

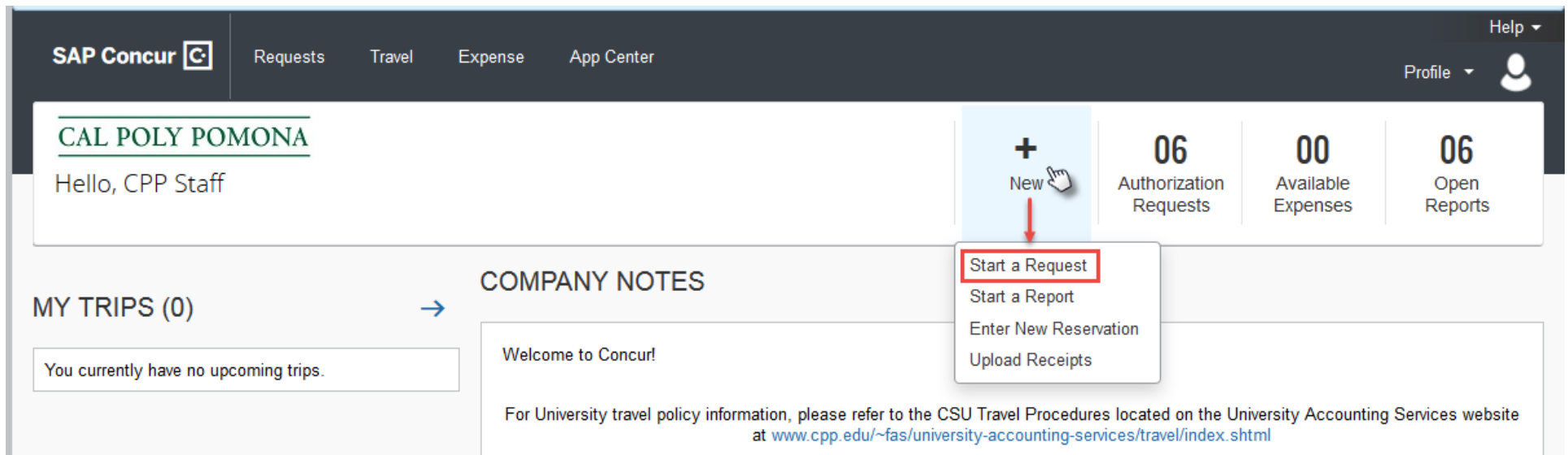
## General Information

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. 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 New Domestic Travel Request

To create a new Domestic 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”.

**Request**

Request/Trip Name: FOA Conference

Request/Trip Start Date: 09/03/2018

Request/Trip Start Time: 08:00 am

Request/Trip End Date: 09/05/2018

Request/Trip End Time: 05:00 pm

Destination City: Oakland, California

Destination State: CALIFORNIA

Destination Country: UNITED STATES

Traveler Type: Staff

Trip Type: In-State Travel

Travel includes Student Participants:

Request/Trip Purpose: Conference Attendee

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

**Callout 1:** When entering a request, if you are using non-state funds (Foundation), change your Request Policy to Foundation by clicking on the drop down arrow. This field **cannot** be changed once your request information has been entered and submitted.

**Callout 2:** If the travel includes student participants, please check the associated box.

**Callout 3:** If you are traveling to a State that is currently on the travel ban listing (AB 1887), utilize the travel ban section of the Request Header to document whether an exception applies and input your justification in the field provided.

**Callout 4:** Once done entering your request information into the Request Header, click on Save.

**Callout 5:** 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.

**Callout 6:** 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.

**Callout 7:** When entering your charfield string, please begin typing and click on the appropriate Fund, Department, Program and Class. Project will generally **not** be used for travel related activity.

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 expenses for your trip. Select the appropriate “Expense Type” for your trip and complete the required and optional fields, including estimated amount.

