

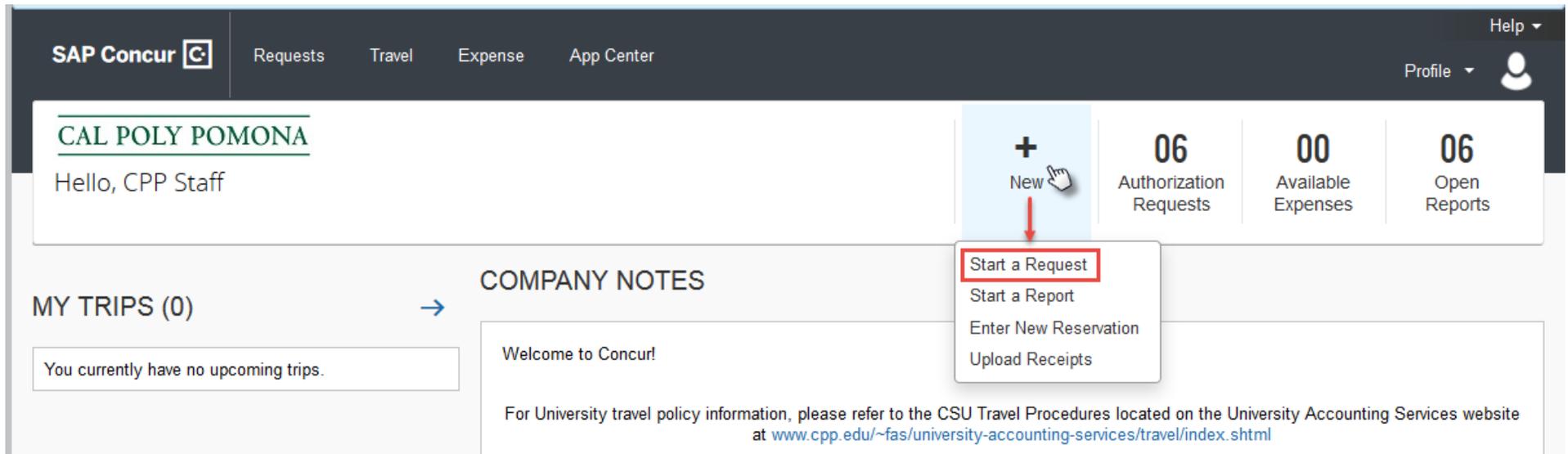
General Information

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".

Request

Request/Trip Name: **Blanket Travel FY 19-20**

Request/Trip Start Date: **07/01/2019**

Request/Trip End Date: **06/30/2020**

Destination City: **Pomona, California**

Destination State: **CALIFORNIA**

Destination Country: **UNITED STATES**

Request/Trip Purpose: **Blanket Travel (Mileage/Parking)**

Traveler Type: **Staff**

Trip Type: **In-State Travel**

Division: **Administrative Affairs**

Does this trip contain personal travel?: **No**

Business Unit: **POCMP**

Fund: **(POM01) OPERATING FUND**

Department: **(67700) Accounting Services**

Program: **(0602) Fiscal Operations**

Class: **(00000) No Class Value**

Buttons: **Cancel Save Print / Email Delete Request Submit Request**

Status: Not Submitted

Annotations:

- Select the appropriate Request Policy.
- The Trip Name should be entered as "Blanket Travel FY YY-YY"
- Select "Blanket Travel (Mileage/Parking) for the Request/Trip Purpose.
- Once done entering your Blanket Travel Request information into the Request Header, click on Save.
- Destination City should be Pomona, California. The traveler can identify the actual Destination Cities when completing the Expense Report at the conclusion of the month.
- Mileage only Blanket Travel Requests can be submitted for a period of one year. The Trip Start Date should be entered as July 1st of the current academic/fiscal year, and the Trip End Date should be entered as June 30th of the current academic/fiscal year.

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.

Request 33H9

Request/Trip Name: **Blanket Travel FY 19-20**

Buttons: **Attachments Print / Email Delete Request Submit Request**

Status: Not Submitted

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Date	Expense Type	Amount	Requested

01. Travel Expenses	02. Transportation	03. Meals	08. Other
Hotel - Domestic	Airfare	Daily Meal Allowance - International	Miscellaneous
Incidentals	Car Rental	Daily Meals - Domestic	Registration Fees
Lodging Allowance - International	Fuel		Mileage
	Parking		

CREATING A BLANKET TRAVEL REQUEST FOR MILEAGE IN CONCUR

08/23/2019

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

Expense Type: Mileage
Date: 07/01/2019
Distance: 200
Mileage: 0.545
Amount: 0.00 USD
Comment: [Empty]

Once you click the Save button, the Amount field will automatically calculate your total.

Enter the total estimated mileage you anticipate to incur for the year.

Be sure to click the Save button once you have entered your estimated mileage.

