

# Concur 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](#)

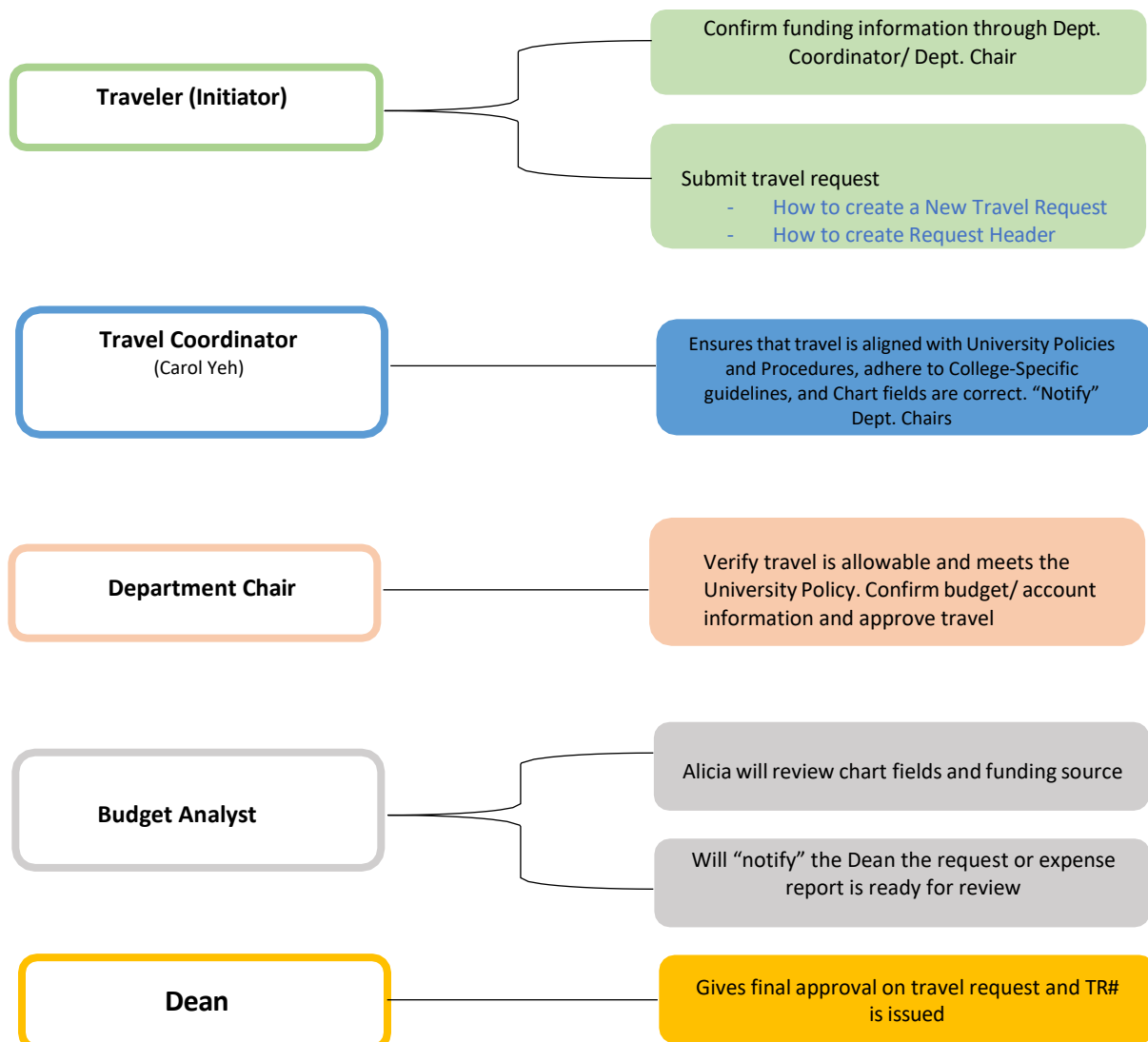
[Concur Trainings](#)

