CREATING A ZERO VALUE TRAVEL REQUEST IN CONCUR

01/28/2019

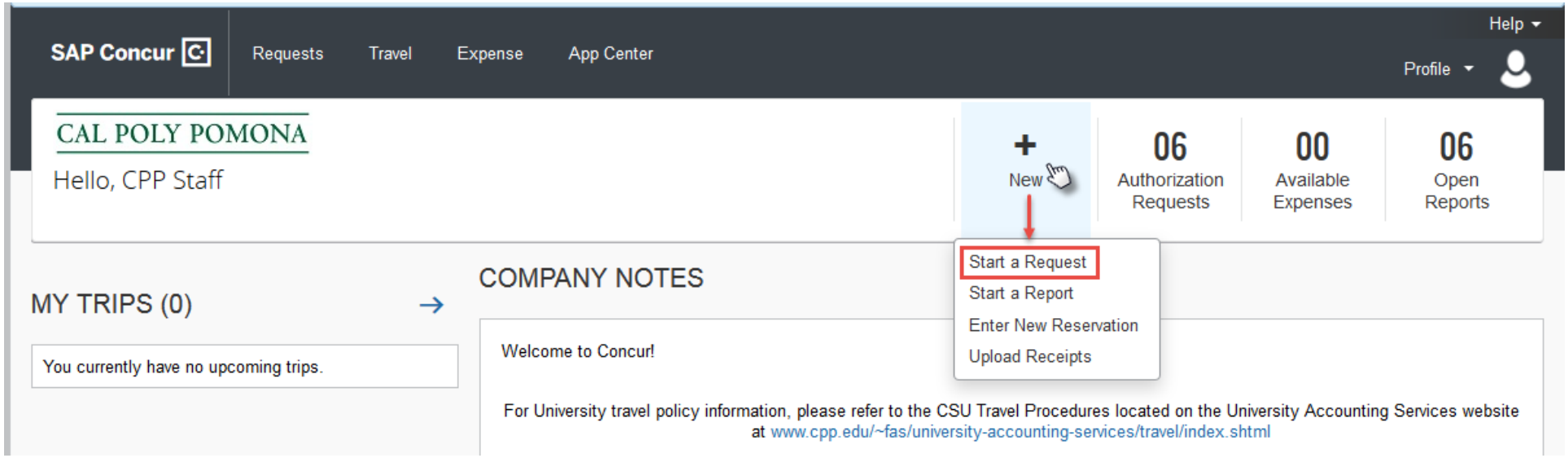
General Information

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

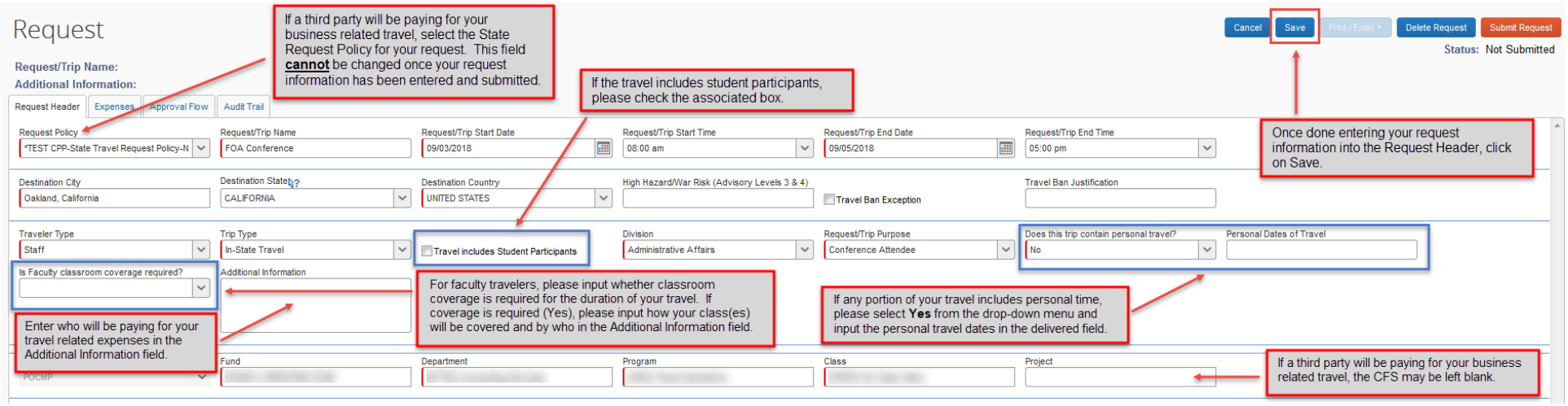
Creating a Zero Value Travel Request

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

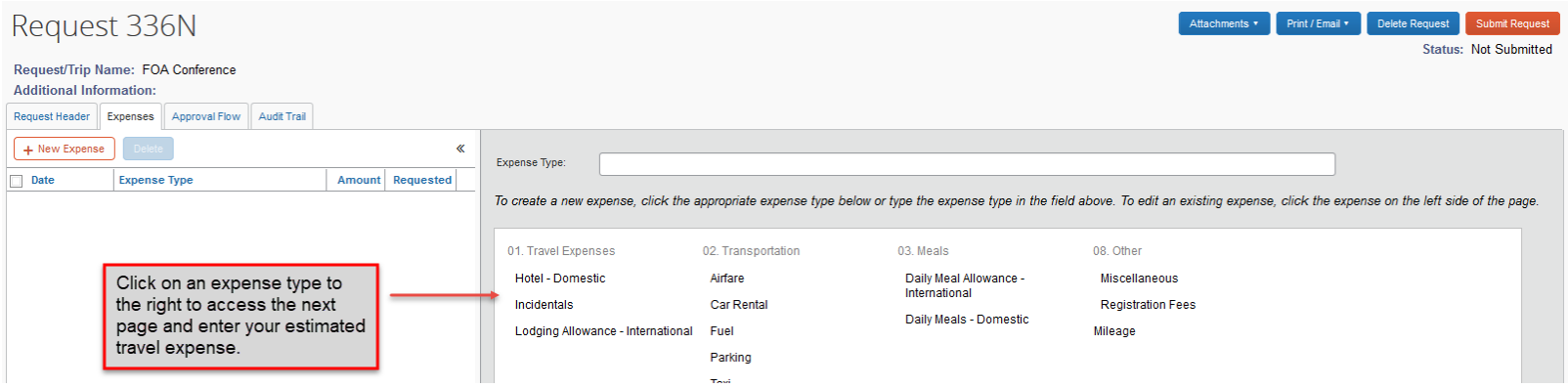


The "Request" page will appear, with the "Request Header" tab selected. On the "Request Header" tab, complete all required and optional fields. Each required field is identified by a red line on the left of the box. Use the drop-down arrows and the