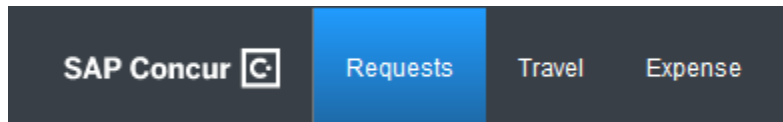


CREATE AND SUBMIT TRAVEL REQUEST THROUGH SAP CONCUR

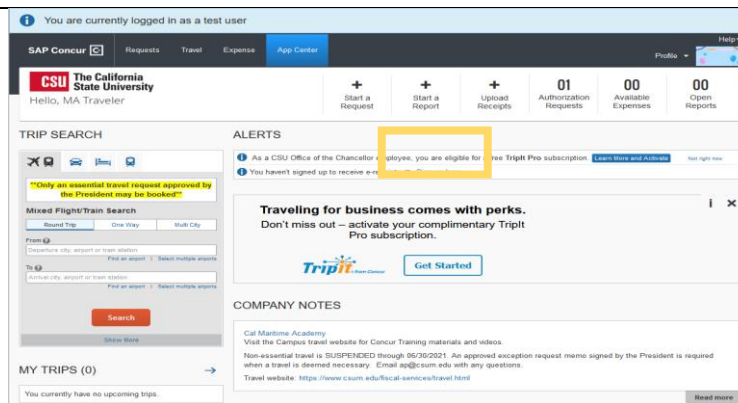


An approved **Travel Request** (Travel Authorization) is required for anyone traveling on university business prior to booking any travel reservations and completing an Expense Report (Travel Claim). [This guide assumes that you have completely provided all the required information on your Profile. If not, on the Concur Home page, click on [Profile](#) and then click on [Personal Information](#).

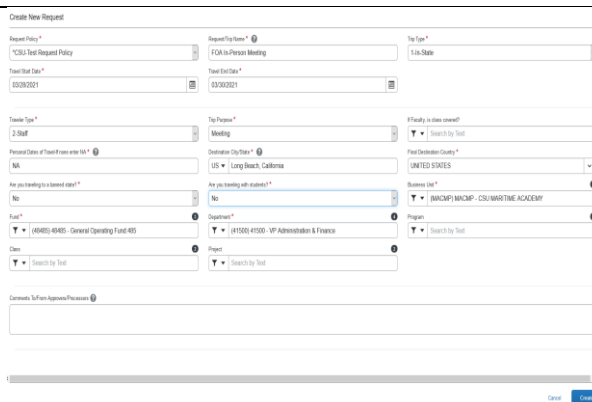
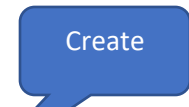
To access Concur: Click [Here](#)

STEPS TO CREATE AND SUBMIT A TRAVEL REQUEST

- From the home page, place your mouse pointer over and click **[Start a Request]**



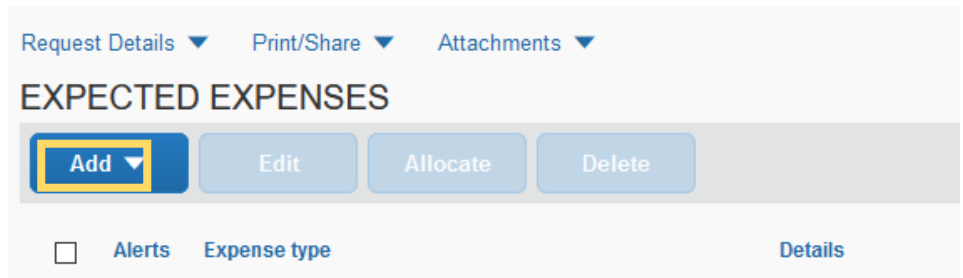
- On the page, **+ Create New Request** complete the required fields (indicated with a red asterisk) and any optional fields as required by your campus' division/department, and then click **Create**.

Field descriptions and information.

