POLY TRAVEL REQUEST & BOOK

Plan. Book. Go.

CAL POLY
Administration & Finance

POLY TRAVEL

CONCUR TOOL

Online and mobile tool

CONCUR TRAVEL CARD

University liability credit card
Feeds into Concur

CHRISTOPHERSON'S BUSINESS TRAVEL

Travel management company
Book via Concur or phone

TRAVEL GUIDELINES

Updated Cal Poly's travel guidelines

- **Request**
- **Travel**
- Expense Report

POLY TRAVEL WEBSITE
AFD.CALPOLY.EDU/TRAVEL/CONCUR/

→ **Roll Out schedule**

Roll Out started September 2019 and runs through September 2020. Scheduled dates of training waves for departments listed

→ **Concur Overview and Approval Flow**

Outline of Concur modules: Request, Book, and Expense Reports; and an outline of the approval flow process

→ **Guides and Tutorials**

Tutorials available for the traveler, approver, and delegates

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BEFORE YOU START

TRAVEL PROCESS

- **Must complete travel in the process you started**
  - If you started with a current travel 1A form, cash advance, direct bill (Enterprise or Giselle's) or current Travel Card - you must complete the current paper process

- **Begin using Concur for travel when ALL aspects of travel are in Concur**
  - When you can start a new Concur Request, book travel in or outside of Concur (EX: Conference Hotel), use your Concur Travel card for all expenses and can submit all expenses using the Expense Report – you are ready to use Concur for your travel process

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GUIDELINES REVIEW – CLARIFICATION REQUESTS

- **An approved request is required before committing any funds for travel, including registration fees**

- **An approved Request is required for each University Travel trip (1:1)**

  - A trip is 25 miles or more from campus or home, may include hotel, air, rail, car rental, a personal or state vehicle

  - University Travel is any travel related to university business; may include travel paid by another entity (i.e. faculty visiting another university)

  - Academic Travel (i.e. student study abroad) is not considered University Travel

  - A local meeting, with or without hospitality within San Luis Obispo county is not considered University Travel

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CONCUR | GETTING READY TO TRAVEL

SAP Concur ☐ | Requests | Travel | Expense | Approvals | Reporting ▾ | App Center

Administration ▾ | Help ▾

Profile ▾ 👤

CSU **The California State University**

Hello, Bernadette

| **+** New | **01** Required Approvals | **13** Authorization Requests | **06** Available Expenses | **07** Open Reports |

TRIP SEARCH

COMPANY NOTES

Profile – *travel and tool preferences*

Request – *fill out information to request authorization to travel*

Travel – *book air, rail, car, and/ or hotel*

Expense – *fill out information to claim and expense travel*

Approvals – *approvers review Requests and Expense Report*

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CONCUR ONLINE TOOL - PROFILE
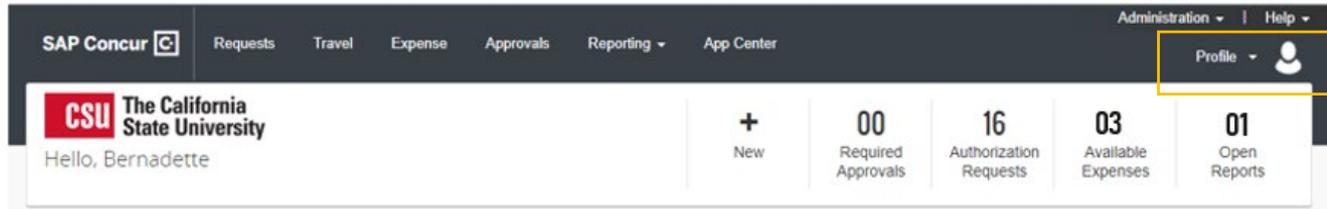
Before you start you must set up your profile

REQUIRED FIELDS:
- First and Last Name*
- Manager/ Supervisor*
- Work of Home Phone
- Email Address
- Gender
- Date of Birth
- Credit Cards – Concur Travel Card only

