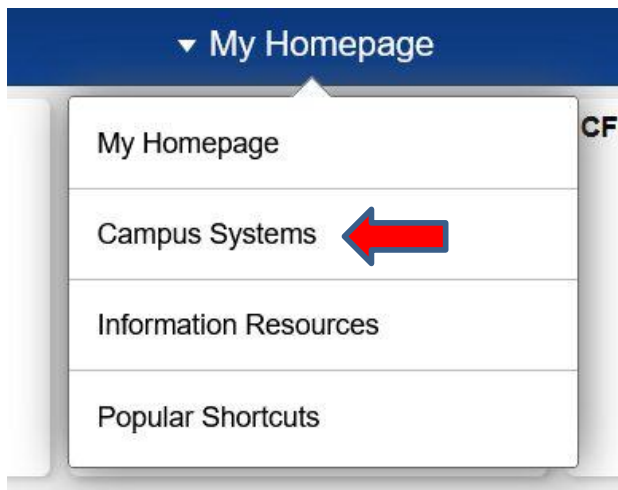# FRESNO STATE

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

SAP Concur [C·] Requests Expense

Manage Requests

Manage Requests

REQUEST LIBRARY   View   Active Requests ⌄

```
        +

Create New Request
```

THERE ARE NO ACTIVE REQUESTS
Click **Create New Request** to create a new request

Complete the Request Header

Type of Travel *	Insurance Form Completed? ❓	Destination *
International ⌄	No ⌄	🌐 ⌄ _____

State	Purpose of Trip *	Start Date *
None Selected ⌄	_____	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 ⌄

Class	Project	Program
▼ ⌄ (00000) Default Sub-Class	▼ ⌄ Search by Code	_____

Fund * ①	Department * ②
▼ ⌄ (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.

Program

2

es

Cancel   **Create Request**

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

SAP Concur

Requests | Travel | Expense

Manage Requests   Process Requests

Concur Conference $0.00 🗑

Not Submitted | Request ID: 3U3J

Request Details ∨   Print/Share ∨   Attachments ∨

EXPECTED EXPENSES

Add   Edit   Delete   Allocate

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

Search for an expense type

˅ 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

To add a chartfield, select which expenses you want to assign to the new chartfield and click "Allocate."

EXPECTED EXPENSES

| Add | Edit | Delete | Allocate |

☑	Alerts ↑↓	Expense type ↑↓
☑		Miscellaneous
☑		Hotel Reservation
☑		Car Rental
☑		Meals-Domestic
☑	💬	Conference/Course Fees

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

Enter the new chartfield and click "Save."

If you will be using the same chartfields frequently, you can "Save as Favorite" for future expense allocations.

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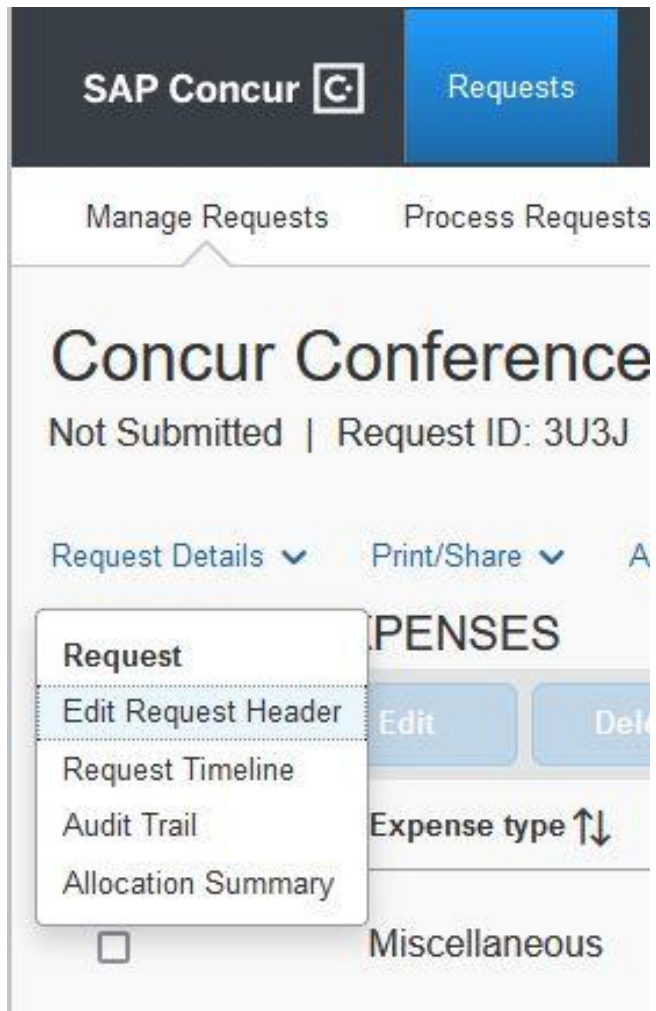
Edit Request Header: To go back to the Request Header (first page)

