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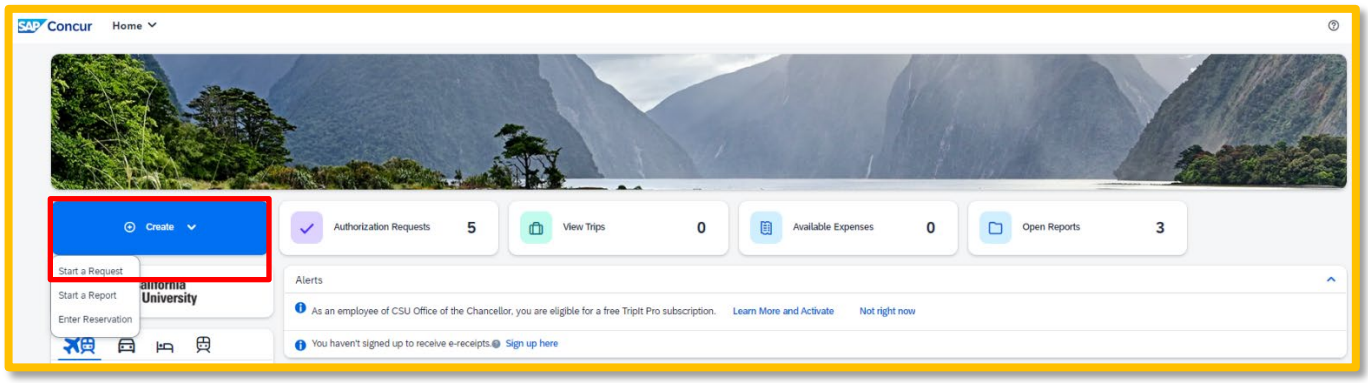
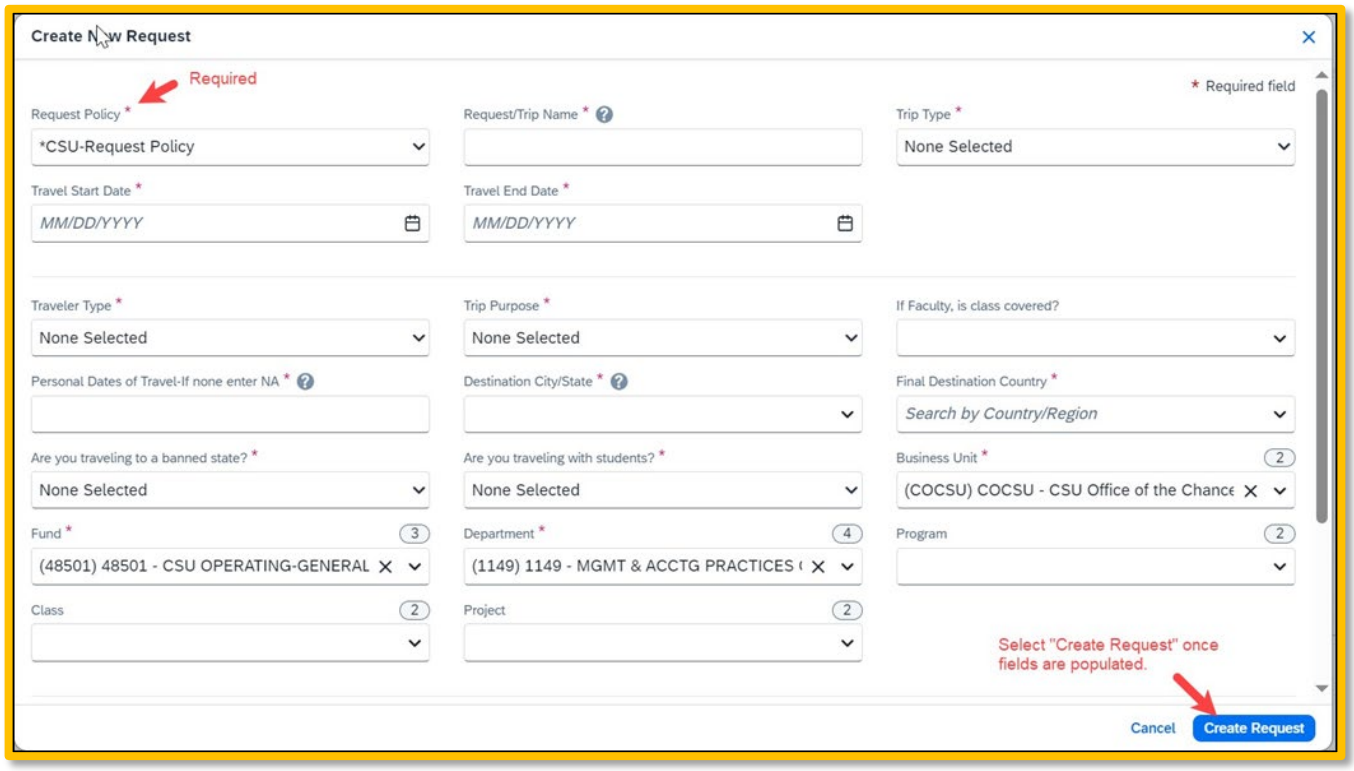
Creating a Travel Request

Request Header

1. To create a request, click the **"Create"** button on the homepage and select **"Start a Request"** from the drop-down menu.



2. Complete all required fields with a red asterisk (*) and make sure to select the correct request policy – **CSU Request Policy**.

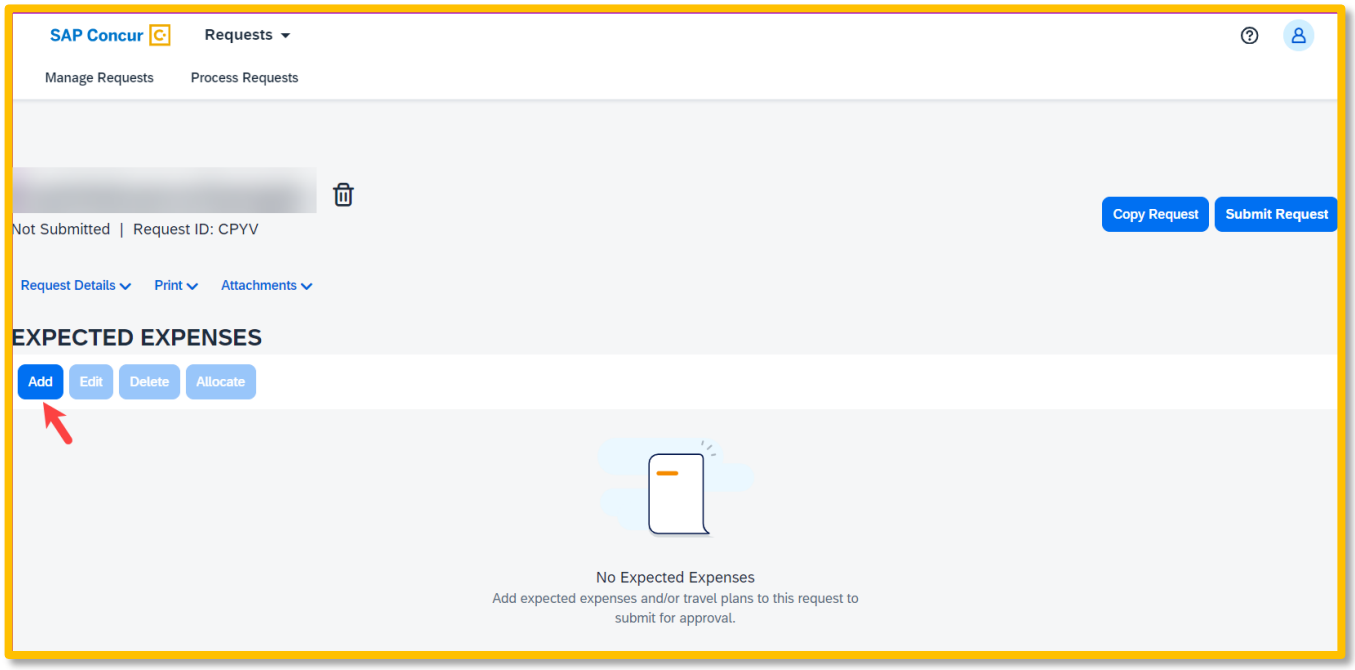


See field descriptions and additional information in the below table.

