

POLY TRAVEL APPROVERS

Plan. Book. Go



CONCUR | APPROVALS

Travel

Book Air, Rail, Car and/or Hotel

Profile set up travel information

SAP Concur Administration | Help

Profile

CSU The California State University

Hello, Bernadette

01 Required Approvals

13 Authorization Requests

06 Available Expenses

07 Open Reports

Approvals Approvers review Requests and Expense Report

Expense

Fill out information to claim and expense travel

Request

Submit travel request for authorization

Start Travel or Expense Report

from an Approved Request

POLY TRAVEL APPROVAL FLOW - CONCUR



Request

Expense Report

Cost Object Approver Chartfield String	
Time in Queue	If no action from approver, the system will
6 days	Automatically approve and it moves to HR manager
10 days	Automatically approve and it moves to HR manager

Manager/ Supervisor Traveler	
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

Exception Approver Banned State or International	
Time in Queue	If no action from approver, the system will
6 days	Automatically move to the next in-line manager

ACCESSING APPROVALS

Email notification – click on Approvals

Mobile App –

Login to Concur – click on Approvals

The screenshot shows the SAP Concur web interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals' (highlighted in blue), 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', and 'Profile'. Below the navigation bar, there are tabs for 'Approvals Home', 'Requests', and 'Reports'. The main content area features three cards: '00 Trips', '01 Requests' (highlighted with a green border and a green callout box labeled 'Requests for approval'), and '00 Expense Reports' (highlighted with an orange border and an orange callout box labeled 'Expense Reports for approval'). Below these cards is a table titled 'Expense Reports' with columns for 'Report Name', 'Employee', 'Report Date', 'Amount Due Employee', and 'Requested Amount'. The table currently displays 'No records found.'

APPROVER | AFTER PREVIEWER HAS REVIEWED

The screenshot displays the SAP Concur 'Approvals' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'Reporting'. The user is logged in as 'Cody R. VanDorn'. The main content area shows 'Approvals Home', 'Requests', and 'Reports' tabs. Two summary cards are visible: '01 Requests' and '00 Expense Reports'. A large green text overlay reads 'Previewer has Reviewed'. Below this, a table lists a single travel request. A brown box highlights the request icon, and a brown arrow points from the text 'Previewer has Reviewed' to this icon.

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
	TEST Delegate	3UE4	Christopher, Overby	10/21/2019 10/23/2019	10/11/2019	\$1,414.00



APPROVER CAPABILITIES IN CONCUR

- Send requests back to traveler for questions
- Change chartfield string(s)
- Add / allocate chartfield strings
- Attach documents
- Review attached documents
- Add and review comments
- Add approvers

APPROVER CAPABILITIES IN CONCUR

SAP Concur Approvals Administration Help

Acting as Haas, Christine E

Approvals Home Requests Reports

Request 3LJ6 [Birdsong, Charles]

Cancel Save Attachments Print / Email Send Back Request Approve

Status: Pending Cost Object Approval
Amount: \$2,280.00

Request/Trip Name: TEST - Approver

Request Header Segments Expense Summary Approval Flow Audit Trail

Request/Trip Name: TEST - Approver
Trip Type: 1-In-State
How will you book your trip?: 2 - Book Outside of Concur Travel
Travel Start Date: 09/03/2019
Travel End Date: 09/06/2019

Traveler Type: 1-Faculty
Trip Purpose: Conference
If Faculty, is class covered?: Yes
Personal Dates of Travel-If none enter NA: NA

Destination City/State: San Francisco, California
Final Destination Country: UNITED STATES
Are you travelling to a banned state?: No
Comments To/From Approvers/Processors:

Business Unit: (SLCMP) SLCMP - Cal Poly San Luis Ot
Fund: (SL001) SL001 - 948-485 CSU Operat
Department: (110100) 110100 - CENG-Mechanical Ei
Program:

Class: Project:

Review General Trip Info - Header

- Attachments: Attach & View
- Save
- Send Back (add comments)
- Approve
- Approve and Forward

Re-submission will go through entire approval flow

APPROVER CAPABILITIES IN CONCUR

SAP Concur Approvals Administration Help

Acting as Haas, Christine E

Approvals Home Requests Reports

Request 3LJ6 [Birdsong, Charles]

Request/Tr Name: T-EST Approver

Attachments Print / Email Send Back Request Approve

Status: Pending Cost Object Approval
Amount: \$2,280.00

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense Type	Amount	Requested
09/03/2019	Car Rental	\$165.00	\$165.00
09/03/2019	Other Accommodation	\$1,000.00	\$1,000.00
09/03/2019	Pending Cost Object Approval	\$40.00	\$40.00
09/03/2019	Registration/Fees	\$755.00	\$755.00
09/03/2019	04b. Meals - Domestic	\$220.00	\$220.00
09/03/2019	Line Item Comments	\$100.00	\$100.00

Expense Type: Car Rental

Transaction Amount: 165.00 USD

Request/Expense Report will route to COA for 'new' chartfield string if different

Check Allocations: Change or Add Allocations View Segment Details

TOTAL REQUESTED \$2,280.00

Allocate View segment detail

APPROVER CAPABILITIES IN CONCUR

Request 3LJ6 [Birdsong, Bernadette] **Check Approval Flow** Save Workflow Attachments Print / Email Send Back Request Approve
Status: Pending Cost Object Approval
Amount: \$2,280.00

Request/Trip Name: TEST - Approver

Request Header Segments Expense Summary **Approval Flow** Audit Trail

Budget Approval:

110100 - CENG-Mechanical Engineering (SL-SLCMP-SL001-110100): Haas, Christine E.

"Reports To" Approval2:

Monterrosa-Birdsong, Bernadette M.

