**Concur Travel Request Quick Guide**

To Access Concur: Click Here

**What is Concur?**

Concur is a comprehensive web based tool that integrates travel request and expense reporting with a complete travel booking solution for higher education business travel. Concur allows for the electronic processing of the following:

- Travel Reimbursements via EFT or Mail
- US Bank Travel Ghost Card Transactions (airfare)
- Domestic & International Travel Approvals

**Concur Modules**

Concur includes three modules which should be used to perform different types of activities in the system.

- **SAP Concur**
  - Requests
  - Travel
  - Expense

**Travel Request** is required to obtain preapproval of your travel prior to making any travel reservations and completing an Expense Report.

**Concur Travel** should be used to book airfare, car rental reservations, and hotel reservations through the University’s travel management company (TMC), Christopherson Business Travel (CBT) by using the online booking tool or booking directly with a CBT agent.

**Expense Report** is required to request reimbursement for out-of-pocket expenses, and to reconcile any university paid transactions including US Bank Travel Ghost Card transactions.

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**Creating a Travel Request**

An approved Travel Request using the Concur Request Module is required for anyone traveling on university business prior to booking any travel reservations and completing an Expense Report.

To create a new Travel Request, on the Concur Homepage Menu, click on Requests > New Request.

- **Travel Request consists on the following Tabs:**
  - Request Header
  - Segments
  - Expenses
  - Approval Flow
  - Audit Trail

1. **Request Header** — fill in all required fields (boxes with red bars) related to your travel. Most fields have you make selections from a drop-down list.
   - **Request/Trip Name:** Enter Conference/workshop name if applicable.
   - **If you indicated Traveler Type: 1-Faculty, the Box If Faculty, is class covered?** is a required field. This is asking if you have a substitution/plan for your courses while you are away travelling.
   - **Add Comments** if there is anything else you want your approvers to know in regards to your travel.
   - Indicate appropriate chartfield information for your Travel Request. Please see Allocations section for more information.
   - **For international or Group Travel, and you want to request a Travel Advance, please contact Travel Desk to activate the Travel Advance feature on the Travel Request.**
   - Once header is complete, click on Segments Tab.

2. **Segments** — there are 4 segments (Air, Car Rental, Hotel, Rail) you will need to provide estimates for if applicable to your travel. If you are booking travel outside Concur, please still populate these segments if applicable. Once all segments are completed, click on the Expenses Tab. Fill out all segments regardless of how you are booking your travel.

3. **Expenses** — Segments will now appear in your list of expenses. Continue to provide estimates for the following additional expense types available:

   - Since not all expense types are available in Request, use Expense Type - Other Expense to enter an estimate for those expenses you don’t see listed. Add a comment of what the estimate is for.
   - When choosing either Meals & Incidentsals – International, Alaska & Hawaii or Meals – Domestic Expense Types, the system will calculate the max daily rate by the number of days of travel. This is only for estimates and you will indicate the actual amounts on the Expense Report.
Approval Flow
To see who is approving your Travel Request or to see where your Request is in the workflow, open the Travel Request, then click Approval Flow Tab.
- “Reportsto” Approver name will be populated.
- Budget Approver Name will not populate until it looks for a Budget Approver after your “Reportsto” Approver approves.
- Once approved, the date and time of approval will populate.
- Approvers have 6 calendar days to approve a Travel Request. Otherwise it will move on to another Approver.

Audit Trail
By clicking on the Audit Trail Tab of the Travel Request, it will show you all actions including a description of the action for that particular Travel Request. This includes any changes made to the Travel Request as well as all approvals.

Adding an Attachment
If you need to attach a document to your Travel Request, you can do so using the Adding an Attachment option.
1. Click on the Attachments > Attach Documents in the right hand corner of the Travel Request.
2. Click Browse to find your file/s and attach any documentation you want to include with your Travel Request. Once you found your file, click Open.
3. Then click Upload.
- For International Travel – Complete and attach Request for Foreign Travel Insurance Program (FTIP) Coverage Form to the Travel Request.
- Please note: Your Attachments will not copy over to your Expense Report so you will need to attach again to your Expense Report if needed.

Submitting Travel Requests for Approval
After you have completed the Request Header, Segments and Expenses tabs, you can submit your request by clicking orange Submit Request button.
- You can also click on Print/Email a Travel Request. A PDF version will pop up and you can make your selection to print or email a copy. It will ask you for an email address.

Recalling/Canceling a Travel Request
1. Click on Requests > Manage Requests, then click on the name of your Request.
2. Click Recall. Then, Yes to confirm.
3. Once recalled, you can make changes, then submit again for approval.
4. Once Travel Request is fully approved, you can no longer recall. But you can cancel the request at anytime. If you need to make changes to a fully approved Travel Request, you will need to cancel the Travel Request and then start a new one.

Creating a Blanket Travel Request
A Blanket Travel Request is acceptable for local travel (mileage only) with no overnight stay.
- Your Blanket Travel Request can be on a fiscal year basis and you must complete an Expense Report each month when there is travel from your approved Travel Request.
- Travel Request/Trip Name should indicate Blanket Travel and the Fiscal Year.
- Choose Multiple Locations (Mileage Only), California as your Destination City/State.

Allocations
Your default chartfield will appear on each Travel Request Header. The default fund is NGOO1. Your Dept. ID will default to your Dept. ID from HR. You can edit the chartfield at the Request Header.
- If you need to allocate an expense to a different chartfield than indicated on the Request Header:
  1. Select the transaction you need to allocate from the expense listing.
  2. Click Allocate near the lower right corner of the Expense Details section.
  3. From the Allocate By drop-down list, choose either Percentage or Amount.
  4. Click the field under Fund or Department. Recently used chartfields will display. You may also edit/add Program, Class, or Project fields. Select the desired segments from the drop-down list or key in the code.
  5. If you want to split the transaction among multiple chartfields, click Add New Allocation.
  6. Repeat steps 4 and 5 for each new allocation.
  7. Click Save. The sum of the split transactions must be equal to the total transaction.
  8. In the confirmation message box, click OK.
  9. In the Allocate Report window, click Done.

Approval
To see who is approving your Travel Request or to see where your Request is in the workflow, open the Travel Request, then click Approval Flow Tab.
- “Reportsto” Approver name will be populated.
- Budget Approver Name will not populate until it looks for a Budget Approver after your “Reportsto” Approver approves.
- Approved Travel Requests will automatically close 60 days after the travel end date.

Audit Trail
By clicking on the Audit Trail Tab of the Travel Request, it will show you all actions including a description of the action for that particular Travel Request. This includes any changes made to the Travel Request as well as all approvals.
- It is best to wait till the Travel Request is fully approved, to have the full approval flow documented.

For Questions:
Please contact Fiscal Affairs – Accounts Payable
http://fiscaff.sfsu.edu/accounts_payable/travel
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