CSU Bakersfield

Concur Reference Guide
Request

Payment Services
Administration East
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Table of Contents

Travel Request 2

Entering a Travel Request 2

Acting as a Delegate 6

Requesting a Cash Advance 7

Altering a Request 8

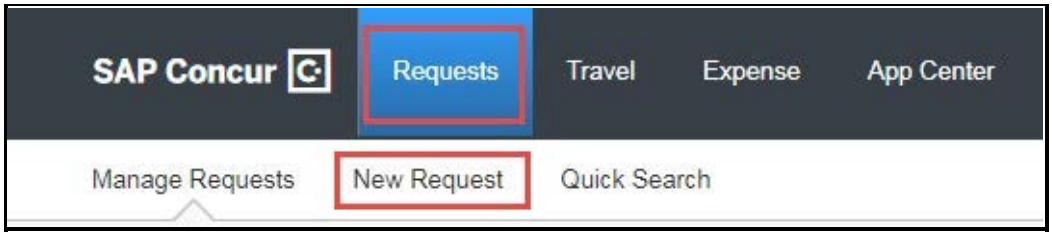
Travel Request

Entering a Travel Request

To create a request:

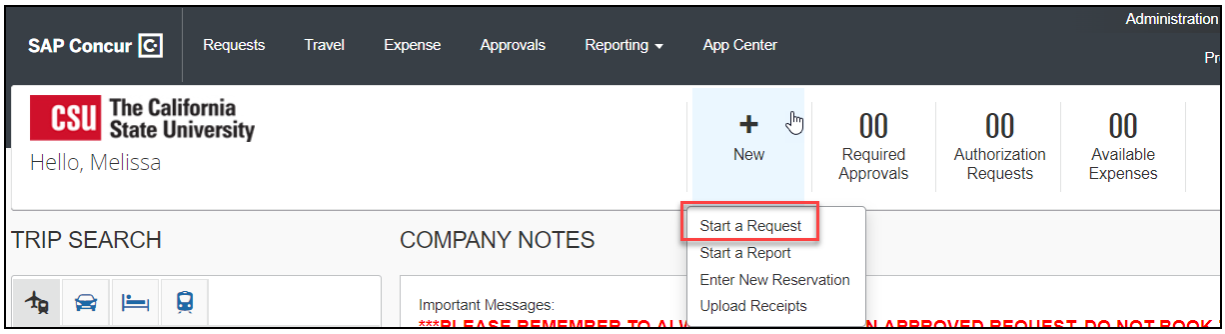
1. Either:

   Click **Requests** on the header toolbar, and then select **New Request** on the request page.

