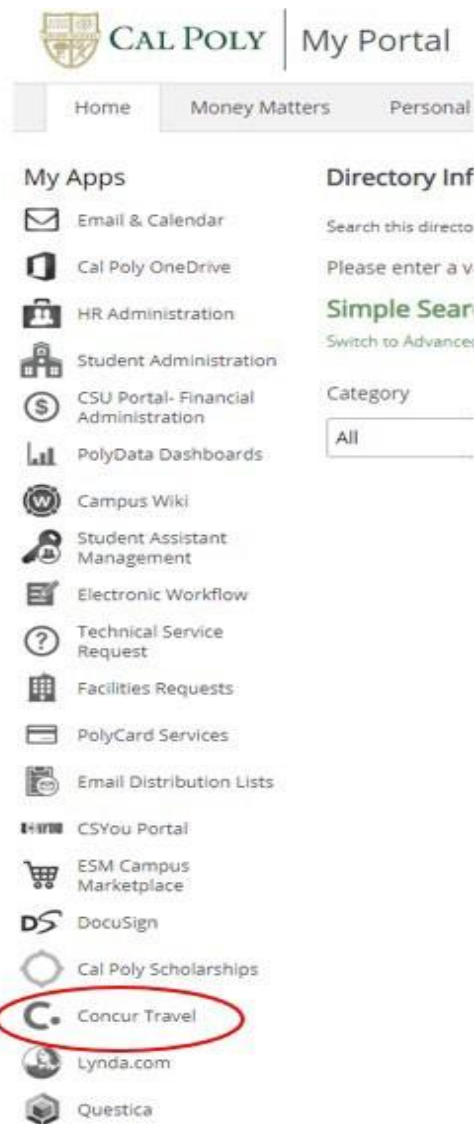
**CAL POLY**  
Strategic Business Services  
ADMINISTRATION & FINANCE

## 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](http://afd.calpoly.edu/travel/concur)

1. Go to [my.calpoly.edu](http://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.**

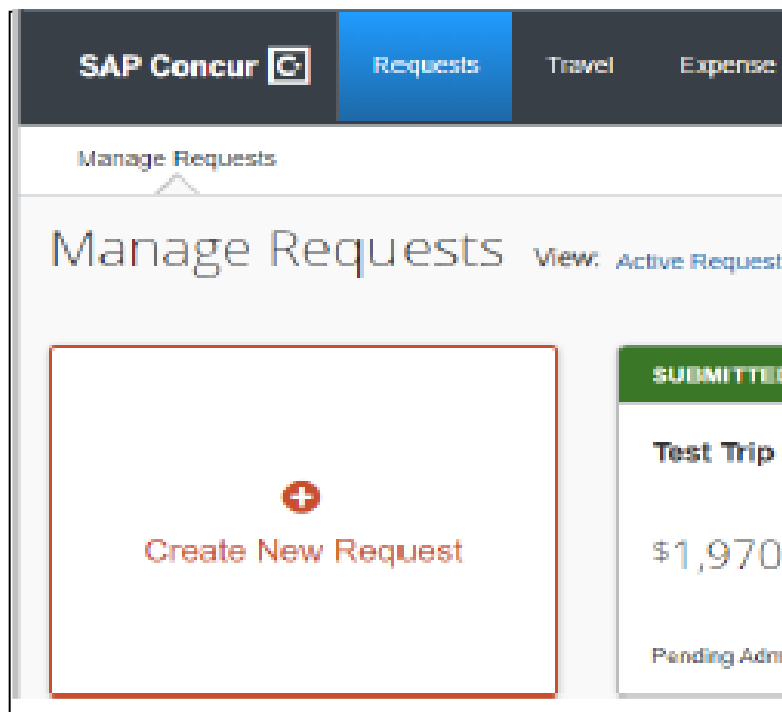
Note: Per CSU Travel Procedures, Section IX.A *"Travel Expense Claim must be submitted to the campus Travel Reimbursement office within 60 days of the end of a trip unless there is recurrent local travel, in which case Claims may be aggregated and submitted monthly."*

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. Click **Request** on the header toolbar, and then select **Create New Request**



1. The **Request Header** tab appears. Complete all required fields with red asterisk.

Create New Request

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? \*

Business Unit \*

Fund \*

Department \*

Program

Class

Project

Comments To/From Approvers/Processors

Cancel **Create**

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 end date to the date you return from 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?	<b>Only Required for Faculty.</b> 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	Are you traveling with students?	Select from the drop-down list.
13	Comments To/From Approvers/Processors	Enter any comments to Approvers or Processors, including justification to travel to a banned state
14	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>

2. Select **Create** in the bottom right-hand corner of the screen.
3. Concur will open the Expected Expenses section. Add expected expenses including Air, Car, Hotel, Meals, etc for best estimate of trip budget.