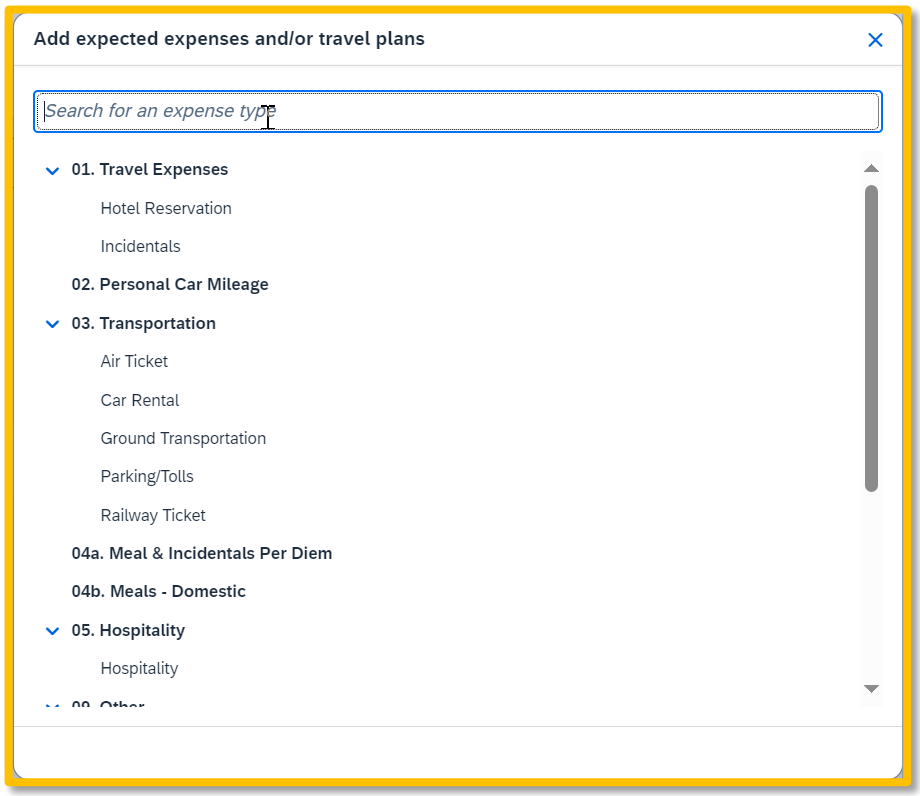
Field Name	Description
Request Policy	Defaulted to "*CSU-Request Policy". Select the Non-Employee request option to initiate the applicable fields needed to capture activity for non-employee travel.
Request/Trip Name	Enter a meaningful trip name, similar to a name given to a travel expense report. Your department may implement a standard naming protocol. Suggested naming convention Destination City, State and dates of Travel (e.g. San Francisco, CA 4/6-4/8).
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?	Only Required for Faculty. 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 "No" from drop-down list unless travel was prior to the date the ban was repealed (9/14/23). This option will be removed beginning in FY24.
Are you traveling with students?	Select from the drop-down list.
Chartfield	Chartfield String will pre-populate based on your department. If necessary, changes can be made by traveler or approver.

3. Select **Create Request** in the lower right-hand corner of the screen.

1. The **Expected Expenses** page will display. Select **"Add".**



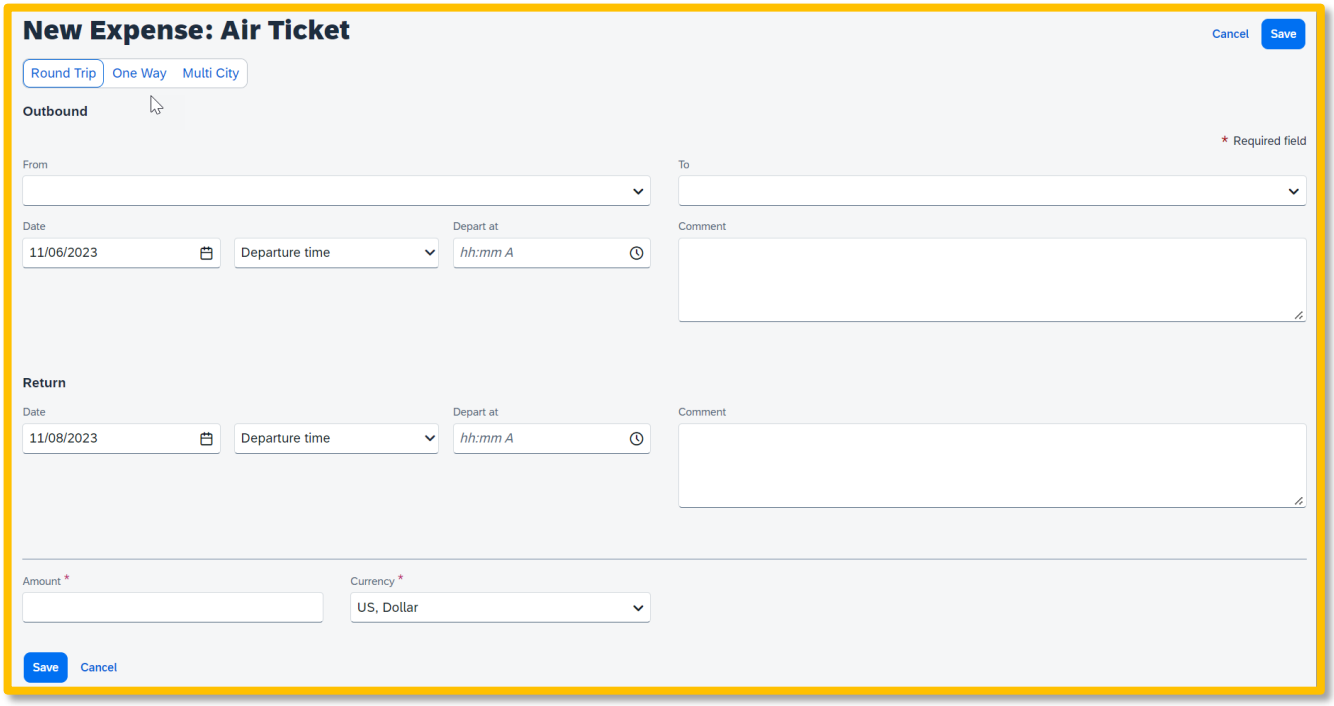
2. From the drop-down list, select the appropriate category to best project expenses for your travel or using the search function.



3. Enter meaningful estimates for the related expense. The final travel request should reflect the anticipated cost for the trip and communicate amount of campus department funding a traveler is seeking for a particular trip. The **Estimated Total** summarizes expected expenses and the amount that is being sought for approval.

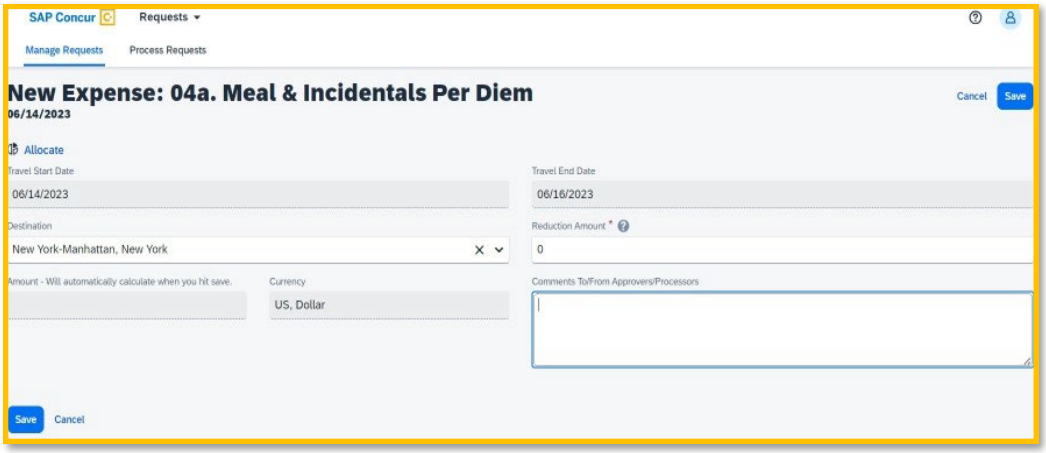
> **NOTE:** If you have a limited budget for travel, please make sure your travel request reflects that situation.

