CREATING A BLANKET TRAVEL REQUEST FOR MILEAGE IN CONCUR

08/23/2019

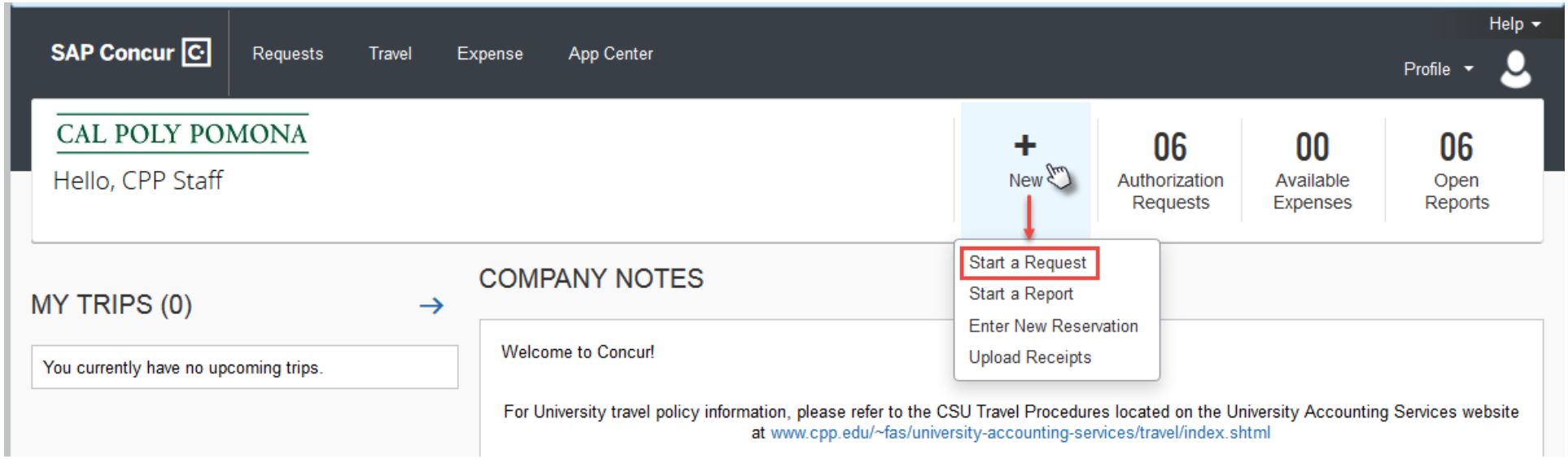
General Information

A Blanket Travel Request can be created for local Domestic mileage only related travel. A Blanket Travel Request may be created for a period of one year; from July 1st to June 30th. A Blanket Travel Request for mileage is required to be completed and approved prior to departure. To remain in compliance with Executive Orders and the CSU Travel Procedures, approval must be obtained prior to travel as follows:

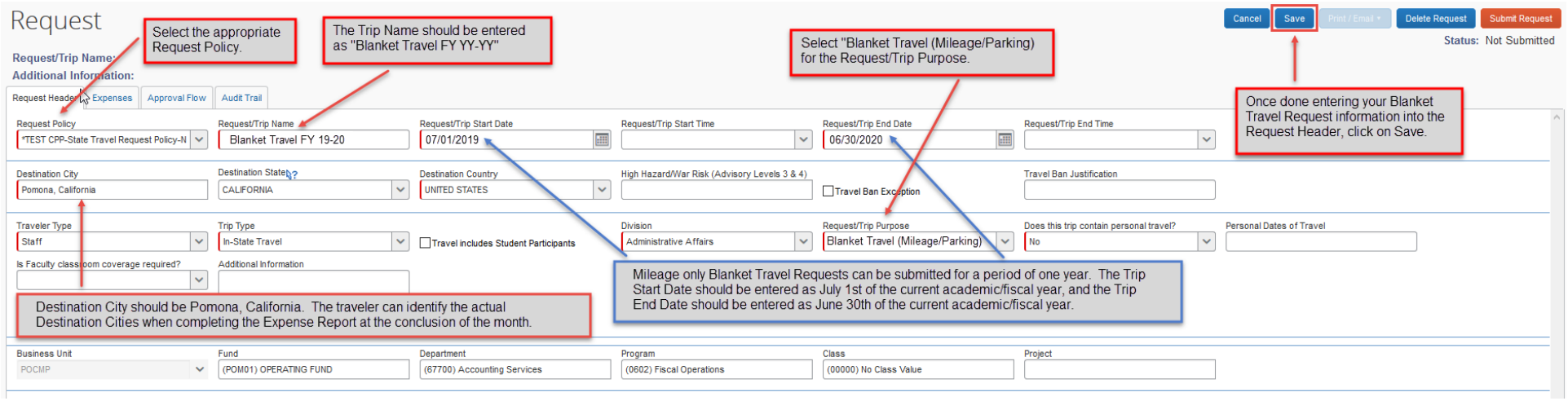
- All travel for faculty and staff, Domestic and International: HEERA Manager
- All travel for faculty, Domestic and International: College Dean
- All travel for faculty and staff, Domestic: Vice President's Sub-Delegates