Field Name	Description
Request/Trip Name	Enter a meaningful trip name, similar to a name given to a travel expense report. Your department may implement a standard naming protocol. Suggested naming convention Destination City, State and dates of Travel (ex. Long Beach, CA 5/18-5/21)
Trip Type	Select from the drop-down list
Travel Start Date	Date business expenses start. If personal days precede business dates, please be sure to still set travel start date to the date you leave for the trip.
Travel End Date	Date business expenses end. If personal days are after business dates please be sure to still set travel end date to the date you return from trip.
Traveler Type	Select from the drop-down list
Trip Purpose	Select from the drop-down list
If Faculty, is class covered?	Only Required for Faculty. Select from the drop down list.
Personal Date of Travel	Enter all dates which are personal. If none, place NA in field.
Destination City/State	If you anticipate travelling to more than one city and/or country, enter where you plan to spend the majority of your travel time.
Final Destination Country	The country will pre-populate based on the destination city selected.
Are you traveling to a banned state?	Select from the drop-down list
Are you traveling with students?	Select from the drop-down list
Chartfield	Chartfield String will pre-populate based on your dept. If necessary, changes can be made by traveler or approver.

3. On the page **Expected Expenses**, click **Add** to enter your trip details and estimated amounts for each expense. The most common expense types are **hotel, incidental, meal, registration fee and transportation**. The **air** should only be booked when the request is approved.



4. Select **Hotel Reservation**

Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

Search for an expense type

- 01. Travel Expenses
 - Hotel Reservation**
 - Incidentals
- 02. Personal Car Mileage
- 03. Transportation

5. On the **New Expense**, complete the required fields, and optional fields as required by your division/department, and then click **Save**

[Amount box should include tax and other basic hotel room charges.]

New Expense: Hotel Reservation Cancel

Travel Start Date: 03/28/2021 Travel End Date: 03/30/2021

City: Comment: Will stay next door hotel as rate is cheaper!

Maximum Nightly Rate: 260 Over Rate Comment:

Amount: 600.00 Currency: US, Dollar

Callouts:
 - Enter the nightly rate for the hotel. (points to Maximum Nightly Rate)
 - Provide a justification if hotel rate exceeds CSU ceiling. (points to Comment)
 - Enter the amount expected for entire business stay including tax and other hotel fees. (points to Amount)

6. Expected Expenses Summary will appear after the **Save**.

[Note: If you have a limited budget for travel please make sure your travel request reflects that situation.]

Alerts: 2

FOA In-Person Meeting \$600.00 Copy Request

Not Submitted | Request ID: 4JHU

EXPECTED EXPENSES

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00

Estimated Total: \$600.00

7. Continue to add your expected expenses for the request, such as incidentals, meals, parking fees and toll. For example, add the incidentals:

The [Transaction Amount] box will auto-calculate when you click **Save**.

Manage Requests

← → Incidentals \$14.00 Cancel

03/28/2021

Number of business days (completing 24 hours) only.

Travel End Date: 03/30/2021


of Business Days: 2 Incidental Rate: 7

Transaction Amount: 14.00 Currency: US, Dollar

Comments To/From Approvers/Processors:

Must Pay Attention to the Alerts:

There are two types of alerts:


 WARNING:

 ACTION REQUIRED:


On this particular case, ACTION REQUIRED shows because of the current travel restrictions. You must enter an explanation to the Comments to/From Approvers/Processors' box.


[Click on **View**] – provides user more information and takes you to the page to correct and satisfy required action.

Click **Save**.

 Alerts: 2

REQUEST

 ACTION REQUIRED: Please enter justification of travel in Comments section on the request header. Required for all travel deemed essential. Please continue with request after saving. [View](#)

 WARNING: At this time, ALL Domestic non-essential travel is suspended through June 30, 2021. Travel deemed essential requires justification, approved Worksite Planning Checklist form attached (if applicable), as well as Dean, VP, and President approval. Please enter justification for travel in the Comments section. [View](#)

Edit Request Header Cancel [Save](#)


