FRESNO STATE

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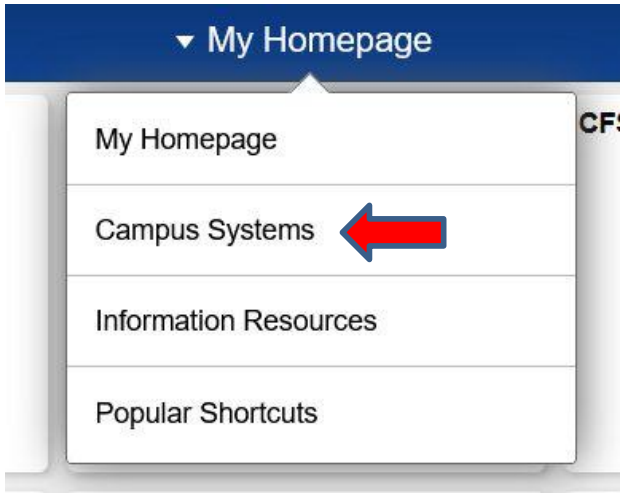
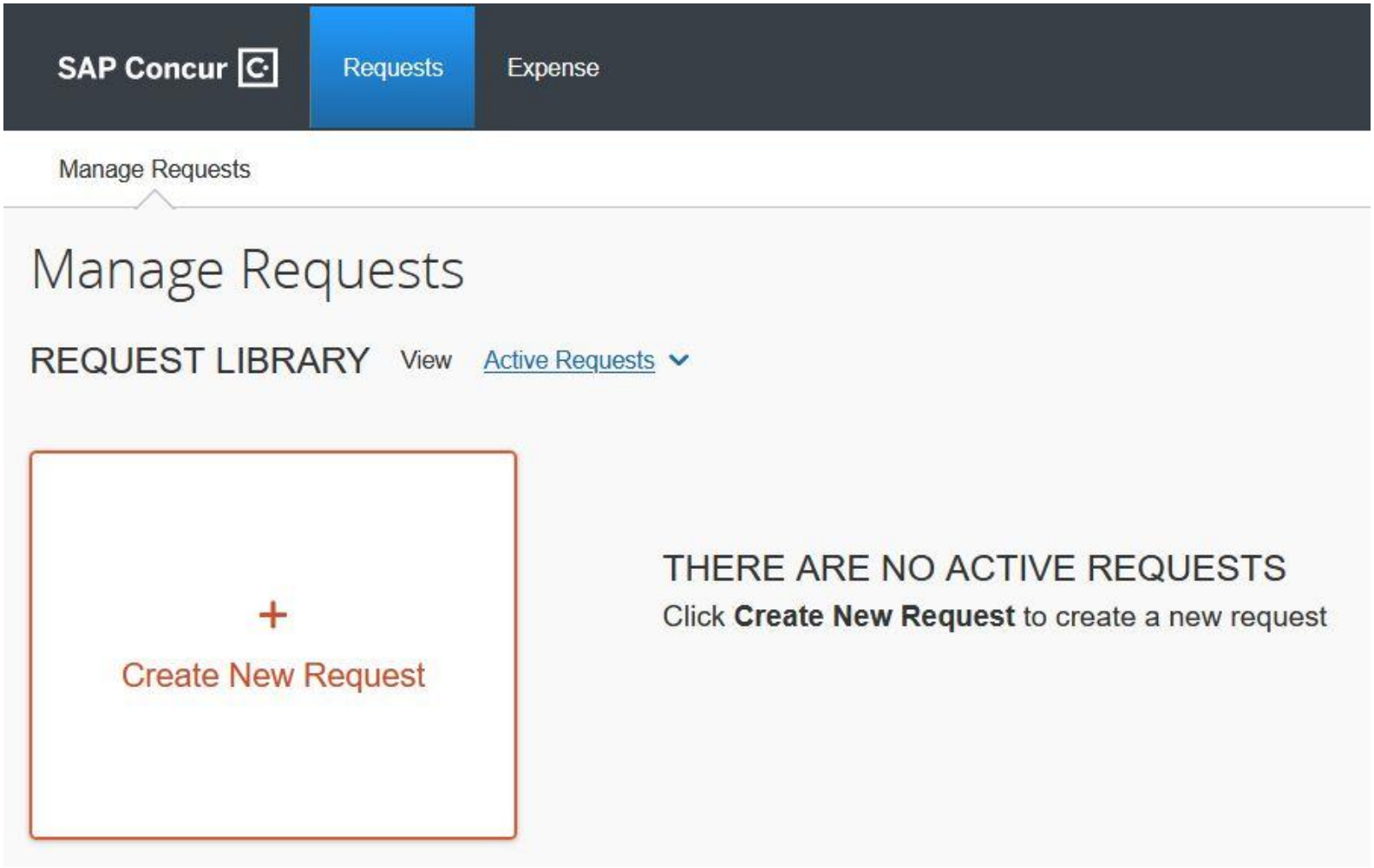
Completing a Concur Request