Creating a New Blanket Travel Request for Mileage

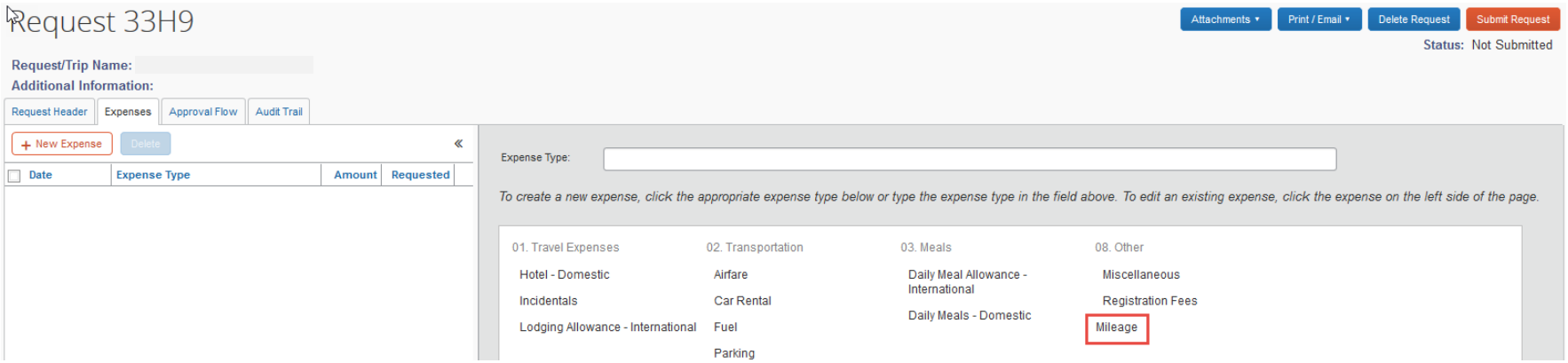
To create a new Blanket Travel Request, click on "New" > "Start a Request" from the Concur home page.