Air Ticket Expense



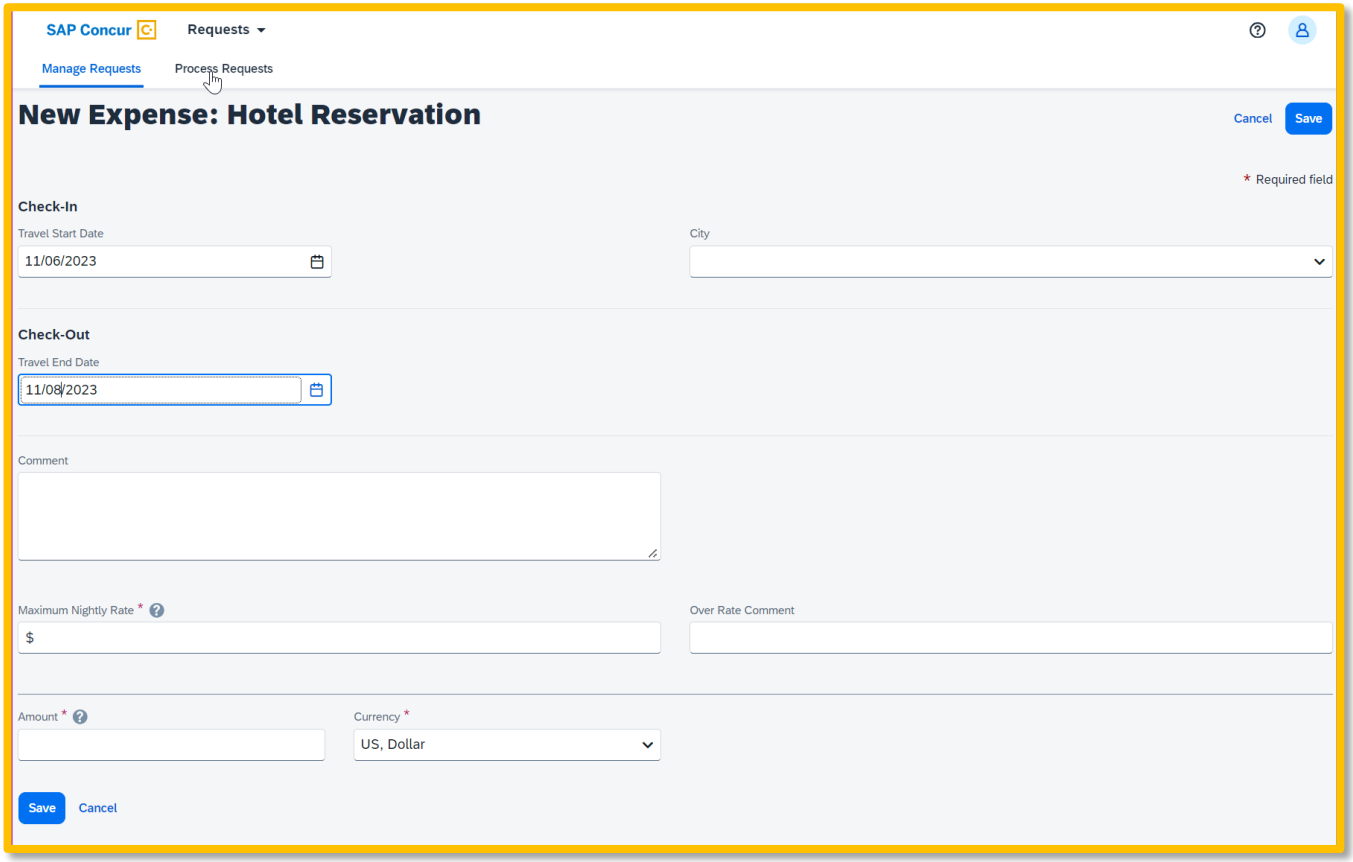
1. Select Round Trip, One Way or Multi City. (optional)
2. Enter the **"From"** and **"To"** locations in the Outbound section. If round trip, populate the Return section also. (optional)
3. Enter flight "**Date(s)"** and **"Depart at"** times. (optional)
4. Enter total airfare **"Amount".**
5. Add **"Comments"** as necessary.
6. Select **"Save"** to add the expense to your Travel Request form.

Meal & Incidentals Per Diem



1. The destination should carry in from the header, but if the destination is different, enter the **"Destination".**
2. If appropriate, enter a reduction amount.
3. Enter **"Comments"** if necessary. (optional)

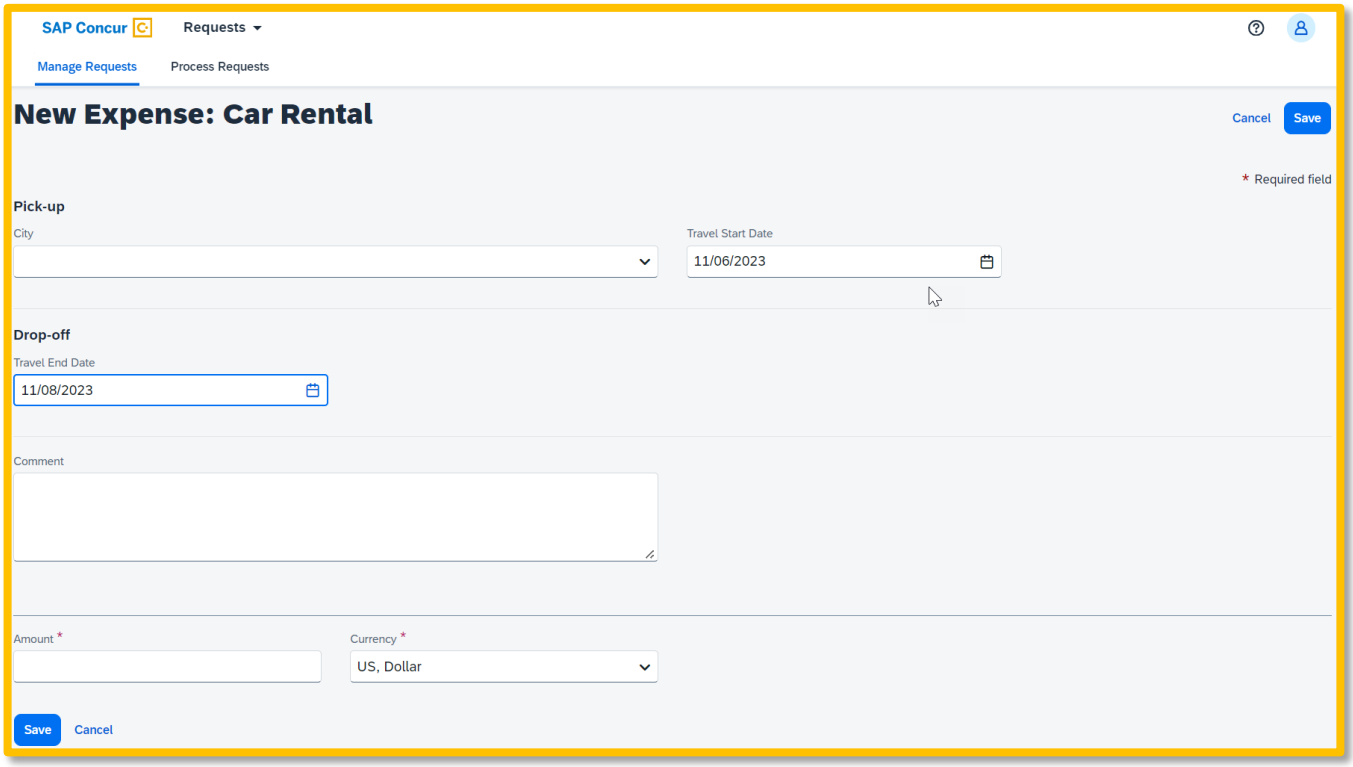
Hotel Reservation Expense



1. Enter Check-In and Check-Out dates in the **"Travel Start Date"** and **"Travel End Date"** fields. (optional)

2. Enter or select the lodging **"City".** (optional)
3. Relevant notes can be provided in the **"Comment"** field.
4. Enter the **"Maximum Nightly Rate"** for the hotel. In the case of fluctuating rates, enter highest rate. If requesting an exception, provide justification for the hotel choice in the **"Over Rate Comment"** field.
5. Enter the anticipated **"Amount"** for the entire business stay.
6. Select **"Save"** to add the expense to your Travel Request form.

