

REQUEST: GROUP TRAVEL

SAP Concur 

Requests

Travel

Expense

Approvals

Reporting ▾

App Center



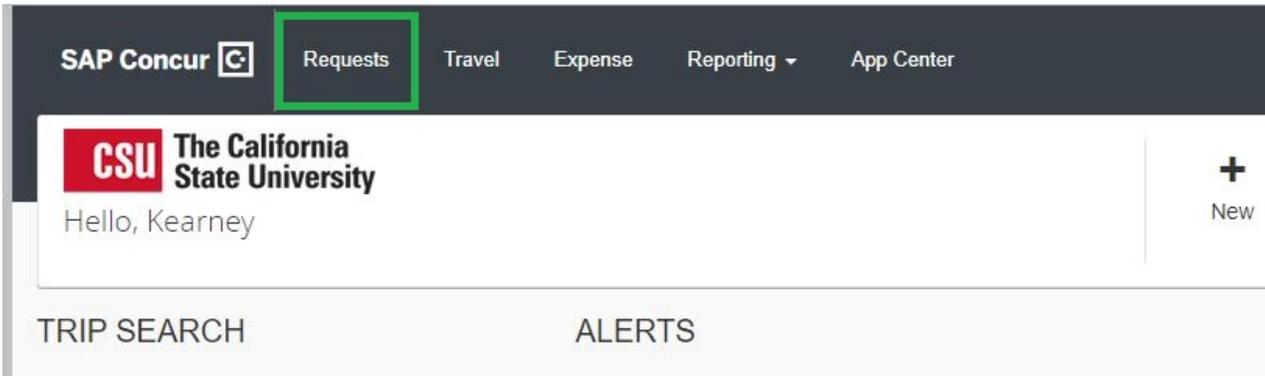
CAL POLY

Strategic Business Services

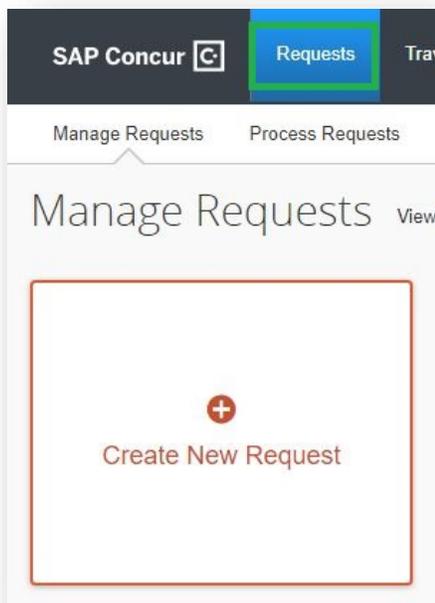
ADMINISTRATION & FINANCE

Group Travel is defined as a Concur user (Cal Poly employee with Concur access) paying on behalf of others (students or non-employees)

1. Log into Concur and click **Request** at the top

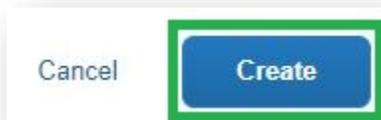


2. Click **Create New Request**



- Complete the Request Header filling in all fields with a red asterisk. Note that the Business Unit and other chartfied information are auto-filled. Contact your department admin for assistance if needed.

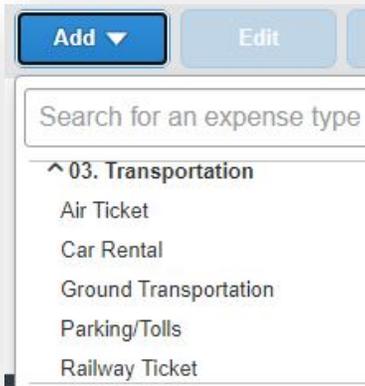
- When Request Header is complete, click Create



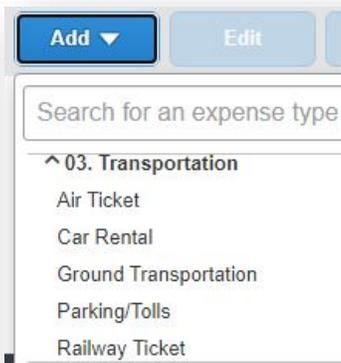
- To request a **Cash Advance**, contact the Poly Travel office to enable to Cash Advance request tab. Include information on how many students are going on the trip, and how much they are receiving each day to justify the cash advance.

- Next add **Expected Expenses** to build the best estimate of the team/group travel. Click ADD, then select an expense to add, or type in your expense in the search bar at the top. Next steps will include some examples of expense types to add for team/group travel.

A. AIRFARE: To add the total cost of flights for your group, click **“Air Ticket”** expense type. On the next screen add the total amount for ALL of the flights and click **SAVE**.



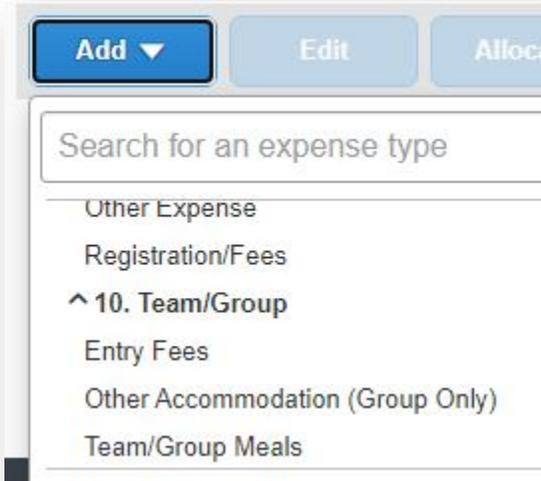
B. Car Rental or Ground Transportation: includes Uber/Lyft or Taxi's. Click the expense type needed and add the total for the whole trip (estimation), then click **SAVE**

A screenshot of a form with two input fields. The first field is labeled "Amount *" and is empty. The second field is labeled "Currency *" and contains the text "US, Dollar" with a downward arrow on the right side, indicating a dropdown menu.A screenshot of two buttons: a blue "Save" button and a grey "Cancel" button.

C. Accommodations: To add the cost of multiple hotel rooms or AirBNB/VRBO rentals, scroll to the bottom and select **“Other Accommodation”** expense type. This will allow you to enter in the total for all rooms. Under **COMMENTS**, add the cost per person per night (must be under \$275 per person before taxes), click **SAVE**



- D. Meals: To add the cost of meals for the group, select **Team/Group Meals**. Add the total estimated cost of meals for your trip. Under **COMMENTS**, provide information regarding the cost per person per day. Click **SAVE**



- E. Once you have completed your estimated expenses, click **SUBMIT REQUEST**. Your travel request will be routed to the Budget Analyst for your department for approval, and then to your Manager for approval. Once you have an **APPROVED REQUEST** you can begin booking your travel.