(this step may be skipped)



Add other MPP, Confidential, or COA to Approval Flow

APPROVER CAPABILITIES IN CONCUR

Request 3LJ6 [Birdsong, Charles]

Attachments ▾

Print / Email ▾

Send Back Request

Approve

Check Audit Trail

Status: Pending Cost Object Approval

Amount: \$2,280.00

Request/Trip Name: TEST - Approver

Request Header

Segments ⚠

Expense Summary

Approval Flow

Audit Trail

Request Level

Date/Time	Updated By	Action	Description
08/27/2019 04:26 AM	Monterrosa-Birdsong, Bernadette	Delegate/Proxy Request Creation	This request was created by a delegate or proxy user.
08/27/2019 04:37 AM	Monterrosa-Birdsong, Bernadette	Delegate/Proxy uploaded an attach...	An attachment was added by a delegate or proxy user.
08/27/2019 05:55 AM	Birdsong, Charles	Field Edit	The field "ReceiptImageAvail" was changed from "N" to "Y"
08/27/2019 05:55 AM	Birdsong, Charles	Field Edit	The field "ReceiptImageAvail" was changed from "N" to "Y"
08/27/2019 05:55 AM	Birdsong, Charles	Confirmation Agreement Acceptance	*CSU-Request User Agreement
08/27/2019 05:55 AM	Birdsong, Charles	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
08/27/2019 05:55 AM	Birdsong, Charles	Approval Status Change	Status changed from Submitted to Submitted & Pending "Reports To" Approval1 Comment:
08/27/2019 05:55 AM	System, Concur	Approval Status Change	Status changed from Submitted & Pending "Reports To" Approval1 to Auto Approved Comment: This step was skipped as it does not require "Reports To" Approval1.

Entry Level

Date/Time	Updated By	Action	Description
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Segment Level

Date/Time	Updated By	Action	Description
08/27/2019 05:55 AM	Birdsong, Charles	Exception	Informational: In order to be eligible for car rental reimbursement, you must book with CSU contracted vendors (Enterprise or National) only when reserving car rental.



APPROVER CAPABILITIES IN CONCUR | EXPENSE REPORT

SAP Concur | Approvals | Administration | Help

Acting as Haas, Christine E

Approvals Home | Requests | Reports

TEST - Approver [Birdsong, Charles]

Summary | Details | Receipts | Print / Email

Send Back to User | Approve

Details | Hide Exceptions

Report Header: General Trip Information

Totals: Money owed to University, employee, (paid) to Concur Travel Card

Audit Trail

Approval Flow

Comments: General Comments to Report & Comments from Approvers

Expense Type	Enter Vendor...	Additional Info...	City of Purchase	Payment Type	Amount
Rental Fuel	Joe's Gas		San Luis Obisp...	Out of Pocket	\$38
Car Rental	Enterprise Car...		San Luis Obisp...	Out of Pocket	\$158
06/13/2019	Car Rental Fuel	Ted's Gas	Anaheim, Califo...	Out of Pocket	\$45
06/13/2019	Dinner - Domestic		Anaheim, Califo...	Out of Pocket	\$36
06/13/2019	Lunch - Domestic		Anaheim, Califo...	Out of Pocket	\$15
06/13/2019	Hotel	XYZ Hotel	Anaheim, Califo...	Out of Pocket	\$570
06/10/2019	Dinner - Domestic		Anaheim, Califo...	Out of Pocket	\$53
04/02/2019	Registration/Fees	NEC	Anaheim, Califo...	Out of Pocket	\$755

COST OBJECT APPROVED AMOUNT
\$1,647.81

APPROVER CAPABILITIES IN CONCUR | EXPENSE REPORT

See Attachments to Report, start with Receipts

SAP Concur | Approvals | Administration | Help | Acting as Haas, Christine E

TEST - Approver [Birdsong, Charles]

Click to view report name and other details

Summary | Details | **Receipts** | Print / Email

View Receipts: See and Print All Attachments to Report

Send Back to User | Approve | Hide Exceptions

Exceptions

Expense Type	Date
N/A	
Car Rental Fuel	06/16/2019

Receipts Required

- View Receipts in new window
- View Receipts in current window
- Attach Receipt Images

request was not linked or completed for this Expense Report. Please link corresponding Request. If a Request was never report and initiate a new Request. Upon approval, an Expense Report can then be created.

This report contains expense(s) outside of the trip dates, please review for accuracy.

Expenses

	Transaction D...	Expense Type	Enter Vendor...	Additional Info...	City of Purchase	Payment Type	Amou
⚠	06/16/2019	Car Rental Fuel	Joe's Gas		San Luis Obisp...	Out of Pocket	\$38
⚠	06/16/2019	Car Rental	Enterprise Car...		San Luis Obisp...	Out of Pocket	\$158
	06/13/2019	Car Rental Fuel	Ted's Gas		Anaheim, Califo...	Out of Pocket	\$45
	06/13/2019	Dinner - Domestic			Anaheim, Califo...	Out of Pocket	\$36
	06/13/2019	Lunch - Domestic			Anaheim, Califo...	Out of Pocket	\$15
>	06/13/2019	Hotel	XYZ Hotel		Anaheim, Califo...	Out of Pocket	\$570
>	06/10/2019	Dinner - Domestic			Anaheim, Califo...	Out of Pocket	\$53
	04/02/2019	Registration/Fees	NEC		Anaheim, Califo...	Out of Pocket	\$755

Summary

Report Summary

Report Totals

Amount Due Com...	Amount Due Emp...
\$0.00	\$1,647.81

COST OBJECT APPROVED AMOUNT

\$1,647.81

COST OBJECT APPROVER (COA) RESPONSIBILITIES

- **COA's primary focus is related to funding**
- Ensures correct allocation to Chartfield string(s) including it's appropriate for travel
 - If incorrect, adds or updates chartfield string(s)
- Request: budget/ estimate only
- Expense Report: funds encumbered
 - **Itemized** receipts attached
 - Approved Request is Linked to Expense Report (in-state)
- Ensure appropriate Approvers are included in flow
- If no action taken, request will move forward to next approver
- Pay attention to timing (Approve Request in 6 days and Expense Report in 10 days)