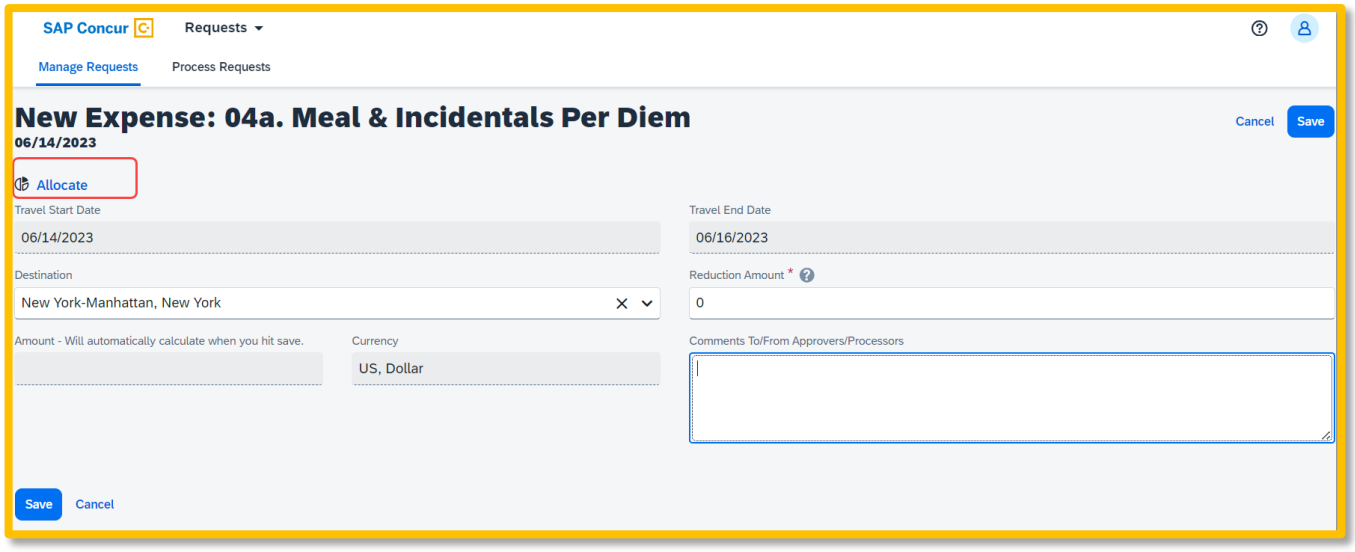
Car Rental Expense



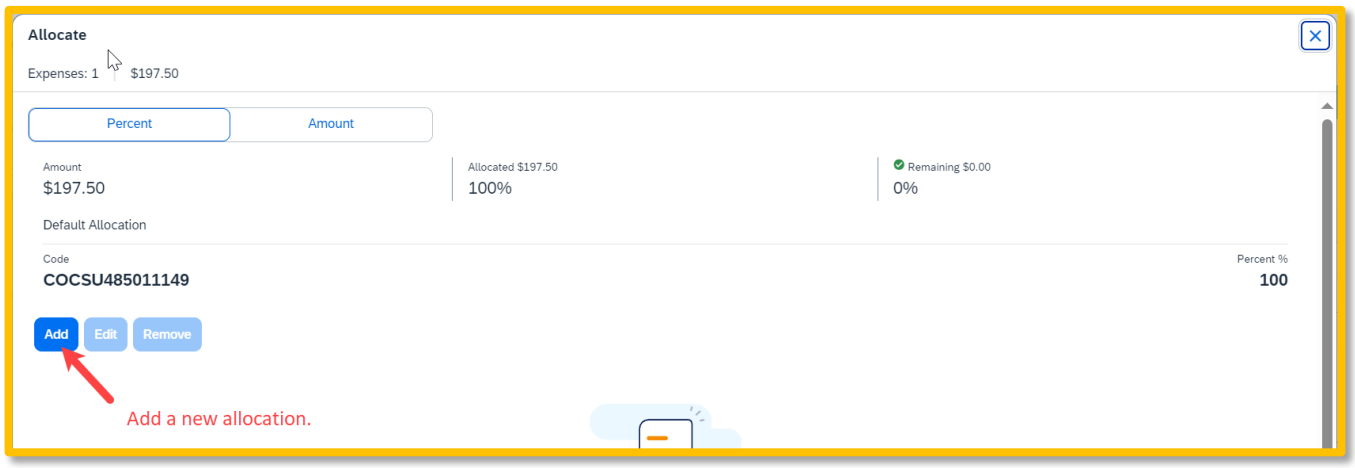
1. Enter the **"City"** where you plan to pick up the car. (optional)
2. Select the **"Travel Start Date".** (optional)
3. Select the **"Travel End Date"** for when you plan to drop off the car. (optional)
4. Type **"Comments"** as necessary (optional).
5. Enter the anticipated **"Amount"** for the car rental.
6. Select **"Save"** to add the expense to your Travel Request form.

Expense Allocations

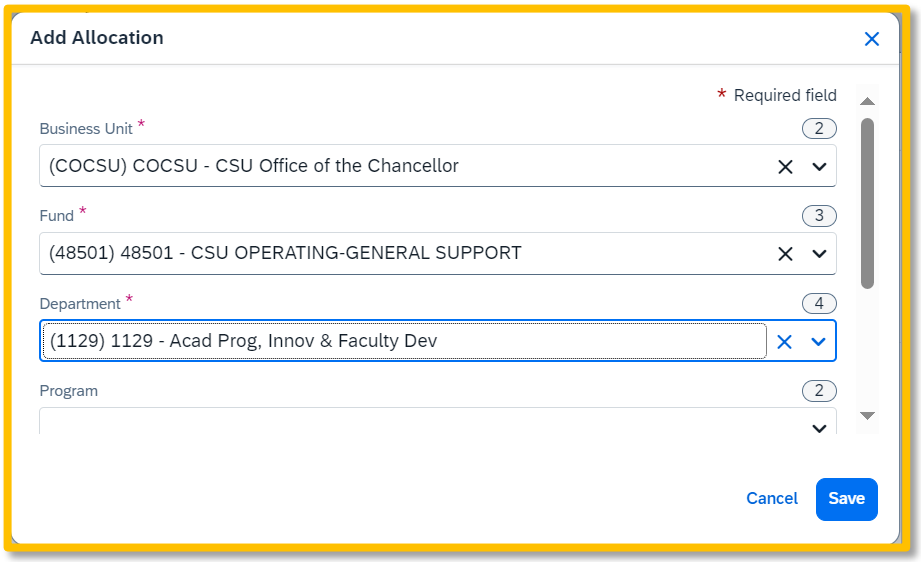
1. When adding expenses, the **"Allocate"** feature can be selected to designate different chartfields for expenses if there is a need to split the funding of a travel transaction.