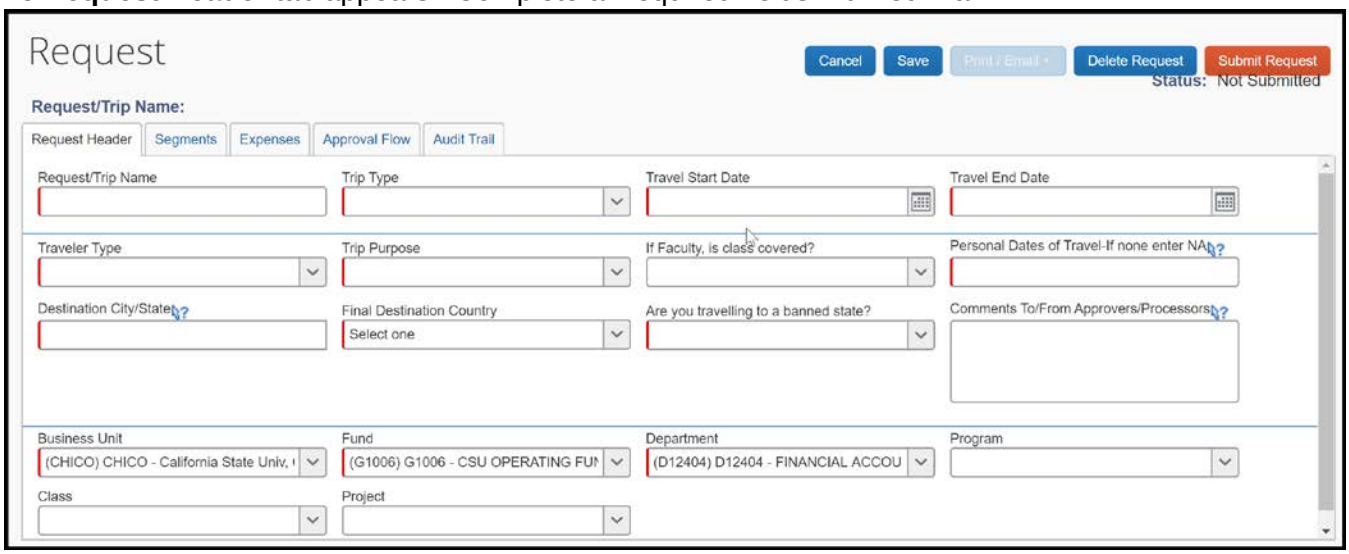


   OR

   On the home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Request**.



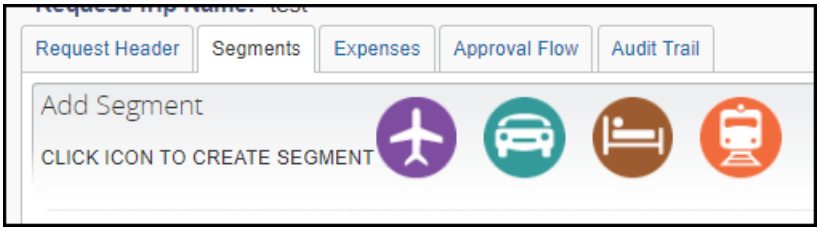
2. The **Request Header** tab appears. Complete all required fields with red mark.



Field Name	Description
Request/Trip Name	Enter a meaningful trip name, similar to a name given to a travel expense report. Your department may implement a standard naming protocol. Suggested naming convention Destination City, State and dates of Travel (ex. Long Beach, CA 5/18-5/21)
Trip Type	Select from the drop-down list
Travel Start Date	Date business expenses start. If personal days precede business dates, please be sure to still set travel start date to the date you leave for the trip.
Travel End Date	Date business expenses end. If personal days are after business dates please be sure to still set travel end date to the date you return from trip.
Traveler Type	Select from the drop-down list
Trip Purpose	Select from the drop-down list
If Faculty, is class covered?	Select from the drop down list.
Personal Date of Travel	Enter all dates which are personal. If none, place NA in field.
Destination City/State	If you anticipate travelling to more than one city and/or country, enter where you plan to spend the majority of your travel time.
Final Destination Country	The country will pre-populate based on the destination city selected.
Are you traveling to a banned state?	Select from the drop-down list
Chartfield	Chartfield String will pre-populate based on your dept. If necessary, changes can be made by traveler or approver.

