

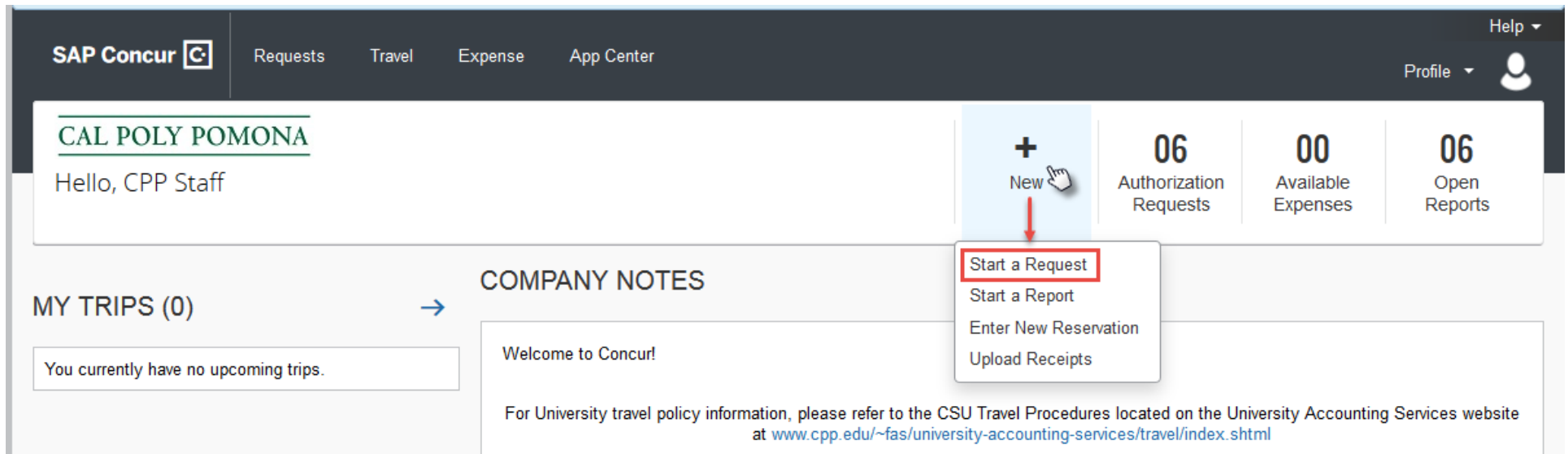
## General Information

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.



# CREATING A ZERO VALUE TRAVEL REQUEST IN CONCUR

01/28/2019

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".

The screenshot shows the "Request" form in the Concur system. The form is titled "Request" and has a "Request Header" tab selected. The form contains several fields and sections, each with a red box around it and a callout box with instructions. The callouts are:

