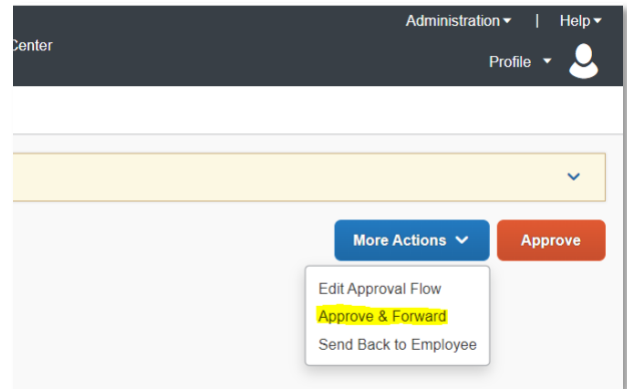




1. Approving Travel from your Fund Source

Budget approvers may be required to approve for a traveler who is not in their department but may be using their funding source for travel. The approver must review and approve the funds and what is being paid by that fund. The approver can then APPROVE the Request or Expense Report will be sent to the manager to approve, or they can *Approve and Forward* to the traveler's department budget approver for additional review and approvals.



2. Paying Back the University

Unintended transactions or exceeding meal allowances may mean that a traveler needs to pay back the University. For unintended transactions, no Request is needed. For personal items paid during business travel, the expense will need to be itemized. Follow the [GUIDE](#) for steps to complete.

3. Creating a New Expense Report: Where is my Request?

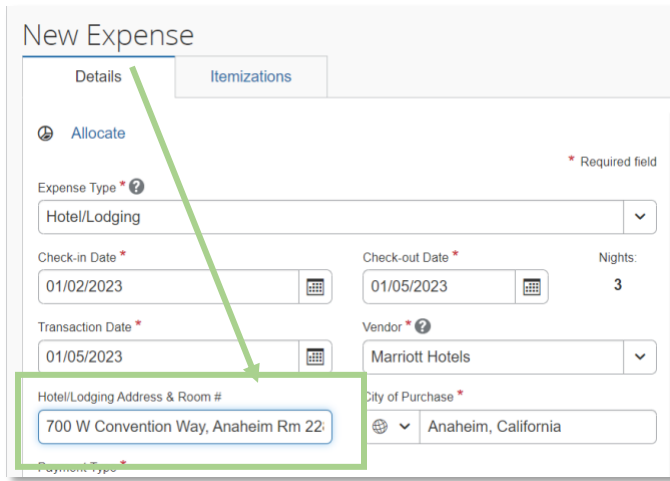
Expense Reports must be submitted within 30 days of trip end date per Cal Poly policy. Travel Requests close 60 days after trip end date. Requests can be reopened by the Poly Travel Office. Email Poly Travel (polytravel@calpoly.edu) and cc your manager to ask for a Request to be reopened for use.

4. Booking for Guests in Concur

Admins will soon have access to Book on behalf of others in Concur. A training session with more information coming soon! If you are interested in attending this training (date TBD) please email polytravel@calpoly.edu Subject Line: **Booking for Guests**

5. Clery Reporting in Concur (traveling with students)

When traveling with students remember to add the HOTEL ADDRESS AND ROOM NUMBERS to your Expense Report as this information is required for Clery Report run in Concur. If you are currently emailing Clery this information, please continue to ALSO do that step until further notice.



