

FRESNO STATE

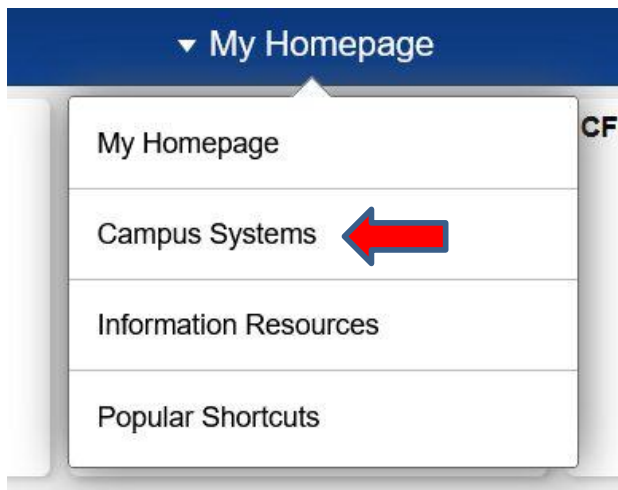
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Completing a Concur Request

- * 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


SAP Concur 

RequestsExpense

Manage Requests

Manage Requests

REQUEST LIBRARYView [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	<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		
Class	Project	Program
(00000) Default Sub-Class	Search by Code	<input type="text"/>
Fund *	Department *	
(90000) TF-CSU Operating Fund ¹	(41406) Accounting Services ²	

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 web form interface. On the left, there are two input fields: the top one is empty, and the bottom one contains the text "PS" and has a small grey circle with the number "2" next to it. To the right of these is a large text area labeled "Program". A vertical scrollbar is positioned to the right of the "Program" field. At the bottom of the form, there are two buttons: a grey "Cancel" button and a blue "Create Request" button. A large red arrow points from the right towards the "Create Request" button.

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 a logo, followed by tabs for 'Requests', '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. Below the title, it says 'Not Submitted | Request ID: 3U3J'. There are three links: 'Request Details', 'Print/Share', and 'Attachments'. Below these links is the section 'EXPECTED EXPENSES' with four buttons: 'Add', 'Edit', 'Delete', and 'Allocate'. A red arrow points to the trash can icon, and another red arrow points to the 'Add' button.

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

▼ **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

AddEditDeleteAllocate

☒ Alerts  Expense type 

<input checked="" type="checkbox"/>	Miscellaneous
<input checked="" type="checkbox"/>	Hotel Reservation
<input checked="" type="checkbox"/>	Car Rental
<input checked="" type="checkbox"/>	Meals-Domestic
<input checked="" type="checkbox"/> 	Conference/Course Fees

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

Allocate

Expenses: 5 | \$1,045.00

Percent

Amount

Amount

\$1,045.00

Allocated \$1,045.00

100%

✓ Remaining \$0.00

0%

Default Allocation

Code

Default

Percent %

100

Add

Edit

Remove

Save as Favorite

Enter the new chartfield and click “Save.”

