

FRESNO STATE

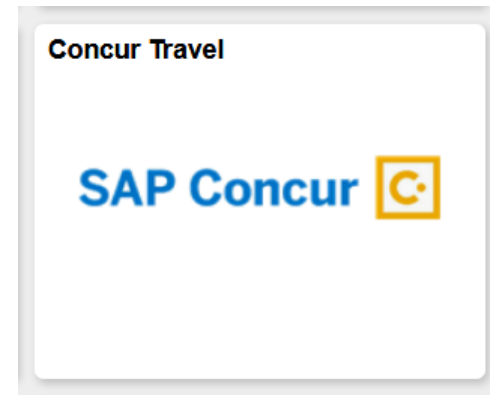
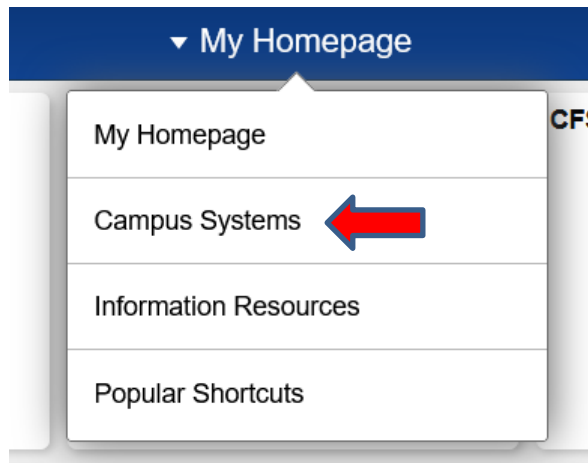
Discovery. Diversity. Distinction.



Completing a Concur Request

- * Travel Requests are for *preapproval purposes* only and are not forwarded to Accounting for reimbursement.

From “My Homepage,” go to “Campus Systems” and select the SAP Concur tile.



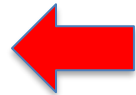
Click the box: Create a New Request

Manage Requests

Request Library

View Active Requests ▾

[+ Create New Request](#)



No requests found

Complete the Request Header (all * fields are required)

Type of Travel *	Insurance Form Completed?	Destination *
International	No	<input type="text"/>
State	Purpose of Trip *	Start Date *
None Selected	<input type="text"/>	MM/DD/YYYY
End Date *	Travel Days	Are any destinations on the High Hazard list? *
MM/DD/YYYY	0	None Selected
Are any destinations on the Travel Warning list? *		
None Selected		
<hr/>		
Class	Project	Program
(00000) Default Sub-Class	Search by Code	<input type="text"/>
Fund *	Department *	
(90000) TF-CSU Operating Fund	(41406) Accounting Services	

Type of Travel: Choose In-State Travel, Out-of-State Travel, or International Travel

Ins Form: Answer 'yes' or 'no' if International Insurance form for international travel was completed and submitted to Risk Management.

Destination: Enter City or Country where business will be conducted. If more than one place, enter additional destinations in the comment box.

State: If domestic travel, enter the State where business will be conducted.

Purpose of Trip: Enter the reason for the trip.

Start/End Date: Enter the departure and return dates of the trip.

High Hazard/Travel Warning fields: Links for these fields are located in the Concur main dashboard under "Company Notes."

Chartfields: Enter the chartfield of the source of funding for this trip. Allocations are not necessary if a single funding source is added to this page.

When all required fields are completed, click the “Create Request” button.

The image shows a portion of a web form. On the left, there are two input fields: the top one is empty, and the bottom one contains the text 'ES' and has a small grey circle with the number '2' next to it. To the right of these is a larger input field labeled 'Program'. Below the 'ES' field is a long, empty text area. At the bottom of the form, there are two buttons: a plain 'Cancel' button and a blue 'Create Request' button. A large red arrow points to the 'Create Request' button from the right side. A vertical scrollbar is visible on the right edge of the form area.

If you need to cancel the Request, or you want to start over, click the trash can.

The screenshot displays the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' and three tabs: 'Requests' (highlighted in blue), 'Travel', and 'Expense'. Below this, there are two sub-tabs: 'Manage Requests' and 'Process Requests'. The main content area shows a request titled 'Concur Conference \$0.00' with a trash can icon to its right. A red arrow points to the trash can icon. Below the title, it says 'Not Submitted | Request ID: 3U3J'. There are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. Below these is a section titled 'EXPECTED EXPENSES' with four buttons: 'Add' (highlighted in blue), 'Edit', 'Delete', and 'Allocate'. A red arrow points to the 'Add' button.

Click the “Add” button to add estimated expenses.

Select an Expense Type and enter the estimated sum total for each expense. Add as much detail as possible. You are only required to enter the estimated State funds used for your trip. Actual expenses will be entered when the Expense Report is created upon your return.