New Expense

Details | Itemizations

Allocate

Expense Type *
Hotel/Lodging

Check-in Date *
01/02/2023

Check-out Date *
01/05/2023

Nights:
3

Transaction Date *
01/05/2023

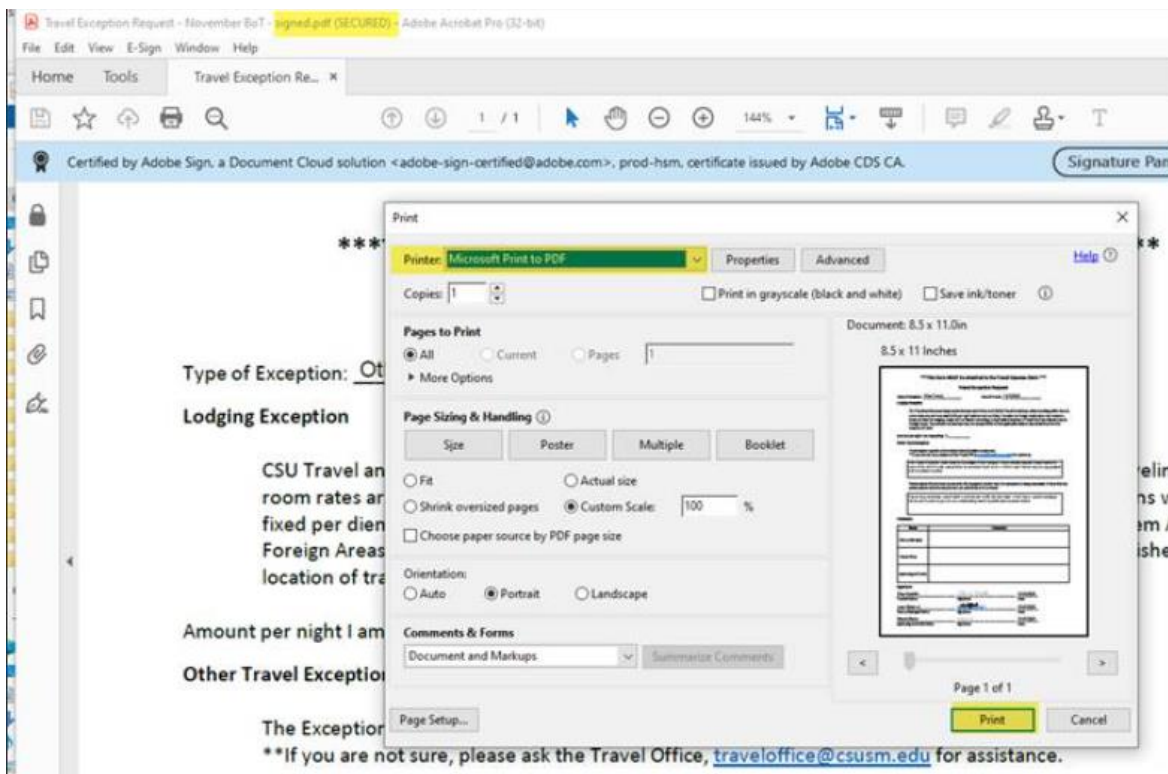
Vendor *
Marriott Hotels

Hotel/Lodging Address & Room #
700 W Convention Way, Anaheim Rm 22.

City of Purchase *
Anaheim, California

6. Attaching Documents in Concur

Concur will only accept PDF, PNG, JPG, JPEG, HTML, TIF, or TIFF. The PDF's cannot be in a SECURED format. To get it out of a secured format you must Microsoft Print to PDF and save the file under a new name. You will then be able to upload.



7. Concur Training

Does your department need a travel refresher training? Schedule a training with the Poly Travel Office polytravel@calpoly.edu. We can attend in person, or via zoom.

Online trainings are also available on the travel website: <https://afd.calpoly.edu/travel/>

8. Upcoming New Features in Concur for 2023/24

Drag and Drop Receipts will enable users to upload receipts into their Concur Expense via “drag and drop” from their computer desktop.

Improved Approval for Concur Request will allow pending approvals to be sortable by approval deadline (travel dates)

Update the Approver View of Concur Expense for more consistency between the User Interface for creating expenses and approving expenses to reduce learning time

Sustainability Travel and Expense emissions calculations reporting greenhouse gas emissions calculations for air, rail, hotel, and car.

Travel Allowance (International Travel) with long-term and extended travel enhancements with the ability to handle trip-within-a-trip scenarios.

Non-Binary Options for Profile/Personal Information

9. Business Travel Trend for 2023

Combining business and personal travel will continue to increase in 2023. When flying for business travel with personal days, remember to attach both the actual airfare (includes business and personal travel dates) receipt and a comparison airfare (includes only business travel dates) to your Expense Report. The traveler will pay the difference if the business + personal dates airfare is more than the business dates only airfare.

Contact Us:

Concur General Support

Stephanie Albright – Travel Analyst
polytravel@calpoly.edu
805-756-1717

Concur Expense Report Support

Payment Services
Find Your P2P Payment Services Tech:
<https://afd.calpoly.edu/procure-to-pay/how-to-pay/>