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

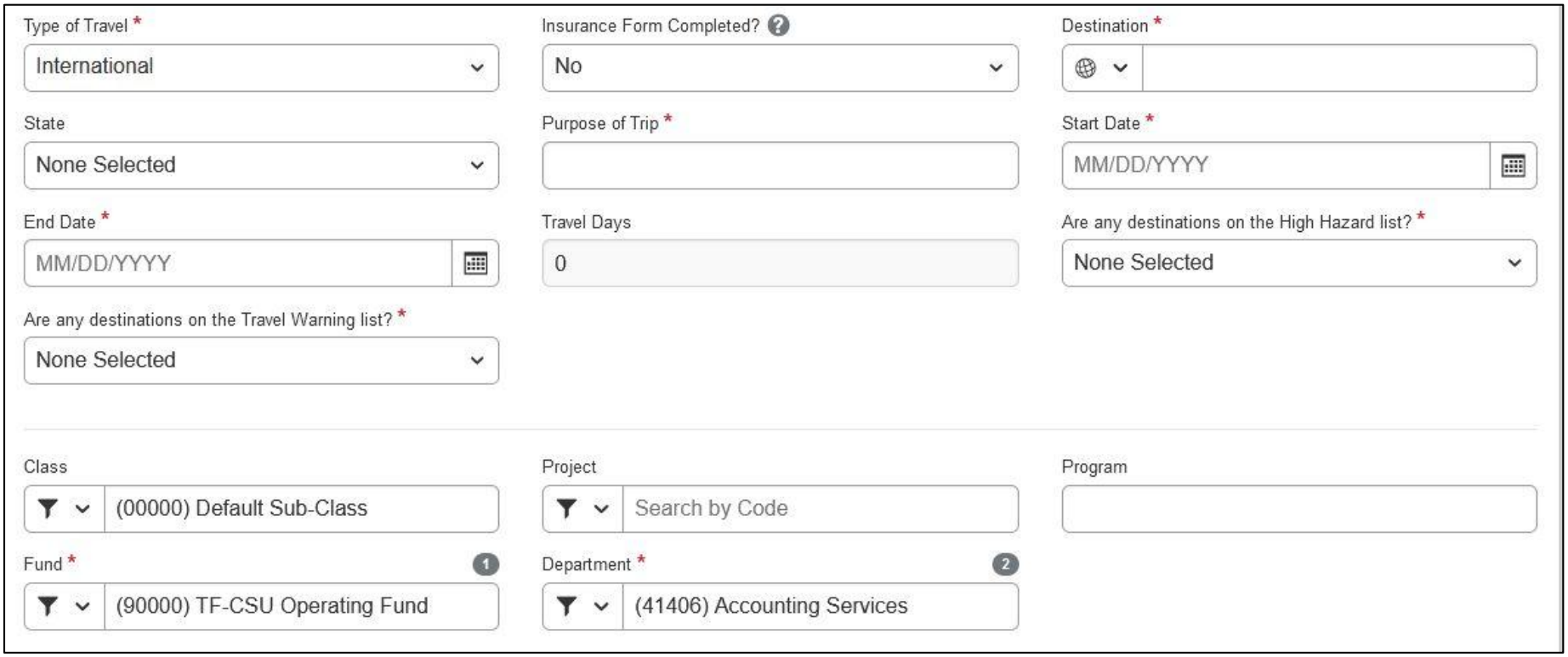
From “My Homepage,” go to “Campus Systems” and select the SAP Concur tile.



