





CONCUR 101

One-Stop Travel Services



TODAY'S AGENDA

1. Concur Overview
2. Setting Up Profile & Mobile App
3. Submitting a Travel Request
4. Travel Request Approval
5. Booking Your Travel
6. Submitting an Expense Report
7. Location-Based Per Diem for M&IE
8. Expense Report Approval
9. Delegates & Travel Arrangers

INTRODUCTION

- This training will cover domestic travel using state funds. International travel in Concur will be available in the next implementation phase.
- Once you have completed this training session, please use Concur as your primary domestic travel system going forward.

TRAINING RESOURCES

- **Materials** for today's training include *Definition Sheet, FAQ, Travel Checklists (2)*
- Visit One-Stop's **Concur Travel** resource center for the latest updates and access to comprehensive training materials including video demos and PDF guides.
 - <https://www.calstatela.edu/finance-onestop/concur-travel>
- Have additional questions? Contact One-Stop Travel Services at:
 - (323) 343-5430, travel@calstatela.edu
 - <https://www.calstatela.edu/finance-onestop/travel>

CONCUR OVERVIEW

■ What is Concur?

- *Concur is a comprehensive web-based tool that integrates travel request and expense reporting with a complete travel booking solution for CSU travel.*
- *Concur also offers the SAP Concur Mobile App to manage your expenses and business travel on your mobile device and/or tablet.*
- *All CSU campuses are transitioning to Concur to streamline paperwork for travel, shorten approval/review times, and improve audit/payment cycles.*

■ What is Concur replacing?

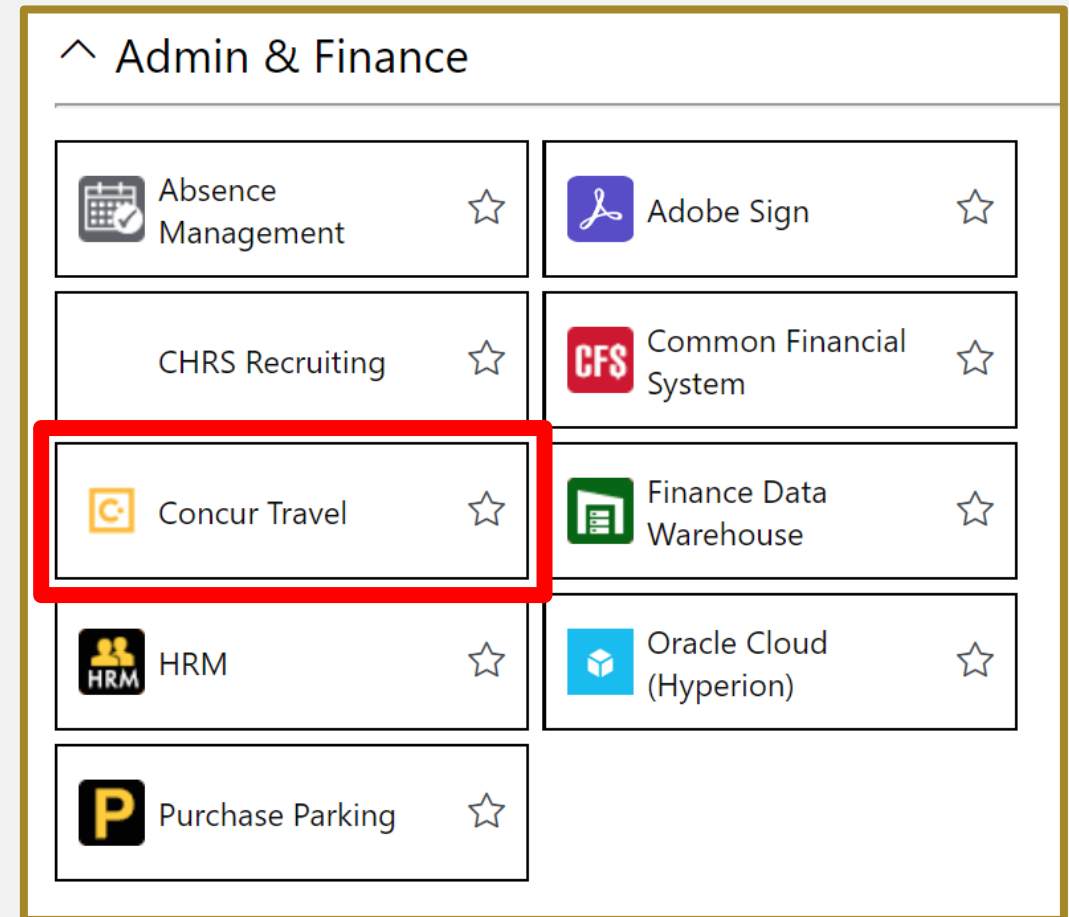
- *Instead of submitting an RFT, you will be submitting a **Concur Travel Request**.*
- *Instead of submitting a TEC, you will be submitting a **Concur Expense Report**.*

■ Who can use Concur?

- *Employees (staff and faculty) who have been trained and onboarded to Concur.*

LOGGING IN TO CONCUR

- The link to Concur is available to all faculty and staff on the **MyCalStateLA** quicklaunch portal
 - Go to *calstatela.edu*
 - Click on *MyCalStateLA*
 - Login with your credentials
 - Click on *Concur Travel*



The screenshot displays the SAP Concur interface for The California State University (CSU). The interface includes a top navigation bar with the SAP Concur logo and a 'Home' dropdown. Below the header, there's a 'Quick Task Bar' with icons for starting requests, reports, and reservations, along with counts for authorization requests (04), available expenses (00), and open reports (02). The main content area is divided into several sections: 'Trip Search' (highlighted with a callout), 'Alerts' (containing notifications about a free Tript Pro subscription and e-receipts), 'Company Notes' (highlighted with a callout), 'My Tasks' (highlighted with a callout), 'My Trips (0)' (highlighted with a callout), and a list of transactions (highlighted with a callout). The 'Trip Search' section includes a 'Mixed Flight/Train Search' form with fields for departure and arrival cities, and a 'Search' button. The 'My Tasks' section shows a list of tasks, including '04 Open Requests' and '00 Available Expenses'. The 'My Trips (0)' section shows a message: 'You currently have no upcoming trips.' The transactions list shows two entries: '02/29 test \$200.00' and '01/17 test \$167.00'. Callouts provide additional context: 'Use Trip Search to gather estimates for your Travel Request. Once your Travel Request is approved, use to book travel reservations' points to the Trip Search section; 'Notifications, activities, reminders will be listed here' points to the Alerts section; 'Individual card transactions will be here' points to the transactions list; 'View of queued items' points to the 'My Tasks' section; and 'Company Notes' points to the 'Company Notes' section.