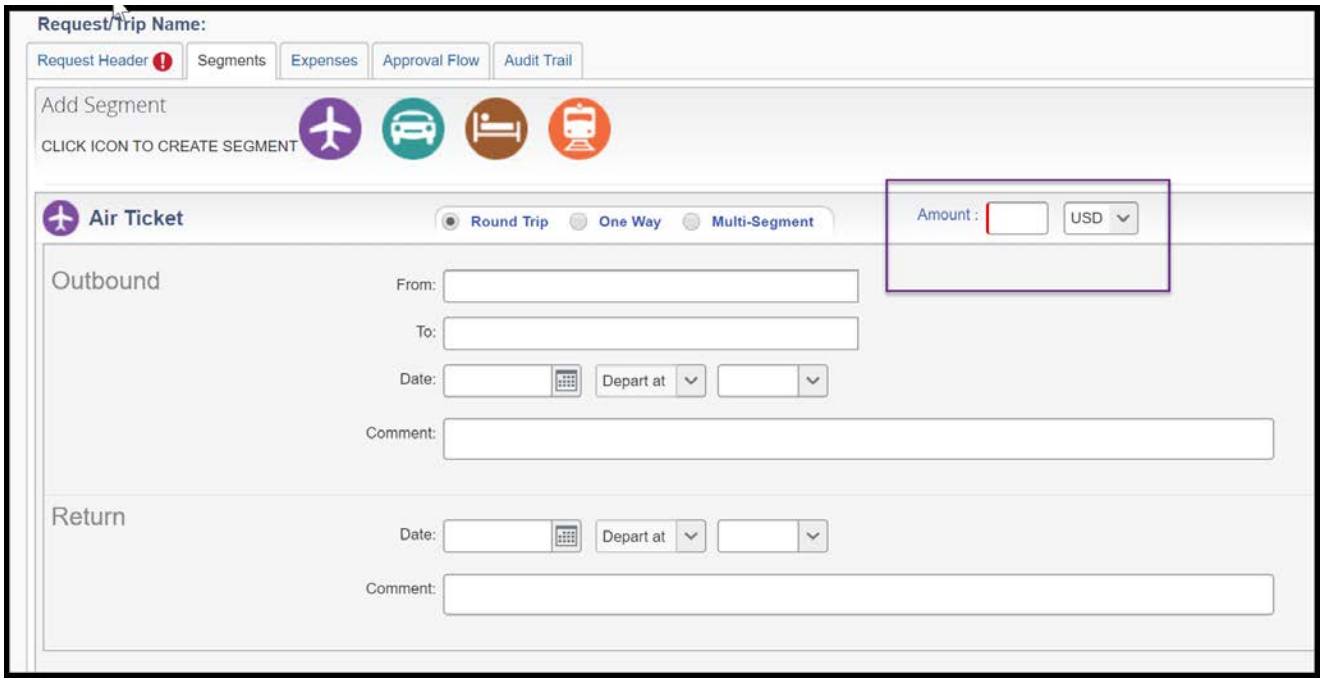
3. Select Save in the top right-hand corner of the screen.

4. Select the **Segments** tab.



Here you can enter the largest travel expenses related to your trip including Air, Car, Hotel or Rail information.

5. For all travel segments related to your trip, enter the estimated cost of the reservation. Add any comments you want your approver or Payment Services to see. (See air example below.) Click **Save**.



Enter any Car, Hotel, or Rail reservations applicable to the trip.

6. Select the **Expenses** tab to enter estimates of the other general travel expenses related to your trip. Meals need to be prorated for business days if any personal days are included within travel dates.

7. Attach supporting information to the request for approver reference. Attachments will be required for the following items:
   - **International Travel -** An Itinerary/Justification, indicating Destination(s) & Trip Purpose.
   - **Conference** – A conference agenda or flyer should be attached
   - **General Itinerary** – Any further trip details that delineate multi-destination stops, or overall information about reason for travel (i.e. information about covering classes).

1. With the request open, select **Attachments** and then **Attach Documents**.

2. In the window that appears, click **Browse** and navigate to the desired folder (wherever you saved the scanned or saved images). Select a file and click **Open**. The file is added to a list under Files Selected for uploading. Repeat the process until all files (up to 10) are listed under Files Selected for uploading. Click **Upload**. Click **Close** when finished uploading.

8. Select the Approval Flow tab to see the routing of your Travel Request.

Once submitted, the request will then route to the employee's supervisor. Based on the chartfield entered on the Request Header tab as well as any additional chartfield allocated at the individual line item level on the Expenses tab, the report will route to the "cost object approver(s)" (minimum travel signature authority) to approve the funding.