Recommendation:

*Have travelers use default chartfield string and COA update
and allocate appropriately*

MANAGER/SUPERVISOR APPROVER RESPONSIBILITIES

- **Supervisor's primary focus is related to business need**
- Reviews business need for travel
- Ensures travel is compliant to policy
 - **Itemized** receipts attached
- Ensure approved Request is linked (in-state)
- If no action, moves up to next line manager...keeps going until President
- Pay attention to timing (Approve Request in 6 days and Expense Report in 10 days)

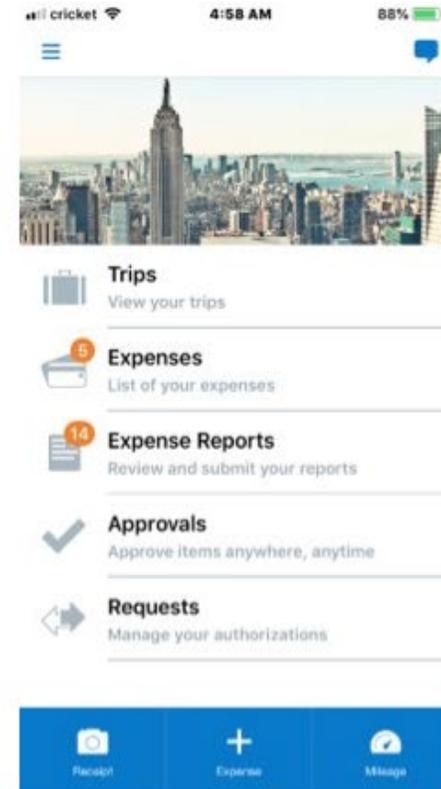
Recommendation:

2nd or 3rd line manager send back to traveler

MOBILE APP

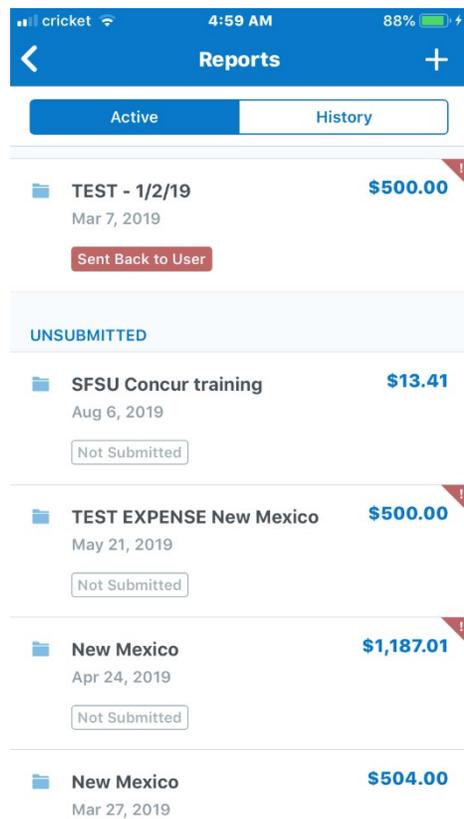
CONCUR MOBILE APP

- Download from Google Play or App Store:
SAP Concur
- Single sign on using Cal Poly login
- Primarily used for Expenses and Approvals,
cannot book travel