Use Trip Search to gather estimates for your Travel Request. Once your Travel Request is approved, use to book travel reservations

Notifications, activities, reminders will be listed here

Individual card transactions will be here

View of queued items

Company Notes



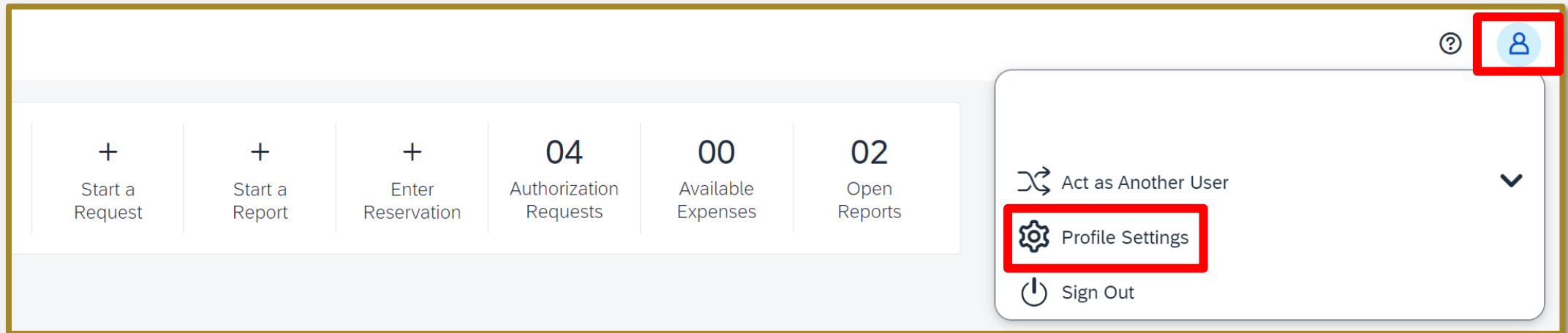
2. SETTING UP PROFILE & MOBILE APP



SETTING UP YOUR PROFILE



- When logging into Concur for the first time, it is important to set up your profile.
- On the Concur Homepage, click on **Profile > Profile Settings**
 - *Review your profile information under **Personal Information** and fill out all required fields.*

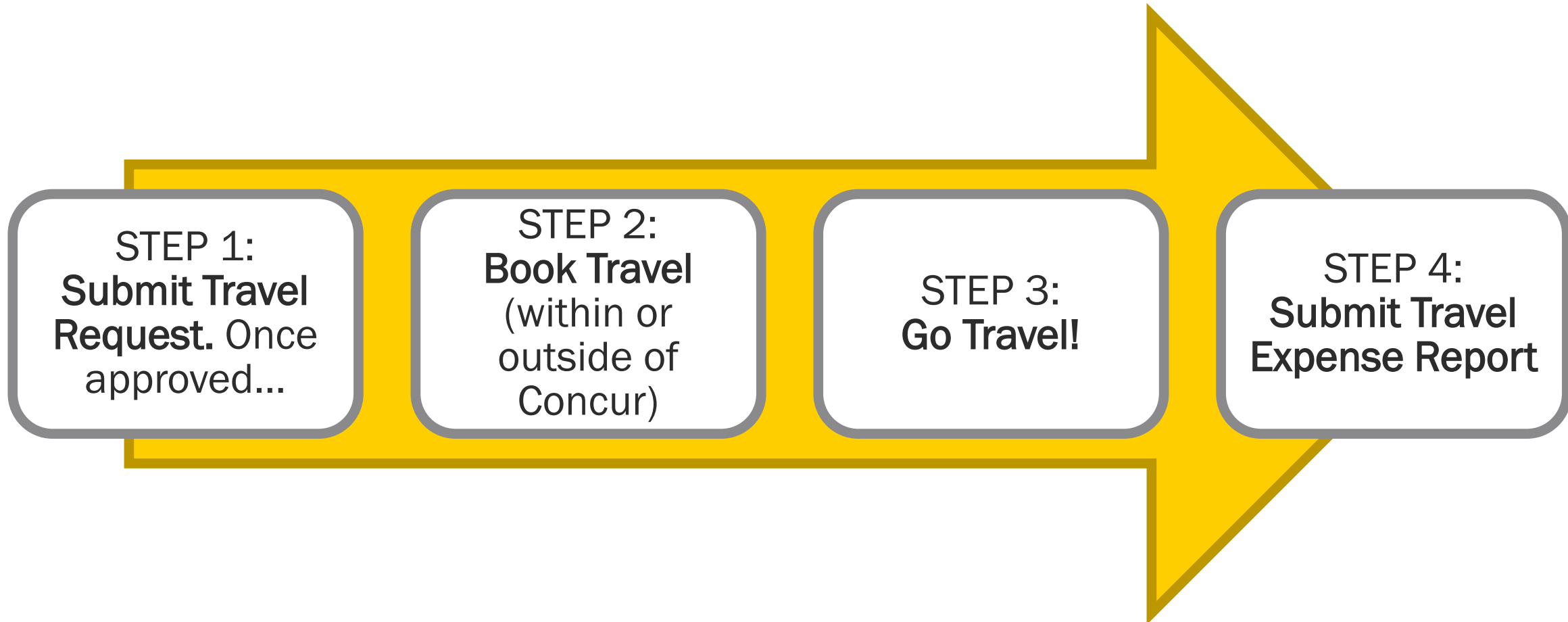




3. SUBMITTING A TRAVEL REQUEST



TRAVEL STEPS



All Travel Request and Expense Reports will go through an integrated approval workflow in Concur.

TRAVEL PLANNING CHECKLIST

- Review your **Travel Planning Checklist** prior to submitting your travel request and booking options.
- Important reminders:
 - *Travelers must submit a travel request and be approved through Concur prior to booking any travel arrangements*
 - *Attach supporting documents to your travel request (e.g., Conference Information, Event Information, Letter of Invitation, Email communications)*
 - *Travelers should keep all travel receipts*

TRAVEL PLANNING CHECKLIST PREVIEW

Travel Planning Checklist (Domestic)

Pre-Approval to Travel (recommended submission at least 30 days prior to travel)

- ☐ Travelers must submit a travel request and be approved through Concur prior to booking any travel arrangements (this excludes service providers, candidates, and non-employee students).
 - ☐ All *stateside* employees using *state funds* (including self-support and trust) will utilize Concur Travel Software.
 - ☐ Non-state employees (including students) will continue to use the current travel forms.
- ☐ Attach supporting documents (Conference Information, Event Information, Letter of Invitation, Email communications)
- ☐ Any other documents as required by your department
 - ☐ Any exception to the travel policy (e.g., lodging over \$275 per night) will need to be approved by your division VP. *If your division uses an exception justification form, be sure to complete and attach the form to your travel request. If not, your budget approver will need to add the division VP to the Concur approval workflow to review your justification comment required in your Concur travel request. (see the "Hotels" section for additional details)*

Registration Fee Payment Options

- ☐ Individual GET card, if assigned
- ☐ Department P-card
- ☐ Personal card (you will be reimbursed after returning from travel, and your expense report has been processed)
- ☐ Contact One-Stop Financial Services to pay the registration fee (after your travel request has been approved through Concur)

Estimated Expenses

- ☐ *Location-based per diem meal expenses and incidentals, with an overnight stay.*



LA TRAVEL REQUEST HEADER

Fill out all required fields

Do you have a plan or substitute for your classes while you are away?

