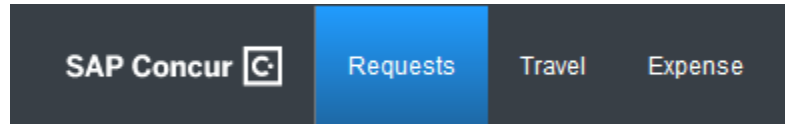# TRAVEL REQUEST

https://www.csum.edu/fiscal-services/concur.html
Accounts Payable Office Adm Bldg, Rm 109

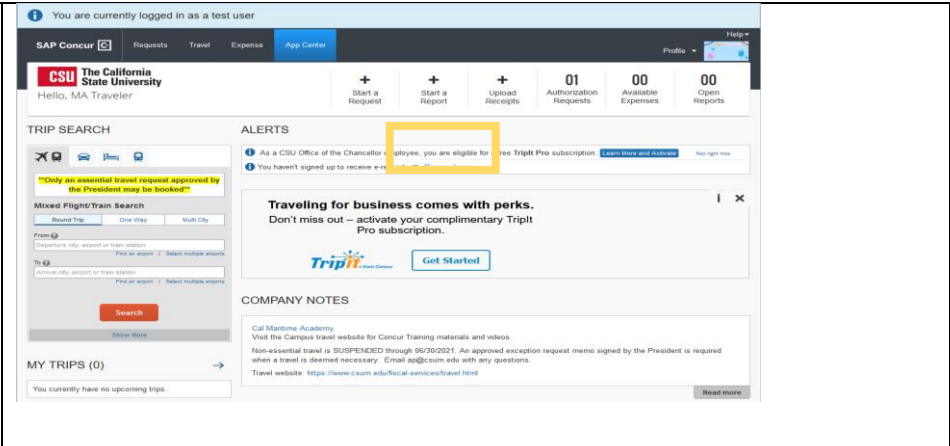## CREATE AND SUBMIT TRAVEL REQUEST THROUGH SAP CONCUR

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.]

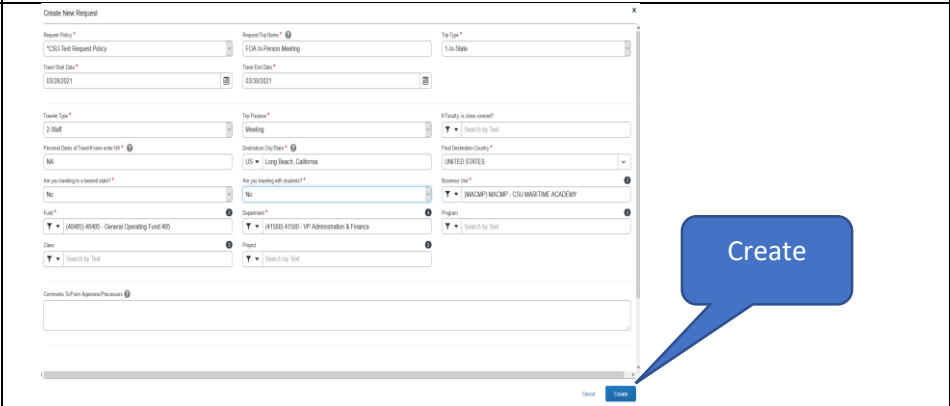To access Concur: Click **Here**

STEPS TO CREATE AND SUBMIT A TRAVEL REQUEST

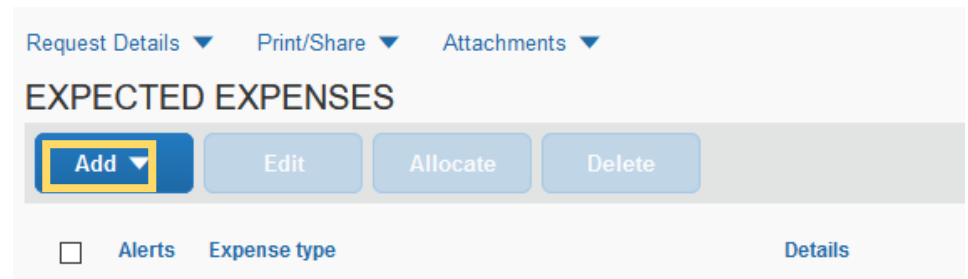|	
1. From the home page, place your mouse pointer over and click **[Start a Request]**	
2. On the page, **+ Create New Request** complete the required fields (indicated with a red asterisk) and any optional fields as required by your campus' division/department, and then click **Create.**	