   * If incorrect, contact Human Resources

OPTIONAL FIELDS:
- Work Address
- Home Address
- Emergency Contact
- Travel Preferences: air, hotel, car rental
- Frequent Traveler Programs: air, hotel, car rental
- Passport and Visa

Information automatically included in your Requests, Bookings, and Expense Reports in Concur

POLY TRAVEL | DOMESTIC OR INTERNATIONAL

→ **DOMESTIC TRAVEL**

- Give manager(s) heads-up
- Check funding sources

→ **INTERNATIONAL TRAVEL**

- Two step process: International Center and Concur
    1. Start with International Center, once this process complete you will receive a PDF via email
    2. Submit Request with attached PDF in Concur for approval
- Allow 60 days for review and approvals

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REQUEST

REQUEST | NEW REQUEST TAB

Required fields have red bars

REQUEST NEW REQUEST

Required Field	Appropriate Usage
Trip Type	In State. Out of State. International
Travel Start and End Date	Start and End date of your travel
Traveler Type	Staff or Faculty
If Faculty, is class covered?	Yes, No, NA
Personal Dates of Travel	Enter Personal Dates of travel and include travel itinerary that includes business and personal dates. If none, enter NA.
Destination City/State & Final Destination Country	Enter Destination City and State. Final Destination Country should populate based on the Destination City/State
Are you traveling to a Banned State/	Yes, No? If Yes, Banned States are listed. Include Comment and attach document for travel to banned state
Chart Field Information	Default chart field string will populate with SL001 fund. It can be changed

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REQUEST | THREE SEGMENTS

AIR

- Total amount of airfare
- Type: Round Trip, One-Way, or Multi-Segment
- Outbound airport
- Return airport
- Date

HOTEL

- Total amount of hotel stay
- Check-in Date
- Check-out Date
- City
- Maximum Nightly Rate
- Over Rate Comment

CAR

- Total amount of car rental
- Pick-up City and Date
- Drop-off City and Date

- *Completing these will provide the budget estimate for your trip*

- *The Segments selected in Request will drive your search criteria in Concur booking tool (Travel)*

REQUEST | EXPENSES

Provide estimates for the following additional Expense Types

01. Travel Expenses	**02. Personal Car Mileage**	**04a. Meals & Incidentals - International, Alaska & Hawaii**	**09. Other**
Incidentals	**03. Transportation**	**04b. Meals - Domestic**	Other Expense
Other Accommodation	Ground Transportation	**05. Hospitality**	Registration/Fees
Team/Group Travel	Parking/Tolls	Hospitality	

- Provide estimates for all travel related expenses regardless of how it is to be paid

- **Airfare, Rail, Car,** and **Hotel** should be added under the Segments Tab

- If selecting **Domestic Meals** – it will automatically calculate $55x the # of Business days indicated. This is an *estimate only.* ACTUALS should be expensed after travel.

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REQUEST|EXPENSES ALLOCATE, DELETE, MODIFY

After you save each segment/expense, you have the option to allocate, delete, or modify

- **Allocate**: You can allocate a valid chartfield string for a particular expense if necessary. If you will be using the same chartfield from your Request Header, then no further action is needed.
  - You have the option to allocate by **Percentage** or **Amount**

- **Delete**: if you want to delete the segment or expense.

- **Modify**: If you need to make changes to any part of the expense.
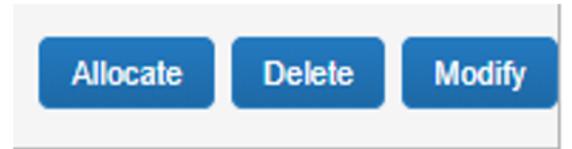
POLY TRAVEL | REQUEST CHECK LIST

- Include ALL estimated expenses for an all inclusive budget

- Confirm your funding sources – chartfield strings are fed from PeopleSoft

- Attach required documents (Itinerary required for International travel or when including personal travel)

- Enter comments

  - Line item comments – specific to that expense type

    example: Ground Transportation "lyft from hotel to airport"