FOA In-Person Meeting | Request ID: 4JHU


Request Policy *CSU-Test Request Policy	Request Id 4JHU	Request/Trip Name * FOA In-Person Meeting
Trip Type * 1-In-State	Travel Start Date * 03/28/2021	Travel End Date * 03/30/2021
Traveler Type * 2-Staff	Trip Purpose * Meeting	If Faculty, is class covered? Search by Text
Personal Dates of Travel-If none enter NA * NA	Destination City/State * US Long Beach, California	Final Destination Country * UNITED STATES
Are you traveling to a banned state? * No	Are you traveling with students? * No	Business Unit * (MACMP) MACMP - CSU MARITIME AC
Fund * (48485) 48485 - General Operating Fund	Department * (41500) 41500 - VP Administration & Fin	Program Search by Text
Class Search by Text	Project Search by Text	

Comments To/From Approvers/Processors *
Required for year-end closing

You'll notice that the Alerts has only a **Warning** message. The **Action Required** alert no longer appears.

Manage Requests

 Alerts: 1


FOA In-Person Meeting \$614.00  Copy Request [Submit Request](#)

Not Submitted | Request ID: 4JHU


Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Add ▾ Edit Allocate Delete

<input type="checkbox"/>	Alerts	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
<input type="checkbox"/>		Incidentals		03/28/2021	\$14.00	\$14.00
					Estimated Total: \$614.00	

8. After entering your expected expenses, click **Attachments** to attach the appropriate documents for your approver's review – (campus specific requirement)


FOA In-Person Meeting \$614.00  Copy Request [Submit Request](#)

Not Submitted | Request ID: 4JHU

Request Details ▾ Print/Share ▾ [Attachments](#) ▾

EXPECTED EXPENSES

Add ▾ Edit Allocate Delete

<input type="checkbox"/>	Alerts	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
<input type="checkbox"/>		Incidentals		03/28/2021	\$14.00	\$14.00
					Estimated Total: \$614.00	

Click **Attach Documents**, and then in the **Document Upload Attach** window, click **Upload and Attach**.

Select the file you want to upload and then click **Open**.

FOA In-Person Meeting \$614.00

Not Submitted | Request ID: 4JHU

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

Attach Documents

Document Upload and Attach

Upload and Attach

5MB limit per file

No file chosen

Close

9. After you complete your expected expenses, click **Submit Request**.

You will be prompted to review **CSU Request Agreement** and to click **Accept & Continue**.

SAP Concur Requests Travel Expense App Center Profile Help

Manage Requests

Alerts: 1

FOA In-Person Meeting \$614.00 Copy Request **Submit Request**

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
<input type="checkbox"/>		Incidentals		03/28/2021	\$14.00	\$14.00

Estimated Total: \$614.00

CSU Request Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate estimation of expenses that will be incurred to accomplish official business for CSU and this request is in compliance with CSU/Campus Travel Policy.
2. If I am driving a personal vehicle, I have taken the University Defensive Driving training (if applicable) and/or a current STD 261 (Authorization to use Privately Owned Vehicles on State Business) form is on file.

Cancel **Accept & Continue**

10. The authorization request is submitted and pending approval.

[Status of a request is shown on the Home page.]

The screenshot shows the SAP Concur 'Manage Requests' interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', and 'App Center'. Below the navigation, there's a 'Manage Requests' section with a 'View Active Requests' dropdown. On the left, there's a red-bordered box with a plus sign and the text 'Create New Request'. To the right, there are two request cards. The first card is for a 'Leadership Conference' submitted on 05/16/2021, with an amount of \$1,131.32 and a status of 'Pending Admin Approval'. The second card is for a 'FOA In-Person Meeting' submitted on 03/28/2021, with an amount of \$614.00 and a status of 'Submitted & Pending "Reports To" Approval1' by 'Test, MA Approver'. The 'Submitted' status and the approval details are highlighted with yellow boxes.

Recall Feature

Recall Feature – enables a traveler to **make changes to your existing travel** request such as adding additional expenses. Just keep in mind that once you recall a travel request, it will be routed again to all the approvers.

