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

**Travel Coordinator**

(Administrative Support Assistant – Alondra Gonzalez)

Ensure blanket travel forms (INF, STD 261, Driver’s certificate) are up to date and reviews request.

** Alondra 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

Ivan checks for accuracy and confirms funding sources and approves to send it to Dean

**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

Step 2: Click on Create New Request.

Request Header

Step 1: Change the Policy to State Blanket Travel.

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

Example: Blanket Travel FY 2023-2024

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 500 miles in the **Distance** box. Then click on **Save**.

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