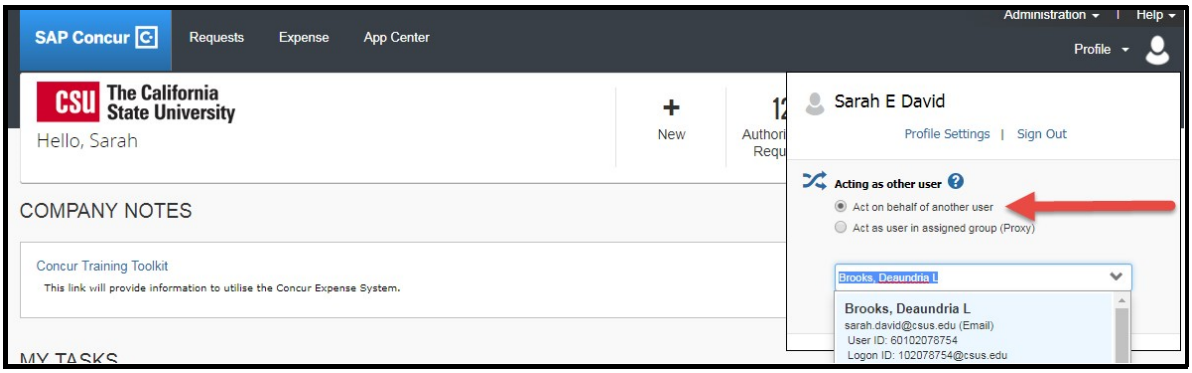
Following these reviews, the International Travel Request and Banned States will route to the Provost for approval. For any War Risk countries it will be routed to the Chancellor's Office of Risk Management for approval.

Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as booking travel, preparing reports, etc.

To work as a delegate:

1. Click **Profile**.
2. Under **Acting as other user**, select the appropriate delegator's name from the drop down.

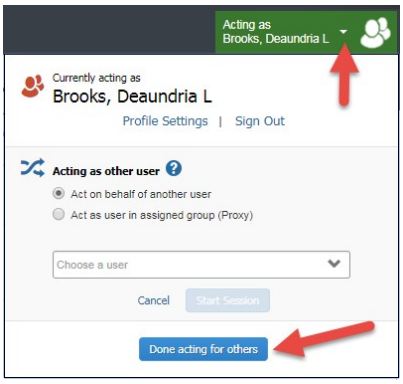


3. Click **Start Session.**

4. Notice that the **Profile** menu now displays **Acting as** and shows the name of the employee you are acting on behalf.
5. You are now officially working on behalf of that person. Complete the normal processes for creating the request as noted in the section above, Entering a Travel Request.
6. Once the Request is built, the Delegate can use the "**Notify Employee**" button to let the traveler know the Request is ready to submit. ***The Traveler must certify and submit their own travel request.***

7. To select a different user, follow the same steps but click a different name.

8. To return to your own tasks, click the down arrow next to **Acting as** and then click **Done acting for others**.



Requesting a Cash Advance

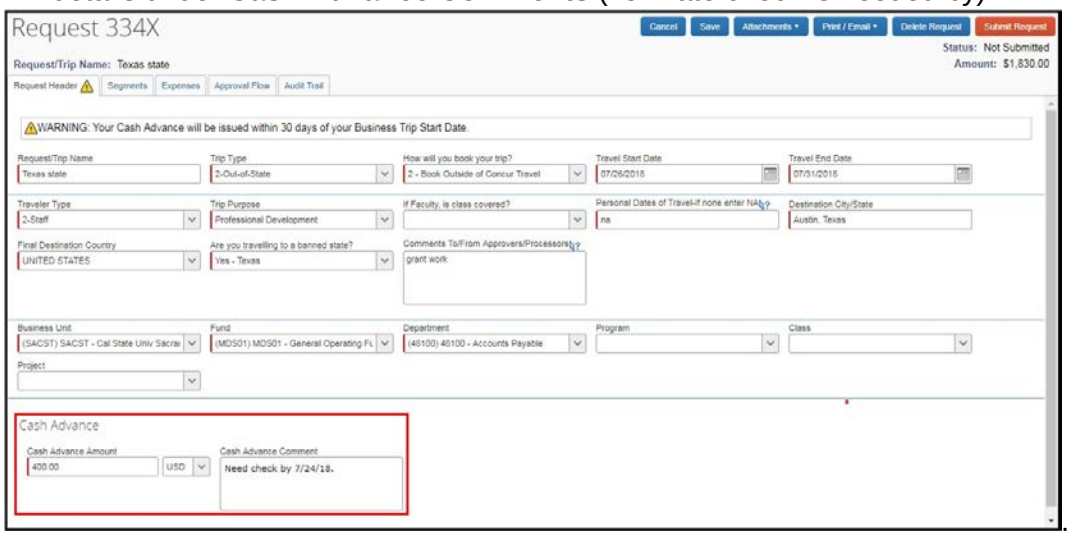
In most cases a travel advance is no longer needed as all travelers should have a Concur Travel card. However cash advances will still be available for hardship reasons and may be entered on the travel request. Cash advances will be issued no more than 10 days prior to the date of travel.