**Request 336N**

Request/Trip Name: FOA Conference

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		

**Callout:** Click on an expense type to the right to access the next page and enter your estimated travel expense.

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

Some frequently used "Expense Types" include:

- Hotel – Domestic (used for in-state and out-of-state domestic travel)

Expense Type: Hotel - Domestic

Transaction Date: 09/03/2018

Description: [Empty]

Room Rate, excluding taxes: 169.00

Transaction Amount: 400.00 USD

Justification for Lodging over the Cap: [Empty]

Comment: [Empty]

Buttons: Save, Allocate, Cancel

Callouts:  
- Enter the hotel check-in date.  
- Your Transaction Amount should be equal to your room rate, plus all applicable hotel taxes and fees, for all nights of your travel.  
- Ensure you are entering the room rate, per night, excluding taxes. This will allow reviewers, approvers, and Accounts Payable to ensure your room rate does not exceed the cap. In the event your lodging exceeds the cap, input a justification in the field provided.  
- Be sure to click the Save button after each entry.

- Airfare

Expense Type: Airfare

Transaction Date: 09/03/2018

Description: [Empty]

Transaction Amount: 300.00 USD

Comment: I'm flying out the morning of my conference since it starts at 10:00AM

Buttons: Save, Allocate, Cancel

Callouts:  
- Enter the flight departure date.  
- If comments are needed, such as why you may be departing a day early due to the start time of your event, utilize the Comment field to document the additional information.  
- Your Transaction Amount should be for your round-trip airfare, including all applicable taxes and fees.  
- Be sure to click the Save button after each entry.

➤ Mileage

The screenshot shows the 'Mileage' entry form in Concur. The form includes the following fields and annotations:

- Expense Type:** A dropdown menu with 'Mileage' selected.
- Date:** A date field containing '09/03/2018'. An annotation box says 'Enter the first date of travel.' with an arrow pointing to the date field.
- Distance:** A text input field containing '33.6'. An annotation box says 'Enter the total mileage you anticipate to drive for this trip.' with an arrow pointing to the distance field.
- Mileage:** A read-only field showing '0.545'.
- Amount:** A text input field containing '0.00'. An annotation box says 'Once you click the Save button, the Amount field will automatically calculate your total.' with an arrow pointing to the amount field.
- Comment:** A large text area for notes.
- Buttons:** 'Save', 'Allocate', and 'Cancel' buttons are at the bottom right. An annotation box says 'Be sure to click the Save button after each entry.' with an arrow pointing to the 'Save' button.
- Note:** A red-bordered box on the right contains the text: 'Note: You have the option of entering your Mileage as one entry for your entire trip, or separate entries for each day of your trip that you will incur mileage.'

The bottom portion of the screenshot shows the form after the 'Save' button is clicked. The 'Amount' field now displays '18.31' and is highlighted with a red box. The 'Distance' field still shows '33.6' and the 'Mileage' field shows '0.545'.

**\*\*If your travel will be funded by multiple University Chartfields, please refer to the "Allocating Expense Types to Multiple Chartfields" section below.\*\***

Once all estimated expenses have been entered, and expense allocations have been made, 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 336N

Request/Trip Name: FOA Conference  
Additional Information:

Request Header Expenses **Approval Flow** Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
09/03/2018	Hotel - Domestic	\$400.00	\$400.00
09/03/2018	Airfare	\$300.00	\$300.00
09/03/2018	Mileage	\$18.31	\$18.31

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		

TOTAL AMOUNT \$718.31 TOTAL REQUESTED \$718.31

The amounts entered for each expense type will appear here as a summary of the estimated expenses you anticipate incurring for this trip.

Attachments Print / Email Cancel Request Submit Request

Status: Sent Back to User  
Amount: \$718.31

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 <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: <input type="text" value="Approver1, Manager T."/>	+	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.	Dean Approval (Faculty Travel Only): <input type="text"/> (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.	Domestic Travel Approval (excluding Academic Affairs): <input type="text" value="Approver1, Manager 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.	Academic Affairs Approval (Domestic Travel less than \$3,000): <input type="text"/> (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.
(This field is empty in the original image)	Academic Affairs Approval (Domestic Travel of \$3,000 or more): <input type="text" value="Approver, AA, Exec Dir T."/> (this step may be skipped)	+	
(This field is empty in the original image)	International & High Hazard Travel Approval (Requires VP or Provost Approval): <input type="text" value="Approver, Provost T."/> (this step may be skipped)	+	
(This field is empty in the original image)	War Risk Approval: <input type="text" value="CPP, President T."/> (this step may be skipped)	+	
(This field is empty in the original image)	Risk Management Approval (All International Travel): <input type="text" value="Approver, Risk T."/> (this step may be 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.