Edit Request Header

Faculty Conference | Request ID: DDJV

Request Policy: *CSU-Request Policy

Request/Trip Name *: Faculty Conference

Trip Type *: 1-In-State

Travel Start Date *: 11/13/2023

Travel End Date *: 11/15/2023

Traveler Type *: Faculty

Trip Purpose *: Conference

If Faculty, is class covered?: Yes

Personal Dates of Travel-If none enter NA *: NA

Destination City/State *: Santa Barbara, California

Final Destination Country *: UNITED STATES (US)

Are you traveling to a banned state? *: No

Are you traveling with students? *: No

Business Unit *: (LACMP) LACMP - Cal State University, L.A.

Fund *: (SF001) SF001 - Campus Operating Fund

Department *: (500000) 500000 - VPA/CFO

Program:

Class:

Project:

Comments To/From Approvers/Processors: Presenting at a conference.

Cancel Save

Fund/Dept auto-populates

Comment here to provide more info about your trip

EXPECTED EXPENSES FOR GROUP TRAVEL

Add expected expenses and/or travel plans ✕

Search for an expense type

Ground Transportation

Parking/Tolls

Railway Ticket

04a. Meal & Incidentals Per Diem

04b. Meals - Domestic (Travel prior to 1-1-24)

✓ 05. Hospitality

Hospitality

✓ 09. Other

Liability/Unfunded Only

Other Expense

Registration/Fees

✓ 10. Team/Group

Entry Fees

Other Accommodation (Group Only)

Team/Group Meals

- **Accommodations:** To add the estimated cost of multiple hotel rooms or Airbnb rentals, select the **Other Accommodation** expense type.
- **Meals:** To add the total estimated cost of meals for the trip, select **Team/Group Meals**.
- Remember to attach supporting documents under **Attachments**.

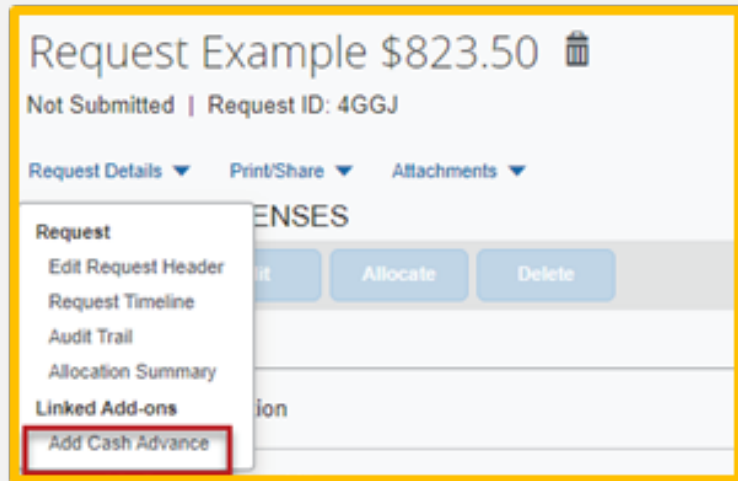
Request Details ▾ Print/Share ▾ Attachments ▾


EXPECTED EXPENSES

Attach Documents

Add Edit Delete Allocate

CASH ADVANCE FOR GROUP TRAVEL



Request Example \$823.50 

Not Submitted | Request ID: 4GGJ

Request Details ▼ Print/Share ▼ Attachments ▼

Request

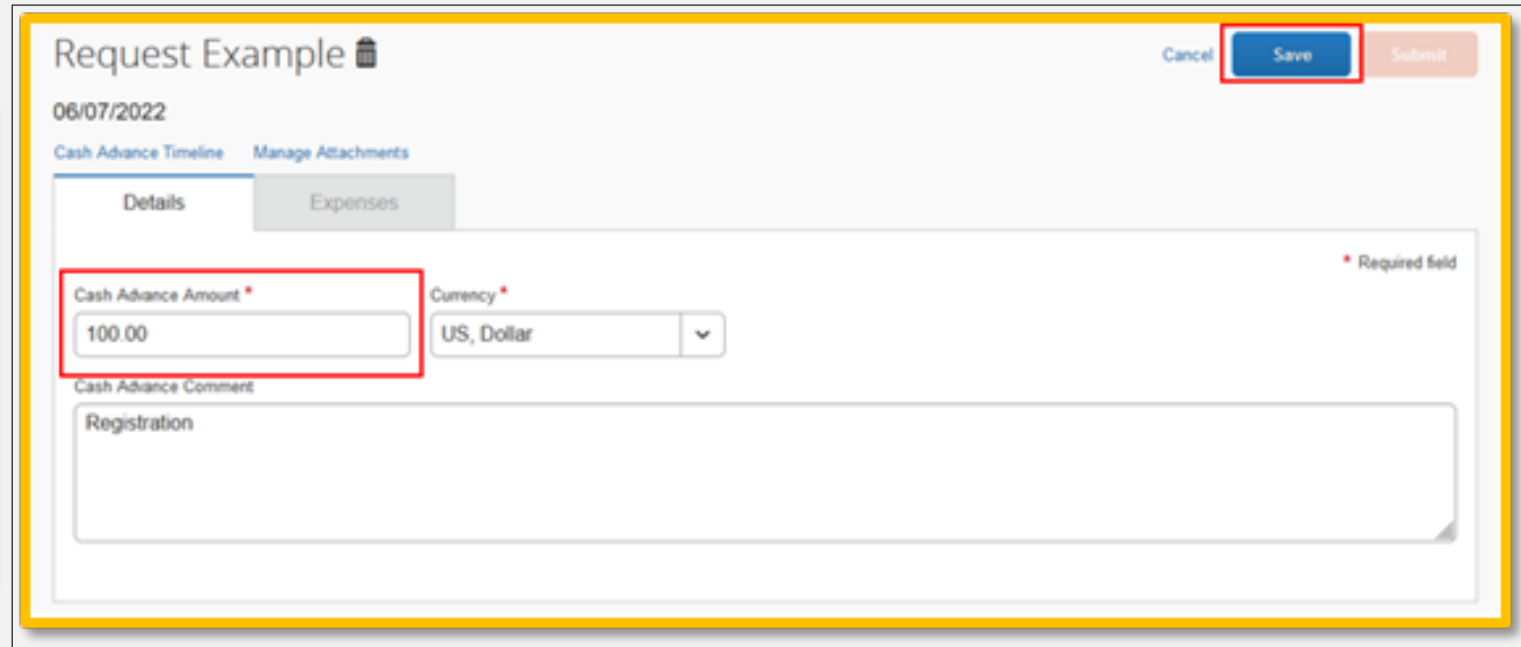
- Edit Request Header
- Request Timeline
- Audit Trail
- Allocation Summary


Linked Add-ons

- Add Cash Advance**

EXPENSES

Allocate Delete



Request Example 

06/07/2022

Cash Advance Timeline Manage Attachments

Details Expenses

Cash Advance Amount * 100.00 Currency * US, Dollar ▼

* Required field

Cash Advance Comment


Registration

Cancel Save Submit

- If you are a group leader traveling with students and are seeking a cash advance, please complete the **Cash Advance Setup Form** prior to submitting a travel request in Concur.