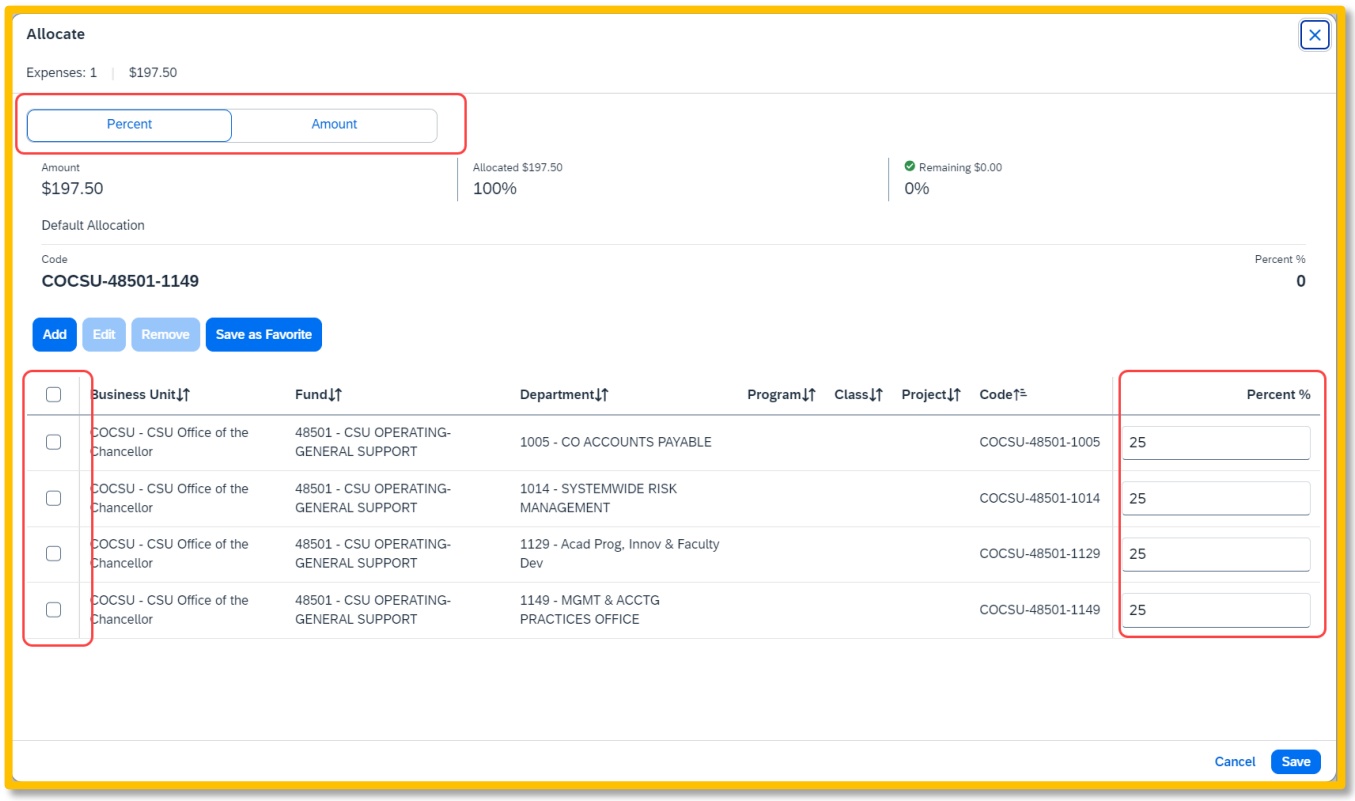
2. Select the **"Add"** button to add the first chartfield string.



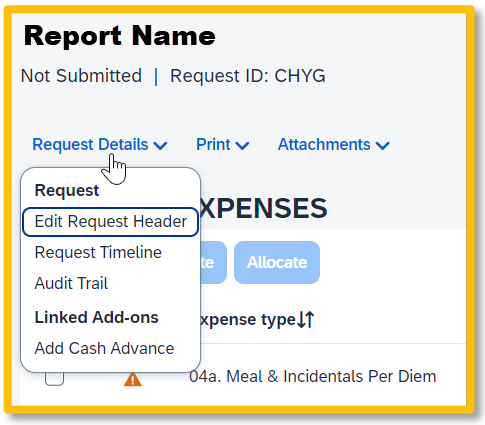
3. Select the Chartfield String, then select **"Save".**



4. Add all desired chartfield distributions and you will notice that they are automatically evenly distributed. Change the distribution percentage or choose to allocate it by amount using the button in the upper left. Once finished specifying the allocations, select **"Save".**



Request Details



Edit Request Header

To edit the Request Details, select the **"Request Details"** drop-down menu, then **"Edit Request Header".**

Request Timeline

This timeline will display the approval workflow and identify the steps which have been completed or are outstanding. Navigate to **Request Details** drop-down menu and select **"Request Timeline".**

Once a request is submitted, the request will route in the following order:

1. The report will route to the cost object approver(s) or those names identified in the Delegation of Authority (DOA) as approvers. DOA approvers are 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.
2. The employee's supervisor.
3. If international travel or other additional review is specified for the request, those approvers will review. This includes campus approvers or Chancellor's Office Risk Management for war risk countries.

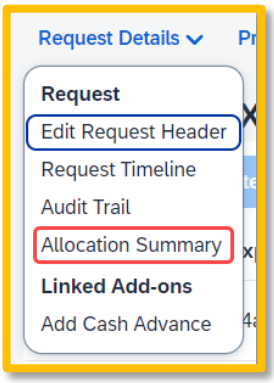
Audit Trail

The audit trail will display the timestamps of certain actions taken on the travel request. Navigate to **Request Details** drop-down menu and select **"Audit Trail".**

The date/time of the approvals and the approver names will display.

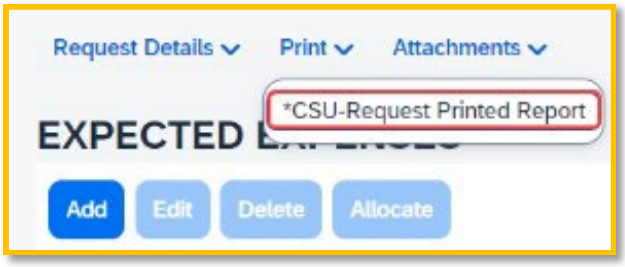
Allocation Summary

If a line has an allocation, the Allocation Summary will display in the Request Details menu. Using this option will display a summary of any chartfield splits that might have been added to the request expenses. Navigate to **Request Details** drop-down menu and select **"Allocation Summary".**



Print/Share

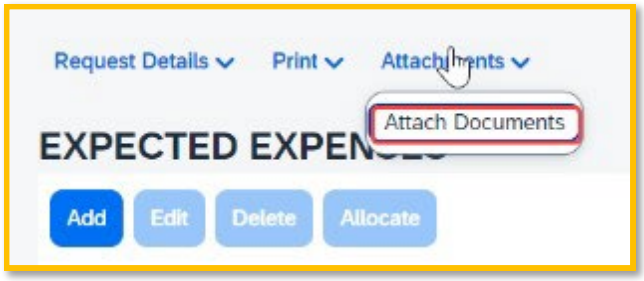
From the Print menu, select the **"CSU-Request Printed Report"** option to save the travel request summary as a PDF or share as deemed necessary.

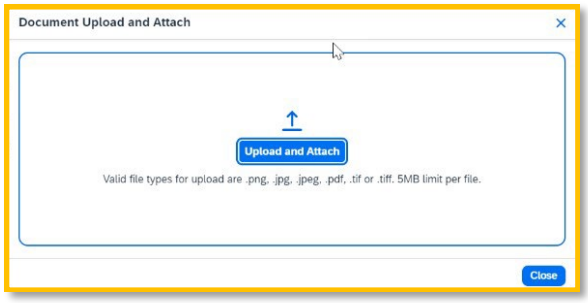


NOTE: Reports in Concur will be retained in the system according to CSU retention guidelines. Printing or saving in duplicate is optional and in most cases is not necessary.

Attachments

The Attachments > Attach Documents menu option launches window to browse then **"Upload and Attach"** files that support the trip request (use the button to search). Documents may include a conference registration showing location/dates of trip, or an itinerary for international travel, or any other support document that is helpful to have on hand for approvers.

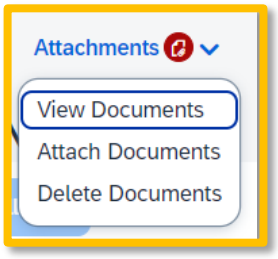




1. Valid file types are specified in the window and are pdfs or image files (.png, .jpg or .jpeg, .pdf, etc). Note that there is a 5MB limit.