Allocating Expense Types to Multiple Chartfields

If your travel will be split funded using multiple University chartfields, you have the ability to allocate each expense by percentage or amount. To allocate any or all "Expense Types" to more than one chartfield, click the "Allocate" button on any "Expense Type" screen. *Note: If your travel will be funded by University and Foundation sources, a separate Travel Request will need to be completed for each funding source. The allocation functionality will only allocate funding sources within the same policy, not across different policies.*

Expense Type: Hotel - Domestic  
Transaction Date: 09/03/2018  
Description:   
Room Rate, excluding taxes: 169.00  
Transaction Amount: 400.00 USD  
Justification for Lodging over the Cap:   
Comment:   
Buttons: Save, Allocate, Cancel

The "Allocations for Request" window will appear. Select which expenses you would like to allocate in your Travel Request by checking the box next to the "Expense Type". Once all selections have been made, click on the "Allocate Selected Expenses" button.

Allocations for Request : FOA Conference

Request List

<input type="checkbox"/>	Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	09/03/2018	Hotel - Domestic		\$400.00
<input type="checkbox"/>	09/03/2018	Airfare		\$300.00
<input type="checkbox"/>	09/03/2018	Mileage		\$18.31

Buttons: Allocate Selected Expenses, Clear Selections, Summary

Allocations

Buttons: Allocate By, Add New Allocation, Delete Selected Allocations, Favorites, Add to Favorites

Buttons: Save, Cancel



The “Allocations” side of the window will update to allow input of the desired chartfield information to allocate the selected “Expense Types”. Travelers have the option of allocating by percentage or amount by clicking on the “Allocate By” button and making the respective selection. Additionally, by selecting the “Add New Allocation” button, the traveler can add multiple lines to input multiple chartfields for allocation.

Allocations for Request : FOA Conference

Request List

Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	09/03/2018	Hotel - Domestic	\$400.00
<input type="checkbox"/>	09/03/2018	Airfare	\$300.00
<input type="checkbox"/>	09/03/2018	Mileage	\$18.31

Allocations

Total:\$400.00 Allocated:\$400.00(100%) Remaining:\$0.00(0%)

Allocate By: **Add New Allocation** Delete Selected Allocations Favorites + Add to Favorites

Amount	Business Unit	Fund	Department	Program	Class	Project	Code
<input type="checkbox"/> \$400.00	POCMP	(POM01) OPER...	(67700) Accou...	(0602) Fiscal ...	(00000) No Cla...		POCMP-(POM01) OPERATING FUND-(67700 ...

Allocate By:  Percentage  Amount

Save Cancel

Once the selection has been made to allocate by percentage or amount, and the appropriate number of allocation lines has been added, allocation information can be entered as noted below. Once done, click “Save”.

Allocations for Request : FOA Conference

Request List

Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	09/03/2018	Hotel - Domestic	\$400.00
<input type="checkbox"/>	09/03/2018	Airfare	\$300.00
<input type="checkbox"/>	09/03/2018	Mileage	\$18.31

Allocations

Total:\$400.00 Allocated:\$400.00(100%) Remaining:\$0.00(0%)

Allocate By: **Add New Allocation** Delete Selected Allocations Favorites + Add to Favorites

Amount	Business Unit	Fund	Department	Program	Class	Project	Code
<input type="checkbox"/> \$200.00	POCMP	(POM01) OPER...	(67700) Accou...	(0602) Fiscal ...	(00000) No Cla...		POCMP-(POM01) OPERATING FUND-(67700 ...
<input type="checkbox"/> \$200.00	POCMP	(UE001) TF CA...	(67900) Stude...	(0602) Fiscal ...	(C5020) Cost ...		POCMP-(UE001) TF CAMPUS SERV-INTERN...

Enter the chartfields you would like your expense allocated to, as well as the amount or percentage you would like allocated. The complete chartfield string will populate under the Code field.

A summary of the amount allocated will appear in the upper right corner of the screen, detailing the remaining amount to be allocated. This is displayed to ensure 100% of the expense is allocated amongst the chartfield strings entered.

Be sure to click the Save button after you are done with your allocation.

Save Cancel

Once the traveler clicks “Save” on the “Allocations for Request” window, an allocation icon will appear on the summary listing for the “Expense Type” that was allocated. (Note: The icon displayed on the “Expense Type” in Travel Request is different than the icon displayed on the “Expense Type” in the Expense Report.)