  - Header comments – overall comments for entire Request

- Include ALL segments you will book in Travel

Ready to submit Request
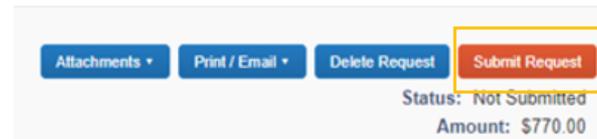
| Attachments ▼ | Print / Email ▼ | Delete Request | Submit Request |

Status: Not Submitted
Amount: $770.00

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POLY TRAVEL APPROVAL FLOW

1. Cost Object Approver — Budget & chartfield string

2. Manager/Supervisor — Business need & policy

3. Exception Approval — Banned state and/or International

Requestor cannot add other approvers to flow

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REQUEST|AUDIT TRAIL

SAP Concur | **Requests** | Travel | Expense | Approvals | Reporting ▾ | App Center

Profile ▾

Manage Requests   New Request   Process Requests   Quick Search

Request 34G3

Attachments ▾   Print / Email ▾   Delete Request   **Submit Request**

Status: Not Submitted
Amount: $1,375.00

Request/Trip Name: Conference for Staples review

Request Header | Segments ⚠ | Expenses ❗ | Approval Flow | Audit Trail

Request Level

Date/Time	Updated By	Action	Description

Entry Level

Date/Time	Updated By	Action	Description

Segment Level

Date/Time	Updated By	Action	Description

**At this point there isn't anything
Need to submit to see trail**

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APPROVAL FLOW

CONCUR|APPROVAL FLOW

Concur has a two-approver process; three for banned state and/or international travel
If same approver is in 2 consecutive approval roles, they will only receive it one time

1. Cost Object Approver — Budget & chartfield string review	2. Manager/ Supervisor — Business need & policy review	3. Exception Approver — Banned state and/or International travel only

Based on…	Cost Object Approver — Chartfield String		Manager/ Supervisor — Traveler		Exception Approver — Banned State or International	
Approval for a(n)	**Time in Queue**	**If no action from approver, the system will**	**Time in Queue**	**If no action from approver, the system will**	**Time in Queue**	**If no action from approver, the system will**
Request	6 days	Automatically approve and it moves to HR manager	6 days	Automatically move to the next in-line manager	6 days	Automatically move to the next in-line manager
Expense	10 days	Automatically approve and it moves to HR manager	10 days	Automatically move to the next in-line manager	**Banned State Travel Approvers: Academic: Provost Non-Academic: Dept. VP**	

Collected from departments   **Fed from HR system**

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TRAVEL

TRAVEL   AIR

Open Travel Tab to Book Air, Hotel, Car, or Rail

SAP Concur | Requests | **Travel** | Expense | Approvals

- Select Air Icon to book **Airfare**

- Select **Round Trip, One Way, or Multi City**

- Enter **From and To Destinations**. Type in the full name of the City and check that ALL AREA AIRPORTS is not selected (examples: Las Vegas, Los Angeles)

- **Search**

Booking for myself |

Mixed Flight/Train Search

| Round Trip | One Way | Multi 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

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TRAVEL | BOOK AIR

- <u>All</u> airports are loaded in Concur.

- Select INTERNATIONAL airports for larger cities.

- Happens often with travel to Los Angeles and Las Vegas

- If no flights available for your search, or trains only, check the airport shown in Search.

Mixed Flight/Train Search

| Round Trip | One Way | Multi City |

From ⊘

San Luis Obispo, CA - San Luis Obispo Airport

Find an airport | Select multiple airports

To ⊘

Los Angeles, CA - Los Angeles Area Airports

LAX Los Angeles Area Airports
Los Angeles, CA, United States of America

BUR Burbank Airport
Burbank, CA, United States of America   Near LAX

LGB Long Beach Airport
Long Beach, CA, United States of America   Near LAX

LAX Los Angeles Intl Airport
Los Angeles, CA, United States of America

ONT Ontario Airport
Los Angeles, CA, United States of America

SNA Santa Ana Airport
Santa Ana, CA, United States of America   Near LAX

VNY Los Angeles Van Nuys Airport
Los Angeles, CA, United States of America

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TRAVEL | BOOK AIR

Trip Summary

✈ **Select Flights or Trains**

Round Trip

SBP - SAN
Depart: Tue, 09/03/2019
Return: Fri, 09/06/2019

✓ Finalize Trip

Change Search ^

From
SBP - San Luis Obispo Airport - San Luis Obispo, CA
Find an airport | Select multiple airports