2. Select **"Close"** once files have been uploaded.

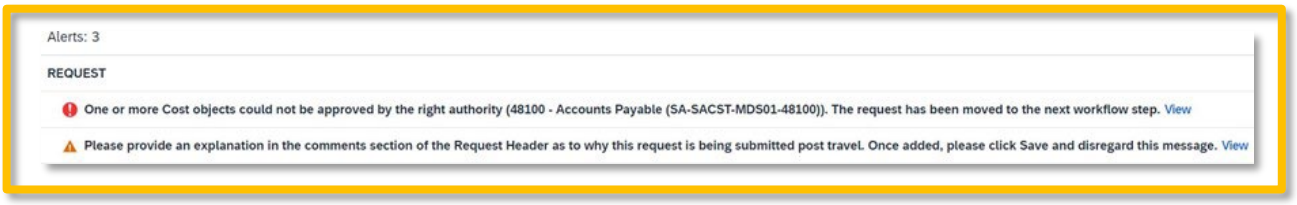
3. Once documents have been uploaded, the Attachments menu displays a small red image to identify that the request has document attachments. The menu changes to have three options – View Documents, Attach Documents and Delete Documents which can be used to update or remove previously uploaded attachments.



NOTE: Documents cannot be removed once the Request is submitted or Approved. They can be added at any time.

Alert Types

Alerts are messages triggered by certain elements of your trip.



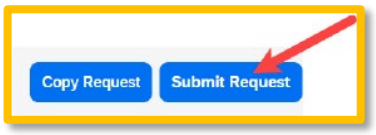
- **A red alert** is required. This means an action must be taken before a request can be submitted. The alert count will change as requirements are met.

- **A yellow/orange alert** is a warning or information only advising you to read and take action. For example, an alert can communicate the need to add comments and explain the trip, or to attach files, etc.

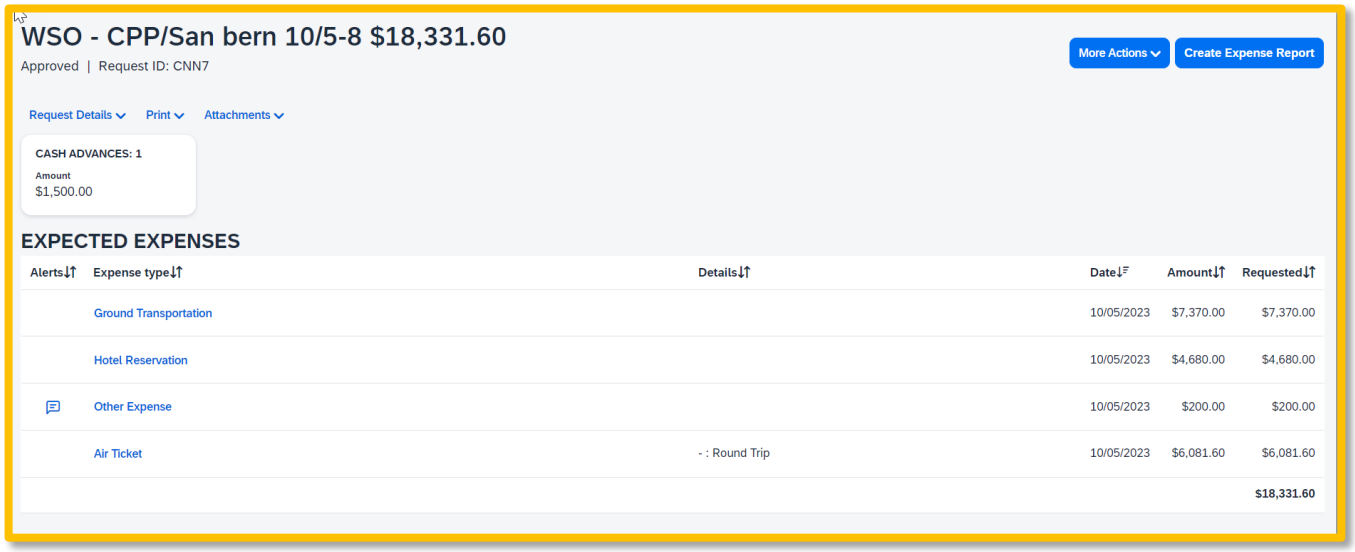
NOTE: Most yellow warnings will not clear, however they will not prevent you from submitting the Request.

Submitting Request for Approval

1. Once the travel request is complete, select the **"Submit Request"** button.



2. See example below of a submitted travel request with multiple lines.

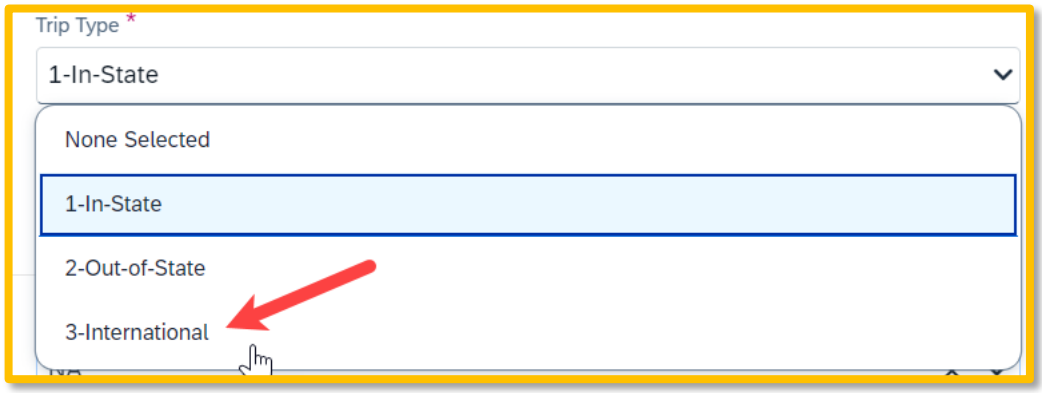


Travel Request Types

International Travel Request

Travel to international destinations generally follow the same process for creating a travel request as a domestic trip, with a few deviations.

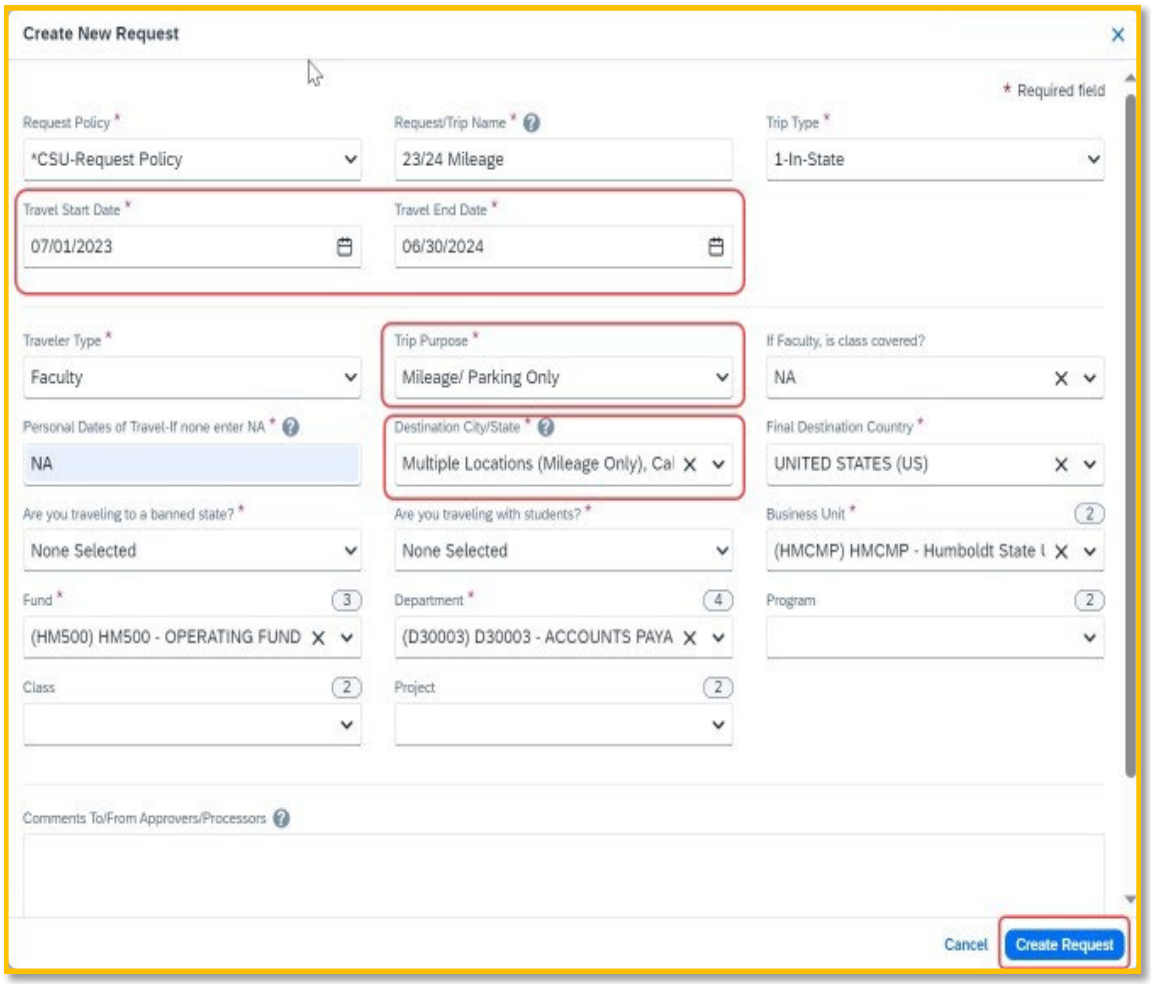
1. **Trip type** should be designated as **International**.
2. Request must have an **attachment** with an international travel itinerary that communicates dates and points of destination. Risk Management will utilize this data to facilitate working with a traveler for necessary foreign travel insurance and other necessary components for a trip.
3. All expenses should be noted in **USD**. In the expense report stage, currency conversions are more relevant with actual expenses.