Click the box: Create a New Request

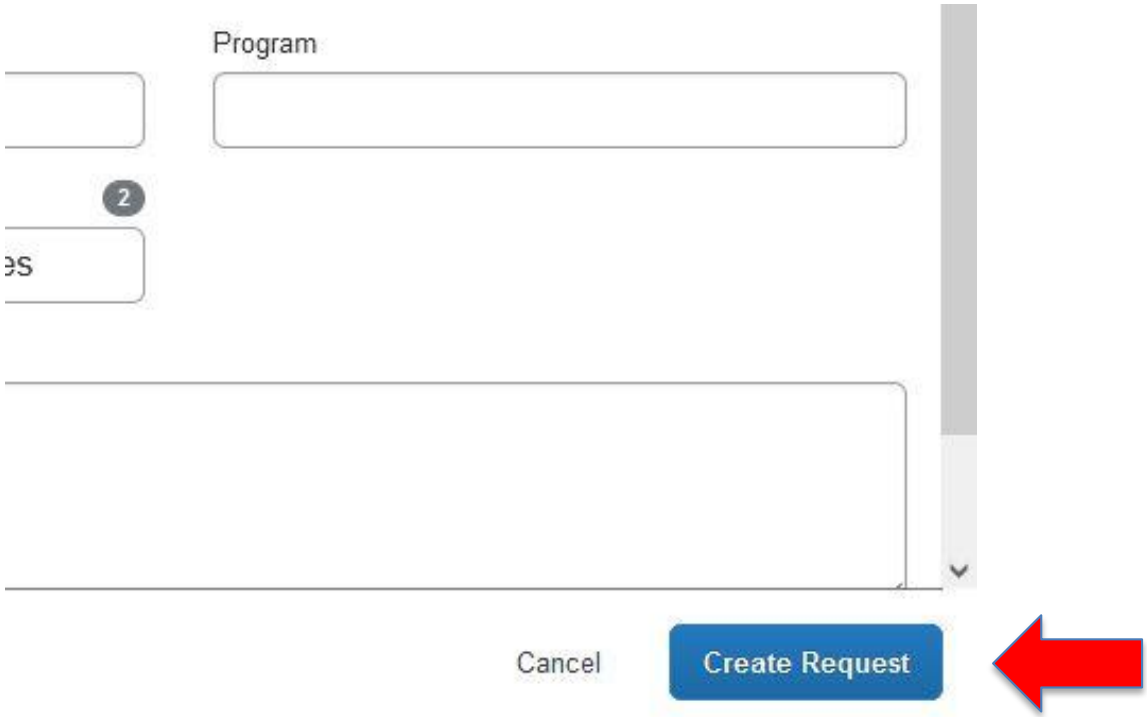


Complete the Request Header

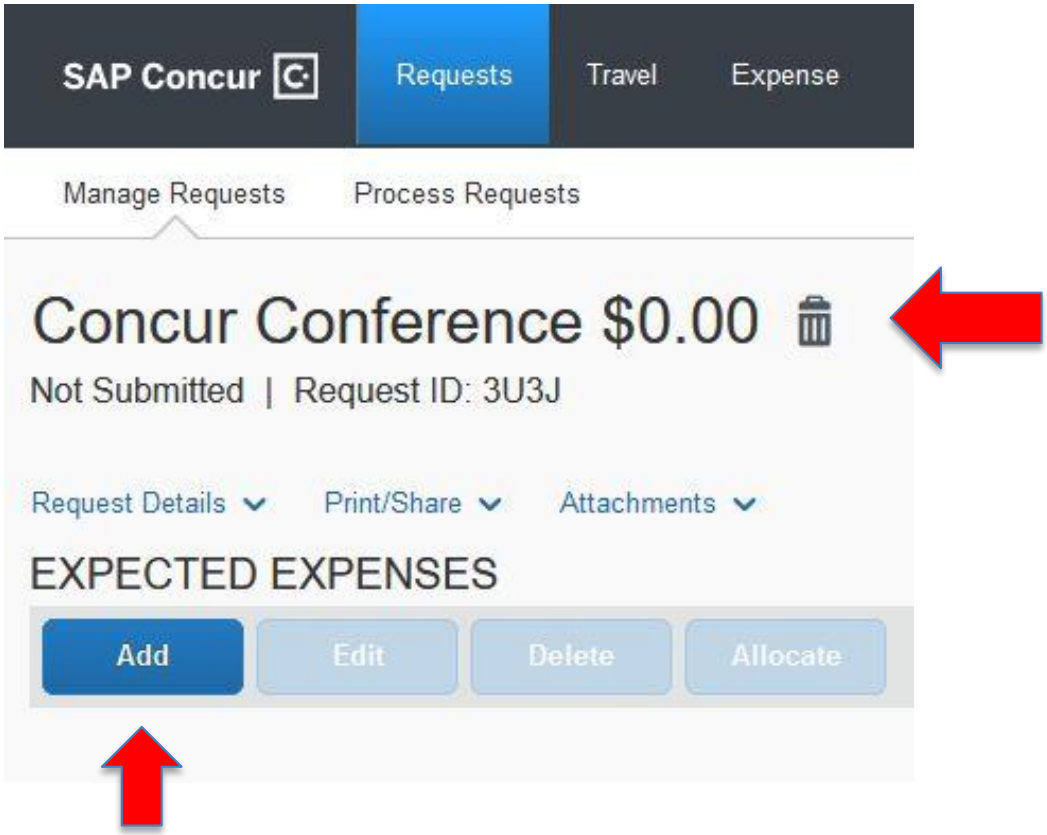


Type of Travel: Choose In-State Travel, Out-of-State Travel, or International Travel
Ins Form: Answer 'yes' or 'no' if International Insurance form for international travel was completed and submitted to Risk Management.
Destination: Enter City or Country where business will be conducted. If more than 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.