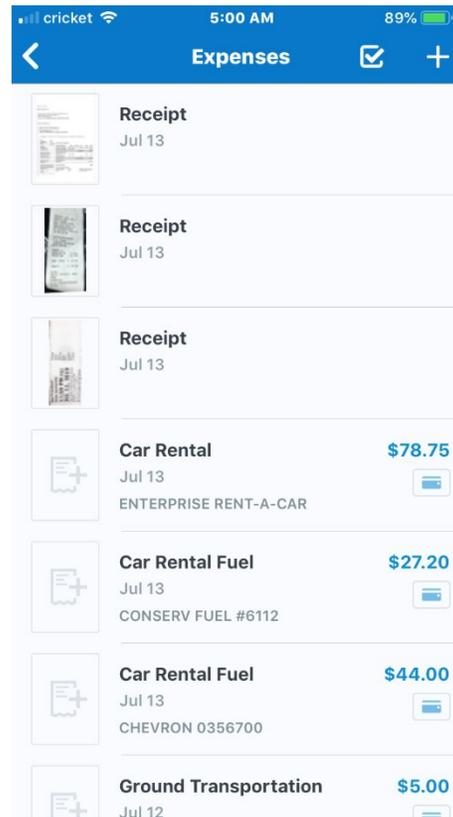


CONCUR MOBILE APP EXPENSES

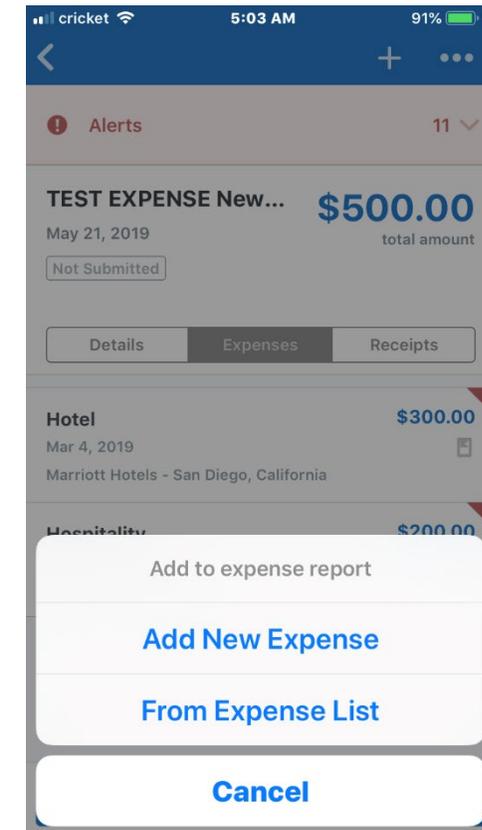
View Expense Reports & Status



Capture Receipts View Transactions



Add Expenses to Expense Report

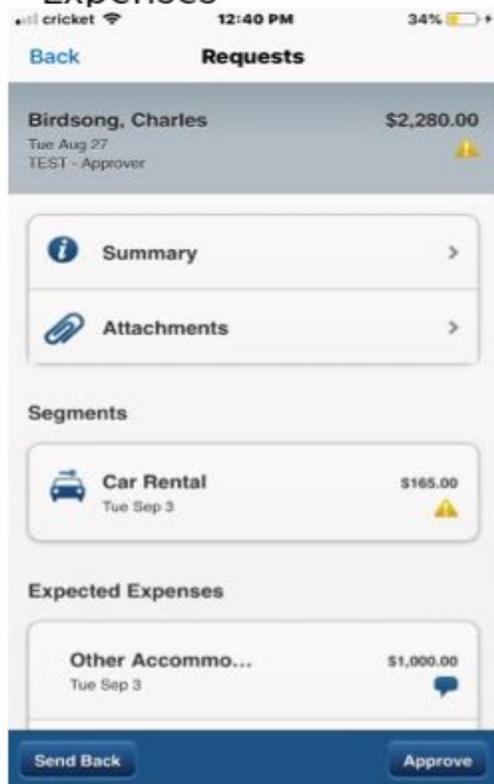


CONCUR MOBILE APP | APPROVALS

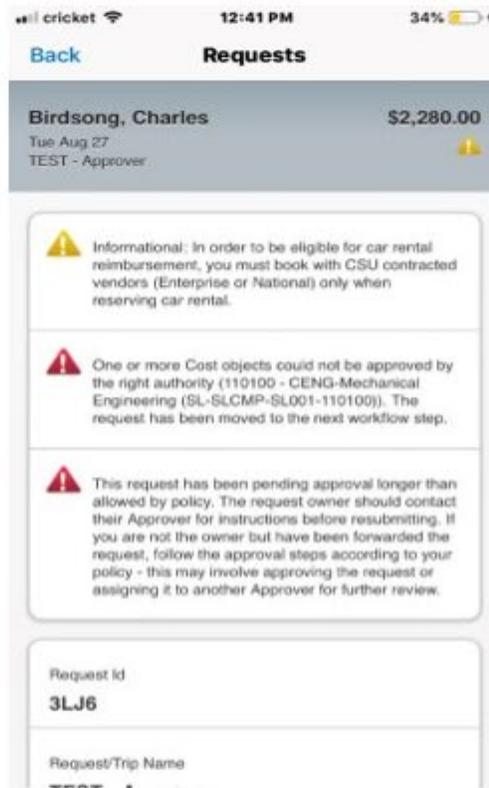
- **Approve both Request & Expense Reports**
 - Separated like web tool
- **Pay attention to icon alerts**
- **Can review:**
 - Receipts
 - Attachments
 - Warnings/ Alerts
 - Allocations
- **Approve or Send Back only**

CONCUR MOBILE APP | APPROVALS

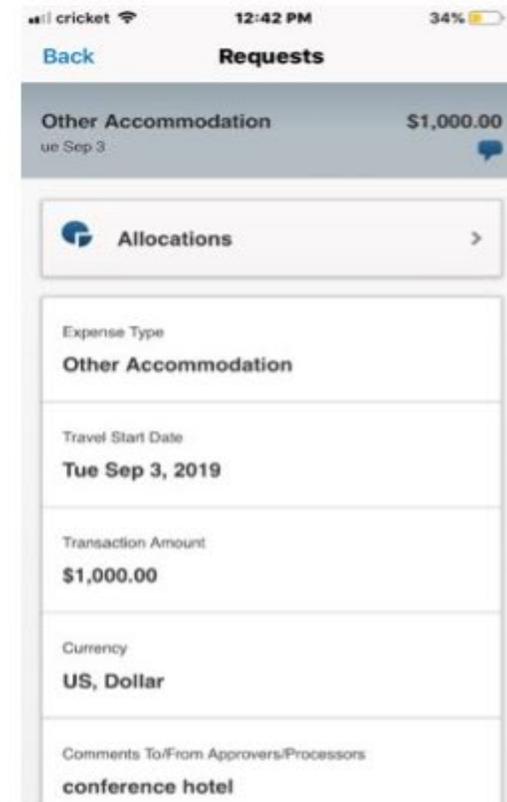
View Summary/
Report Header,
Attachments &
Expenses



View Alerts/ Warnings



View Allocations



DELEGATES

DELEGATE | SET UP IN PROFILE

Request or Expense Delegate

Request Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Haas, Christine Add Cancel

Haas, Christine
cehaas@calpoly.edu
*Campus : San Luis Obispo

Haas, Whitney
whaas@calpoly.edu
*Campus : San Luis Obispo

bfein@calpoly.edu

When assigning permissions for Expense and Request.

Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

DELEGATE | SET UP IN PROFILE

Request or Expense Delegate

Request Delegates

Delegates Delegate For

Add Save Delete

Reporting

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Emyan, Mariam memyan@calpoly.edu	<input type="checkbox"/> [Calendar Icon]	<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	Fein, Brian bfein@calpoly.edu	<input type="checkbox"/> [Calendar Icon]	<input type="checkbox"/>	<input type="checkbox"/>					

Previewer has same rights as Approver, except final approval

Receives Email when a request is submitted for Approval

Can Preview – any level can review for Approver

Limited time (out of office)