calendar when available on each field. After entering 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".

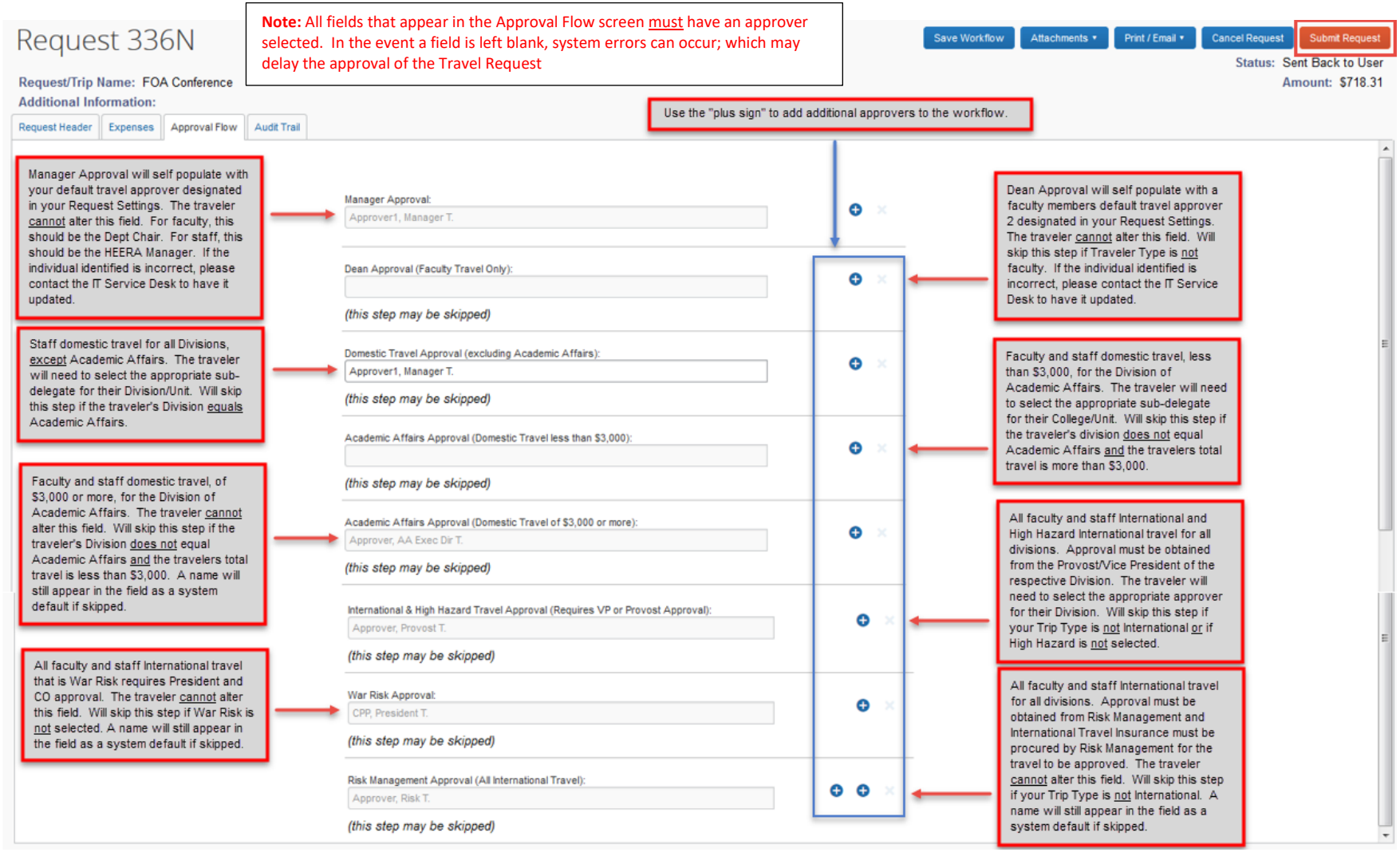


Once you click on “Save” on the “Request Header” tab, you will automatically be routed to the “Expenses” tab. Select the appropriate “Expense Types” for your trip and complete the required and optional fields. **Input your estimated amount for each “Expense Type” as $0.00.**



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.



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.

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