Field descriptions and information.	<table><tr><th>Field Name</th><th>Description</th></tr><tr><td>Request/Trip Name</td><td>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)</td></tr><tr><td>Trip Type</td><td>Select from the drop-down list</td></tr><tr><td>Travel Start Date</td><td>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.</td></tr><tr><td>Travel End Date</td><td>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.</td></tr><tr><td>Traveler Type</td><td>Select from the drop-down list</td></tr><tr><td>Trip Purpose</td><td>Select from the drop-down list</td></tr><tr><td>If Faculty, is class covered?</td><td>Only Required for Faculty. Select from the drop down list.</td></tr><tr><td>Personal Date of Travel</td><td>Enter all dates which are personal. If none, place NA in field.</td></tr><tr><td>Destination City/State</td><td>If you anticipate travelling to more than one city and/or country, enter where you plan to spend the majority of your travel time.</td></tr><tr><td>Final Destination Country</td><td>The country will pre-populate based on the destination city selected.</td></tr><tr><td>Are you traveling to a banned state?</td><td>Select from the drop-down list</td></tr><tr><td>Are you traveling with students?</td><td>Select from the drop-down list</td></tr><tr><td>Chartfield</td><td>Chartfield String will pre-populate based on your dept. If necessary, changes can be made by traveler or approver.</td></tr></table>
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.	Request Details ▼ Print/Share ▼ Attachments ▼ **EXPECTED EXPENSES** Add ▼ Edit Allocate Delete ☐ Alerts Expense type Details

4.	Select **Hotel Reservation**	Request Details ▼ Print/Share ▼ Attachments ▼ **EXPECTED EXPENSES** Add ▼ Edit Allocate Delete 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 Save * Required field Travel Start Date: 03/28/2021 Travel End Date: 03/30/2021 City Comment: Will stay next door hotel as rate is cheaper *(Provide a justification if hotel rate exceeds CSU ceiling.)* Maximum Nightly Rate * : 260 *(Enter the nightly rate for the hotel.)* Over Rate Comment Amount * : 600.00 Currency * : US, Dollar *(Enter the amount expected for entire business stay including tax and other hotel fees.)*
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 Submit Request Not Submitted | Request ID: 4JHU Request Details ▼ Print/Share ▼ Attachments ▼ **EXPECTED EXPENSES** Add ▼ Edit Allocate Delete ☐ Alerts Expense type Details Date ▼ Amount Requested ☐ 💬 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 Save 03/28/2021 ⊕ Allocate 03/28/2021 Travel End Date: 03/30/2021 # of Business Days * : 2 *(Number of business days (completing 24 hours) only.)* Incidental Rate: 7 Transaction Amount: 14.00 Currency: US, Dollar Comments To/From Approvers/Processors Save Cancel

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 Aprovers/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
FOA In-Person Meeting | Request ID: 4JHU   Cancel   **Save**

Request Policy	Request Id	Request/Trip Name *
*CSU-Test Request Policy	4JHU	FOA In-Person Meeting

Trip Type *	Travel Start Date *	Travel End Date *
1-In-State	03/28/2021	03/30/2021

Traveler Type *	Trip Purpose *	If Faculty, is class covered?
2-Staff	Meeting	Search by Text

Personal Dates of Travel-If none enter NA *	Destination City/State *	Final Destination Country *
NA	US ▾ Long Beach, California	UNITED STATES

Are you traveling to a banned state? *	Are you traveling with students? *	Business Unit *
No	No	(MACMP) MACMP - CSU MARITIME AC

Fund *	Department *	Program
(48485) 48485 - General Operating Fund	(41500) 41500 - VP Administration & Fin	Search by Text

Class	Project	
Search by Text	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 🗑
Not Submitted | Request ID: 4JHU   Copy Request **Submit Request**

Request Details ▾   Print/Share ▾   Attachments ▾
EXPECTED EXPENSES

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

---

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 🗑
Not Submitted | Request ID: 4JHU   Copy Request **Submit Request**

Request Details ▾   Print/Share ▾   Attachments ▾
EXPECTED EXPENSES
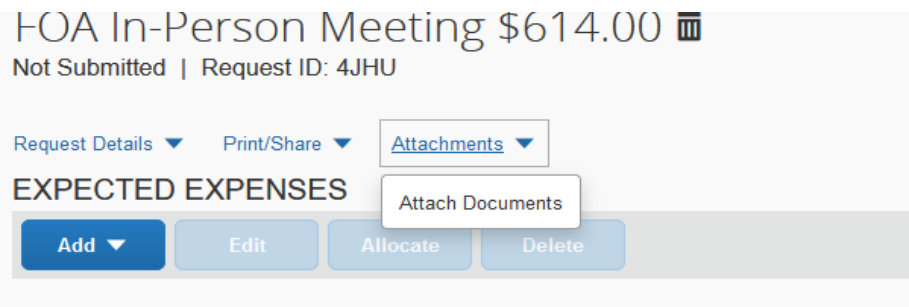
Add ▾   Edit   Allocate   Delete