Can Approve – must be MPP or Confidential; suggest **second in command**

Receives Traveler's Email Notifications

Prepare Requests or Expense Reports

Green = as Traveler

Gold = as Approver

DELEGATE | ACT ON BEHALF OF OTHERS

Name of User you are acting on behalf of appears

The screenshot displays the SAP Concur interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right, a 'Help' dropdown is visible. Below the navigation bar, the user's profile is shown as 'Bernadette M. Monterrosa-Birdsong' with options for 'Profile Settings' and 'Sign Out'. A green box highlights the 'Acting as Brancart, Victor N' dropdown menu. In the center, a green box contains the text 'Select Act on behalf of another user'. Below this, the 'Acting as other user' section is visible, with two radio button options: 'Act on behalf of another user' (which is selected and circled in green) and 'Book travel for any user (Self-assign)'. A search dropdown is open, showing the text 'vi' and a search result for 'Brancart, Victor N' with email 'vbrancar@calpoly.edu' and campus 'San Luis Obispo'. A green box highlights this search result. At the bottom left, the 'TRIP SEARCH' section is partially visible, showing 'Booking for myself' and 'Book for a guest' options, along with icons for flight, car, and hotel. A red warning message is visible in the background: 'PLEASE REMEMBER TO ALWAYS BOOK FROM AN APPROVED TRIP SEARCH.' A red text prompt at the bottom reads: 'Please take a moment to review your profile and en...'

Type name of **user** and list of all users you are able to act on behalf of will appear. Select the one you want

DELEGATE | ACT ON BEHALF OF OTHERS

To Logout

The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' and various menu items: Requests, Travel, Expense, Approvals, Reporting, and App Center. On the right, it indicates the user is 'Acting as Brancart, Victor N'. Below the navigation bar, the user's name 'Brancart, Victor N' is displayed, along with a 'New' button and a '00 Required Approvals' indicator. The main content area is divided into two sections: 'TRIP SEARCH' and 'COMPANY NOTES'. The 'TRIP SEARCH' section includes options for 'Booking for myself' or 'Book for a guest', icons for different travel modes (air, car, hotel, train), and a 'Mixed Flight/Train Search' section with buttons for 'Round Trip', 'One Way', and 'Multi City'. The 'COMPANY NOTES' section contains an 'Important Messages' box with a red warning: '***PLEASE REMEMBER TO ALWAYS BOOK FROM AN APP THROUGH TRIP SEARCH.***' and a welcome message: 'Welcome to Concur Travel, the corporate online tra... Please take a moment to review your profile and ensu...'. A dialog box titled 'Acting as other user' is open on the right side, showing three radio button options: 'Act on behalf of another user', 'Act as user in assigned group (Proxy)', and 'Book travel for any user (Self-assign)'. Below these options is a search field 'Search by name or ID' and two buttons: 'Cancel' and 'Start Session'. At the bottom of the dialog, a blue button labeled 'Done acting for others' is highlighted with a green box. A green arrow points from the text 'To Logout' above to this button.

THANK YOU

APPENDIX

TRAVEL GUIDELINES

NEW GUIDELINES

All state employee travel to go through Poly Travel

- Includes Sponsored Programs or grant travel (Corporation funded)
- After roll out, clear cut-off date, Concur will be the only method to request and expense/claim travel for faculty and staff travel

Concur Travel Card is the required method of payment for travel expenses

- For all faculty and staff, regardless of frequency of travel
- Claim actuals; per diems are allowance or do not exceed amounts
- Only Concur Travel Card allowed in Concur profile
- Travel expenses for individual card holder only

No cash advances, except rare instances

NEW GUIDELINES CONTINUED

Christopherson's Business Travel is Cal Poly's preferred travel agency

- Online (Concur Travel) or Phone
- 24 hours / 7 day support
- International or Domestic
- Direct bill to Cal Poly
- CSU wide: manage and leverage spend
- No "Group 9" airfare, unless requested

When traveling to a banned state on state funds approval must be obtained by each traveler's VP

NEW GUIDELINES CONTINUED

All individual-hosted hospitality shall be paid via the Concur Travel Card

- Regardless of location (25 miles within campus or during travel)
- Expense non-travel hospitality monthly (one hospitality Expense Report per month)
- Department events may still use department P-Cards
- Hospitality policy applies and enforced

Domestic daily meal allowance is \$55/ day¹, including...

- Days of travel (outbound and return)
- Conferences
- EXCEPT, same day travel (24 hour travel), lunch expense is not permitted, therefore maximum daily allowance is \$36.33. Amount claimed is taxable

¹Departments may have more restrictions which they will need to enforce

NEW GUIDELINES CONTINUED

Car rental for individual travel is required to be paid via Concur Travel Card

- Direct bill is only available for non-employee travel (student or guest)
- Only admins will receive PIN to book Enterprise cars via state portal

Mileage only requires a monthly approved Request

- Submit a monthly Expense Report (only allowed to expense mileage 1X per month)

NEW GUIDELINES PERSONAL AND INTERNATIONAL TRAVEL

Personal Travel and International Travel requires itineraries

- Itineraries clearly indicate days of personal travel – v.s. – university business travel (from outbound/ start date to return/ end date of travel), and locations when required
- Itineraries required with Request and Expense Reports

International Travel is a two step process

- Request begins with International Center and will include Concur – more to come with International travel roll out in January 2020

PROFILE: SET UP

CONCUR: LOGIN

My Apps

- PASS (Plan A Student Schedule)
- Email & Calendar
- Cal Poly OneDrive
- HR Administration
- Student Administration
- CSU Portal- Financial Administration
- PolyData Dashboards
- Campus Wiki
- Student Assistant Management
- Electronic Workflow
- Technical Service Request
- Facilities Requests
- Telephone Administration
- PolyCard Services
- Email Distribution Lists
- CSYou Portal
- ESM Campus Marketplace
-  Concur Travel
- LinkedIn Learning

Telephone Requests

Request Forms

- Update Billing or Directory Information
- Desk Phone Services
- Cellular Services
- Additional Services

Form Information

To assist you in determining which form to use, please review the information under the links below. Once you know which form to use, please click on the form link under the Request Forms.