Blanket Travel Request for Mileage

Blanket mileage requests can be used for recurring activity for a given fiscal year. These mileage requests are meant to facilitate ongoing mileage reimbursement claims for employees. An example of this would be driving throughout Southern California to observe and meet with student teachers/interns and mentor teachers.

1. Enter general information about the activity and note the time frame from August through May (academic year) or July through June (fiscal year).
2. Select **Mileage/Parking Only** for the **Trip Purpose**.
3. Select **Multiple Locations (Mileage Only)** in the **Destination City/State** field.
4. Add relevant comments and select **"Create Request".**



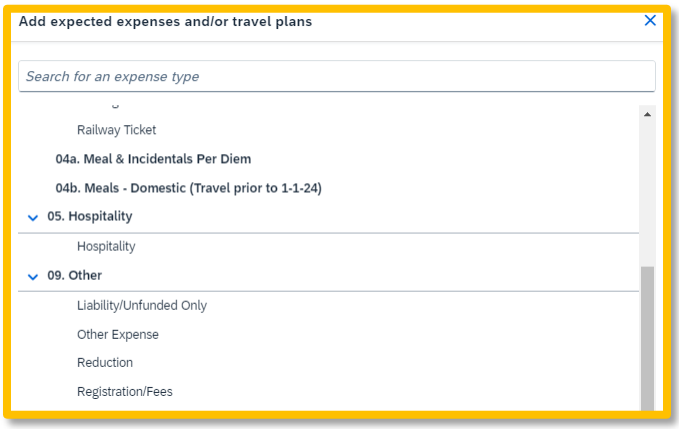
5. In the Expected Expenses section, select **"Add"** then select **"Personal Car Mileage".**
6. In the New Expense window, enter the estimated mileage distance for the entire year. Prior year could be used as a reference point and should be adjusted for any known variances for a given year.
7. Select **"Save".** Cost will automatically calculate once **"Save"** is selected.

"Liability Only/Unfunded" Travel Request

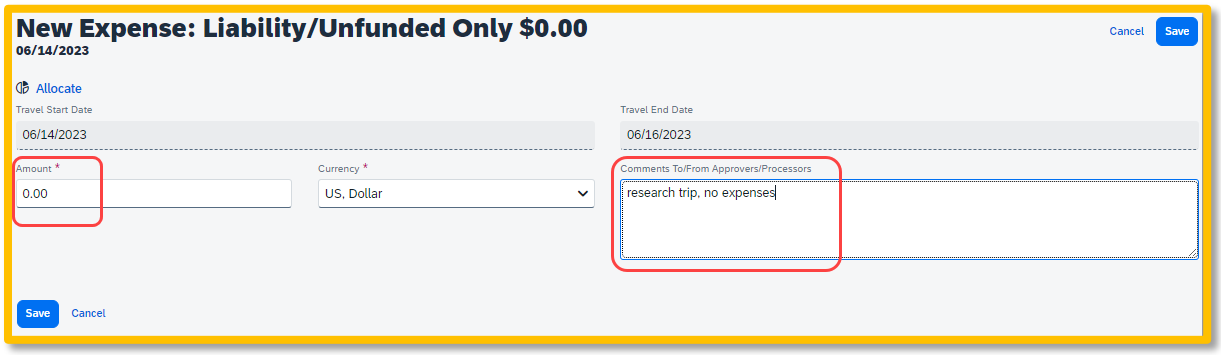
Travel with no funding from the campus, e.g. travel that is fully funded by outside sources or by the traveler needs to be evaluated for connection to University business. If directly connected to University business that supports campus mission, a travel authorization should be completed to communicate time away from campus. This will assist with campus duty of care objectives.

NOTE: Accepting travel gifts from a 3rd party may result in a conflict of interest (COI). Please refer to further information about COI.

1. Follow the steps above to create a travel request. Once trip details have been added to the travel request header, in the Expected Expenses section select **"Add",** then select **"Liability/Unfunded"** from the expense list.



2. Add $0 to the **"Amount"** and make a note in the **"Comments"** field for reference.



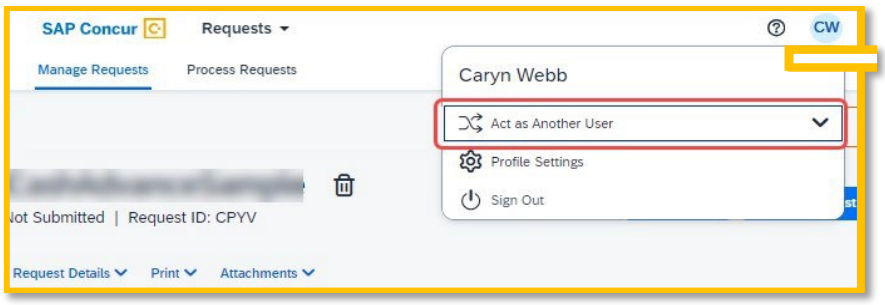
3. Once your trip is approved and you are notified via email, it is best to go back into Concur and follow the steps below for marking the request as **Closed/Inactivate Request**. Otherwise, the request will close on day 61 post trip, but in the meantime, the traveler will be prompted with reminders about submitting expense reports. Marking "closed" will reflect there are no expected expenses and will eliminate those expense report reminders.

Acting as a Delegate

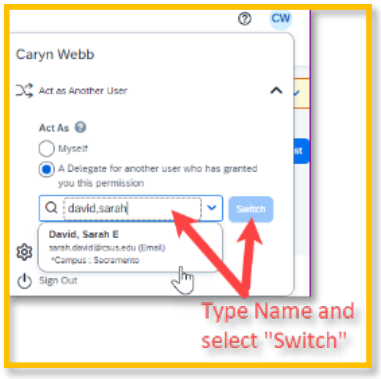
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, etc.

To work as a delegate:

1. Select **"Profile"** in the upper right.
2. Under **"Act as Another User"**, select the appropriate delegator's name from the drop-down list or type their name in the search field.

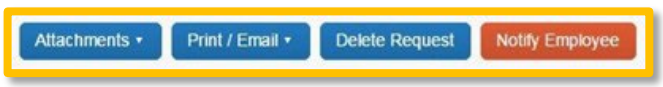


3. Select **"Switch"** to begin working as the other person.



4. Notice that the **Profile** menu now displays **Acting as** and displays the name of the employee you are acting on behalf of.