Request 336N

Request/Trip Name: FOA Conference

Additional Information:

Request Header Expenses Approval Flow Audit Trail

+ New Expense Delete <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	09/03/2018	Hotel - Domestic	\$400.00	\$400.00
<input type="checkbox"/>	09/03/2018	Airfare	\$300.00	\$300.00
<input type="checkbox"/>	09/03/2018	Mileage	\$18.31	\$18.31

Expense Type has been allocated.

International Travel

The process for creating a Travel Request for International Travel follows the same steps as Domestic Travel, except for some variations in “Request Header” fields and “Expense Types” that will be selected for lodging and meals/incidentals. Travelers to foreign destinations will receive a fixed amount per diem for lodging, meals and incidentals in accordance with the Federal Maximum Travel Per Diem Allowances for Foreign Areas published by the U.S. Department of State Office of Allowances.

When creating a Request for International Travel, be sure to identify your “Trip Type” as “International” to ensure your Travel Request will be routed to the appropriate approvers. Additionally, if you are traveling to a foreign destination that is currently listed as High Hazard (Advisory Level 3) or War Risk (Advisory Level 4), denote this in the field provided on the “Request Header”. (Note: A selection for “Destination State” is not required for International Travel since the field only houses US State options to select from. Your international destination will be identified by your “Destination City” and “Destination Country” selected.)

**Request** Cancel Save Print / Email Delete Request Submit Request  
 Status: Not Submitted

Request/Trip Name: Additional Information: Request Header Expenses Approval Flow Audit Trail

Request Policy: TEST CPP-State Travel Request Policy-N  
 Request/Trip Name: Michelle - International Travel  
 Request/Trip Start Date: 10/09/2018  
 Request/Trip Start Time: [Dropdown]  
 Request/Trip End Date: 10/10/2018  
 Request/Trip End Time: [Dropdown]

Destination City: Paris, FRANCE  
 Destination State: [Dropdown]  
 Destination Country: FRANCE  
 High Hazard/War Risk (Advisory Levels 3 & 4): High Hazard (Advisory Level 3)  
 Travel Ban Exception: [Dropdown]

Traveler Type: Staff  
 Trip Type: International  
 Division: Administrative Affairs  
 Request/Trip Purpose: Conference Attendee  
 Does this trip contain personal travel?: No  
 Personal Dates of Travel: [Text]

When selecting an International location in the Destination City field, the Destination Country will auto-populate. However, please make sure to review your entries to ensure the city and country are correctly matched.

If your foreign destination is currently classified as High Hazard (Advisory Level 3) or War Risk (Advisory Level 4), please denote this in the field provided. You can search the selections by entering a % in the field, or begin typing either selection.

High Hazard/War Risk (Advisory Levels 3 & 4): [Dropdown]  
 Type to search by:  TEXT  CODE  EITHER  
 (Code) Text  
 High Hazard (Advisory Level 3)  
 War Risk (Advisory Level 4)

Business Unit: POCMP  
 Fund: (POM01) OPERATING FUND  
 Department: (67700) Accounting Services  
 Program: (0602) Fiscal Operations  
 Class: (00000) No Class Value  
 Project: [Text]

For International travel, ensure you select "International" for your Trip Type. This will ensure your Request goes through the proper approvals.

Once you have completed the information on the “Request Header”, from the “Expenses” tab, select the “Lodging Allowance – International” and “Daily Meal Allowance – International” “Expense Types” to enter your per diem amounts for your trip; and complete the required and optional fields.

## Request 33CF

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

Status: Not Submitted

Request/Trip Name: Michelle - International Travel

Additional Information:

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

[+ New Expense](#) [Delete](#)

<input type="checkbox"/>	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            | <b>Daily Meal Allowance - International</b> | Miscellaneous     |
| Incidentals                              | Car Rental         | Daily Meals - Domestic                      | Registration Fees |
| <b>Lodging Allowance - International</b> | Fuel               |   | Mileage           |
|  | Parking            |   |                   |
|  | Taxi               |   |                   |
|  | Train              |   |                   |

Lodging Allowance – International

Expense Type: Lodging Allowance - International  
 Transaction Date: 10/08/2018  
 Description:   
 Allowance Amount: 425.00  
 Number of Days: 2  
 Transaction Amount: 0.00 USD  
 Comment:

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

Enter the first day of your travel.