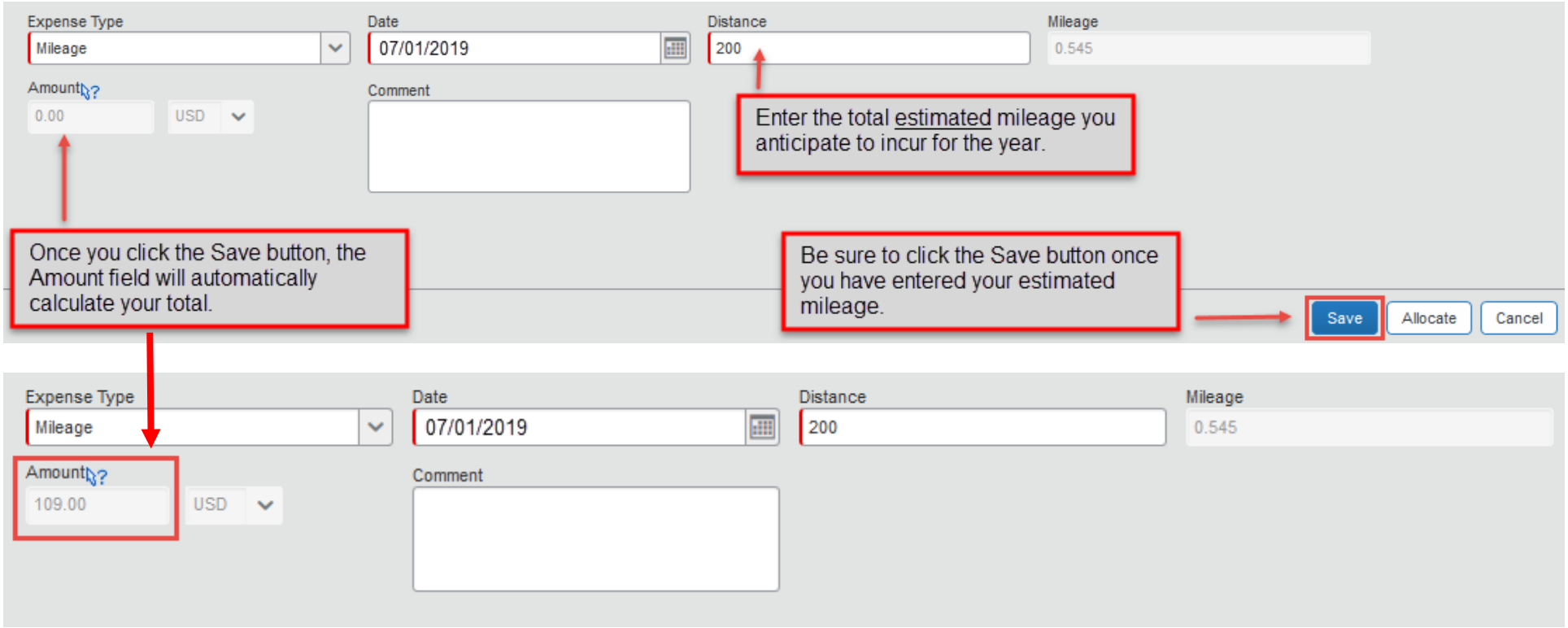
The "Request" page will appear, with the "Request Header" tab selected. On the "Request Header" tab, complete all required and optional fields. Each required field is identified by a red line on the left of the box. Use the drop-down arrows and the calendar when available on each field. Below is an example Request Header, showing the information that should go into each required field. After entering all required and optional information, click "Save".



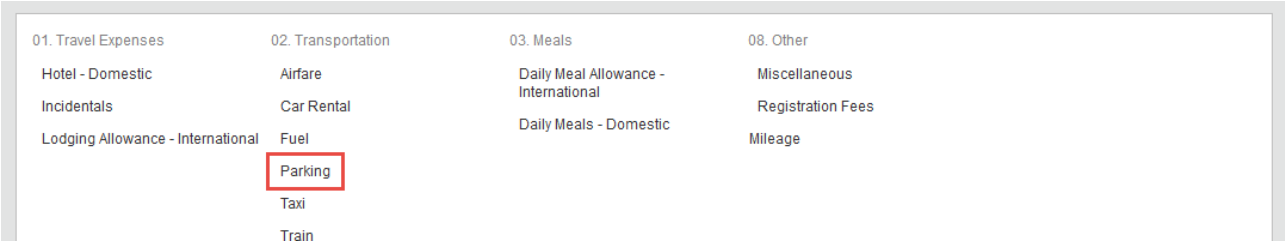
Once you click on "Save" on the "Request Header" tab, you will automatically be routed to the "Expenses" tab. This tab will be used to enter your estimated mileage for the year. Select the "Mileage" "Expense Type" and complete the required and optional fields.