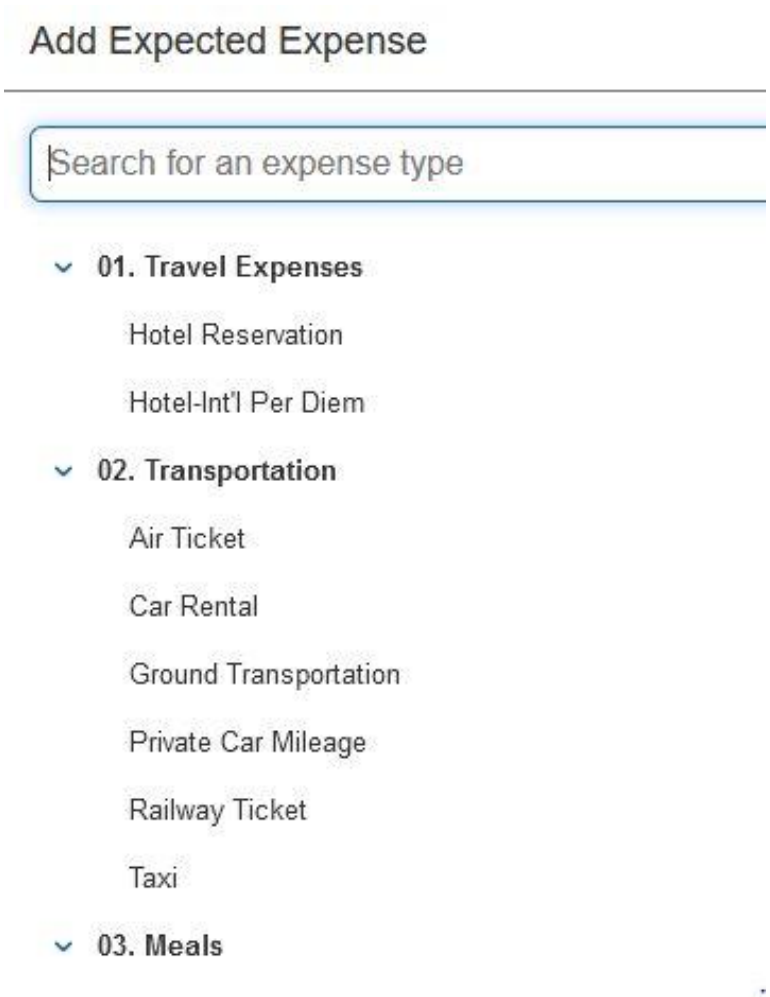


If you need to cancel the Request, or you want to start over, click the trash can.