+

New Allocation

★

Favorite Allocations

Fund *

1

▼ ▼ (90000) TF-CSU Operating Fund

Department *

2

▼ ▼ (41411) Bulldog Card-Accounting

Class

(41405) Financial Services

(41406) Accounting Services

(41408) Procurement Services

Project

(41409) Mail Warehouse & Property Svcs

(41410) Printing Services

(41411) Bulldog Card-Accounting

Cancel

Save

* Required field

^

▼

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

Allocate

Expenses: 5 | \$1,045.00

Percent

Amount

Amount

\$1,045.00

Allocated 100%

\$1,045.00

Remaining 0%

\$0.00

Default Allocation

Code

Default

Amount USD

\$545.00

Add

Edit

Remove

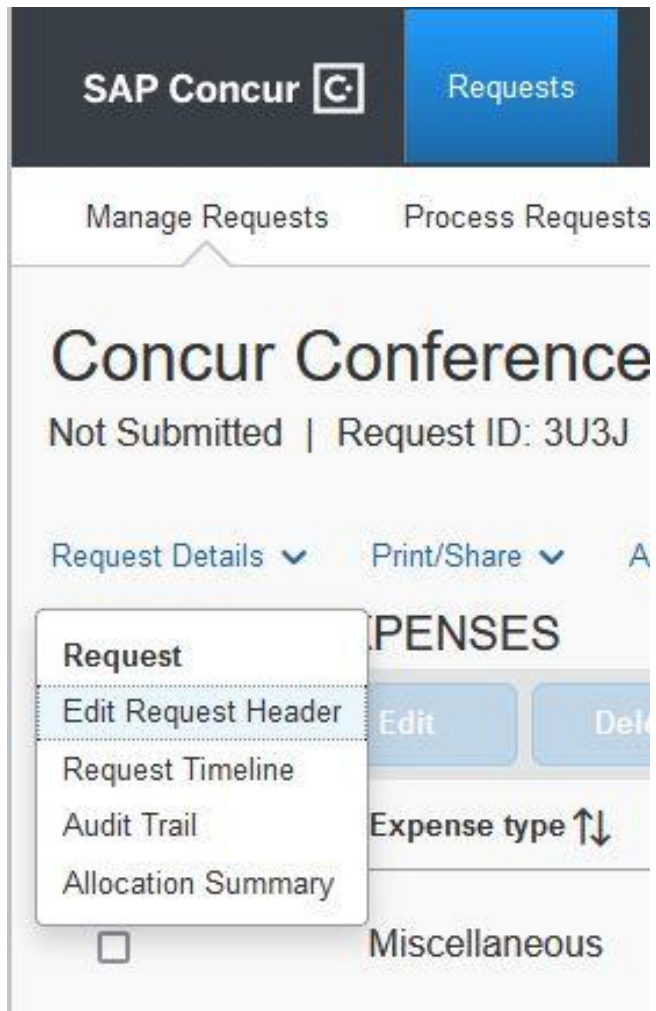
Save as Favorite

<input type="checkbox"/>	Fund ↑↓	Department ↑↓	Class ↑↓	Project ↑↓	Program ↑↓	Has IRA Funds ↑↓	Code ≡	Amount USD
<input type="checkbox"/>	TF-CSU Operating Fund	Bulldog Card-Accounting					90000-41411	<div>500.00</div>

Cancel

Save

“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.

Concur Conference \$1,045.00

Not Submitted | Request ID: 3U3J

Submit Request

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:

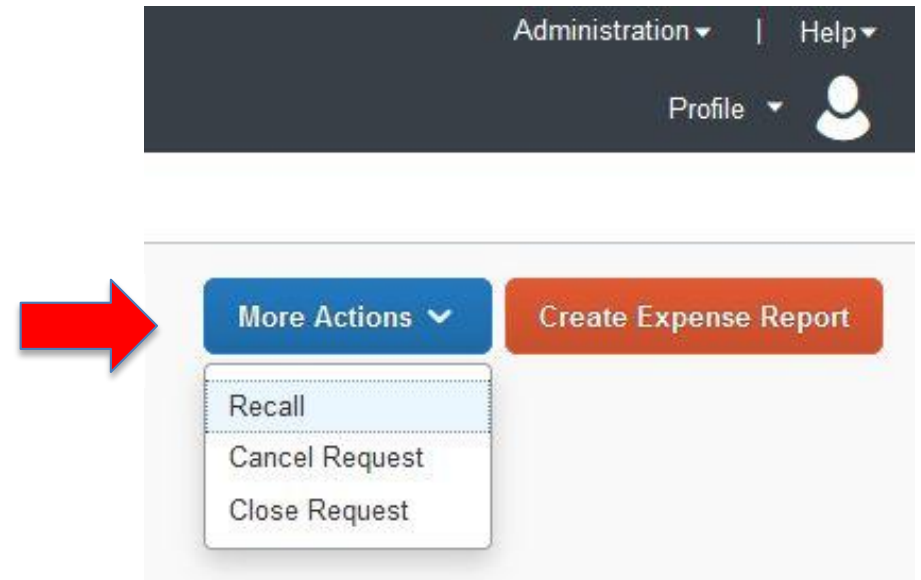
1. Employee's direct supervisor
2. Employee's Dean/Director
3. Over \$2500.00 – Provost/V.P.
4. Cost Object Approver (budget approver)

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 user interface. At the top, a dark navigation bar contains the 'SAP Concur' logo and several menu items: 'Requests' (highlighted in blue), 'Travel', 'Expense', 'Reporting' (with a dropdown arrow), and 'App Center'. Below this, a secondary navigation bar shows 'Manage Requests' and 'Process Requests'. A red arrow points to the 'Manage Requests' tab. The main content area is titled 'Manage Requests' and includes a 'REQUEST LIBRARY' section with a 'View' dropdown set to 'Active Requests'. On the left, there is a large box with a red '+' icon and the text 'Create New Request'. On the right, a request card is shown with a green header 'SUBMITTED' and the date '10/01/2022'. The card title is 'Concur Conference' with an amount of '\$1,045.00'. The bottom section of the card, which has a grey background, indicates the status 'Submitted & Pending Approval' and lists the approver 'Hanks, Cynthia'. A red arrow points to this bottom section of the request card.

SUBMITTED		10/01/2022
Concur Conference		
\$1,045.00		
Submitted & Pending Approval Hanks, Cynthia		

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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