POLY TRAVEL REQUEST & BOOK
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
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
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
CONCUR | GETTING READY TO TRAVEL

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

- 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.
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
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
At this point there isn’t anything to submit to see trail
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.

<table>
<thead>
<tr>
<th>Approval for</th>
<th>Time in Queue</th>
<th>If no action from approver, the system will</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request</td>
<td>6 days</td>
<td>Automatically approve and it moves to HR manager</td>
</tr>
<tr>
<td>Expense</td>
<td>10 days</td>
<td>Automatically approve and it moves to HR manager</td>
</tr>
</tbody>
</table>

1. Cost Object Approver
   Chartfield String

2. Manager/Supervisor
   Business need & policy review

   Time in Queue | If no action from approver, the system will
   ---------------|-------------------------------------------|
   6 days          | Automatically move to the next in-line manager |
   10 days         | Automatically move to the next in-line manager |

3. Exception Approver
   Banned state and/or international travel only

   Time in Queue | If no action from approver, the system will
   ---------------|-------------------------------------------|
   6 days          | Automatically move to the next in-line manager |

Banned State or International
Travel Approvers:
Academic: Provost
Non-Academic: Dept. VP
TRAVEL
TRAVEL AIR

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

- 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
TRAVEL | BOOK AIR

- All 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.
TRAVEL | BOOK AIR

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.
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
Change Search allows you to change reference point and booking dates
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:

- Print/PDF of Concur Approved Request (see guides and tutorials) or Approved 1A (if still on paper process)
- Cal Poly ID
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
THANK YOU
PROFILE: SET UP
Concur: Login

afd.calpoly.edu/travel/concur/
CONCUR: LOGIN
LOGIN WARNING: NAME & AIRPORT SECURITY

![Login Warning Screen]

- **Important Note:**
  - Your Name and Airport Security: Please make certain that the first, middle, and last names listed in your travel profile 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 contact your Concur Administrator for any updates to your name in your travel profile prior to booking travel. Thank you.

[afd.calpoly.edu/travel/concur]
CONCUR: PROFILE
**Profile**

Required Fields

- **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

afd.calpoly.edu/travel/concur/
**Profile**

### Additional Fields

**Email Addresses**

- Email 1: allbright@calpoly.edu
  - Verification Status: Check email for code
  - Actions: OK
- Email 2: allbright101@yahoo.com
  - Verification Status: Check email for code
  - Actions: OK

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?

**Work Address**

- Address

**Home Address**

- Address

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

**Emergency Contact**

- Contact Information

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

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

[afd.calpoly.edu/travel/concur/](afd.calpoly.edu/travel/concur/)