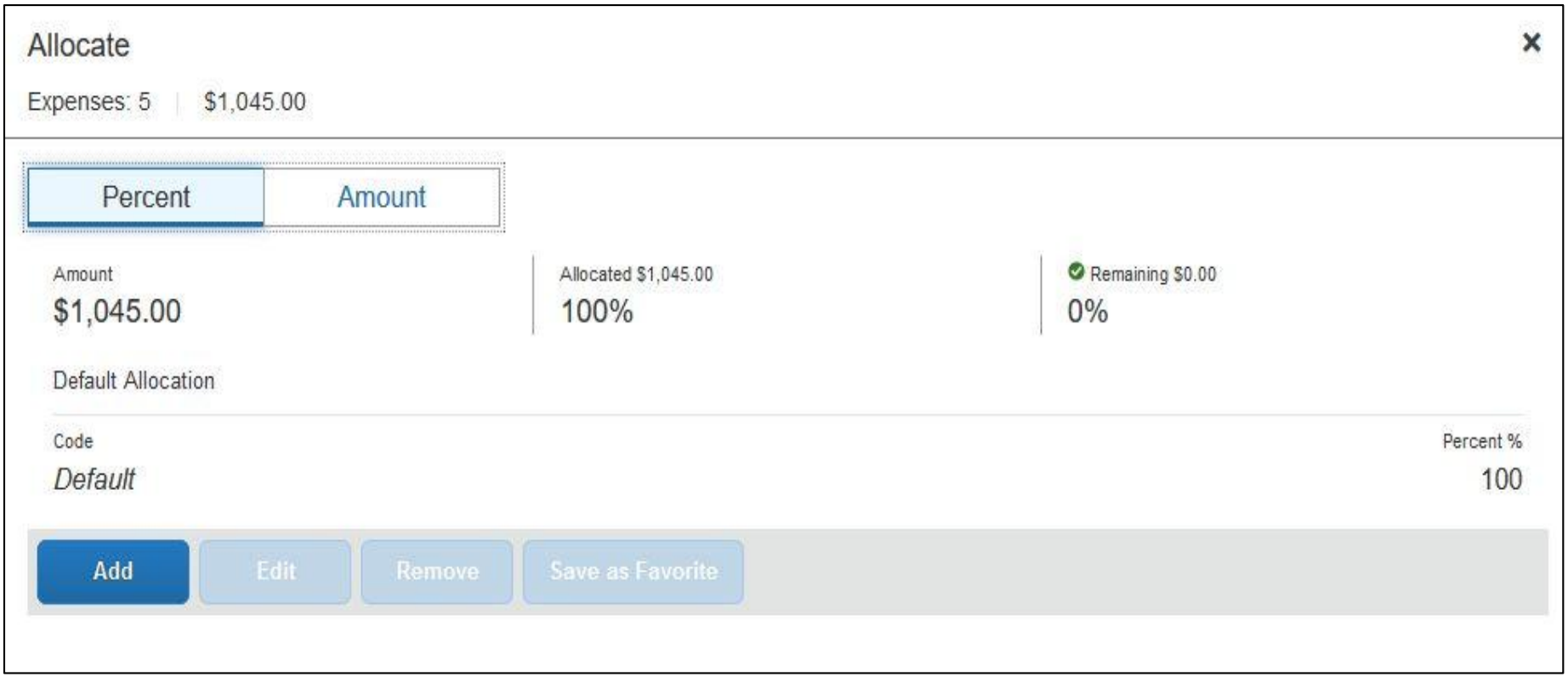
Click the “Add” button to add estimated expenses.

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.