Save Allocate Cancel

Expense Type: Mileage
Date: 07/01/2019
Distance: 200
Mileage: 0.545
Amount: 109.00 USD
Comment: [Empty]

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

01. Travel Expenses	02. Transportation	03. Meals	08. Other
Hotel - Domestic	Airfare	Daily Meal Allowance - International	Miscellaneous
Incidentals	Car Rental	Daily Meals - Domestic	Registration Fees
Lodging Allowance - International	Fuel		Mileage
	Parking		
	Taxi		
	Train		

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.

Request 33H9

[Attachments](#) [Print / Email](#) [Delete Request](#) [Submit Request](#)

Status: Not Submitted
Amount: \$109.00

Request/Trip Name:

Additional Information:

[Request Header](#) [Expenses](#) [Approval Flow](#) [Audit Trail](#)

[+ New Expense](#) [Delete](#) «

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	11/01/2018	Mileage	\$109.00	\$109.00

TOTAL AMOUNT	TOTAL REQUESTED
\$109.00	\$109.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- 01. Travel Expenses
- 02. Transportation
- 03. Meals
- 08. Other
- Hotel - Domestic
- Airfare
- Daily Meal Allowance - International
- Miscellaneous
- Incidentals
- Car Rental
- Daily Meals - Domestic
- Registration Fees
- Lodging Allowance - International
- Fuel
- Mileage
- Parking
- Taxi
- Train

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.

Request 336N

Save Workflow Attachments Print / Email Cancel Request **Submit Request**

Status: Sent Back to User
Amount: \$718.31

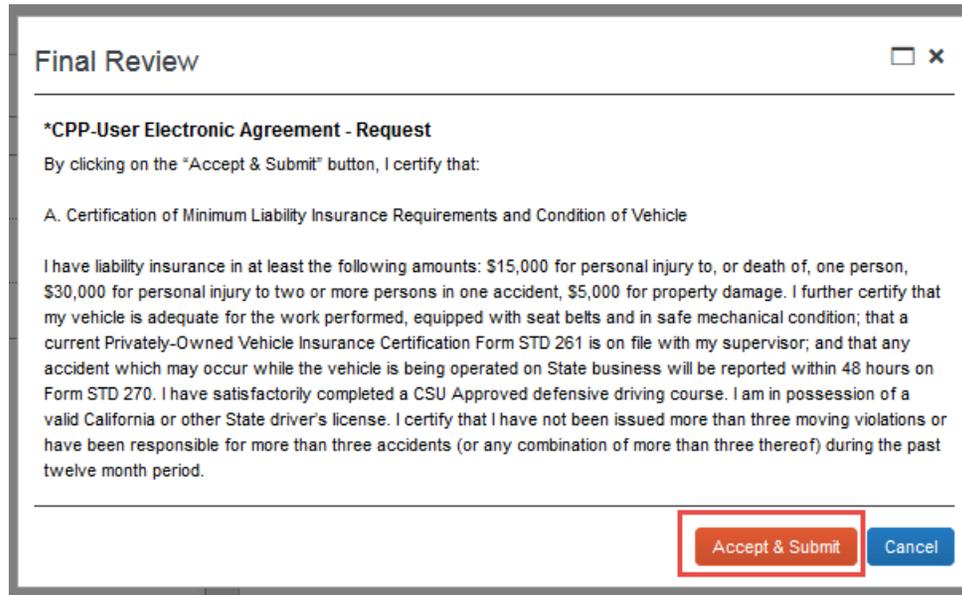
Request/Trip Name:
Additional Information:

Request Header Expenses Approval Flow **Audit Trail**

Use the "plus sign" to add additional approvers to the workflow.