[Concur Video Channel](#)

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

## Approval Workflow for Travel Requests

### College Concur Workflow for Travel Pre-Approval



## Travel Requests

1. Login to Concur using your CSUF credentials
  - a. [Logging into Concur](#)
2. Create a new travel request
  - a. Go to Concur dashboard and click “Requests”, Click “Create New Request”, and complete the request header
    - i. [How to create a New Travel Request](#)
    - ii. [How to create Request Header](#)
      - Request Header Format should be “MMM YEAR CITY, STATE”
      - EX: AUG 2022 Sacramento, CA
  - b. Once you have created your request you can begin filling out the travel information.
    - i. For the section titled “How will you book your travel” please be sure to select “Outside of Concur”
    - ii. If you are including personal dates, please include that in the “Personal Dates” section of the request
      - Please fill out “# of personal days”, “personal dates and locations”
    - iii. Leave a comment in the Header’s comment section the funding sources you will be using. Make sure to also note the specific amount you will be using from each funding source.
    - iv. “Division” and “Department ID” will automatically be filled out for you. Please make sure the funding matches the funding you will be using for your request.
      - **If you do not know your account information, please reach out to your Department Coordinator or Department Chair.**

**\*\*If using Dean’s Travel Award to fully fund your trip you will have to change the account information at the request header level to the following funding: 10370 THEFD 5278 \*\***

1. You will need to change the “Department ID” to **10370 (Ed Doctorate)** and input **5278** in the “Program” section
2. You can then click “Save”
3. Your expenses will automatically be charged to the Dean’s Travel Award once you have added all your expected expenses

**\*\*If you are using the Dean’s Travel Award, please be sure to submit your APA Citation in the “Comments” box\*\***

- A travel request using the Dean’s Travel Award will be considered incomplete without the APA citation and will be sent back to you.

- v. Once all sections have been filled out you can click “Create Request”
- c. You can now begin to add expenses to your travel request
  - i. [Travel Request Navigation](#)
  - ii. Click “Add” and scroll through list of expenses and select the expense you are looking for

- iii. Fill out the “Date”, “City”, “Detail”, “Amount”, “Currency”, and “Comment” sections
  - iv. Once all sections have been filled out click on “Save”
- d. [Adding Expenses to Travel Request](#)

**\*\*Concur only accepts stateside funding. If your trip is fully funded by ASC or Philanthropic funds you will continue to use the old form process\*\***

**\*\*If using split funding that is stateside you will have to allocate each expense to the different funding accounts you will be using\*\***

**EX: You are using \$1000 from the Dean’s Travel Award and \$500 from startup funds. You will need to allocate each expense to the different funding accounts.**

- To allocated expenses follow the steps below:
  4. Click on the box on the left-hand side next to the expense and check it off
  5. Click on “Allocate” button below “Expected Expenses”
  6. Select “Add” and from here you will be able to edit the funding
  7. You can change the “Department ID” and add “Class” or “Program” codes depending on which account you will be using.
  8. You can then click “Update” and “Save”
  9. The allocation will update, and you will see “Allocated” next to each expense
- [How to Allocate Travel Expenses](#)

**NOTE:** If funding is Auxiliary funding, you will not be able to make those changes in the travel request. You will need to wait until after the trip to complete the travel expense report.

**\*\*If using split funding that is split between stateside and ASC or Philanthropic funds, only one travel request needs to be submitted. On the Concur travel request, you will need to include an extra expense type named “(660899) AUX ORG Split Funding”.**

-In the amount you would like to request from this funding source. Note the account number, any special approvals needed, if funds will only be used for a specific expense, and any other information related to the funding source in the comment section.