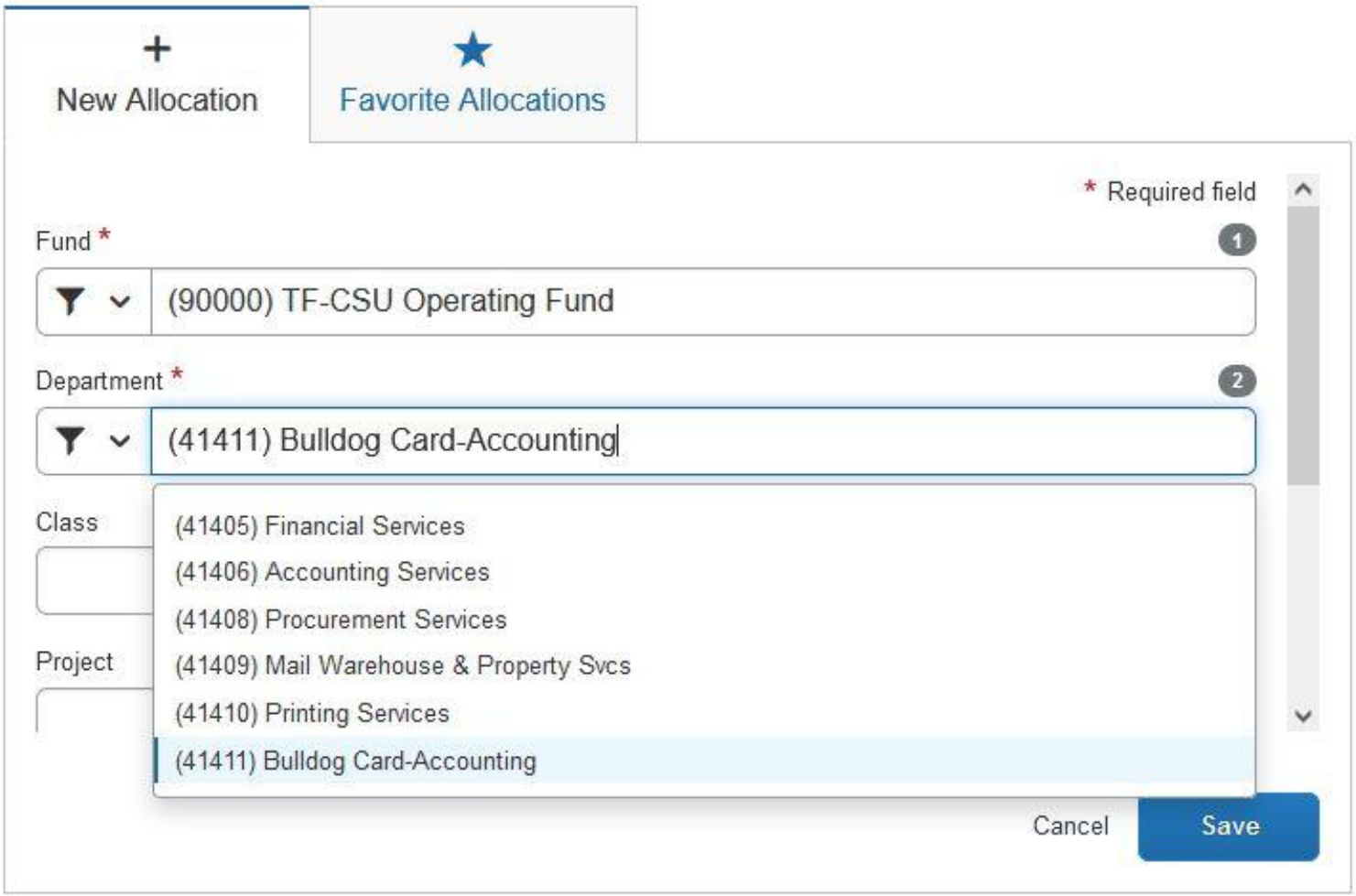


To add a chartfield, select which expenses you want to assign to the new chartfield and click “Allocate.”

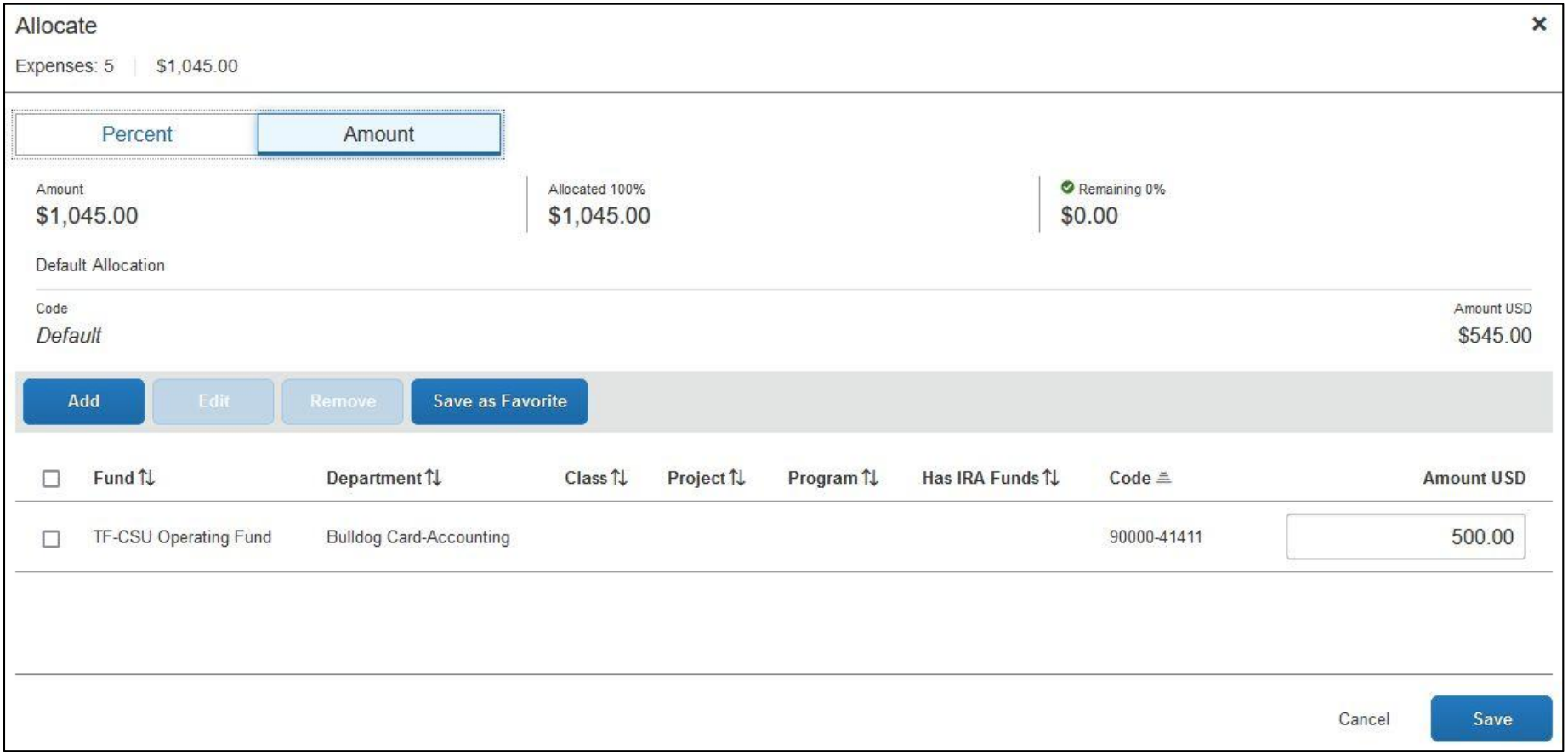
Select if you want to allocate by “Percentage” or “Amount” and click “Add.”