Click **Recall**

Select **Yes** to proceed

The screenshot shows the 'Manage Requests' interface for a specific request titled 'FOA In-Person Meeting \$614.00'. The status is 'Submitted & Pending "Reports To" Approval1 | Request ID: 4JHU'. There are 'More Actions' and 'Recall' buttons. Below this, there's a table of 'EXPECTED EXPENSES' with columns for Alerts, Expense type, Details, Date, Amount, and Requested. The table lists 'Hotel Reservation' for Long Beach, California (\$600.00) and 'Incidentals' (\$14.00), with an 'Estimated Total: \$614.00'. A 'Confirm' dialog box is overlaid on top, asking 'Are you sure you want to recall this request?' with 'No' and 'Yes' buttons. The 'Recall' button in the background is highlighted with a yellow box.

See **Steps 7 – 9** to add expected expenses for Meals

The [Amount] box will auto-calculate when you click **Save** or click **Allocate**.

FOA In-Person Meeting \$614.00
Sent Back to User | Request ID: 4JHU

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

<input type="checkbox"/>	Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
<input type="checkbox"/>		Incidentals		03/28/2021	\$14.00	\$14.00

Total: \$614.00

New Expense: 04b. Meals - Domestic \$0.00
03/28/2021

Enter number of business days. Actual expenses will be accounted for, up to CSU ceiling rate, in the expense report.

[The **allocate** feature can also be used to “split” funding of the travel transaction.

Click on the applicable **chartfield** box and select a value from the dropdown list. After selection is completed, click **Add to List**.

Allocate

Expenses: 1 | \$600.00

Amount: \$600.00 | Allocated 100%: \$600.00 | Remaining 0%: \$0.00

Default Allocation

Code: MACMP-48485-41500

Can select either method – percentage or amount

Click **Add** and select new chartfield value/s to split funding.

Add Allocation

New Allocation | Favorite Allocations

Business Unit * (MACMP) MACMP - CSU MARITI | Fund * (48485) 48485 - General Operatin

Department * (41500) 41500 | VP Administratior | Program Search by Text

Class (MA-MACMP-48485-41500) 41500 - VP Administration & Finance | Search by Text

(10100) 10100 - CSUPERB - Neurosleeve
 (11600) 11600 - Training Ship Golden Bear
 (11650) 11650 - Waterfront

The \$600 hotel fee is now allocated and broken down under two CF strings, i.e.
Fund / Dept 48485 41500 and
Fund / Dept 48485 42500

Allocate
Expenses: 1 | \$600.00

Percent | Amount

Amount: \$600.00 | Allocated 100%: \$600.00 | Remaining 0%: \$0.00

Default Allocation

Code: **MACMP-48485-41500** | Amount USD: \$200.00

Buttons: Add, Edit, Remove, Save as Favorite

Business Unit	Fund	Department	Program	Class	Project	Code *	Amount USD
MACMP - CSU MARITIME ACADEMY	48485 - General Operating Fund 485	42500 - Financial Operations				MACMP-48485-42500	400.00

After you complete adding expected expenses, click **Submit Request**. (cr: Step 9)

FOA In-Person Meeting \$614.00
Not Submitted | Request ID: 4JHU

Buttons: Copy Request, Submit Request

Request Details | Print/Share | **Attachments**

EXPECTED EXPENSES

Buttons: Add, Edit, Allocate, Delete

Alerts	Expense type	Details	Date	Amount	Requested
	Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
	Incidentals		03/28/2021	\$14.00	\$14.00

Estimated Total: \$614.00

Alerts: 1

FOA In-Person Meeting \$724.00
Sent Back to User | Request ID: 4JHU

Buttons: More Actions, **Submit Request**

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Buttons: Add, Edit, Allocate, Delete

Alerts	Expense type	Details	Date	Amount	Requested
	Hotel Reservation	Long Beach, California	03/28/2021	\$600.00	\$600.00
	Incidentals		03/28/2021	\$14.00	\$14.00
	04b. Meals - Domestic		03/28/2021	\$110.00	\$110.00

Estimated Total: \$724.00

To Sign Out,
Click **Profile**

From the dropdown box, click **Sign Out**

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

Manage Requests | View | Active Requests

Buttons: Create New Request

NOT SUBMITTED 05/16/2021

Entre Leadership Summit

Profile dropdown: MA Approver Test, Profile Settings, **Sign Out**

Acting as other user