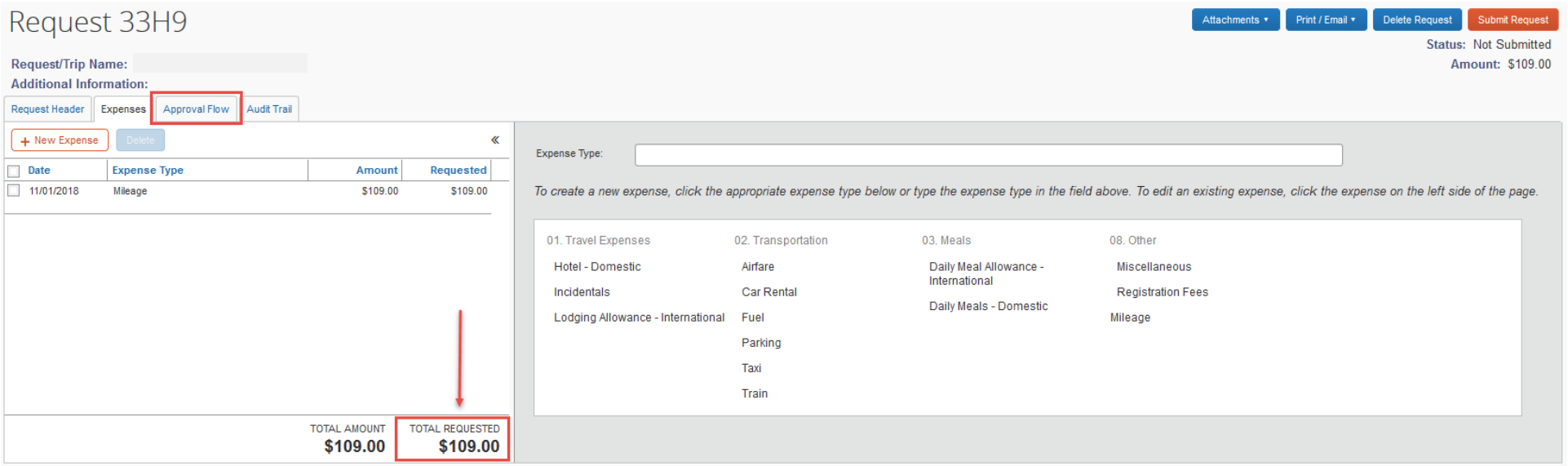
When your estimate for your annual mileage has been entered, click on Save at the bottom of the page.



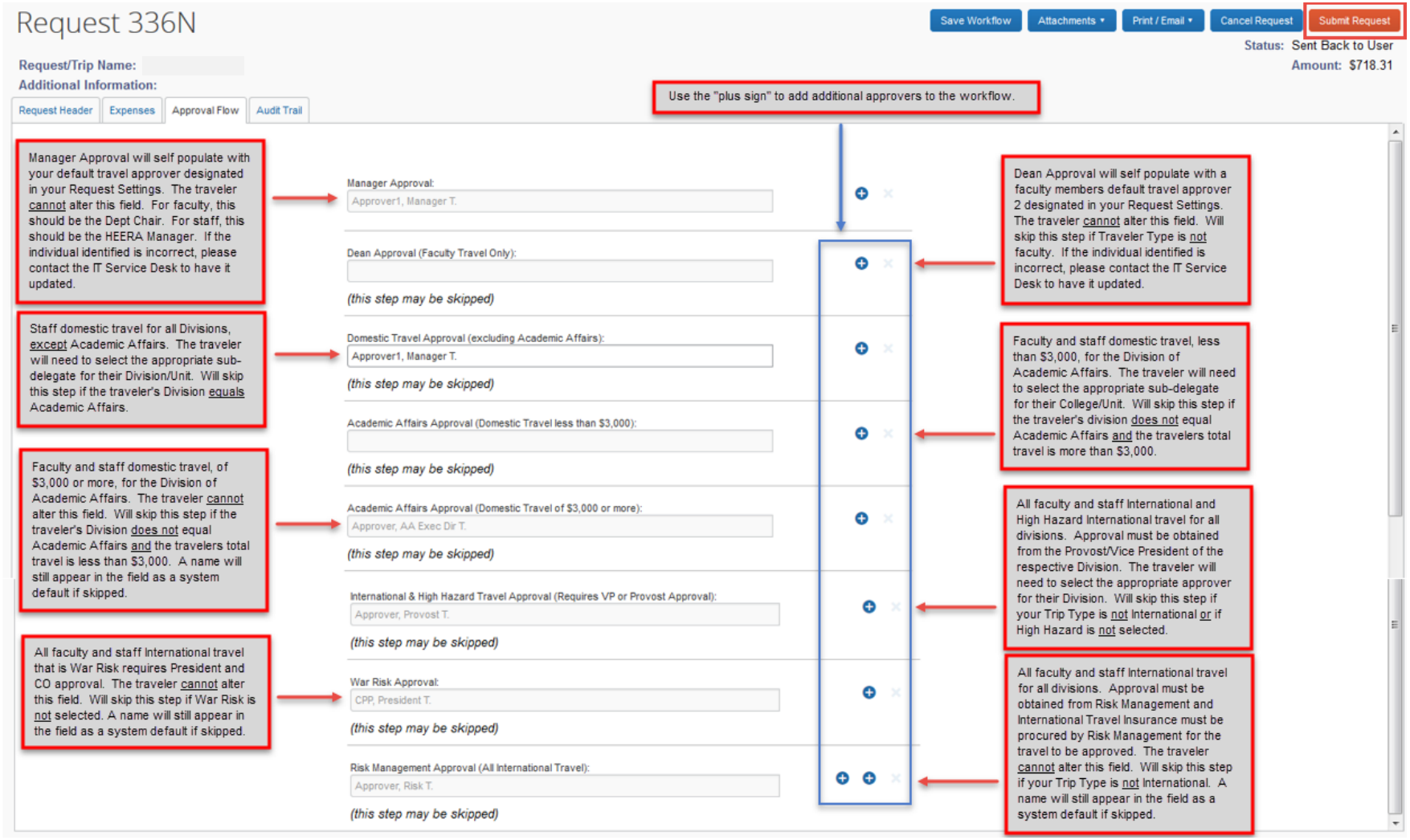
If you anticipate incurring parking expenses, select the “Parking” “Expense Type” and enter your estimated amount for the year.