CASH ADVANCE SET UP FORM PREVIEW



**CAL STATE LA**
CALIFORNIA STATE UNIVERSITY, LOS ANGELES

Last Updated: 02/21/2024

Cash Advance Request Form

ONE-STOP FINANCIAL SERVICES/SERVICE CENTER

Purpose:

To obtain access to cash advance requests for group travel through the Concur Travel & Expense System as an employee.

Requestor Information

First Name:		Employee ID #:	
Last Name:		Campus Phone:	
Campus Email Address:		Department ID:	

Reason for Cash Advance

I will be a group leader for future group travel with students.

Certification and Approvals

The following will apply to every cash advance that I obtain:

- When I accept custody of advanced funds, I agree to be accountable for the appropriate care and disposition of these funds, including safeguarding against loss or theft. In the event of loss or theft, or unauthorized or unreconciled distribution, the University may require reimbursement from me for the amount lost or stolen. Should that be the case, I understand it could result in collection activities that may include internal and external collection efforts, deduction from future travel claims, deduction from a payroll warrant, and/or tax refund offset.
- I will not use advanced funds for purposes other than approved travel expenses, and I will make advanced funds available for audit. I am responsible for complying with all applicable rules, regulations, and policies, including reconciling advanced funds with appropriate receipts and documentation within the required time frame.
- I understand cash advances may be picked up at the One-Stop Financial Services, Student Services Bldg., Room 2380 or directly deposited into my bank account after processing in the Concur Travel & Expense System. Furthermore, I understand it is my responsibility to reimburse the University for the unused portion of the cash advances at the time of reconciliation of the expense report in Concur within 60 days after a trip is completed.

Requester Signature

Date

Approver Information

DOA Approver First Name		Position/Title	
DOA Approver Last Name		Email Address	

I approve the person named above to be set up within the Concur Travel & Expense System to request cash advances. Furthermore, I understand that cash advance requests submitted by this individual will require my approval within the Concur Travel & Expense System before advanced funds will be issued.

DOA Approver Signature (level 4 or above)

Date

OFFICE USE ONLY:

ALLOCATION FEATURE

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ↓↕	Amount ↑↓	Requested ↑↓
<input checked="" type="checkbox"/>	Hotel Reservation		11/09/2023	\$275.00	\$275.00 <i>Allocated</i>

Allocate

Expenses: 1 | \$275.00

Percent

Amount

Amount

\$275.00

Allocated 100%

\$275.00

Remaining 0%

\$0.00

Default Allocation

Code

LACMP-SF001-500000

Amount USD

\$275.00

Add

Edit

Remove

Save as Favorite

PRINT/SHARE FEATURE

Faculty Conference \$1,561.00

Not Submitted | Request ID: DDJV

[Request Details](#) [Print/Share](#) [Attachments](#)

*CSU-Request Printed Report

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

- You can use the **Print/Share** feature to share your Travel Request Header and Expected Expenses as needed.
- You can also download your supporting documents from **Attachments**.

*CSU-Request Printed Report

Request to Travel

Request ID : **DDJV**
Request/Trip Name : **Faculty Conference**
*Trip Purpose : **Conference**
Travel Start Date : **11/13/2023**
Travel End Date : **11/15/2023**
Destination City/State : **Santa Barbara (US)**
Destination Country : **UNITED STATES (US)**
Requested Amount : **\$1,561.00**

Traveler

User Name
Email Address

Request Header Details

*Trip Type : **1-In-State**
*Traveler Type : **Faculty**
*If Faculty, is class covered? : **Yes**
*Personal Dates of Travel : **NA**
*Business Unit : **LA-LACMP (LACMP - Cal State University, L.A.)**
*Fund : **LA-LACMP-SF001 (SF001 - Campus Operating Fund)**
*Department : **LA-LACMP-SF001-500000 (500000 - VPA/CFO)**

[Close](#) [Print](#) [Save as PDF](#) [Email](#)