To
SAN - San Diego Intl Airport - San Diego, CA
Find an airport | Select multiple airports

Depart
📅 09/03/2019 | dep ▼ | 10:00 an ▼ | ± 3 ▼
∨

Return
📅 09/06/2019 | dep ▼ | 10:00 an ▼ | ± 3 ▼

SAN LUIS OBISPO TO SAN DIEGO
TUE, SEP 3 - FRI, SEP 6

Hide matrix   Print / Email

Sorry, we are unable to return search results, which may be due to:
- your company's travel policy
- the way your company has configured Concur Travel
- no available options for the dates/times searched

Please try another search.

Change Search can be used to expand or change your search options for booking air, rail, car, and hotel.

⬅

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TRAVEL | CAR

- Select Car Icon for **Rental Car**

- Select **Pick-Up** and **Drop-Off** dates – times are for search parameters only

- **Enter location to pick up car.** Either Airport Terminal or Off-Airport (example, SBP for Airport, or San Luis Obispo, CA for off-airport)

- **Search**

- *Please note:* For Cal Poly campus delivery, first make the reservation with Concur, then call the Broad Street office to set up delivery. Call again upon return for car pick up by Enterprise

- **Concur Users will be required to pay for Enterprise Rental Cars with their Concur travel card.**

TRAVEL HOTEL

- Select Hotel Icon for **Hotel Reservation**

- Select **Pick-up and Drop-Off** dates – times are for search parameters only

- Enter **Check-in and Check-Out** dates

- Add Reference Points for Search if needed. Example: San Diego Convention Center

- **Search**

Booking for myself |

Hotel Search

Check-in Date   Check-out Date

Search within 5   miles from
○ Airport   ○ Address
○ Company   ● Reference Point / Zip
  Location   Code

Reference Point / Zip Code
(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

☐ With names containing:

Search

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TRAVEL | BOOK HOTEL

Change Search allows you to change reference point and booking dates

TRAVEL | HOTEL

Hotel/Motel Transient Occupancy Tax Waiver Form

afd/calpoly.edu/travel/book-travel

Hotel in California:

California hotels may charge an occupancy tax and this tax is determined by each COUNTY, not the state. Please visit the county's website prior to traveling for more information. In addition, we encourage all travelers to call their hotel in advance to confirm what documentation or forms are required to qualify for occupancy tax exemption since it is up to each hotel if they will waive the occupancy tax from your bill.

- The City of San Diego 📄
- San Diego County 📄
- Sacramento 📄

Be prepared to provide the following, as a minimum, to the hotel:

- Hotel/Motel Transient Occupancy Tax Waiver (Exemption Certificate for State Agencies) STD. 236 (https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std236.pdf 📄)
- Print/PDF of Concur Approved Request (see guides and tutorials) or Approved 1A (if still on paper process)
- Cal Poly ID

