Blanket Travel Guide

Trainings and Support for Concur

The links provided below have training guides and resources you can access if you have any questions regarding Concur or need help trouble shooting.

Concur User Support
Concur Trainings
Concur Video Channel

24/7 Help Line for User Support: 866-793-4040

Blanket Travel Request Approval Workflow

**Traveler (Initiator)**
Submit blanket travel request
- [How to create a New Blanket Travel Request](#)
- Please note to add Department Chair as first approver in the approval workflow on Concur (click Request Detail then Request Timeline)

**Travel Coordinator**
(Administrative Support Assistant – Carol Yeh)
Ensure blanket travel forms (INF, STD 261, Driver’s certificate) are up to date and reviews request.
**Carol will notify Dept. Chair via Concur when it is ready for approval and will leave comment “ready for approval” in the comments section**

**Department Chair**
Verify blanket travel, confirm budget/ account information, and approve request

**Academic Resource Manager**
Alicia will review chartfields and funding source and send to Ivan for review

**Dean**
Ivan checks for accuracy and confirms funding sources and approves to send it to Dean
Gives final approval on travel request and TR# is issued
**Blanket Travel Request**

**Step 1:** Log into Concur using the CSUF Portal. You will see your Concur dashboard.

Click on **Requests**.

a. **Logging into Concur**

![Concur Portal](image1)

**Step 2:** Click on **Create New Request**.

![Create New Request](image2)

**Request Header**

**Step 1:** Change the Policy to **State Blanket Travel**.

![Request Policy](image3)

**Step 2:** Enter in the Blanket Travel Fiscal Year box: **Blanket Travel FY Year – Year**.

**Example:** Blanket Travel FY 2023-2024

![Blanket Travel Fiscal Year](image4)

**Step 3:** Under *How will you book your travel*, leave it as **Outside of Concur**.
Step 4: Under *Trip Type*, leave it as **In-State**.

Step 5: For Fiscal Year Start Date and Fiscal Year End Date select the Fiscal Year Dates.

Example:

- Fiscal Year Start Date: 07/01/2023
- Fiscal Year End Date: 06/30/2024

**Report/Trip Purpose**

Step 1: Under *Report/Trip Purpose*, leave it as **Blanket Travel (Mileage and Parking)**.

Step 2: Under *Traveler/User Type*, click on **Staff or Faculty**, as appropriate.

Step 3: Under *Purpose*, enter **Blanket Travel** and designate the year as example shows in the comments box.

Step 4: Under *Main Destination City*, enter **Fullerton, California**.

Step 5: Under *State*, leave it as **California**.
Step 6: Under Main Destination Country, leave it as the United States.

Step 7: In the Comments box, enter in Various cities in California.

Step 8: Ensure Division, Department ID, and Fund are listed correctly.
   - “Division” and “Department ID” will automatically be filled out for you.
   - FUND: THEFD
   - Add PROGRAM: 5629

Step 9: Then click on Create in the lower right-hand corner.

Adding Expenses
   - Adding expenses to blanket travel request

Step 1: If you plan to have mileage on your blanket travel request, click on Add and select Mileage.

Step 2: Enter 150 miles in the Distance box. Then click on Save. (If you are a Supervisor or Clinical Coach, please reach out to your Department Coordinator to verify the mileage amount you will be inputting)

Step 3: Once you have filled out all required fields and added your expenses, click on Submit Request.