**\*\* If expenses exceed the approved amount for the total cost of your travel request you will have to make an adjustment in the expenses section \*\***

- You will need to add an expense under the “other” category and click “adjustment”
- You will fill out the “Transaction Amount” with the amount your expenses have exceeded available funding
  - o EX: Dean’s Travel Award is \$2,000 but the request has come out to \$2,500
    - You will put “ -500” in the transaction amount
- You can add a comment that says, “Cannot exceed (AMOUNT)” and click save

- The page will refresh, and you will see the new estimated amount adjusted on your request. The total should then match the funding amount you have available.
  - [How to Adjust Expenses with Amount Not to Exceed](#)
3. Once you have created your request and added expenses, you will need to upload the following forms into Concur:
    - a. Travel estimate form
    - b. University Related Travel Form (Missing Class Form) \*\*Must be signed by Department Chair
    - c. Conference flyer with dates of conference
    - d. Registration fee chart for the conference
    - e. If presenting, invitation letter(s) to present
    - f. If special award or grant funding awarded, email with approval amount and chart-fields
    - g. If staying at a conference hotel, a flyer/screenshot from the conference that lists the hotel
    - h. If international travel, you will need international travel insurance. This will need to be requested and reviewed by Risk Management first before submission of travel request. Email approval from Risk Management will need to be attached. [Risk Management Insurance request](#)
    - i. \*Receipts are not attached on the travel requests, it will need to be attached on the expense report
    - j. [How to upload Travel Request Attachments](#)
  4. Once you finish adding expenses and review your request you can now submit for approval. Make sure to press the submit button at the top right and ensure you receive a pop up that confirms you have submitted your request.
  5. Travel Coordinator will review to ensure all forms and information is correct. If request needs to be edited, you will be notified. Once request is ready, travel coordinator will indicate the request is ready for dept. chair review/approval.
  6. The request will then move through the college workflow.
  7. Once it has been approved, the Request ID on the request is your Travel Authorization Number and can begin booking your trip. Once the request has been approved, the status of the request will show "Approved".

### **Directions for Department Chairs**

Once you have received your faculty's travel request please do **not** approve until the Travel Coordinator has reviewed it. When the request is ready for your review and approval, you will see an email notification and a green checkmark will be present next to the request or expense report.

## **Travel Expense Reports (Claims for Reimbursement)**

1. You must submit your expense report within 60 days after returning from your trip.
2. Login to Concur using your CSUF credentials
  - a. [Logging into Concur](#)
3. Click on “Requests” tab and find the request you would like to create an expense report for and click into it
  - If you cannot find the request, please make sure the view is filtered to show all requests. (Use the drop down at the top left of the home page. Select “Requests”, and use the “View” drop down option on the right side when you view requests under “Manage Requests”)
4. Once it loads, click on the “Create Expense Report” button in the upper right
  - i. Click on “Report Details” and scroll down to “Report Header”
    - You will need to manually fill in “start time”, “main destination city” and “end time”
    - Once you have filled out all the fields click the “Save” button
5. Your page will refresh, and your expense report has now been created with your travel request already linked
  - a. [How to Create an Expense Report Through Travel Requests](#)

**\*\*If using Dean’s Travel Award to fully fund your trip you will have to change the account information at the report header to the following funding: 10370 THEFD 5278 \*\***

1. You will need to change the “Department ID” to **10370 (Ed Doctorate)** and input **5278** in the “Program” section
    2. You can then click “Save”
    3. Your expenses will automatically be charged to the Dean’s Travel Award once you have added all your expected expenses
6. Once you finish adding expenses/itemizing, attaching receipts for expenses, and reviewing your report, you can now submit for approval.
  - a. Meals and Incidentals no longer need receipts. This expense is now per diem. As of 1/1/2024, there is a new process of entering Meals and Incidentals into the expense report. Please refer to the guide on [COE Travel website](#).
7. Make sure to upload the program or agenda from the conference.
8. The travel coordinator will review to ensure all information is correct and will indicate if report is ready to be approved or revisions are needed.