POLY TRAVEL | SUPPORT

CHRISTOPHERSON BUSINESS TRAVEL
CSU Agent Group 800-285-3603 5:00am -6:00pm PCT

After Hours 800-960-7862

csu@cbtravel.com

onlinesupport@cbtravel.com

OPEN LABS

Friday Open Labs for support with Concur Request/Book/Expense

Visit website for times and locations   https://afd.calpoly.edu/travel/concur/

Sign up or Drop-Ins Welcome

POLY TRAVEL OFFICE

756-2232

polytravel@calpoly.edu

Cal Poly

THANK YOU

APPENDIX

PROFILE: SET UP

CONCUR: LOGIN

afd.calpoly.edu/travel/concur/

CONCUR: LOGIN
LOGIN WARNING: NAME & AIRPORT SECURITY
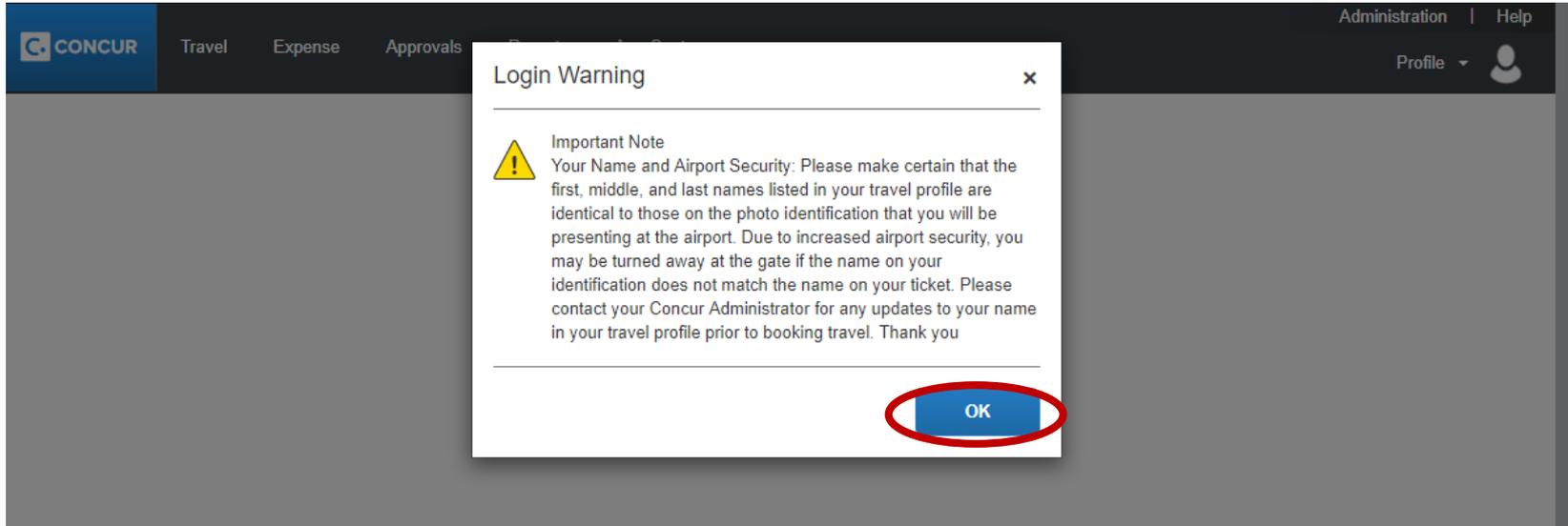
CONCUR: HOMEPAGE

CONCUR: PROFILE

PROFILE

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.

Title: Ms ▼ First Name: Bernadette Middle Name [Required]: M. ☐ No Middle Name Nickname: Bernadette Last Name: Monterrosa-Birdsong Suffix: ▼

Company Information Go to top

Employee ID: 15000821414

Manager: Cody VanDorn ▼ Org. Unit/Division Employee Position/Title:

Save

Work Address Go to top

✓ **Name** – *must match photo identification for travel*. Name is loaded from Human Resources. Contact HR for changes.

✓ **Contact Information** – Work Phone/ Home Phone. Recommend Cell Phone for travelers

✓ **Gender and Date of Birth**

✓ **Concur Credit Card** – only card to be loaded into Concur Profile

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PROFILE

Additional Fields

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	albright@calpoly.edu	✉ Check email for code	Resend | Cancel	Yes	✏
		Enter Code [ ]	OK		
Email 2	salbright101@yahoo.com	✉ Check email for code	Resend | Cancel	Yes	✏ 🗑
		Enter Code [ ]	OK		

✓ **Work Address**

✓ **Home Address**

✓ **Email Address –** *REQUIRED to use* *receipts@concur.com*

✓ **Emergency Contact**

✓ **Travel Preferences** *- air, hotel, car, frequent-traveler programs, advantage programs*

✓ **Assistants and Arrangers**– *permission to perform travel functions for you*