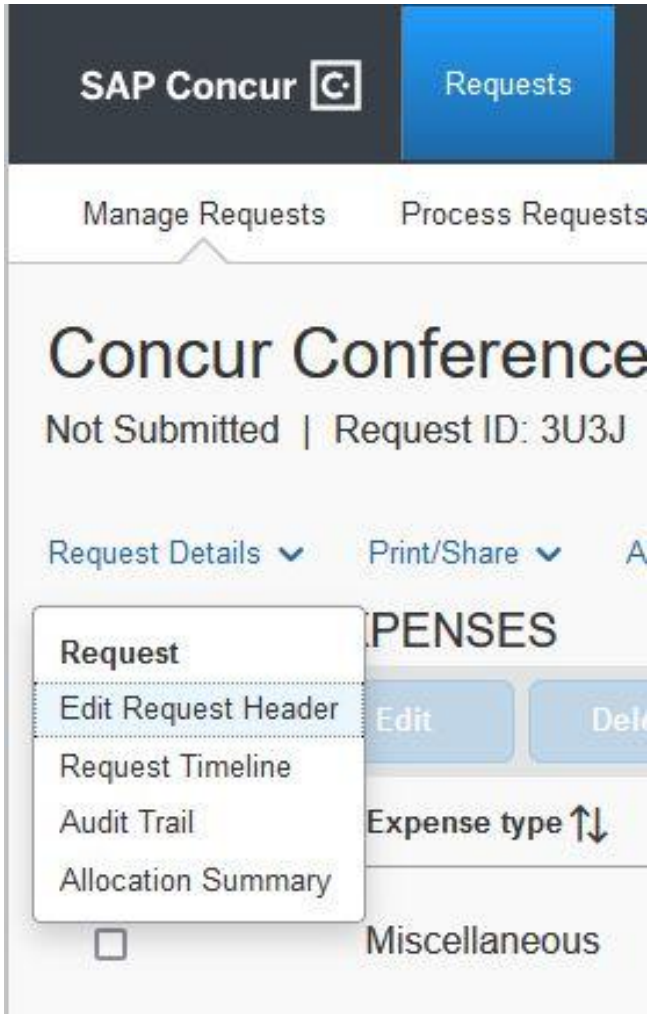
Enter the new chartfield and click “Save.”



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

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.