[Update Billing or Directory Information](#)

[Desk Phone Services](#)

[Cellular Services](#)

[Additional Services](#)

Telephone Requests

Request Forms

- Update Billing or Directory Information
- Desk Phone Services
- Cellular Services
- Additional Services

Form Information

To assist you in determining which form to use, please review the information under the links below. Once you know which form to use, please click on the form link under the Request Forms.

[Update Billing or Directory Information](#)

[Desk Phone Services](#)

[Cellular Services](#)

[Additional Services](#)

Campus Announcements

Information Technology Services

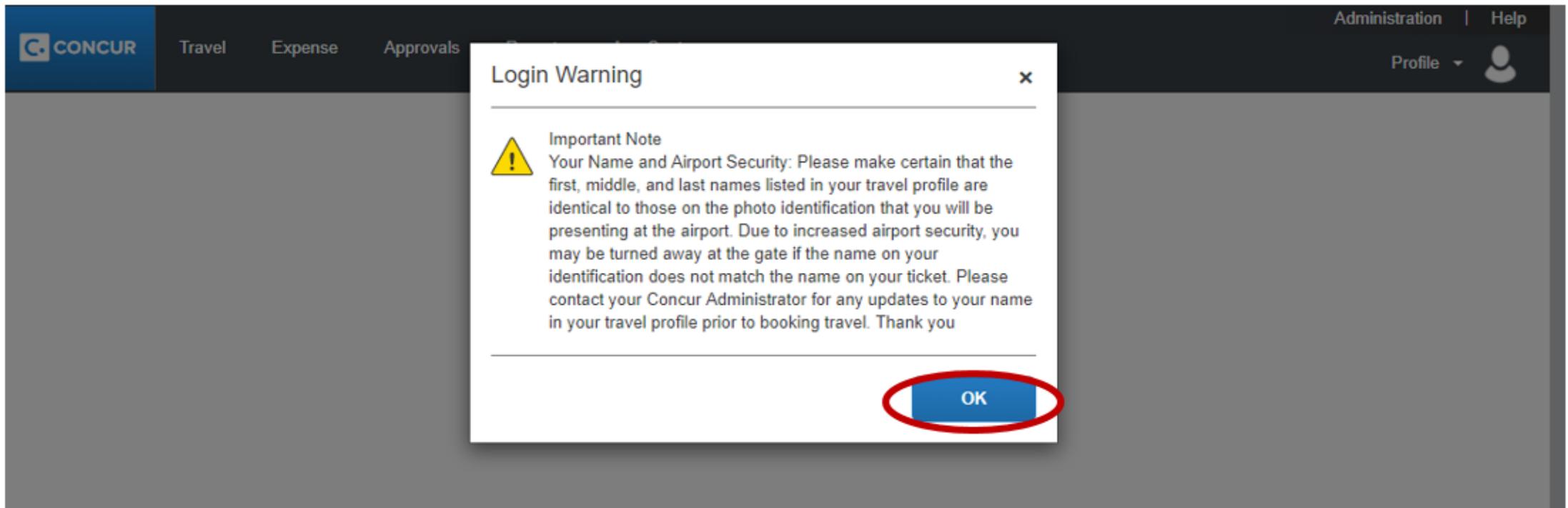
- PeopleSoft Finance Outage 8/21 6:00PM - 10:00PM
- PeopleSoft Finance Production Maintenance Outage: Wednesday 6:00PM - 10:00PM
- PolyPlanner and PeopleSoft Outage 8/21 8pm - midnight
- PolyPlanner and PeopleSoft Student & HR Administration Production Maintenance Outage: Wednesday 8 pm - midnight

[Previous Announcements](#)



CONCUR: LOGIN

LOGIN WARNING: NAME & AIRPORT SECURITY



The screenshot shows the Concur application interface with a modal dialog box titled "Login Warning". The dialog box contains an "Important Note" with a yellow warning icon. The text of the note reads: "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". At the bottom right of the dialog box, there is a blue "OK" button, which is circled in red.

CONCUR

Travel Expense Approvals

Administration | Help

Profile

Login Warning

! 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

OK

CONCUR: HOMEPAGE

SAP Concur | Administration | Help

Requests | Travel | Expense | Approvals | Reporting | App Center

Profile

CSU The California State University
Hello, Bernadette

TRIP SEARCH

Booking for myself | [Book for a guest](#)

Mixed Flight/Train Search

Round Trip | One Way | Multi City

From: SBP - San Luis Obispo Airport - San Luis Obispo, CA

To: Arrival city, airport or train station

Search

COMPANY NOTES

Important Messages:
*****PLEASE REMEMBER TO ALWAYS BOOK FROM AN AIRPORT THROUGH TRIP SEARCH.*****

Welcome to Concur Travel, the corporate online travel management system.

Please take a moment to review your profile and preferences.

MY TASKS

- 00** Required Approvals →
Great! You currently have no approvals.
- 05** Available Expenses →
07/13 Enterprise \$78.75
07/13 CONSERV FUEL #6112
- 14** Open Reports →
08/06 SFSU Concur training \$13.41
05/21 New Mexico

Profile | Bernadette M. Monterrosa-Birdsong | [Profile Settings](#) | [Sign Out](#)

Acting as other user ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)
- Book travel for any user (Self-assign)

Choose a user

[Cancel](#) [Start Session](#)

[Read more](#)

CONCUR: PROFILE

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help

Profile | Personal Information | System Settings | Concur Mobile Registration | Travel Vacation Reassignment

Your Information

- Personal Information**
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.
- Request Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Personal Car**
Personal Car

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration

Set up access to Concur on your mobile device

PROFILE

REQUIRED FIELDS

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	First Name	Middle Name [Required]	Nickname	Last Name	Suffix
<input type="text" value="Ms"/>	<input type="text" value="Bernadette"/>	<input type="text" value="M."/>	<input type="text" value="Bernadette"/>	<input type="text" value="Monterrosa-Birdsong"/>	<input type="text"/>
		<input type="checkbox"/> No Middle Name			

Company Information

[Go to top](#)