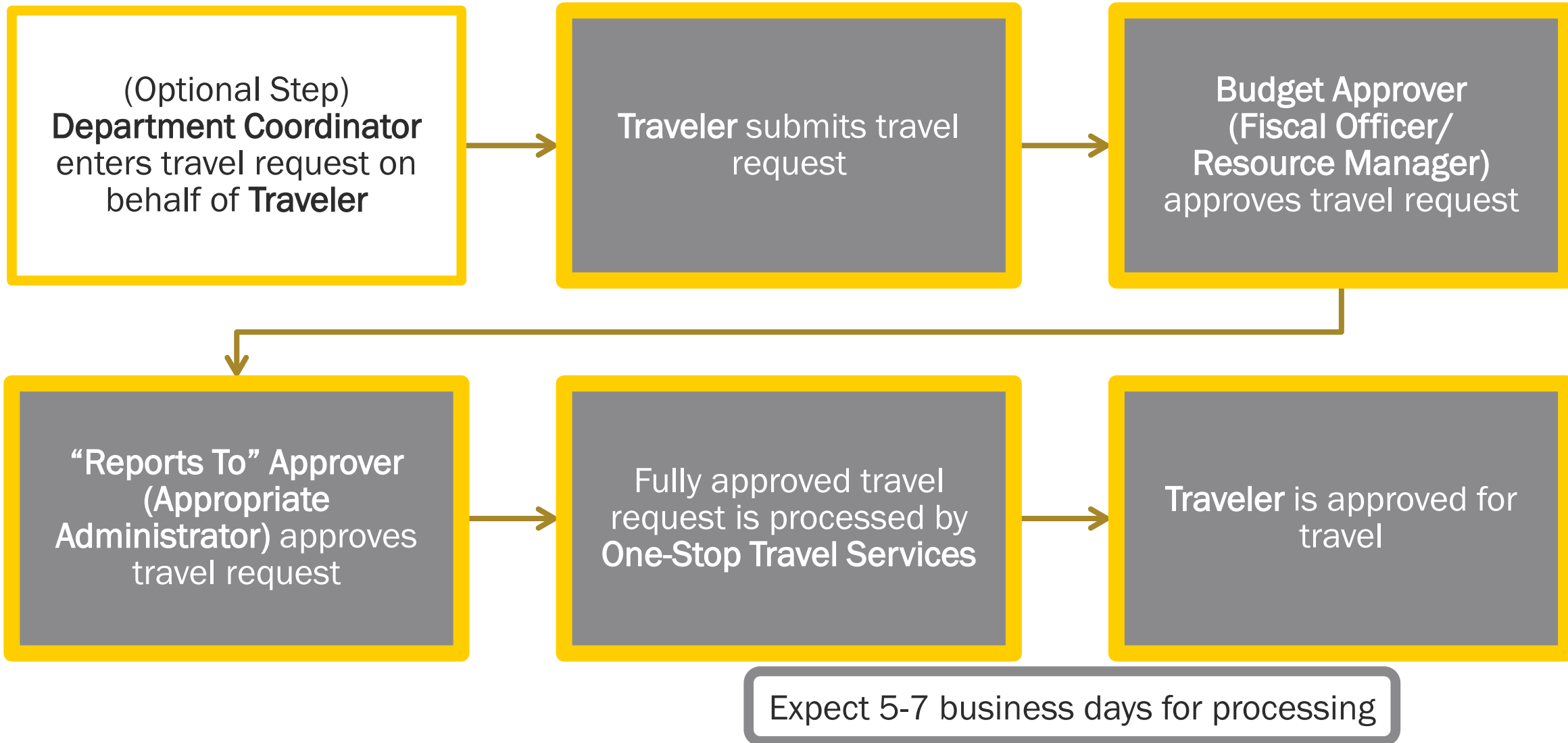
4. TRAVEL REQUEST APPROVAL



APPROVER ROLES

- The **Budget Approver** (Fiscal Officer) is based on DOA and your Dept. ID/fund combination.
- The **“Reports To” Approver** (Appropriate Administrator) is your supervisor provided by HR.
- For the approval flow to be accurate, please make sure position numbers are up to date with the appropriate MPP supervisor.
 - *The fiscal officer can check the position number by going to **GET > CSULA Baseline > CSULA Human Resources > Position by Dept***

BASIC TRAVEL REQUEST WORKFLOW



HOW TO CHECK YOUR PENDING TRAVEL REQUEST




- You can view where your travel request is pending in the approval workflow
- Go to **Requests** > Click on your active request > **Request Details** > **Request Timeline**

Request Timeline

Out State - LA Test | \$2,320.00

Approval Flow



Budget Approval
System, Concur

"Reports To" Approval2
System, Concur

User-Added Processor

Request Summary

Request Comment
Test, LA Traveler 02/17/2022
Spring Training: IT Conference

Expense Comment Hotel Reservation 03/24/2022 \$600.00 [View](#)
Test, LA Traveler 02/28/2022
Tax 15%

Submitted

BUDGET APPROVER: EDIT APPROVAL FLOW

- Budget approvers can add additional approvers anywhere in the approval workflow.
- Before clicking Approve, select **More Actions > Edit Approval Flow**
- To add an additional approver, click on **+ Add Step** where you want to insert an additional approver into the workflow.
- Click **Save**, then **Approve** to send the travel request to the next approver.

Edit Approval Flow

Budget Approval

Test, Budget Approver1

+ Add Step

48100 - Accounts Payable (SA-SACST-MDS01-48100)

Test, Budget Approver1

+ Add Substep

User-Added Approver

Search by Last Name Delete

+ Add Step

"Reports To" Approval2

Test, SA Approver

+ Add Step

User-Added Approver

Search by Last Name Delete

+ Add Step

Approval for Processing

Cancel Save

IMPORTANT NOTE

An Approver **MUST** approve or send back a Concur travel request within 10 calendar days of receiving the request for approval.

If an Approver does not act on the travel request within this timeframe, the request will be automatically forwarded to the Approver's direct supervisor for approval, according to HR.

Please check your junk mail if you are not seeing email notifications regarding Concur approval requests.



5. BOOKING YOUR TRAVEL



CHANGES TO BOOKING & PAYMENT FOR TRAVEL



Early reimbursement of expenses will no longer be an option



We are also moving away from cash advances*



New Golden Eagle Travel (GET) Card



Additional booking options available in Concur

GOLDEN EAGLE TRAVEL (GET) CARD



You can request a University-issued travel card, called the GET card, to avoid out-of-pocket travel expenses; *highly recommended for frequent travelers (i.e., 3 or more trips per calendar year).*



With the GET card, you can pay for business expenses: *Airfare, Lodging, Car Rental, Gas, Registration, Parking, Ground Transportation, and more.*



Note: GET cardholders are responsible for ensuring that all charges comply with University policy (card is linked to your department accounts).



If you're interested in applying for a GET card, ask your Resource Manager to contact Service Center for the application at travel@calstatela.edu

WAYS TO BOOK YOUR TRAVEL

	Can I book through Concur?	Can I book outside of Concur?
Flight	Yes, recommended since charged directly to department	Yes
Hotel	Yes	Yes, recommended if using conference group rate
Car Rental	Yes, recommended since contracted CSU rates already incorporated	Only by directly contacting One-Stop Travel Services
Registration Fee	No	Yes

*Have questions about how to book your travel?
Contact One-Stop Travel Services at travel@calstatela.edu*

WAYS TO PAY FOR YOUR TRAVEL





	Personal Card*	GET Card	P-Card	Charged directly to dept via Concur
Registration Fee	Yes	Yes	Yes	No
Flight	Yes	Yes	No	Yes, recommended
Hotel	Yes	Yes	No	No
Car Rental	Yes	Yes	No	No
Meals & Incidentals	Yes	Yes	No	No

**If using a personal card, you will be reimbursed after returning from travel once your expense report has been processed.*

*Have questions about how to book your travel?
Contact One-Stop Travel Services at travel@calstatela.edu*

BOOKING A FLIGHT

Trip Search



****Don't book travel until your request is approved****

Mixed Flight/Train Search

Round Trip

One Way

Multi City

From ?

Departure city, airport or train station

Find an airport | Select multiple airports

To ?


Arrival city, airport or train station

Find an airport | Select multiple airports

Search

Show More

Depart ?

 mm/dd/yyyy


depart ▾

Morning ▾

± 4 ▾

▾

Return ?

 mm/dd/yyyy

depart ▾

Afternoon ▾

± 4 ▾

▾

☐ Pick-up/Drop-off car at airport

☐ Find a Hotel

Search by

Price ▾

☐ Include additional refundable air fares

☒ Flights w/ no double connections

Search

- You can use the Trip Search feature to book a flight or train.
- You can search by Price or Schedule.