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 EX   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

Submit Request

Request Details ∨   Print/Share ∨   Attachments ∨

EXPECTED EXPENSES

| Add | Edit | Delete | Allocate |

☐	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
☐		Miscellaneous	Long Beach, California	10/03/2022	$100.00	$100.00 Allocated
☐		Hotel Reservation	Long Beach, California	10/01/2022	$305.00	$305.00 Allocated
						$225.00

Travel Approval Guidelines:

International Travel:	Domestic Travel:
1. Risk Manager	1. Employee's direct supervisor
2. Employee's Direct Supervisor	2. Employee's Dean/Director
3. Provost/V.P.	3. Over $2500.00 – Provost/V.P.
4. Cost Object Approver (budget approver)	4. Cost Object Approver (budget approver)
5. Provost	
6. V.P. of Administration/C.F.O.	

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.

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.
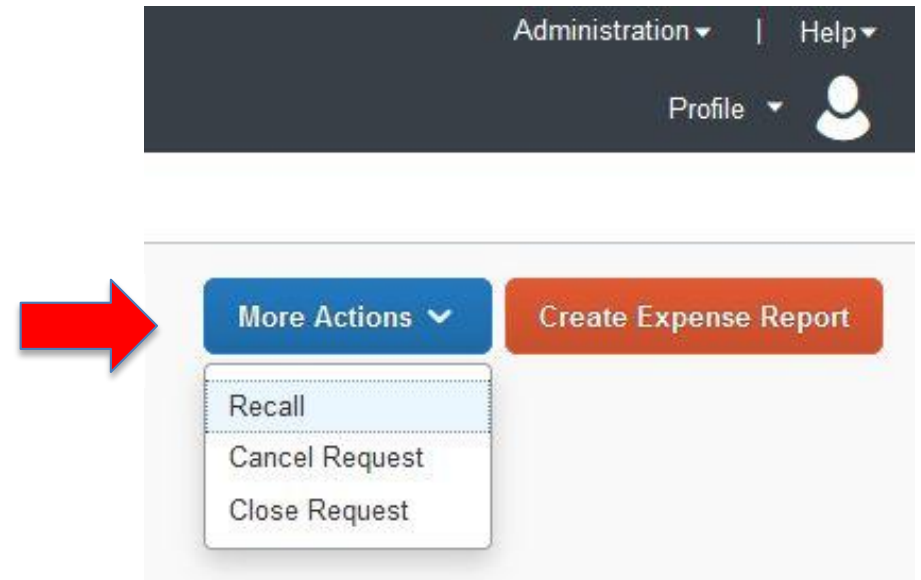
Need help?
Marie Cuningham (559) 278-2911
mariec@csufresno.edu
Or
Virginia Nevarez (559) 278-2877
vnevarez@csufresno.edu