Employee ID

Manager

Org. Unit/Division Employee Position/Title



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



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	<input type="text"/>	<input type="button" value="OK"/>	
Email 2	salbright101@yahoo.com	Check email for code	Resend Cancel	Yes	
		Enter Code	<input type="text"/>	<input type="button" value="OK"/>	



Work Address



Home Address



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



Emergency Contact

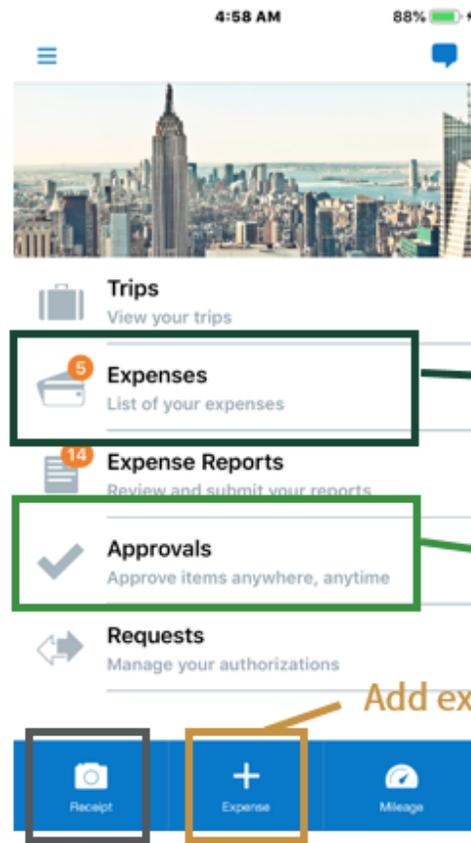


Travel Preferences - *air, hotel, car, frequent-traveler programs, advantage programs*



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

MOBILE APP

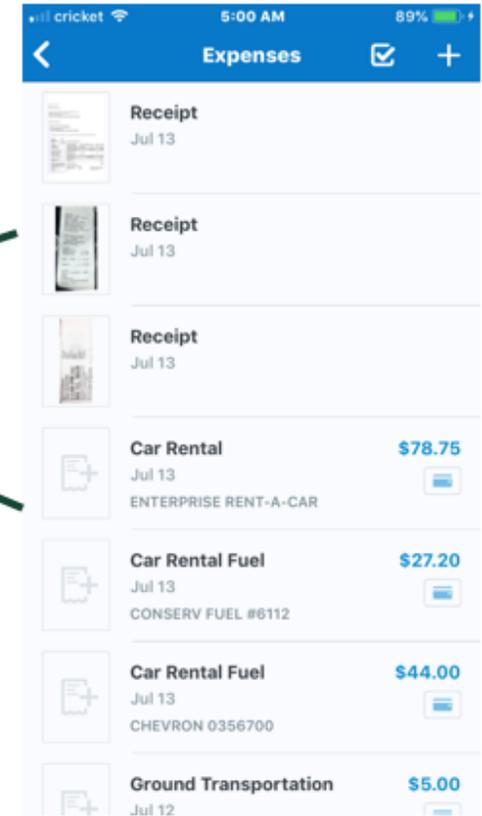


Review & expense receipts & card transactions

Review & approve Requests & Expense Reports

Add expenses while traveling

Use camera to capture receipts



TRAINING PLAN/STRATEGY - WAVES

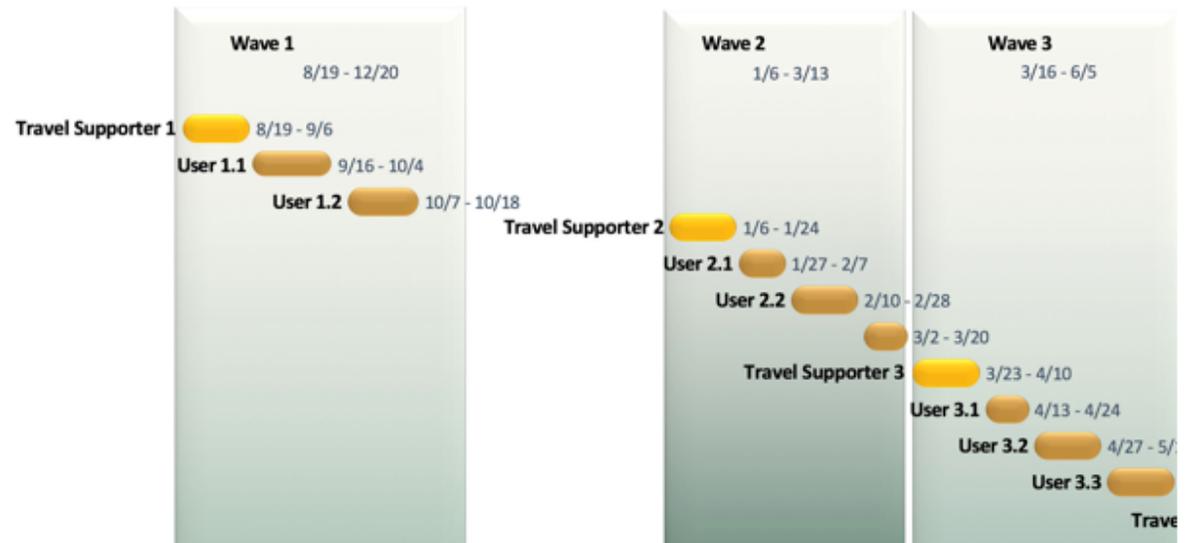
Travel Supporters Budget Analysts, Admins, Coordinators	User Traveler, Approver
Identify travelers in their departments for Concur Travel cards at beginning of travel	Receive Concur travel card at training
Hands on Training modules –multiple offerings over three weeks – 6-8 hours	Lecture/demonstrations, create profile – multiple offerings over 2-3 weeks, 1-2 hours
Support their departments	Travel and use resource and tools
Open Labs	

