



Concur Travel & Expense

CONCUR TRAINING - OVERVIEW



Concur Training Agenda

Today's meeting will cover:

- Concur Overview
 - How to Login and Navigate
 - User Profile Setup
 - Completing a Travel Request
 - Completing an Expense Report
 - Approval Workflow Process
 - Q & A





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 higher education business travel.
- Concur also offers the **Concur Mobile App** to manage your expenses and business travel on your mobile device and/or tablet.



Concur Overview



Concur streamlines for a fully automated electronic workflow process of...

- ✓ Travel reimbursements
- ✓ US Bank State Travel Card transactions
- ✓ Domestic & International travel approvals
- ✓ Travel Advance (Exceptional circumstance)



Concur Overview

Concur has 3 Modules:

- ✓ **Request (Travel Request)** – (Replaces the Travel Requisition or Travel PO) is required to obtain preapproval of your travel prior to making any travel reservations.
- ✓ **Travel (Concur Travel)** – Concur Travel should be used to book airfare and make rental car and hotel reservations through the University's travel management company (TMC), Christopherson Business Travel (CBT) either by using the online booking tool or booking directly with a CBT agent.
- ✓ **Expense (Expense Report)** – (Replaces the Travel Claim) is required to request reimbursement for out-of-pocket expenses, and to reconcile any university prepaid transactions including US Bank State Travel Card transactions.
- ❖ All Travel Request and Expense Reports will go through an integrated approval workflow in Concur.



Concur Overview

Benefits of Concur....

- ✓ Seamless travel and expense experience
- ✓ Improved visibility of travel expense and approval status
- ✓ Quicker employee reimbursement
- ✓ Easier receipt capture and documentation by upload/scan to expense report
- ✓ Email notifications and reminders of submissions and approvals at designated timed intervals
- ✓ Minimize out-of-pocket expenses for airfare when booking through Concur Travel and using the US Bank State Travel Card for other business expenses.
- ✓ Convenience through built-in automated features for travel policy compliance, CSU and campus specific policies, mileage calculation, currency conversion, etc.



The Travel Process

Step 1:

Complete
Travel
Request.
Once
approved....

Step 2:

Book Travel
(via Concur
Travel or
outside
Concur)

Step 3:

Complete
and submit
Travel
Expense
Report after
trip return.



US Bank Travel Ghost Card

- A new US Bank Travel ghost card account has been created for use in Concur. The card will be linked to user profiles when using Concur Travel.
- The US Bank travel ghost card account number is hidden and can only be used for university business travel in Concur.
- **Only airfare can be charged to the US Bank Travel ghost card.** Hotel and car rental reservations will need to present a physical credit card in person at the time of payment (Individual State Travel Card).
- US Bank travel ghost card transactions will upload to the traveler's Concur account where they can attach them to an Expense Report.





US Bank Individual State Travel Cards



- New individual US Bank State Travel Cards will be issued to all individuals who travel, with the approval of their supervisor. The card will be entered into user profiles when using Concur Travel.
- The US Bank individual State Travel Cards will be an only be used for university business travel in Concur (Lodging, Car Rental & Fuel, Parking, Ground Transportation, Meals, etc.)
- All business related expense should go onto this card to help reduce out-of-pocket expenses.
- US Bank individual State Travel Card transactions will upload to the traveler's Concur account where they can attach them to an Expense Report.





Approval Workflow

- All Travel Requests and Expense Reports will go through an automated workflow process.
- The **Budget Approver** has been designated by your Department Head and is based on Dept. ID/fund combination.
- The **“Reports To” Approver** is your direct report provided by HR.
- Depending on **Travel Type** and **Travel Destination**, additional approvals may be required for Travel Request.
- In addition to required approvals, users and/or approvers can add additional approvers to the workflow to any particular Travel Request and/or Expense Report.



Accessing Concur

- Eligible Humboldt State University employees are already setup to use Concur. If you are not able to access Concur, please contact the University Concur Coordinator @ travel@Humboldt.edu.
- To access Concur, go to the link that was provided to you when your travel card was approved.
- Prior to using Concur, please review and complete your User Profile. Setting up your profile is important so that all the information in Concur is current and accurate for booking travel and getting the most out of the Concur Travel & Expense System.