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, **Creating 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, select **"Acting as",** then select **"Myself"** and **"Switch".**

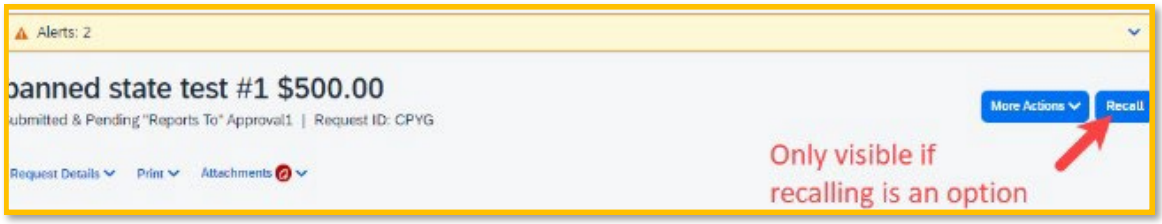
Edit or Remove a Submitted Request

If there is a need to revisit and alter a request (e.g. dates, locations, or if significant cost changes are necessary), there are a few options.

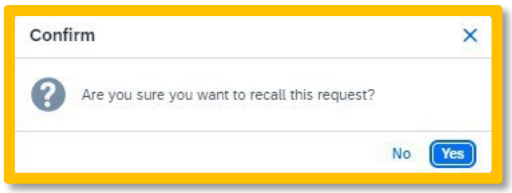
You cannot change, cancel, or delete a **Request** that has been submitted unless you **Recall** it first. You can only recall a request that is not in **"Approved"** status. If the request has been fully Approved, you will need to take different steps as noted below in **Replacing a Request**.

Recall a Request

1. From the **Manage Requests** page, click on the tile associated with your request in your **Request Library**.
2. Click "**Recall"**.



3. Click "**Yes"** to confirm the Recall. The status of the request is updated to **Sent Back to User.**



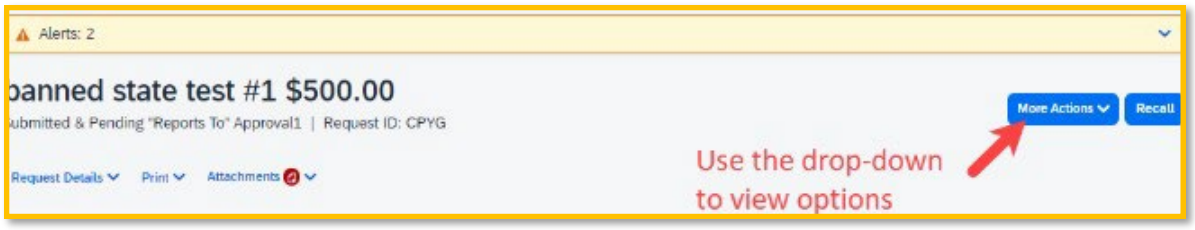
4. Make any necessary changes, then select "**Submit Request".**

Replacing a Request

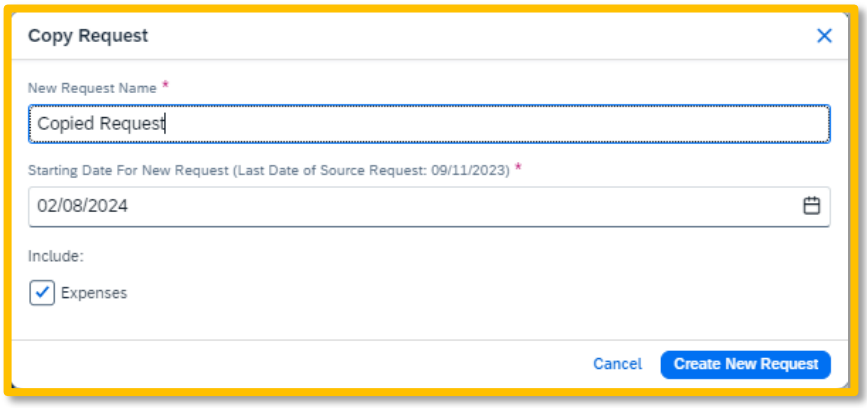
This step is only needed in the case where a request has been fully approved and details have changed in such a way that the prior approved request is no longer valid.

1. From the **Manage Requests** page, click on the tile associated with your request in your **Request Library**.

2. Select the "**More Actions**" drop-down and select **"Copy Request".**



3. Enter a different **"New Request Name"** (so you can differentiate between old and new), enter the **"Starting Date",** then select **"Expenses"** checkbox. This helps cut down on duplicative data entry if there are alike expenses between old and new. Select the **"Create New Request"** button to complete the process.

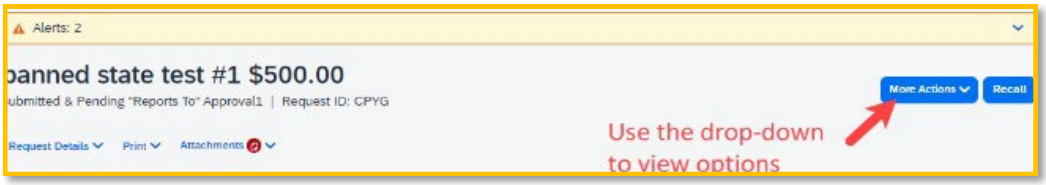


4. Make any necessary updates to the new request and **"Submit Request"** to submit for approval.

Cancel a Request

If a trip is canceled or elements have changed so significantly that you need to replace a request as noted in the prior section, please cancel the request by going back to the Requests tab and open the request.

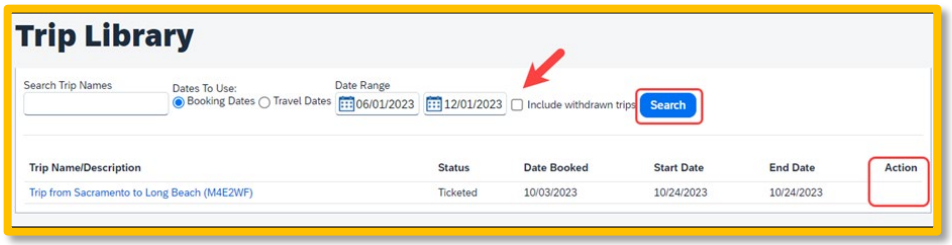
1. On the Request Page, select the **"More Actions"** drop-down and select "**Cancel Request".**



2. For travel reservations, refer to the Trip Library and make sure to cancel or change them based on the changed elements. They will be noted as cancelled/withdrawn after completion of this step. This will ensure the campus/employee does not incur unnecessary expenses for not canceling on time.

3. Using the Navigation menu across the top, select **"View Trips".**

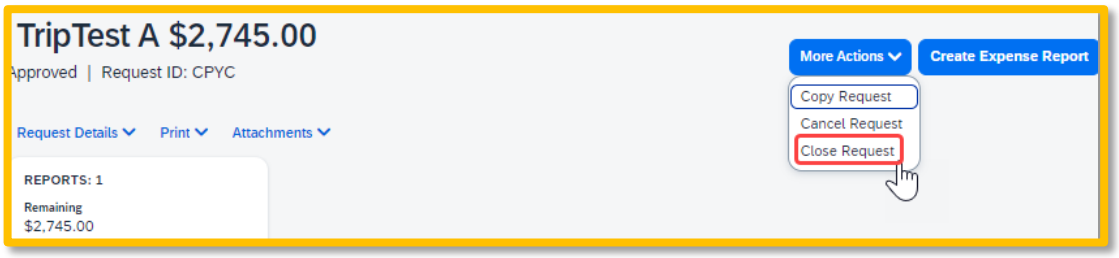
4. Select the date range, click **"Cancel"** under the Action column. Check the "**Include Withdrawn Trips"** checkbox and click **"Search"** to see all travel itineraries and withdrawn trips.



Closing/Inactivating a Request

The system will automatically close open travel requests 61 days after a trip is complete. Reminder, Expense Reports need to be submitted within 60 days from travel end date. If all relative expenses have been submitted, a user can manually close/inactivate the request. This is not a required step.

1. Select the Request tab, selecting the specific request and select the **"Close Request".** This option is context sensitive. It will not be visible if it is not an option.



2. The difference between this status and cancelation is that cancelation signals a true recall of an anticipated trip. Closing/inactivating means the trip is complete. If by chance an expense needs to be submitted after a request is closed, please reach out to One-Stop Travel Services for assistance.