ROLL OUT SCHEDULE

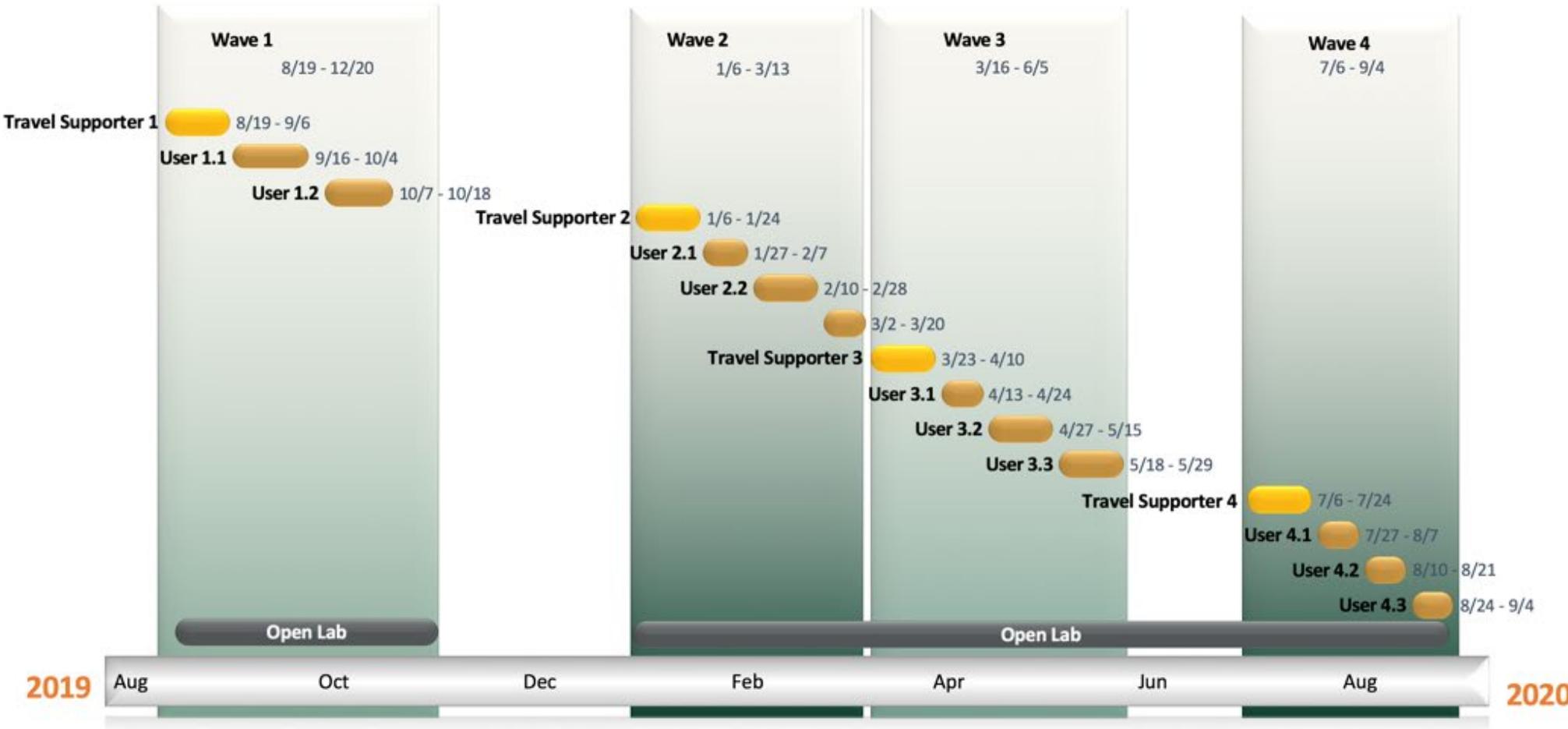
POLY TRAVEL | Roll Out and Training

→ WAVE APPROACH

- Training of the travel supporters began in August
- Training included hands-on workshop, lectures, demos and open labs
- Rollout is projected to end Summer 2020



POLY TRAVEL TIMELINE - DRAFT



Wave 1		Wave 2			Wave 3			Wave 4		
1.1	1.2	2.1	2.2	2.3	3.1	3.2	3.3	4.1	4.2	4.3
9/16 - 10/4	10/7 - 10/18	1/27 - 2/7	2/10 - 2/28	3/2 - 3/20	4/13 - 4/24	4/27 - 5/15	5/18 - 5/29	7/27 - 8/7	8/10 - 8/21	8/24 - 9/4
ANTS Strategic Business Services Financial Services International Center Office of the Provost	A&F Office of the VP Facilities Management and Development Public Safety Human Resources	College of Science & Mathematics Performing Arts Center University Development University Scheduling Information Technology Services	College of Agriculture, Food & Environmental Sciences	Orfalea College of Business University Housing Office of Equal Opportunity International Graduate & Extended Education	College of Architecture & Environmental Design Academic Personnel Disability Resource Center Systems and Resources New Student and Transition Program	College of Engineering	College of Liberal Arts Career Services Parent and Family Programs Research and Economic Development Institutional Research University Advising Office of the Registrar Admissions/Recruitment/Financial Aid University Marketing	Library Students Academic Services Dean of Students	Commencement Academic Programs and Planning Athletics Intercollegiate	President's Office Center for Teaching, Learning and Technology Student Affairs Office of the VP University Legal Counsel

ROLL OUT TO ORGANIZATIONS

1. Overview to organization
2. Identify Travel Supporters for organization
3. Travel Supporters identify travelers (& get approval) for Concur Travel Cards
4. SBS processes Concur Travel Cards
5. Travel Supporter (hands on) training
6. User training/ Concur Travel Card distribution

Program overview, with focus on travel policy & Concur Travel Card training & acceptance; Concur profile set up

Traveler training (Request & Expense)

Approver training

type of approver & flow

approver checklist

responsibilities

capabilities

temporary delegation to next in command (out of office)

mobile app approving