Contact Payment Services if an advance is requested, because the Cash Advance segment isn't visible in Concur until the Concur Admin allows this option for the traveler.

Note: If you do not have a Travel Card, fill out a Corporate Credit Card Request form and allow 2 weeks for delivery. Make sure you allow yourself enough time to obtain the card before your travel dates. https://www.csub.edu/bas/paymentservices/_files/us_bank_concur_travel_card_app.pdf

To Request a Cash Advance:

1. Navigate to **Request**, **New Request**.
2. Complete all required Header fields. Enter amount under **Cash Advance Amount** and any details under **Cash Advance Comments** (i.e. Date check is needed by).



3. Continue to enter estimated **Segments** and **Expenses**.
4. Complete and **Submit Request** as normal.

Altering a Request

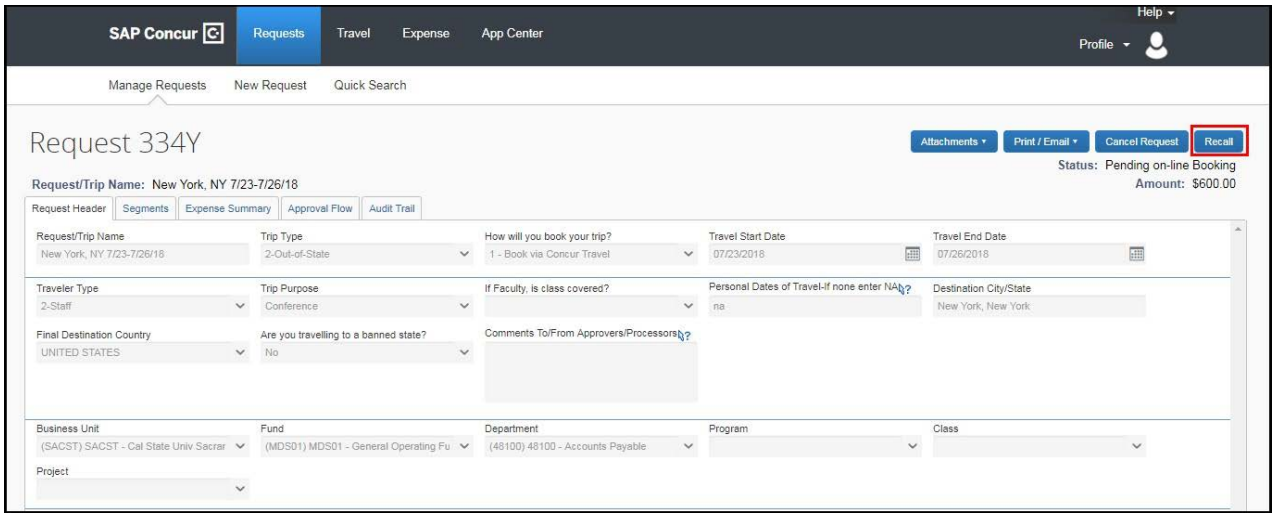
If there is a need to revisit and alter a request, because dates, locations, or significant cost changes are necessary there are a few options.

Recalling a Request

You cannot change, cancel, or delete a Request that has been submitted unless you Recall it first. You can only recall a request that is not in “approved” status. If the request has been fully approved you will need to take different steps as noted below in Replacing Request.