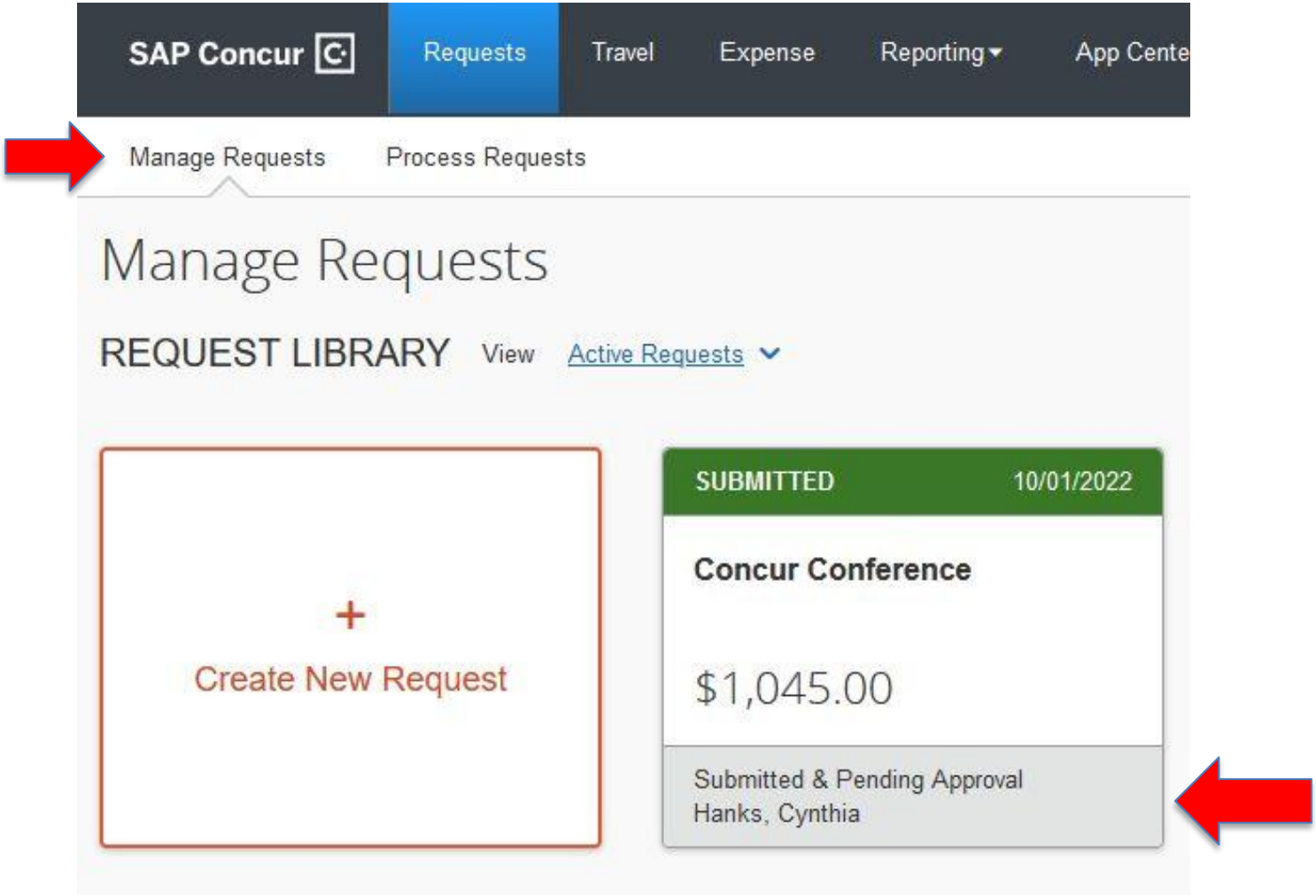
When all estimated expenses have been added, you are ready to Submit your Request. The International Request will be forwarded to the International Risk Manager to begin securing your insurance. A Domestic Request will be forwarded to the first authorized approver.

Travel Approval Guidelines:

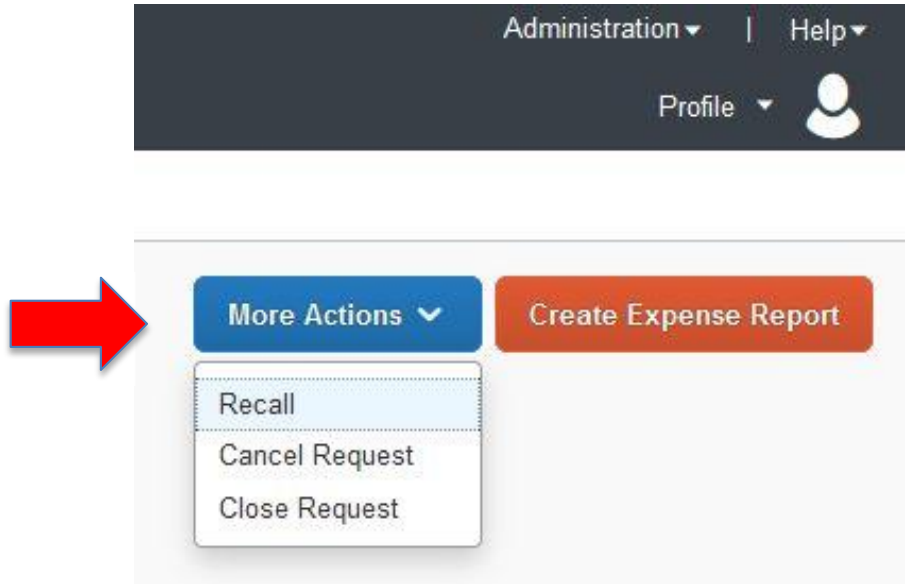
International Travel:
1. Risk Manager
2. Employee's Direct Supervisor
3. Provost/V.P.
4. Cost Object Approver (budget approver)
5. Provost
6. V.P. of Administration/C.F.O.

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.



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.



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Need help?

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