- Request Policy:** "If a third party will be paying for your business related travel, select the State Request Policy for your request. This field **cannot** be changed once your request information has been entered and submitted." (Points to the "Request Policy" dropdown menu)
- Request/Trip Name:** "If the travel includes student participants, please check the associated box." (Points to the "Request/Trip Name" field)
- Request/Trip Start Date:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Request/Trip Start Date" field)
- Request/Trip Start Time:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Request/Trip Start Time" field)
- Request/Trip End Date:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Request/Trip End Date" field)
- Request/Trip End Time:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Request/Trip End Time" field)
- Destination City:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Destination City" field)
- Destination State:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Destination State" dropdown menu)
- Destination Country:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Destination Country" dropdown menu)
- High Hazard/War Risk (Advisory Levels 3 & 4):** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "High Hazard/War Risk" field)
- Travel Ban Exception:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Travel Ban Exception" checkbox)
- Travel Ban Justification:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Travel Ban Justification" field)
- Traveler Type:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Traveler Type" dropdown menu)
- Trip Type:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Trip Type" dropdown menu)
- Division:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Division" dropdown menu)
- Request/Trip Purpose:** "If a third party will be paying for your business related travel, the CFS may be left blank." (Points to the "Request/Trip Purpose" dropdown menu)
- Does this trip contain personal travel?:** "If any portion of your travel includes personal time, please select **Yes** from the drop-down menu and input the personal travel dates in the delivered field." (Points to the "Does this trip contain personal travel?" dropdown menu)
- Personal Dates of Travel:** "If any portion of your travel includes personal time, please select **Yes** from the drop-down menu and input the personal travel dates in the delivered field." (Points to the "Personal Dates of Travel" field)
- Is Faculty classroom coverage required?:** "For faculty travelers, please input whether classroom coverage is required for the duration of your travel. If coverage is required (Yes), please input how your class(es) will be covered and by who in the Additional Information field." (Points to the "Is Faculty classroom coverage required?" dropdown menu)
- Additional Information:** "For faculty travelers, please input whether classroom coverage is required for the duration of your travel. If coverage is required (Yes), please input how your class(es) will be covered and by who in the Additional Information field." (Points to the "Additional Information" field)
- Fund:** "Enter who will be paying for your travel related expenses in the Additional Information field." (Points to the "Fund" field)
- Department:** "Enter who will be paying for your travel related expenses in the Additional Information field." (Points to the "Department" field)
- Program:** "Enter who will be paying for your travel related expenses in the Additional Information field." (Points to the "Program" field)
- Class:** "Enter who will be paying for your travel related expenses in the Additional Information field." (Points to the "Class" field)
- Project:** "Enter who will be paying for your travel related expenses in the Additional Information field." (Points to the "Project" field)

The form also includes a "Request Header" tab, a "Save" button, and a "Submit Request" button. The status is "Not Submitted".

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.**

Request 336N

Request/Trip Name: FOA Conference  
Additional Information:

Request Header | Expenses | Approval Flow | Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested

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		

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 must 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

Save Workflow Attachments Print / Email Cancel Request Submit Request

Request/Trip Name: FOA Conference  
 Additional Information: Status: Sent Back to User Amount: \$718.31

Request Header Expenses Approval Flow Audit Trail

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 cannot 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.

**Staff domestic travel** for all Divisions, except 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 equals Academic Affairs.

**Faculty and staff domestic travel**, of \$3,000 or more, for the Division of Academic Affairs. The traveler cannot alter this field. Will skip this step if the traveler's Division does not equal Academic Affairs and the travelers total travel is less than \$3,000. A name will still appear in the field as a system default if skipped.

All faculty and staff International travel that is War Risk requires President and CO approval. The traveler cannot alter this field. Will skip this step if War Risk is not selected. A name will still appear in the field as a system default if skipped.

<p>Manager Approval:  <input type="text" value="Approver1, Manager T."/></p> <p>Dean Approval (Faculty Travel Only):  <input type="text"/></p> <p><i>(this step may be skipped)</i></p> <p>Domestic Travel Approval (excluding Academic Affairs):  <input type="text" value="Approver1, Manager T."/></p> <p><i>(this step may be skipped)</i></p> <p>Academic Affairs Approval (Domestic Travel less than \$3,000):  <input type="text"/></p> <p><i>(this step may be skipped)</i></p> <p>Academic Affairs Approval (Domestic Travel of \$3,000 or more):  <input type="text" value="Approver, AA, Exec Dir T."/></p> <p><i>(this step may be skipped)</i></p> <p>International &amp; High Hazard Travel Approval (Requires VP or Provost Approval):  <input type="text" value="Approver, Provost T."/></p> <p><i>(this step may be skipped)</i></p> <p>War Risk Approval:  <input type="text" value="CPP, President T."/></p> <p><i>(this step may be skipped)</i></p> <p>Risk Management Approval (All International Travel):  <input type="text" value="Approver, Risk T."/></p> <p><i>(this step may be skipped)</i></p>	+ ×  + ×  + ×  + ×  + ×  + ×  + ×	<p><b>Dean Approval</b> 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><b>Faculty and staff domestic travel</b>, 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>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 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>
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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**

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**\*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](mailto:Travel@cpp.edu)

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

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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](mailto: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>