BOOKING A FLIGHT

Trip Summary

Select Flights or Trains

Round Trip

LAX - SEA

Depart: Mon, 05/27/2024

Return: Fri, 05/31/2024

Finalize Trip

Previous Searches

Previous Searches

Load

Change Search

From

LAX - Los Angeles Intl Airport - Los Angeles, CA

To

SEA - Seattle-Tacoma Intl Airport - Seattle, WA

Depart

05/27/2024

09:00 a

± 4

Return

05/31/2024

03:00 p

± 4

Search by

Price

☐ Include additional refundable air fares

☒ Flights w/ no double connections

Search

Depart - Mon, May 27

Depart 05:15 A - 01:00 P

Arrive 08:57 A - 12:15 A

Los Angeles, CA To Seattle, WA

Mon, May 27 - Fri, May 31

Show as USD

Hide matrix Print / Email

All	Southwest	Alaska Airlines	Delta	United	Multiple	American Airlines
851 results	Preferred					
Nonstop 51 results	—	371.20 25 results	401.20 9 results	401.20 1 results	486.20 15 results	536.96 1 results
1 stop 800 results	545.97 2 results	375.70 165 results	638.71 33 results	410.70 98 results	495.70 321 results	546.46 181 results

Shop by Fares

Shop by Schedule

Please be advised, CSU has established a new vendor contract with discounted pricing on Southwest Airlines. The discount will automatically be applied during pricing and ticketing if the fare is eligible. Include your Rapid Rewards number to earn points on qualifying flights! Some classes of services or routing may not be included. Book in Concur or with Christopherson and fly to start earning.

Flight Number Search

Sorted By: Price - Low to High

Displaying: 851 out of 851 results.

Previous | Page: 1 of 86 | Next | All

Alaska Airlines

06:00a LAX → 08:57a SEA

Nonstop

2h 57m

05:44p SEA → 08:28p LAX

Nonstop

2h 44m

\$371.20

Hide Fares

Least Cost Logical Fare

Hide all details

DEPART ✈ Mon, May 27 – Los Angeles, CA to Seattle, WA

Flight details

RETURN ✈ Fri, May 31 – Seattle, WA to Los Angeles, CA

Flight details

Fare Options	Free Checked Bags	Refundable
Main (N, O) Rules Benefits/Services	0	No
Refundable Main (N, O) Rules Benefits/Services	0	Yes Fees may apply

✓ \$371.20

⚠ \$471.21





- Audit rules are automatically incorporated.
 - The *green checkmark icon* indicates the fare is within policy.
 - The *orange caution icon* indicates a policy violation.
- Flights booked through Concur are directly charged to the department.

CAL STATE LA

BOOKING A CAR

Travelers are required to use **Enterprise** and **National** for all rental car needs.

Trip Search



Car Search


Pick-up date
 12:00 pm ▾

Drop-off date
 12:00 pm ▾

Pick-up car at
☒ Airport Terminal ☐ Off-Airport

Please enter an airport.

☐ Return car to another location

 [More Search Options](#)

Search

Car Type (Select up to 3)

Compact Car
Intermediate Car
Standard Car
Full-size Car
Intermediate SUV

Smoking
Don't care ▾

Preferred

☒ Enterprise
☒ National

Car Vendors

☒ Any Vendor
☐ Alamo*
☐ Avis*
☐ Budget*

Your company preferred vendors will be included in the search with your preferences.

*Indicates major vendor.

Search

BOOKING A CAR

Trip Summary

Select a Car

Pick-up: Mon, 05/27/2024
Drop-off: Thu, 05/30/2024

Finalize Trip

Change Car Search

Car Display Filters

☐ Unlimited miles

☐ Air conditioning

☐ Hybrid

Car Transmission

☐ Automatic

☐ Manual

Additional insurance purchased may not be reimbursable, refer to the CSU Travel Procedures.

Pick up: (LAX) on Mon, May 27 12:00 PM

Return: Thu, May 30 12:00 PM

Show as USD

Hide matrix

Print / Email

All 21 results	Compact	Intermediate	Standard	Full-size	Mini	Premium
<div>enterprise</div> <div>Most Preferred</div>	171.84	173.05	181.51	184.14	273.78	338.07
<div>National</div> <div>Most Preferred</div>	171.84	173.05	181.51	184.14	273.78	338.07

Sorted By: Policy - Most Compliant

Displaying: 4 out of 18 results.

enterprise

Intermediate Car - \$37.49 per day (Worldspan)

Automatic transmission
Unlimited miles, Pick-up: Terminal: LAX
Adults: 4, Large bags: 1, Small bags: 2
(Corporate rate)

Total cost
\$173.05

Most Preferred Car Vendor for CSU / E-Receipt Enabled

Location details

National

Intermediate Car - \$37.49 per day (Worldspan)

Automatic transmission
Unlimited miles, Pick-up: Terminal: LAX
Adults: 4, Large bags: 1, Small bags: 2
(Corporate rate)

Total cost
\$173.05

Most Preferred Car Vendor for CSU / E-Receipt Enabled

Location details

enterprise

Intermediate SUV - \$63.62 per day (Worldspan)

Automatic transmission
Unlimited miles, Pick-up: Terminal: LAX
Adults: 5, Large bags: 3, Small bags: 2
(Corporate rate)

Total cost
\$273.05

To reserve a car, you will need to have a payment method, such as a credit card, on file.

CAL STATE LA

BOOKING A HOTEL

Trip Search



Hotel Search

Check-in Date



Check-out Date



Search within 5 miles from

☐ Airport

☐ Address

☐ Company
Location

☒ Reference Point / Zip
Code

Reference Point / Zip Code

(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

Only show results containing:

Search

Trip Summary



Select a Hotel

Nights: 3

Seattle, WA, USA

Check-in: Mon, 05/27/2024

Check-out: Thu, 05/30/2024

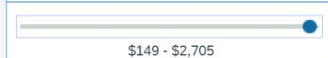


Finalize Trip

Change Search



Price



Display Settings



Hide Sold Out

Property Brand



☒ Chain ☐ Superchain

☐ BENCHMARK HOSPITALITY INTERNATIONAL (2)

☐ Best Western (1)

☐ Booking Services (1)

☐ BT Advantage (4)

☐ CitizenM Hotels (1)

[Check All](#) | [Reset](#)

Amenities



☐ Breakfast (35)

☐ Broadband Internet (79)

☐ Business center (67)

☐ Convention center (0)