The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', and 'App Center'. A user profile icon and 'Help' link are on the right. Below the navigation bar, the page title is 'Manage Requests'. The main content area shows a request for 'Test Trip 547' with a budget of '\$0.00' and a trash icon. It indicates the request is 'Not Submitted' with 'Request ID: 4ENT'. There are 'Copy Request' and 'Submit Request' buttons. Below this, there are links for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section is highlighted, featuring a toolbar with 'Add', 'Edit', 'Allocate', and 'Delete' buttons.

4. Click ADD to open the expense type drop down. Choose your expense type. In this example we will choose Car Rental.

Test Trip 547 \$0.00

Not Submitted | Request ID: 4ENT

Request Details ▼ Print/Share ▼ Attachments ▼

### EXPECTED EXPENSES

**Add** ▼ Edit Allocate Delete

Search for an expense type

- 02. Personal Car Mileage
- 03. Transportation**
  - Air Ticket
  - Car Rental**
  - Ground Transportation
  - Parking/Tolls

5. Type in City for car rental pickup drop off, and the Amount (estimated) for the car rental. Hit **Save**. Repeat for each expected expense for the trip.

New Expense: Car Rental Cancel **Save**

City: San Luis Obispo, California Date: 11/19/2020 At: hh:mm A

Detail:

City:

Date: 11/16/2020 At: hh:mm A

Detail:

Comment:

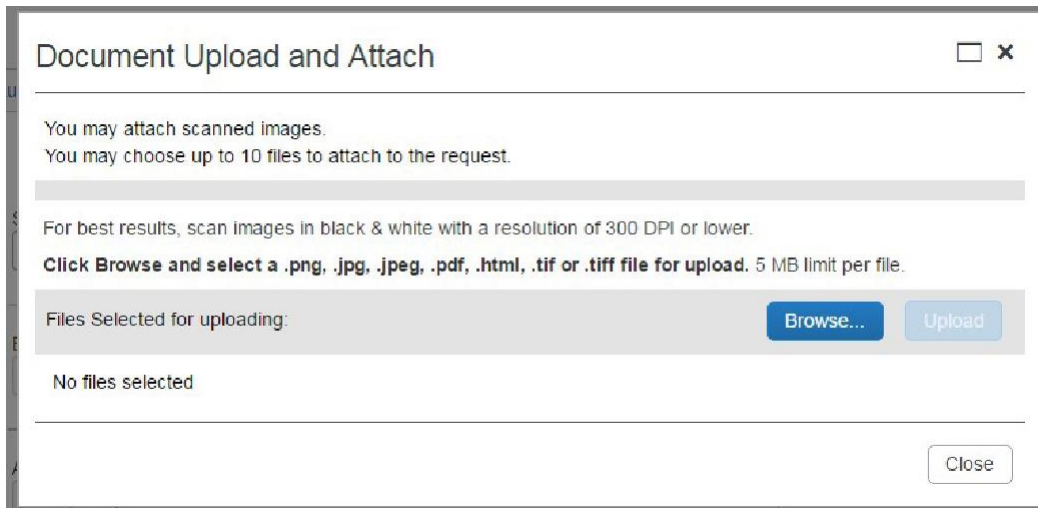
Amount \* 500.00 Currency \* US, Dollar

## Attach Supporting Documentation

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.



1. Select **Attachments** and then **Attach Documents**.
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.



**Submit Request by hitting the orange Submit Request button on the top right of the page.**

Alerts: 1

Test Trip 547 \$1,620.00 

Copy Request

**Submit Request**

Not Submitted | Request ID: 4ENT

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES


Attach Documents

Add ▾

Edit

Allocate

Delete

<input type="checkbox"/>	Alerts	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>		Car Rental	San Luis Obispo, California	11/16/2020	\$500.00	\$500.00
<input type="checkbox"/>		Hotel Reservation	San Diego, California	11/16/2020	\$900.00	\$900.00
<input type="checkbox"/>		04b. Meals - Domestic		11/16/2020	\$220.00	\$220.00
						<b>Estimated Total: \$1,620.00</b>

**Questions?** Please contact Stephanie Albright at [polytravel@calpoly.edu](mailto:polytravel@calpoly.edu)