Navigating Concur Homepage

SAP Concur | Requests | Travel | Expense | App Center | Profile Access | Profile

CSU The California State University
Hello, SF Traveler

Quick Task Bar

- + New
- 12 Authorization Requests
- 00 Available Expenses
- 22 Open Reports

TRIP SEARCH

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](#)

ALERTS

As a CSU Office of the Chancellor employee, you are eligible for a free Triplt Pro subscription. [Learn More and Activate](#) Not right now

COMPANY NOTES

Concur Training Toolkit
This link will provide information to utilise the Concur Ex...

MY TASKS

- 12** Open Requests →
 - 07/17 Denver Conference \$495.00 — Travel
 - 07/01 Blanket Request- July \$109.00 — Travel
 - 06/28 Test Validation #3 \$418.18 — Travel
 - 06/19 alaska trip \$20.00 — Travel
 - 06/12 international test 070218 \$200.00 — Travel
- 00** Available Expenses →
You currently have no available expenses.
- 22** Open Reports →
 - 07/06 alaska trip \$307.00
 - 07/05 test
 - 07/05 intl test \$939.50
 - 07/05 0625 \$435.33
 - 07/05 alaska trip

MY TRIPS (0) →
You currently have no upcoming trips.

Click here to return home anytime

Use Trip Search to gather estimates for your Travel Request.

Upcoming Trips will be listed here

Quick Task Bar →

Concur updates will be here

US Bank Ghost & Individual Card Transactions will be here



Completing User Profile

- On the Concur Homepage, Click on **Profile > Profile Settings**.

The screenshot shows the Concur user profile settings page. The navigation menu on the left includes:

- 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
 - Expense Approvers
 - Personal Car
 - Favorite Attendees
- Other Settings
 - E-Receipt Activation
 - System Settings
 - Connected Apps
 - Concur Connect
 - Change Password
 - Forgot Concur Mobile PIN
 - Travel Vacation Reassignment
 - Concur Mobile Registration

The main content area, titled 'Profile Options', contains the following sections:

- Personal Information**: Your home address and emergency contact information.
- Company Information**: Your company name and business address or your remote location address.
- Credit Card Information**: You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**: Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**: Going to be out of the office? Configure your backup travel manager.
- Request Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Personal Car**: Personal Car
- Concur Mobile Registration**: Set up access to Concur on your mobile device
- System Settings**: Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**: How can we contact you about your travel arrangements?
- Setup Travel Assistants**: You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**: Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**: Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**: Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Change Password**: Change your password.

- **Profile Options:**
 - Your Information
 - Travel Settings
 - Request Settings
 - Expense Settings
 - Other Settings



Personal Information

➤ **Name-**

- Make sure your name is identical to the name on your photo identification if using Concur Travel to book airfare as the name in the system will be the name provided on your ticket. Otherwise, contact the Concur Coordinator **prior** to booking your airfare.

➤ **Contact Information-**

- A work or home phone number is required.

➤ **Email Addresses-**

- Your email address has been provided by HR. You can add additional email addresses.
- You will want to verify your email address to be able to forward travel plans and receipt images to Concur.



Request/Expense Settings

- The following categories can be found in both **Request Settings** and **Expense Settings**. Once you assign it to one setting, it will automatically be assigned to the other, except for Preferences (Email)...

Settings	Descriptions
Preferences (Email)	<ul style="list-style-type: none">Select options that define when you want to receive email notifications.Actual setting selections are different in both Request and Expense.
Information (chartfield) & Approvers ("Reports to")	<ul style="list-style-type: none">You can view this information. You cannot update this information, however you can change the chartfield on the actual Travel Request and Expense Report. "Reports to" Approver is your direct report provided by HR.
Delegates	<ul style="list-style-type: none">By assigning permissions to a delegate, you are assigning permissions for Request and Expense.
Favorite Attendees	<ul style="list-style-type: none">Attendees added to Request will also be added to Expense. The Attendee functionality can be used to enter attendee names that are present at a travel business entertainment event (Hospitality related).
Personal Car (Under Expense Settings Only)	<ul style="list-style-type: none">In order to claim personal car mileage on an expense report, you need to add a car to your profile. The Vehicle ID is your license plate #. Mileage Rate Type is Personal (CSU current standard reimbursement rate) or Athletics.



Delegate Permissions

Delegate - employee who is allowed to perform work on behalf of another employee. Delegate Permissions are only for Request and Expense. You will also need to add this delegate as an Assistant/Travel Arranger to allow them to book travel via Concur.

➤ **Traveler Permissions:**

- ✓ Prepare Travel Requests and Expenses Reports
- ✓ View Receipt Images
- ✓ Receive a copy of Email Notifications (No approval emails)

➤ **Approver Permissions:** Approvers will have additional approval permissions to assign to a delegate.