Add Expected Expense

▼ **01. Travel Expenses**

Hotel Reservation

Hotel-Int'l Per Diem

▼ **02. Transportation**

Air Ticket

Car Rental

Ground Transportation

Private Car Mileage

Railway Ticket

Taxi

▼ **03. Meals**

For International Travel, add the \$60.00 foreign insurance fee. This fee is paid for by the sponsoring department and is not reimbursable to the employee.

[Home](#) / [Requests](#) / [Manage Requests](#) / [International Studies](#) / [New Expense: Foreign Insurance](#)

New Expense: Foreign Insurance

Cancel **Save**

* Required field

City

London, UNITED KINGDOM X v

Start Date

01/27/2024 📅

Detail

Insurance fee

End Date

02/02/2024 📅

At

hh:mm A ⌚

Comment

0/2000

Estimated Amount *

60.00

Currency *

US, Dollar v

Save Cancel

For trips on 1/1/2024 and after, add Travel Allowance for meals & incidentals per diem.

Not Submitted | Request ID: 4CJ3

[Request Details](#) ▼

[Print/Share](#) ▼

[Attachments](#) ▼

[Manage Travel Allowance](#) ▼



EXPECTED EXPENSES

Add Travel Allowance

Add

Edit

Delete

Allocate

Click the down arrow to add your Travel Allowance (meals & incidentals per diem)

Travel Allowance cont'd

Travel Allowance



Itinerary [\(Technical Information\)](#)

Itinerary Name * * Required

International Studies Detailed Itinerary ? Without overnight ?

Start Location * Start Date * Start Time *

Fresno, California

+ Add Destination

Arrival Location *

London, UNITED KINGDOM

+ Add Destination

End Location * End Date * End Time *

Fresno, California

Next: Adjust your travel allowance

[Cancel](#) [Next](#)

1. Enter the starting location, the departure date, and the time you will be leaving for your trip.
2. Enter your arrival location. Add a destination if you are traveling to more than one location.
3. Enter the ending location, the arrival date, and the time you will arrive.
4. Click "Next" at the bottom of the page when finished.

Enter Adjustments to Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.


View: [Adjustments](#) ▼ [Show Filters](#)

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Reimbursement Amount ?
All Days Dates: 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sat, 01/27/2024 London, UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$133.50
Sun, 01/28/2024 London, UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$178.00
Mon, 01/29/2024 London, UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$178.00
Tue, 01/30/2024 London, UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$178.00
Wed, 01/31/2024 London, UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$178.00
Thu, 02/01/2024 London, UNITED KINGDOM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fri, 02/02/2024 London, UNITED KINGDOM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
					Total: \$845.50

Exclude any meals provided to you during your trip. If you have nothing to exclude, click “Finish” at the bottom of the page.

To allocate funds to different chartfields, select the expense(s) to allocate on the left side, and click the “Allocate” button.

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#) 

<input checked="" type="checkbox"/>	Expense type↓↑	Details↓↑
<input checked="" type="checkbox"/>	Railway Ticket	London, UNITED KINGDOM - London, UNITED KINGDOM :
<input checked="" type="checkbox"/>	Hotel-Int'l Per Diem	London, UNITED KINGDOM
<input checked="" type="checkbox"/>	Travel Allowances	London, UNITED KINGDOM
<input checked="" type="checkbox"/>	Foreign Insurance	London, UNITED KINGDOM

Select if you want to allocate by “Percentage” or “Amount” and click “Add.”

Allocate

Expenses: 5 | \$1,955.50

Percent

Amount

Amount
\$1,955.50

Allocated \$1,955.50
100%

✔ Remaining \$0.00
0%

Default Allocation

Code

Default

Percent %

100

Add

Edit

Remove

Save as Favorite

Enter the new chartfield and click “Save.”

Add Allocation

+
New Allocation

★
Favorite Allocations

* Required field

Fund * 1

(90000) TF-CSU Operating Fund X ▼

Department * 2

Code ▼ 41408 Q

(41408) Procurement Services

Project

If you will be using the same chartfields frequently, you can “Save as Favorite” for future expense allocations. When the allocations are correct, click “Save.”

Allocate



Expenses: 5 | \$1,955.50

Percent

Amount

Amount
\$1,955.50

Allocated \$1,955.50
100%

✓ Remaining \$0.00
0%

Default Allocation

Code Percent %
Default **0**

Add Edit Remove **Save as Favorite**

<input type="checkbox"/>	Fund↓↑	Department↓↑	Class↓↑	Project↓↑	Program↓↑	Has IRA Funds↓↑	Code↑≡	Percent %
<input type="checkbox"/>	TF-CSU Operating Fund	Procurement Services					90000-41408	<input type="text" value="50"/>
<input type="checkbox"/>	TF-CSU Operating Fund	Procurement Services					90000-41408	<input type="text" value="50"/>