Enter the Foreign Per Diem Rate for Lodging for the Country/City you are requesting to travel to. The rate can be found on the U.S. Department of State - Office of Allowances website.

Enter the number of days you expect to procure lodging on your trip. (Note: This may not be the same number of days as your actual travel; only the days you need lodging in the foreign country.)

Be sure to click the Save button after each entry.

Save Allocate Cancel

Foreign Per Diem Rates In U.S. Dollars  
 DSSR 925  
 Country: FRANCE  
 Publication Date: 10/01/2018

Previous Rates: 10/01/2018 Go

Country Name	Post Name	Season Begin	Season End	Maximum Lodging Rate	M & IE Rate	Maximum Per Diem Rate	Footnote	Effective Date
FRANCE	Bordeaux	01/01	12/31	216	137	353	N/A	06/01/2018
FRANCE	Other	01/01	12/31	223	134	357	N/A	06/01/2018
FRANCE	Paris	01/01	12/31	425	183	608	View	06/01/2018
FRANCE	Strasbourg	01/01	12/31	252	142	394	N/A	06/01/2018

Expense Type: Lodging Allowance - International  
 Transaction Date: 10/08/2018  
 Description:   
 Allowance Amount: 425.00  
 Number of Days: 2  
 Transaction Amount: 850.00 USD  
 Comment:

Daily Meal Allowance – International

Expense Type: Daily Meal Allowance - International

Transaction Date: 10/08/2018

Description: [Empty]

Allowance Amount: 183.00

Number of Days: 3

Transaction Amount: 0.00 USD

Comment: [Empty]

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

Enter the first day of your travel.

Enter the Foreign Per Diem Rate for Meals and Incidentals for the Country/City you are requesting to travel to. The rate can be found on the U.S. Department of State - Office of Allowances website.

Enter the number of days you expect to incur meals and incidentals in the foreign country on your trip. (Note: This may not be the same number of days as your actual travel; only the days you expect to incur meals and incidentals in the foreign country.)

Be sure to click the Save button after each entry.

Save Allocate Cancel

Foreign Per Diem Rates In U.S. Dollars  
DSSR 925  
Country: FRANCE  
Publication Date: 10/01/2018

Previous Rates: 10/01/2018 Go

Country Name	Post Name	Season Begin	Season End	Maximum Lodging Rate	M & IE Rate	Maximum Per Diem Rate	Footnote	Effective Date
FRANCE	Bordeaux	01/01	12/31	216	137	353	N/A	06/01/2018
FRANCE	Other	01/01	12/31	223	134	357	N/A	06/01/2018
FRANCE	Paris	01/01	12/31	425	183	608	View	06/01/2018
FRANCE	Strasbourg	01/01	12/31	252	142	394	N/A	06/01/2018

Expense Type: Daily Meal Allowance - International

Transaction Date: 10/08/2018

Description: [Empty]