Once you have entered your estimated mileage and parking, and expense allocations have been made if necessary, you will see a summary on the left side of the screen with the total amount requested. You are now ready to review your approval workflow and submit your Travel Request for approval. Click the "Approval Flow" tab to be routed to the approval workflow screen.



Review the approval workflow and input the appropriate approvers based on the criteria for each approval step noted below. If additional approvers need to be added based on your divisional, college or department internal approval process, you can do so by clicking on the "plus signs" on the "Approval Flow" tab. By hovering your mouse over the "plus sign" before clicking on it, it will indicate the action that will be taken; either adding a step before or after the current approval field. Once an additional approver field has been added, type in the individual's last name and click on it to populate the field.

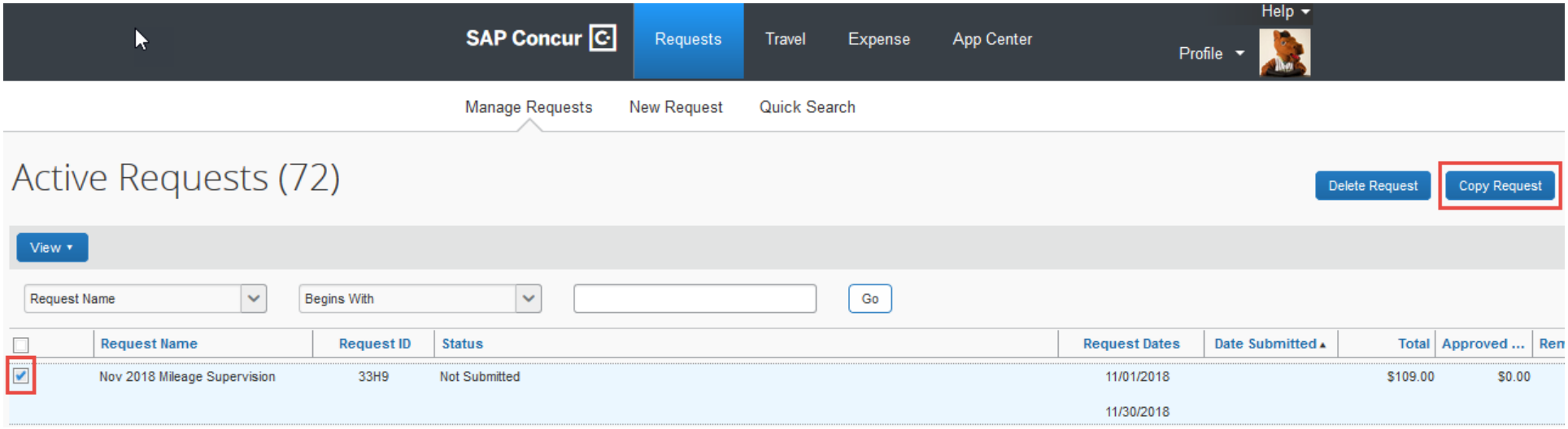


Once done, click “Submit Request” in the upper right corner of the screen. The “Final Review” window will appear. Read through the user electronic agreement and click “Accept & Submit” to acknowledge confirmation of your submission.