<p>Manager Approval will self populate with your default travel approver designated in your Request Settings. The traveler <u>cannot</u> alter this field. For faculty, this should be the Dept Chair. For staff, this should be the HEERA Manager. If the individual identified is incorrect, please contact the IT Service Desk to have it updated.</p>	<p>Manager Approval: Approver1, Manager T.</p>	<p>Dean Approval will self populate with a faculty members default travel approver 2 designated in your Request Settings. The traveler <u>cannot</u> alter this field. Will skip this step if Traveler Type is <u>not</u> faculty. If the individual identified is incorrect, please contact the IT Service Desk to have it updated.</p>
<p>Staff domestic travel for all Divisions, <u>except</u> Academic Affairs. The traveler will need to select the appropriate sub-delegate for their Division/Unit. Will skip this step if the traveler's Division <u>equals</u> Academic Affairs.</p>	<p>Dean Approval (Faculty Travel Only): (this step may be skipped)</p> <p>Domestic Travel Approval (excluding Academic Affairs): Approver1, Manager T. (this step may be skipped)</p>	<p>Faculty and staff domestic travel, less than \$3,000, for the Division of Academic Affairs. The traveler will need to select the appropriate sub-delegate for their College/Unit. Will skip this step if the traveler's division <u>does not</u> equal Academic Affairs <u>and</u> the travelers total travel is more than \$3,000.</p>
<p>Faculty and staff domestic travel, of \$3,000 or more, for the Division of Academic Affairs. The traveler <u>cannot</u> alter this field. Will skip this step if the traveler's Division <u>does not</u> equal Academic Affairs <u>and</u> the travelers total travel is less than \$3,000. A name will still appear in the field as a system default if skipped.</p>	<p>Academic Affairs Approval (Domestic Travel less than \$3,000): (this step may be skipped)</p> <p>Academic Affairs Approval (Domestic Travel of \$3,000 or more): Approver, AA, Exec Dir T. (this step may be skipped)</p>	<p>All faculty and staff International and High Hazard International travel for all divisions. Approval must be obtained from the Provost/Vice President of the respective Division. The traveler will need to select the appropriate approver for their Division. Will skip this step if your Trip Type is <u>not</u> International <u>or</u> if High Hazard is <u>not</u> selected.</p>
<p>All faculty and staff International travel that is War Risk requires President and CO approval. The traveler <u>cannot</u> alter this field. Will skip this step if War Risk is <u>not</u> selected. A name will still appear in the field as a system default if skipped.</p>	<p>International & High Hazard Travel Approval (Requires VP or Provost Approval): Approver, Provost T. (this step may be skipped)</p> <p>War Risk Approval: CPP, President T. (this step may be skipped)</p>	<p>All faculty and staff International travel for all divisions. Approval must be obtained from Risk Management and International Travel Insurance must be procured by Risk Management for the travel to be approved. The traveler <u>cannot</u> alter this field. Will skip this step if your Trip Type is <u>not</u> International. A name will still appear in the field as a system default if skipped.</p>
	<p>Risk Management Approval (All International Travel): Approver, Risk T. (this step may be skipped)</p>	

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.



The screenshot shows a window titled "Final Review" with a close button (X) in the top right corner. Below the title bar, the text reads: "*CPP-User Electronic Agreement - Request". Underneath, it says "By clicking on the 'Accept & Submit' button, I certify that:". This is followed by section "A. Certification of Minimum Liability Insurance Requirements and Condition of Vehicle". The main body of text states: "I have liability insurance in at least the following amounts: \$15,000 for personal injury to, or death of, one person, \$30,000 for personal injury to two or more persons in one accident, \$5,000 for property damage. I further certify that my vehicle is adequate for the work performed, equipped with seat belts and in safe mechanical condition; that a current Privately-Owned Vehicle Insurance Certification Form STD 261 is on file with my supervisor; and that any accident which may occur while the vehicle is being operated on State business will be reported within 48 hours on Form STD 270. I have satisfactorily completed a CSU Approved defensive driving course. I am in possession of a valid California or other State driver's license. I certify that I have not been issued more than three moving violations or have been responsible for more than three accidents (or any combination of more than three thereof) during the past twelve month period." At the bottom right of the window, there are two buttons: "Accept & Submit" (highlighted with a red box) and "Cancel".

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”.

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', and 'App Center'. Below this, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (72)'. To the right of this heading are two buttons: 'Delete Request' and 'Copy Request', with the latter being highlighted by a red box. Below the heading is a search area with a 'View' dropdown, a 'Request Name' dropdown, a 'Begins With' dropdown, a text input field, and a 'Go' button. Below the search area is a table with the following columns: 'Request Name', 'Request ID', 'Status', 'Request Dates', 'Date Submitted', 'Total', 'Approved ...', and 'Ren'. The first row of the table is highlighted in light blue and has a checked checkbox in the first column, also highlighted by a red box. The data in this row is: 'Nov 2018 Mileage Supervision', '33H9', 'Not Submitted', '11/01/2018', '11/30/2018', '\$109.00', '\$0.00'.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved ...	Ren
<input checked="" type="checkbox"/>	Nov 2018 Mileage Supervision	33H9	Not Submitted	11/01/2018	11/30/2018	\$109.00	\$0.00	

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 image shows two side-by-side screenshots of the 'Copy Request' dialog box. The left screenshot shows the initial state where the 'Request Name' is 'Copy of Blanket Travel FY 18-19' and the 'Starting date for New Request' is empty. The right screenshot shows the updated state where the 'Request Name' is 'Blanket Travel FY 19-20' and the 'Starting date for New Request' is '07/01/2019'. Red boxes and arrows highlight the changes made to these fields. Both screenshots include an 'Existing Request' section with a message: 'We have provided a default name. Change the name if desired.' and a 'Last Date of Source Request' field with the value 'Friday, November 30, 2018'. The 'New Request' section includes a message: 'You can change the start date of the new request. If you provide a date below, the request start date or the earliest request entry on the new request will be given that date and dates for all other request entries will be adjusted based on that. Otherwise, the start date will be defined as Last date of source request +1.' and a 'Starting date for New Request' field with a calendar icon. Both screenshots also have a checked 'Expected Expenses' checkbox and 'OK' and 'Cancel' buttons at the bottom.

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.