Allowance Amount: 183.00

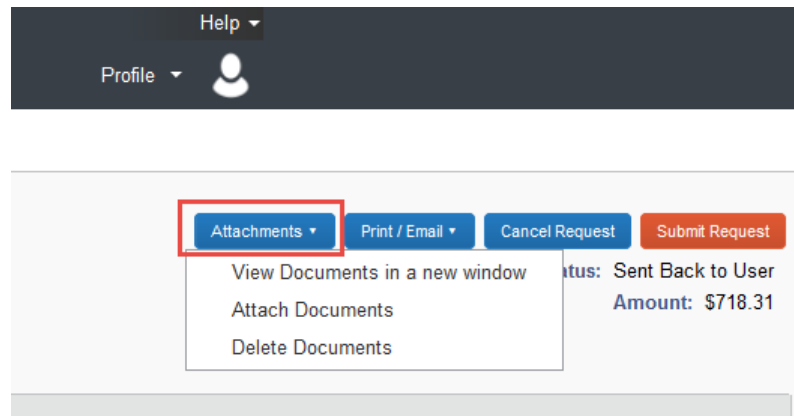
Number of Days: 3

Transaction Amount: 549.00 USD

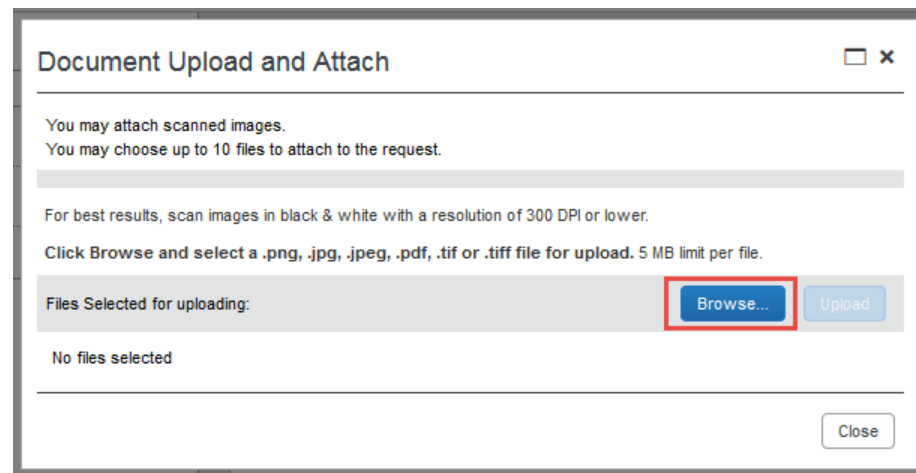
Comment: [Empty]

Adding Attachments

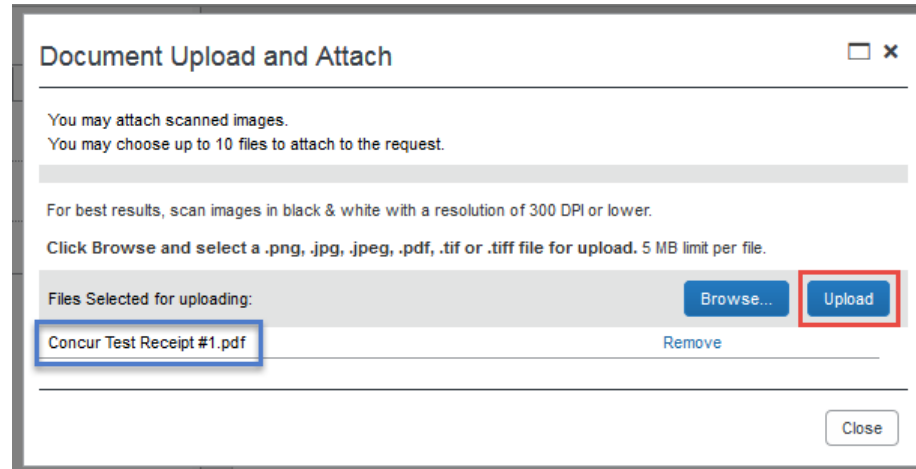
Additional documentation may be required to be attached to your Travel Request, based on your divisional, college or department internal process; as well as due to student participants and international travel. To attach documents to your Travel Request, click on “Attachments” > “Attach Documents” in the upper right corner of the Travel Request screen. This can be done while working on any tab in your Travel Request.



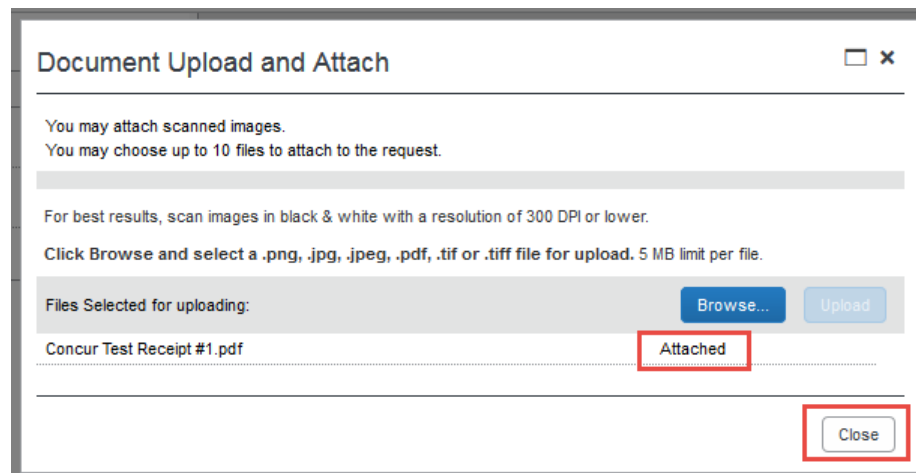
The “Document Upload and Attach” window will appear. Click on “Browse” to select the file you wish to upload.