1. Click the **Request Name** from the **Manage Requests** page.

2. Click **Recall.**



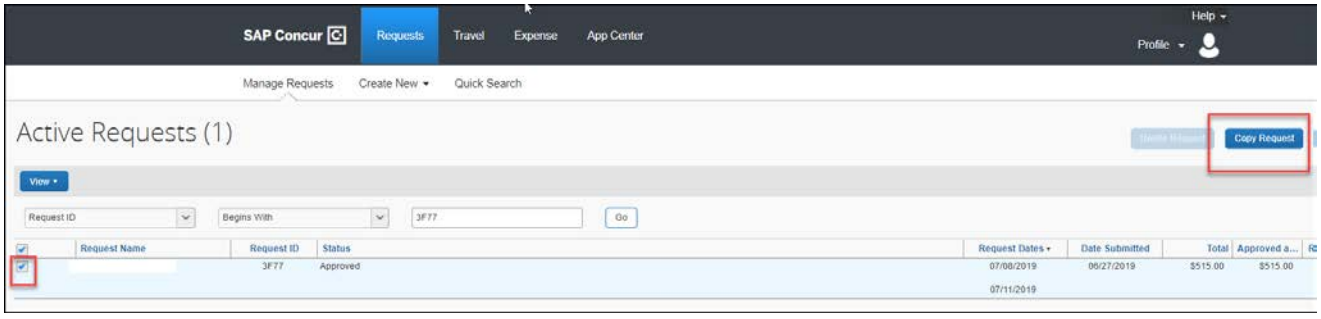
3. Click **Yes** to confirm the Recall. The status of the request is updated to **Sent back to user**.

4. Make any necessary changes, then select **Save, Attachments, Print/Email, Cancel the Request** or **Submit Request** to complete the process**.**

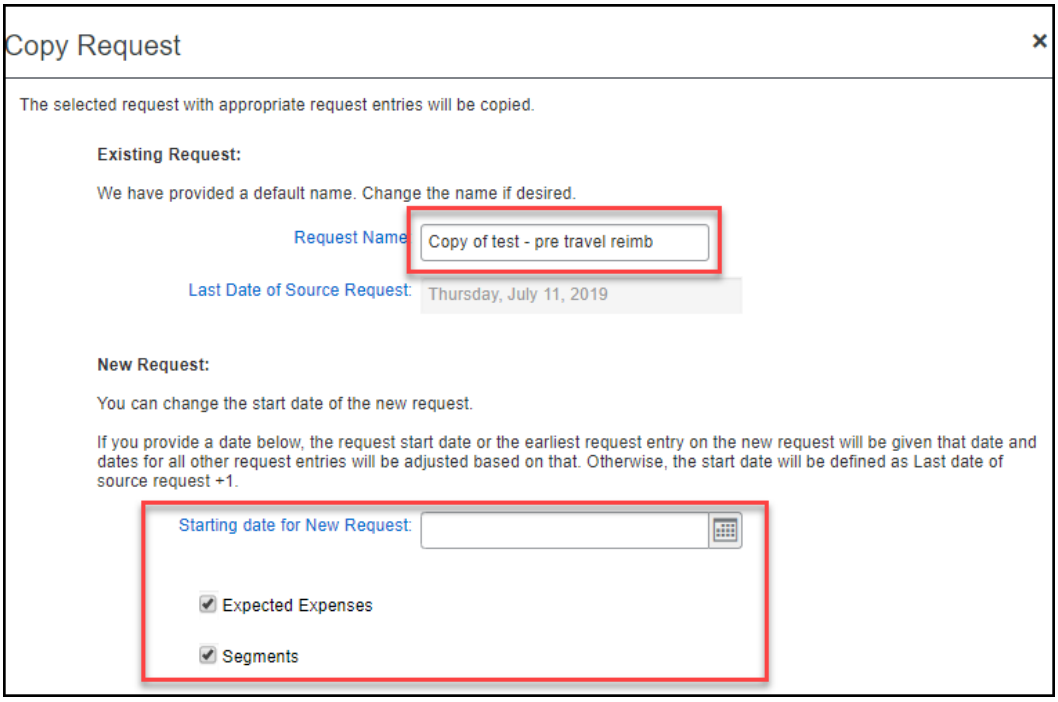
Replacing a Request

This step is only need in the case where a request has been fully approved and details have changed in such a way that the prior approved request is no longer valid.

