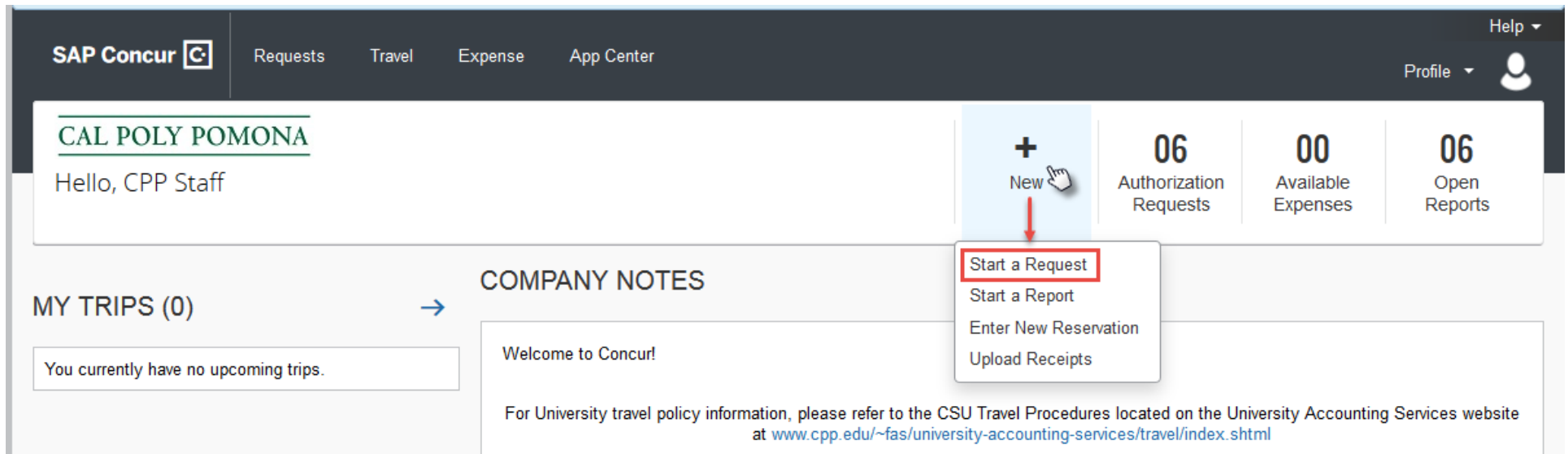## General Information

A Travel Request is required to be completed and approved for all travel types and funding sources (State, Foundation and ASI), prior to booking travel arrangements and departure. **This also includes travel that is funded through a third party, such as a donor or conference host.** 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
- All International travel for faculty and staff: Provost/Vice President & Risk Management
- All High Hazard International travel for faculty and staff: Provost/Vice President & Risk Management

Creating a Zero Value Travel Request

To create a new Zero Value 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. After entering all required and optional information, click "Save".

Note: It is recommended to include the trip purpose and destination in your Trip Name. Ex. "Training in Oakland"; "AVS Conference in New York".

Once you click on "Save" on the "Request Header" tab, you will automatically be routed to the "Expenses" tab. Select the appropriate "Expense Types" for your trip and complete the required and optional fields. **Input your estimated amount for each "Expense Type" as $0.00.**

Once you have entered all the appropriate "Expense Types" with an estimated amount of $0.00 for your trip, 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.

Note: All fields that appear in the Approval Flow screen <u>must</u> have an approver selected. In the event a field is left blank, system errors can occur; which may delay the approval of the Travel Request

Request 336N

Request/Trip Name: FOA Conference
Additional Information:

Request Header | Expenses | Approval Flow | Audit Trail

Save Workflow | Attachments ▼ | Print / Email ▼ | Cancel Request | Submit Request

Status: Sent Back to User
Amount: $718.31

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

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.

Manager Approval:
Approver1, Manager T.

Dean Approval (Faculty Travel Only):

(this step may be skipped)

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.

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.

Domestic Travel Approval (excluding Academic Affairs):
Approver1, Manager T.

(this step may be skipped)

Academic Affairs Approval (Domestic Travel less than $3,000):

(this step may be skipped)

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.

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.

Academic Affairs Approval (Domestic Travel of $3,000 or more):
Approver, AA Exec Dir T.

(this step may be skipped)

International & High Hazard Travel Approval (Requires VP or Provost Approval):
Approver, Provost T.

(this step may be skipped)

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.

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.

War Risk Approval:
CPP, President T.

(this step may be skipped)

Risk Management Approval (All International Travel):
Approver, Risk T.

(this step may be skipped)

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.

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.

Final Review   □ ✕

*CPP-User Electronic Agreement - Request

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

A. Certification of Minimum Liability Insurance Requirements and Condition of Vehicle

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.

[Accept & Submit]   [Cancel]

Your request is now submitted and pending approval.

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, or your default approvers need to be updated, please contact:

Cal Poly Pomona IT Service Desk
itservicedesk@cpp.edu -or- (909) 869-6776
Submit a Request IT or Fix It ticket using the IT Service Portal at https://cpp.service-now.com/ehelp