Once selected, click on "Upload".



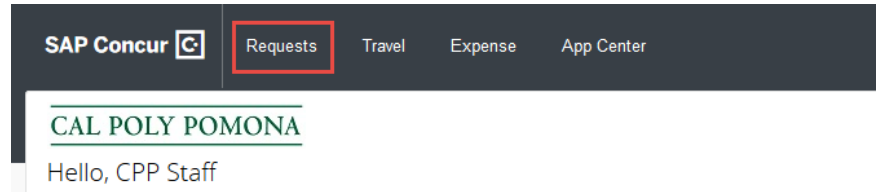
The file status in the "Document Upload and Attach" window will update to show "Attached", confirming your document was successfully attached. Once you have completed your document upload, click on "Close".





Checking the Status of your Request

With Concur, you have the ability to check the status of your Travel Request in the system in real time. From the Concur home page, click on “Requests” in the menu bar at the top left side of the screen.



The “Managing Requests” screen will appear. This screen will default to show the Active Requests that a traveler currently has pending. These can include requests that are not yet submitted for approval, or those that have been submitted and are pending approval.

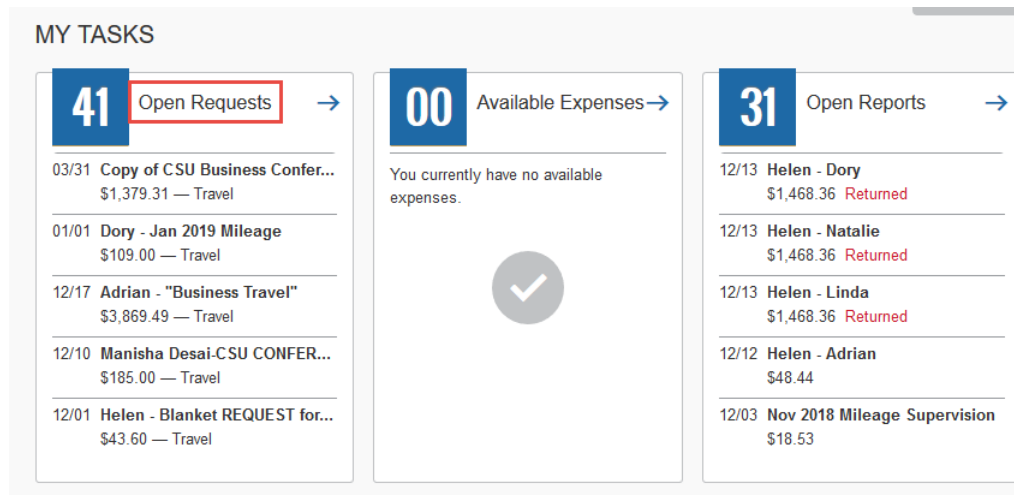
- By clicking on the “View” button on the left of the screen, you have the ability of changing the filter status of your request to one of seven (7) options; including “All Requests”, which allows a traveler to view all requests entered into Concur under their profile.
- By reviewing the information in the “Status” column, a traveler can determine where their request is in the process; such as Approved, Submitted & Pending Approval, or Not Submitted.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved ...	Remaining...	Action
Test Workflow_BF	3369	Approved	09/28/2018	09/25/2018	\$299.00	\$299.00	\$299.00	Expense
Linda Los Angeles	336Y	Approved	10/02/2018	09/28/2018	\$311.50	\$311.50	\$31.97	Expense
Helen student affairs	336V	Approved	09/28/2018	09/27/2018	\$35.00	\$35.00	\$0.00	Expense
Helen Over \$5000 same day travel	336W	Submitted & Pending Approval - Approver1, Manager T.	09/27/2018	09/27/2018	\$4,180.25	\$0.00	\$0.00	
FOA Conference	336N	Sent Back to User - Traveler1, CPP Staff T.	09/27/2018	09/27/2018	\$718.31	\$0.00	\$0.00	