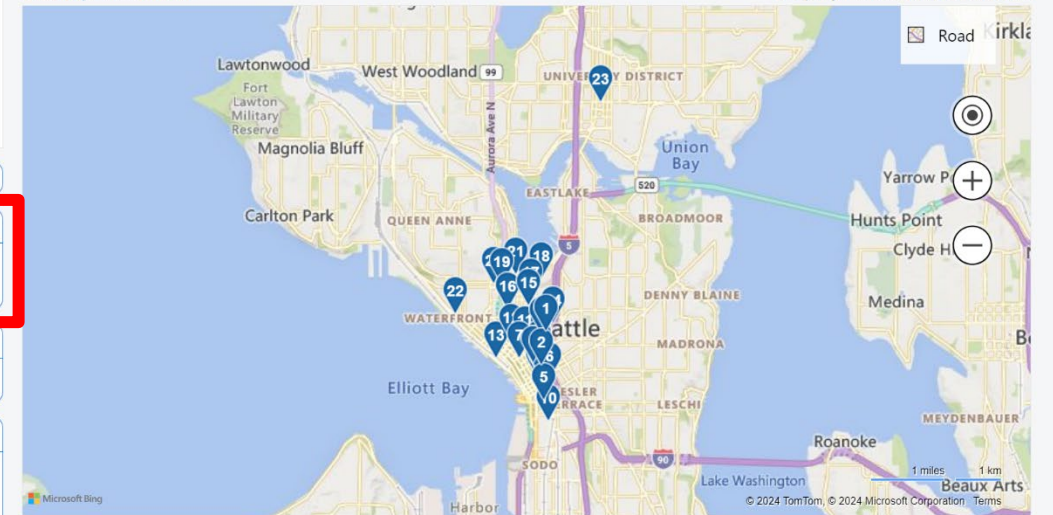
Certain hotels may offer government/preferred member rates which do not apply to all. CSU employees may use **State Government** rates. Additional verification may be required in order to receive the discounted/preferred rate shown.

Check-in Mon, May 27 - Check-out Thu, May 30

Show as USD

[Hide Map](#) [Print / Email](#)

Company Preferred Accommodation



Name Search



Sorted By: Preference



Displaying: 84 out of 84 results.

[Previous](#) [1](#) [2](#) [3](#) [4](#) [Next](#) | [All](#)



1. Hilton Garden Inn Seattle Downtown

1821 Boren Avenue, Seattle, WA 98101 [Map it](#)

0.69 miles ★★★★★

\$149

[View Rooms](#)

[Hotel details](#)




2. Hilton Seattle

1301 6th Avenue, Seattle, WA 98101-2304 [Map it](#)

\$178

[View Rooms](#)

BOOKING A HOTEL



16. Grand Hyatt Seattle
721 Pine St, Seattle, WA 98101-1815 [Map it](#)

0.44 miles

★★★★★

\$232

Hide Rooms

[Hotel details](#)

Room Options

Government Rate 1 King Bed Standard King 380 Sq Ft King Bed Please cancel 24 hours before checkin (Worldspan)
[Rules and cancellation policy](#)

Arts Entertain 2 Dbl Clb Access Access To Lounge Floors 25-30 2 Double Beds Please cancel 72 hours before checkin (Worldspan)
[Rules and cancellation policy](#)

Member Adv Purch 1 King Bed Standard King 380 Sq Ft King Bed (Worldspan)
[Rules and cancellation policy](#)

✓

\$232

⚠

\$364

✗

\$215

Not Allowed

Deposit required

To reserve a hotel, you will need to have a payment method, such as a credit card, on file.

CAL STATE LA



6. SUBMITTING AN EXPENSE REPORT



EXPENSE REPORT CHECKLIST

- Review your **Expense Report Checklist** prior to submitting your Concur expense report.
- Main categories to add to your expense report include:
 - *Digital copies of receipts for expenses*
 - *Meals with an overnight stay*
 - *Additional supporting documents (e.g., mileage)*
- It is recommended to sign up for direct deposit for employee reimbursement in lieu of receiving a physical check. You can initiate this request by emailing One-Stop Financial Services at 1stopfinancial@calstatela.edu

EXPENSE REPORT CHECKLIST PREVIEW

Expense Report Checklist

You may use this guide as a reminder of items that may need to be included in your expense report. Depending on your travel, some of the following items may not be relevant.

It is highly recommended to submit your expense report as soon as possible and no later than 60 days after your travel end date.

Please reach out to One-Stop Financial Services if you have any questions.


- ☐ Receipts for expenses*
 - ☐ Hotel Folio (Payment Receipt)
 - ☐ Air (Itinerary with Receipt)
 - ☐ Registration
 - ☐ Car Rental
 - ☐ Transportation
 - ☐ Other Business Expenses (ex. luggage fee, gas for rental)
 - ☐ *When itemizing expenses, be sure to include all trip expenses (not just out-of-pocket) in order to validate the total business cost of the trip.*
- ☐ Meals with overnight stay (location-based per diem meals and incidentals)
- ☐ Additional Supporting Documents – examples provided below:
 - ☐ Attendance Verification for Virtual Webinars, Conferences, Training, etc.
 - ☐ Conference Agenda



CONCUR'S AVAILABLE RECEIPTS LIBRARY



SUBMITTING AN EXPENSE REPORT

 **The California State University**

1

+

Start a Request

+

Start a Report

+

Enter Reservation

03

Authorization Requests

00

Available Expenses

03

Open Reports

Create New Report 2

Create From an Approved Request

Policy *

*CSU-Expense Policy

An Expense Report must be linked to an approved Travel Request, otherwise you will receive the following alert.

WACUBO BMI 2024 \$0.00 3

Not Submitted | [Report Number: MV27XH](#)


REQUEST
Approved
\$

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

✖ NO REQ-ACTION REQUIRED: An Approved Request was not linked or completed for this Expense Report. Please link corresponding Request by clicking Report Details > Manage Requests > Add. The system will re-evaluate the error once you click the Submit button. If a Request was never completed, please delete this Report and initiate a new Request. Upon approval, an Expense Report can then be created. [View](#)

AVAILABLE EXPENSES

 **The California State University**

1

+
Start a Request

+
Start a Report

+
Enter Reservation

03
Authorization Requests

00
Available Expenses

03
Open Reports

Add Expense ×

Number of expenses available for assignment

2

5
Available Expenses

+
Create New Expense

<input type="checkbox"/>	Payment Type↑↓	Expense So... ↑↓	Expense Type↑↓	Vendor Det... ↑↓	Date↑↓	Amount↑↓
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Meals & Incidentals	TST* DESCHUTES BREWERY PO Portland, Oregon	08/09/2023	\$46.00
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Airfare	UNITED 0164229270960	08/08/2023	\$35.00
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Meals Charged on Campus Issued Card	UNITED 0164229270961	08/08/2023	\$45.00
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Undefined	SAN LUIS OBISPO, CA SL	08/08/2023	\$18.41
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Meals Charged on Campus Issued Card	MARRIOTT 33709 PORTLAN Portland, Oregon	08/08/2023	\$22.00

Close Add To Report

- All available expenses done on the **Golden Eagle Travel (GET)** card or purchased by the Travel Team using the University Card will appear here.
- Note that flights purchased through Concur (including booking through Christopherson travel agency) will appear in Available Expenses.



7. LOCATION-BASED PER DIEM FOR M&IE



TRAVEL REQUEST: MEALS & INCIDENTALS

LOCATION-BASED PER DIEM



Concur automatically calculates your total **expected expenses** for M&IE based on location and dates of travel.