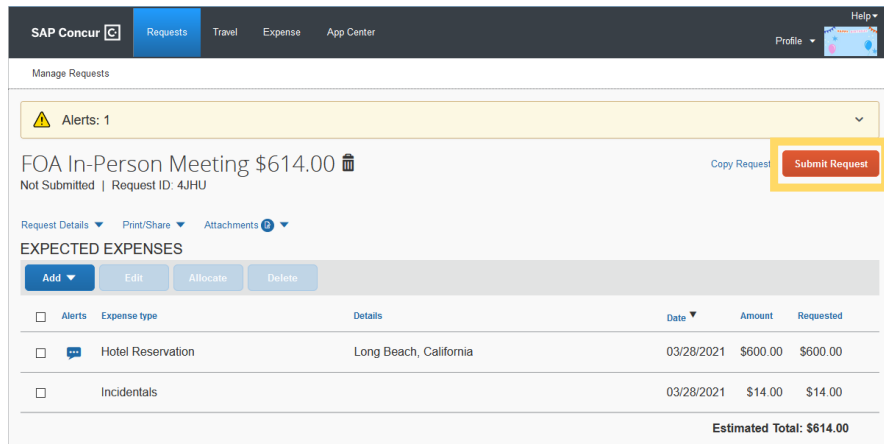|	Alerts	Expense type	Details	Date ▾	Amount	Requested
☐	💬	Hotel Reservation	Long Beach, California	03/28/2021	$600.00	$600.00
☐		Incidentals		03/28/2021	$14.00	$14.00
					Estimated Total:	$614.00

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

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

Request Details ▼   Print/Share ▼   Attachments ▼

Attach Documents

EXPECTED EXPENSES

Add ▼   Edit   Allocate   Delete

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

Document Upload and Attach   ✕

Upload and Attach
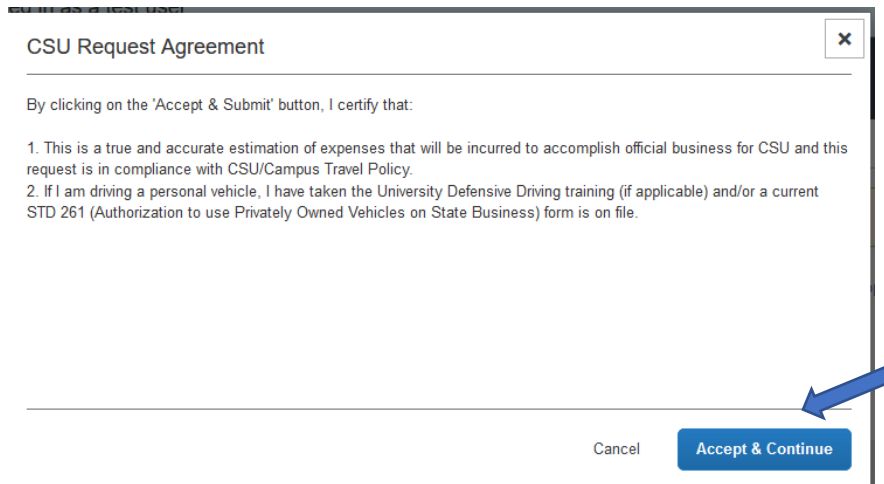
5MB limit per file

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 C   Requests   Travel   Expense   App Center   Help ▼   Profile ▼

Manage Requests

⚠ Alerts: 1   ⌄

FOA In-Person Meeting $614.00 🗑   Copy Request   Submit Request
Not Submitted | Request ID: 4JHU

Request Details ▼   Print/Share ▼   Attachments ❷ ▼
EXPECTED EXPENSES

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

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.]	

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	

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

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

More Actions ▼   Submit Request

Request Details ▼   Print/Share ▼   Attachments **2** ▼

EXPECTED EXPENSES

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

...ed Total: $614.00

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

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

Cancel   Save

🕐 Allocate

Travel Start Date
03/28/2021

Travel End Date
03/30/2021

# of Business Days *
2

Non-GSA Daily Meal Rate
55

Amount - Will automatically calculate when you hit save.

Currency
US, Dollar

Comments To/From Approvers/Processors

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

Save   Cancel

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

Allocate
Expenses: 1 $600.00

> Can select either method – percentage or amount

Percent	Amount

Amount   Allocated 100%   ✅ Remaining 0%
$600.00 $600.00 $0.00

Default Allocation

Code
MACMP-48485-41500

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

Add   Edit   Remove   Save as Favorite

Add Allocation   ✕

➕ New Allocation	⭐ Favorite Allocations

* Required field

Business Unit *   **2**   Fund *   **3**
▼ ▼ (MACMP) MACMP - CSU MARITI   ▼ ▼ (48485) 48485 - General Operatin

Department *   **4**   Program   **2**
▼ ▼ (41500) 41500 - VP Administration   ▼ ▼ Search by Text

Class   **2**

Recently Used
(MA-MACMP-48485-41500) 41500 - VP Administration & Finance

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

Cancel   **Add to List**

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

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 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 🗑 Copy Request **Submit Request**
	Not Submitted | Request ID: 4JHU
	
	Request Details ▼ Print/Share ▼ Attachments ▼
	EXPECTED EXPENSES
	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 More Actions ▼ **Submit Request**
	Sent Back to User | Request ID: 4JHU
	
	Request Details ▼ Print/Share ▼ Attachments 🅿 ▼
	EXPECTED EXPENSES
	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 ▾
	                                                   Profile ▾ 👤
	Manage Requests 👤 MA Approver Test
	
	Manage Requests View Active Requests ▼ Profile Settings | Sign Out
	
	     NOT SUBMITTED 05/16/2021 ⇄ Acting as other user ❓
	     ❗ Entre Leadership Summit Search by name or ID 🔍
	  ➕ Cancel Start Session
	Create New Request $886.32