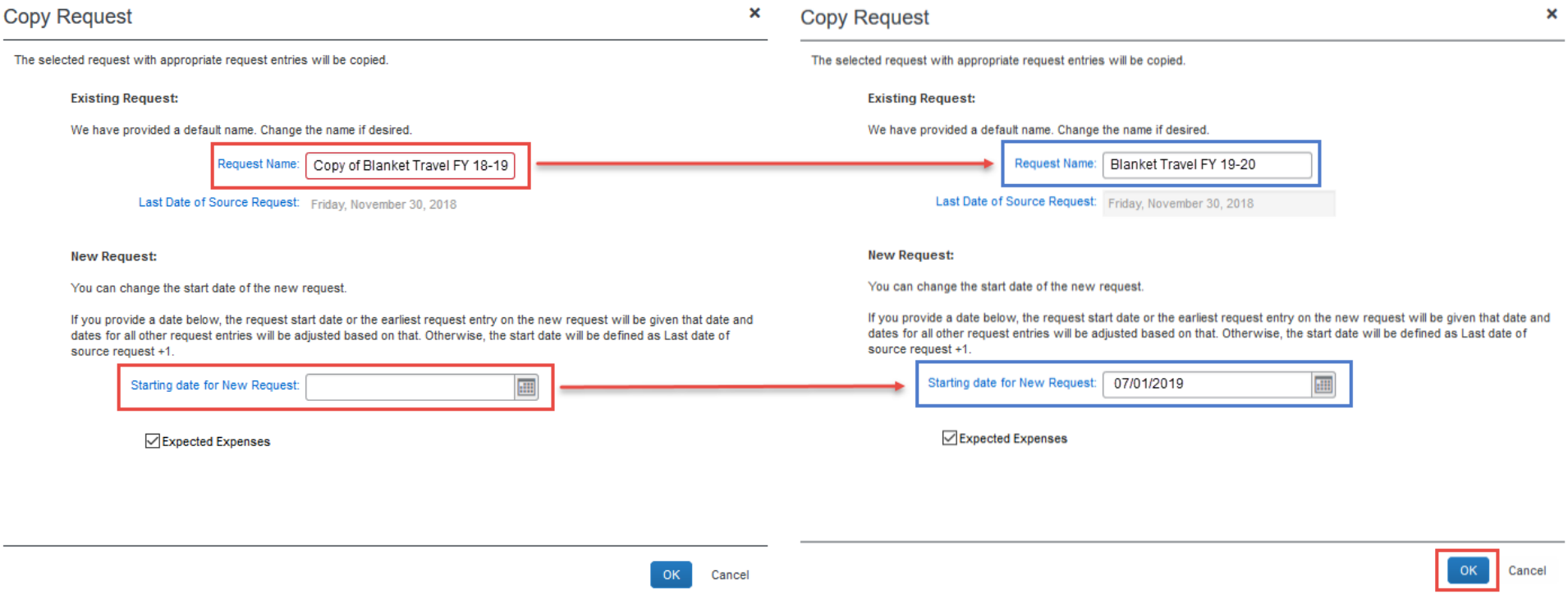
Your request is now submitted and pending approval.

Copying a Travel Request

You can easily copy a Travel Request multiple times for Blanket Travel Requests. To do so, go to Active Requests and find a Travel Request you would like to copy. Check the box next to the Travel Request you would like to copy and click on "Copy Request".



After clicking on “Copy Request”, you will be asked to enter a new name for the new Travel Request. In the “Request Name” field, delete “Copy of” and change the academic/fiscal year. In the “Starting date for New Request” field, enter July 1st for the new academic/fiscal year. Click “OK” when done.



The new Travel Request will appear with the new “Trip Name” and new “Trip Start Date”. You will need to update the “Trip End Date” field for the new year. On the “Expenses” tab, you have the option of changing the estimated mileage and parking if needed; or, you can click “Submit Request” if no adjustments are needed.

Campus Contact Information

If you have questions regarding the Travel Procedures or how to use Concur, please contact:

Travel@cpp.edu

A staff member from University Accounting Services/Accounts Payable will contact you to address your question.

If you have technical questions regarding the Concur system, cannot log into the system, or your default approvers need to be updated, please contact:

concurtech@cpp.edu

A staff member from IT will contact you to address your question.