1. Click the box next to the **Request Name** from the **Manage Requests** page and select **Copy Request.**



2. Enter a different request name (so you can differentiate between old and new) and then enter date and select boxes of things that you want copied from old version. This helps cut down on duplicative data entry if there are alike expenses between old and new. Click OK.

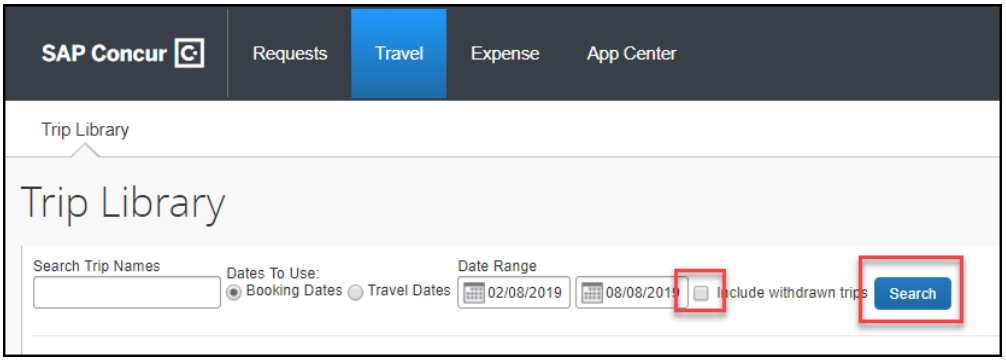


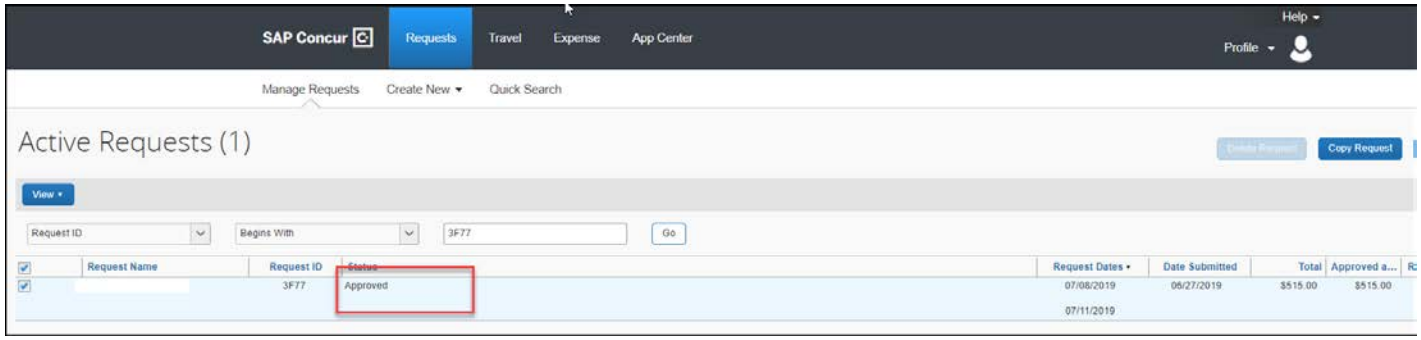
3. Go through each tab of the new request and make necessary updates and submit for approval.

4. Cancel old request by going back to Manage Requests tab and opening prior request that you just replaced. Open request and select **Cancel Request**.

If your prior request had booked segments you will want to go to your Trip Library and make sure they are noted as cancelled/withdrawn (if that is your goal).

Check the “include withdrawn trips” box and click Search




SAP Concur
Requests
Travel
Expense
App Center
Help
Profile
Manage Requests
Create New
Quick Search
Active Requests (1)
Copy Request
View
Request ID
Begins With
3F77
Go
Request Name
Request ID
Status
Request Dates
Date Submitted
Total
Approved a...
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07/08/2019
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