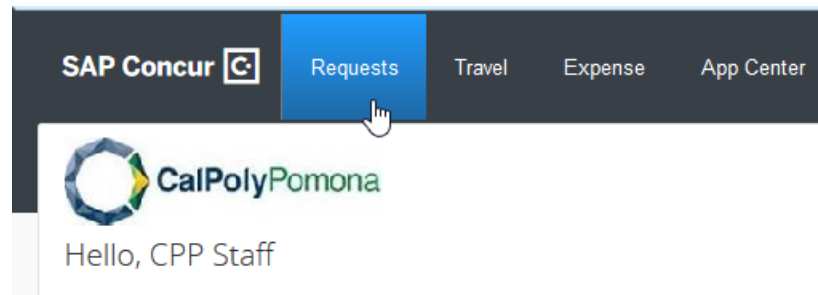
Delete a Travel Request

A Travel Request can only be deleted when it has not yet been submitted for approval and has a “Status” of “Not Submitted”. To delete an unsubmitted request, click either:

- The “Open Requests” tile in the “Quick Task Bar” on the home page.



- On the menu, click “Requests”.



The “Manage Requests” page will appear. Select the check box to the left of the desired request. Click “Delete Request”.

Manage Requests    New Request    Quick Search

---

Active Requests (41) Delete Request   Copy Request   Close/Inactivate Request

View ▾

Request Name ▾    Begins With ▾        Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved ...	Remaining...	Action
<input checked="" type="checkbox"/>	Copy of CSU Business Conference	33FE	Not Submitted	03/31/2019		\$1,379.31	\$0.00	\$0.00	▲
				04/02/2019					

Copy a Travel Request

With the “Copy Request” feature, a traveler can select a Travel Request and copy it as a template for the new request. The new Travel Request can then be edited as desired. Any Travel Request can be copied – regardless of the status or whether it is open or closed.

To copy a Travel Request, select the check box to the left of the desired request on the “Manage Requests” page. Click “Copy Request”.

Manage Requests    New Request    Quick Search

---

Active Requests (72) Delete Request   Copy Request

View ▾

Request Name ▾    Begins With ▾        Go

<input type="checkbox"/>	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		\$109.00	\$0.00	
				11/30/2018				

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 month. In the “Starting date for New Request” field, enter the first day of the month you are creating the new Travel Request for. 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 Nov 2018 Mileage Supervisi' and the 'Starting date for New Request' is empty. The right screenshot shows the edited state where the 'Request Name' is 'Dec 2018 Mileage Supervision' and the 'Starting date for New Request' is '12/01/2018'. 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. At the bottom of each dialog, there are 'OK' and 'Cancel' buttons. The 'OK' button in the right screenshot is highlighted with a red box.

The new Travel Request will appear with the new “Trip Name” and new “Trip Start Date”. Depending on the number of days in the month, you may need to update the “Trip End Date” field to include the last day of the month. On the “Expenses” tab, you have the option of changing the estimated mileage for the particular month if needed; or, you can click “Submit Request” if no adjustments are needed.

## Close/Inactivate a Travel Request

A Travel Request can only be closed/inactivated when it has been submitted for approval and has a “Status” of “Approved”. Travel Requests should only be closed/inactivated for the following reasons:

- The trip has been canceled.
- The trip has already occurred, and the Travel Request was for a zero-value due to a third party funding the trip.
- All Expense Reports have been submitted and processed for payment against the Travel Request.

To close/inactivate a Travel Request, select the check box to the left of the desired request on the “Manage Requests” page. Click “Close/Inactivate Request”.

The screenshot shows the 'Manage Requests' page in Concur. At the top, there are navigation links for 'Manage Requests', 'New Request', and 'Quick Search'. Below this, the page title is 'Active Requests (41)'. There are three buttons: 'Delete Request', 'Copy Request', and 'Close/Inactivate Request', with the last one highlighted by a red box. Below the buttons is a search area with 'Request Name' and 'Begins With' dropdowns, a text input field, and a 'Go' button. A 'View' dropdown is also present. The main part of the screenshot is a table with the following columns: Request Name, Request ID, Status, Request Dates, Date Submitted, Total, Approved..., Remaining..., and Action. One request is listed with a checked checkbox in the first column.

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved ...	Remaining...	Action
<input checked="" type="checkbox"/>	2018 Tax Forum Sales Tax, Use Tax, UBIT, NRAT, Bond Income Tax Issues	33HK	Approved	11/05/2018 11/07/2018	12/07/2018	\$866.64	\$866.64	\$67.00	Expense

## 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.

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>