Cancel **Save**

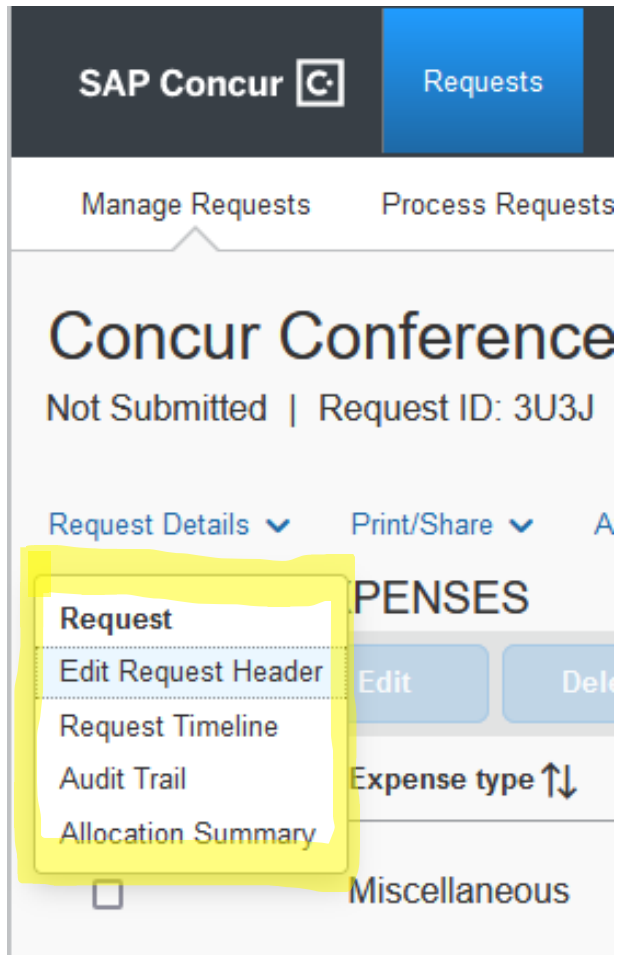
Foreign Insurance

London, UNITED KINGDOM

01/27/2024

\$50.00

“Request Details” Explained



Edit Request Header: To go back to the Request Header (first page)

Request Timeline: This is a snapshot of your electronic workflow.

Audit Trail: Time/Date stamps of your Request activity.

Allocation Summary: A summary of the amounts assigned to each funding source.

“Print/Share” & “Attachments” Explained

Concur Conference \$1,045.00

Not Submitted | Request ID: 3U3J

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

New Request Printed Report

Add

Edit

Delete

Allocate

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Attach Documents

Add

Edit


Delete

Allocate

Save, email, or print a hard copy of the Request by clicking the “Print/Share” button.

Attach informative documents, emails, approvals, etc by clicking the “Attachments” button.

When all estimated expenses have been added, you are ready to Submit your Request. The International Request will be forwarded to the International Risk Manager to begin securing your insurance. A Domestic Request will be forwarded to the first authorized approver.

Concur Conference \$1,045.00 


Not Submitted | Request ID: 3U3J

[Request Details](#) | [Print/Share](#) | [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Miscellaneous	Long Beach, California	10/03/2022	\$100.00	\$100.00 <small>Allocated</small>
<input type="checkbox"/>		Hotel Reservation	Long Beach, California	10/01/2022	\$305.00	\$305.00 <small>Allocated</small>
						\$225.00



Travel Approval Guidelines:

International Travel:


1. Risk Manager
2. Employee's Direct Supervisor
3. Provost/V.P.
4. Cost Object Approver (budget approver)
5. Provost
6. V.P. of Administration/C.F.O.


Domestic Travel:

1. Employee's direct supervisor
2. Employee's Dean/Director
3. Over \$2500.00 – Provost/V.P.
4. Cost Object Approver (budget approver)

You can check to see where your Request report is at any given time by clicking the “Manage Requests” tab and reviewing the status information in the report folder.

The screenshot displays the SAP Concur interface. At the top left, the logo 'SAP Concur' is followed by a 'Requests' dropdown menu. Below this, the 'Manage Requests' tab is highlighted with a blue underline and a red arrow pointing to it from the left. The breadcrumb trail reads 'Home / Requests / Manage Requests'. The main heading is 'Manage Requests' in a large, bold font. Below this is the 'Request Library' section. A request card is shown with the title 'International Study', the date '01/27/2024 | 4CJ4', and a large amount of '\$1,955.50'. A green 'Submitted' badge is visible. At the bottom of the card, the status 'Submitted & Pending Approval' is displayed with a red arrow pointing to it from the right.

SAP Concur  Requests ▾

 [Manage Requests](#)

[Home](#) / [Requests](#) / [Manage Requests](#)


Manage Requests

Request Library

International Study
01/27/2024 | 4CJ4

\$1,955.50

Submitted

Submitted & Pending Approval 

Once you “Submit” your report, no changes can be made unless you “Recall” your report. You can do this by clicking the “More Actions” button.



 Acting as Traveler1, Test

Cancel Request

Recall



FRESNO STATE

Discovery. Diversity. Distinction.

Need help?

Marie Cuningham (559) 278-2911
mariec@csufresno.edu

Or

Virginia Nevarez (559) 278-2877
vnevarez@csufresno.edu