[Home](#) / [Requests](#) / [Manage Requests](#) / [Faculty Conference](#) / New Expense: 04a. Meal & Incidentals Per Diem

New Expense:04a. Meal & Incidentals Per Diem

CancelSave

Allocate

Travel Start Date

11/13/2023

Travel End Date

11/15/2023

Destination

Santa Barbara, California

X v

Reduction for Meals Provided/Personal Days * ?

0

Amount - Will automatically calculate when you hit save.

Currency *

US, Dollar (USD)

X v

Comments To/From Approvers/Processors

0/2000

Save

Cancel



EXPENSE REPORT: MEALS & INCIDENTALS

LOCATION-BASED PER DIEM

Conference \$0.00

Not Submitted | [Report Number: PYOSP2](#)

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾ [Travel Allowance](#) ▾

Add Expense

Edit

Delete

Copy

Allocate

Manage Travel Allowance

Combine Expenses

Move to ▾

1. Click **Travel Allowance > Manage Travel Allowance**.

Travel Allowances For Report: Conference

1 [Create New Itinerary](#) 2 [Available Itineraries](#) 3 [Expenses & Adjustments](#)

Itinerary Info

Itinerary Name

Conference

Selection

USGSA



Add Stop

Delete Rows

Import Itinerary

2. Click **Create New Itinerary** (or **Import Itinerary** if booked travel in Concur).

EXPENSE REPORT: MEALS & INCIDENTALS

LOCATION-BASED PER DIEM

3. Enter your travel stop details (departure to arrival).

Edit Itinerary Stop

Departure City

San Francisco, California

Date

11/08/2023

Time

08:00 AM

Arrival City

Sacramento, California

Date

11/08/2023

Time

10:00 AM

Save

Edit Itinerary Stop

Departure City

Sacramento, California

Date

11/13/2023

Time

05:00 PM

Arrival City

San Francisco, California

Date

11/13/2023

Time

08:00 PM

Save

EXPENSE REPORT: MEALS & INCIDENTALS

LOCATION-BASED PER DIEM

4. Mark any specific meals that were provided on your trip which will automatically be deducted.

Travel Allowances For Report: Conference

1 Create New Itinerary

2 Available Itineraries

3 Expenses & Adjustments

Show dates from to

Go

Exclude All <input type="checkbox"/>	Date/Location↑	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	11/08/2023 Sacramento, California	\$51.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75
<input type="checkbox"/>	11/09/2023 Sacramento, California	\$69.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	11/10/2023 Sacramento, California	\$69.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	11/11/2023 Sacramento, California	\$69.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$38.00
<input type="checkbox"/>	11/12/2023 Sacramento, California	\$69.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$69.00
<input type="checkbox"/>	11/13/2023 Sacramento, California	\$51.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$51.75

EXPENSE REPORT: MEALS & INCIDENTALS

LOCATION-BASED PER DIEM

5. Meal Expenses will then automatically be added to the expense report.

Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓=	Requested↓↑
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/13/2023	\$51.75
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/12/2023	\$69.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/11/2023	\$38.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/10/2023	\$53.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/09/2023	\$53.00
Out of Pocket	Meals/Incidentals - Location Based	Sacramento, California	11/08/2023	\$51.75
				\$316.50



8. EXPENSE REPORT APPROVAL



BASIC EXPENSE REPORT WORKFLOW




HOW TO CHECK YOUR PENDING EXPENSE REPORT

- You can view where your expense report is pending in the approval workflow
- Go to **Expenses** > Click on your active request > **Expense Details** > **Expense Timeline**


Request Timeline

Out State - LA Test | \$2,320.00

Approval Flow



Budget Approval
System, Concur



"Reports To" Approval2
System, Concur



User-Added Processor

Request Summary

Request Comment
Test, LA Traveler 02/17/2022
Spring Training: IT Conference

Expense Comment Hotel Reservation 03/24/2022 \$600.00 [View](#)
Test, LA Traveler 02/28/2022
Tax 15%

Submitted

IMPORTANT NOTE

An Approver MUST approve or send back a Concur expense report within 10 calendar days of receiving the report for approval.

If an Approver does not act on the expense report within this timeframe, the report will be forwarded to the Approver's direct supervisor for approval, according to HR.

Please check your junk mail if you are not seeing email notifications regarding Concur approvals.



9. DELEGATES & TRAVEL ARRANGERS



DELEGATES & TRAVEL ARRANGERS



Delegates can be authorized to act on behalf of a traveler or review/approve on behalf of an approver.

Delegate Preparer
Delegate Previewer
Delegate Approver (temporary role)

Travel arrangers can be authorized to book travel on behalf of the traveler. *Note that a user must first be assigned as a delegate before also being assigned as a travel arranger.*

It is still the responsibility of the traveler to review and submit their own travel requests and expense reports.

ACTING AS A DELEGATE



SAP Concur Home

CSU The California State University

+ Start a Request + Start a Report 00 Required Approvals 00 Authoriz Reque

Tasks

00 Required Approvals → Great! User currently has no approvals.

00 Available Expenses → User currently has no available expenses.

00 Open Reports → User currently has no open reports.

Act as Another User

Act As ?

☐ Myself

☒ A Delegate for another user who has granted you this permission

Search by name or ID

Switch

Profile Settings

Sign Out

On the Concur Homepage, click on **Profile**. Under the *Act as Another User* drop-down, mark **Act As: A Delegate for another user who has granted you this permission**. Then search for the user you are acting as a delegate for and click **Switch**. To switch back, mark **Act As: Myself**.

SETTING UP A DELEGATE

Your Information

[Personal Information](#)

[Company Information](#)

[Contact Information](#)

[Email Addresses](#)

[Emergency Contact](#)

[Credit Cards](#)

Travel Settings

[Travel Preferences](#)

[International Travel](#)

[Frequent-Traveler Programs](#)

[Assistants/Arrangers](#)

Request Settings

[Request Information](#)

[Request Delegates](#)

[Request Preferences](#)

[Request Approvers](#)

[Favorite Attendees](#)

Expense Settings

[Expense Information](#)

[Expense Delegates](#)

[Expense Preferences](#)

Request Delegates

Delegates

Delegate For

Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
No records found.					

On the Concur Homepage, click on **Profile > Profile Settings**. Then go to either ***Request Settings > Request Delegates*** or ***Expense Settings > Expense Delegates***.

SETTING UP A TRAVEL ARRANGER

On the Concur Homepage, click on **Profile > Profile Settings**.

Then go to *Travel Settings > Assistants/Arrangers*.

Travel Settings

[Travel Preferences](#)

[International Travel](#)

[Frequent-Traveler Programs](#)

[Assistants/Arrangers](#)

Assistants and Travel Arrangers

[Go to top](#)

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

☐ Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers

[+ Add an Assistant](#)

You currently have no assistants defined.

Save

HELPFUL RESOURCES

- Travel Planning Checklist
- Expense Report Checklist
- Definition Sheet
- FAQ

<https://www.calstatela.edu/finance-onestop/concur-travel>



Contact Us

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Web

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