- ✓ Approve Travel Requests and Expenses Reports without date constraints
- ✓ Approve Temporarily (beginning/end date required)
- ✓ Preview Travel Request/Expense Report for Approver prior to Approval
- ✓ Receive a copy of Approval Email Notifications

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	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	SF Traveler sftraveler@sfsu.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee you assign "Can Approve" permission must already be an approver in Concur.



Travel Settings

- **Travel Preferences** – Complete all fields if you will be Booking Travel via Concur so your preferences will be saved and to enhance your search results and reservation wishes using the online booking tool.

Travel Preferences	Descriptions
Air, Hotel, & Car Rental Preferences	<ul style="list-style-type: none">• Indicate any preferences such as seat selection, room type, accessibility needs, car transmission, etc.
Frequent- Traveler & Advantage Programs	<ul style="list-style-type: none">• indicate any programs/discounts such as AAA member, Government, frequent traveler numbers.
TSA Secure Flight -Required	<ul style="list-style-type: none">• Add date of birth and TSA Pre-check number.
International Travel: Passports and Visas	<ul style="list-style-type: none">• Add passport/International Visa information.
Assistants/Travel Arrangers	<ul style="list-style-type: none">• Add a primary Travel Assistant/Travel Arrangers.
Credit Cards- Required	<ul style="list-style-type: none">• US Bank Individual State Travel Credit Card should be added in order to guarantee hotel reservations.



Assistants/Arrangers

- **Primary Travel Assistant vs. Travel Arranger** – A **Travel Arranger** can perform travel functions such as book travel on a traveler's behalf whereas a **Primary Travel Assistant** can also receive confirmation emails from CBT (Christopherson Business Travel) regarding the travel as well as update profile information.
- In order to make someone a Travel Assistant/Arranger, you must also make them a delegate for Travel Request/Expense.

The screenshot displays the 'Profile Options' page in the Concur system. The 'Assistants and Travel Arrangers' section is highlighted with a green arrow. A modal window titled 'Add an Assistant' is open, showing a list of assistants and checkboxes for 'Can book travel for me' and 'Is my primary assistant for travel*'. A note at the bottom of the modal states: '*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.' The modal has 'Save' and 'Cancel' buttons at the bottom.



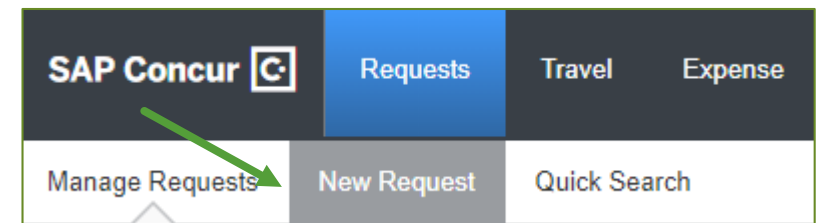
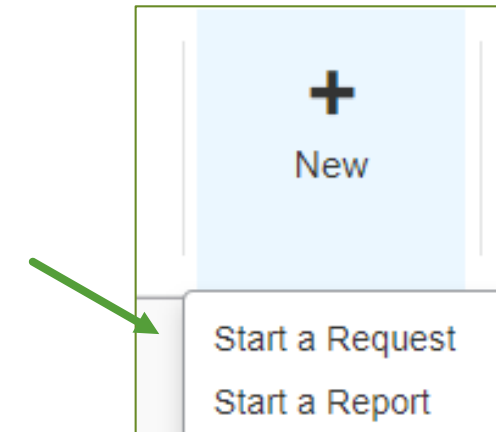
Creating a New Travel Request

- To Create a New Travel Request from the Concur Homepage, you have two options:

- On the Quick Task Bar, under **New > Start a Request**

OR

- On the menu, click **Requests > New Request**





Creating a New Travel Request

Travel Request consists of the following Tabs:

Request Header

Segments

Expenses

Approval Flow

Audit Trail

- **Request Header**
- **Segments (Airfare, Car Rental, Hotel)**
- **Expenses**
- **Approval Flow**
- **Audit Trail**



Request Header

- **Step 1:** Complete **Travel Request Header**.
- **Step 2:** Once Header is complete, click on **Segments Tab**.

Request

All boxes with red bars are required fields.

Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Request/Trip Name:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name: Trip Type: How will you book your trip?: Travel Start Date: Travel End Date:

Traveler Type: Trip Purpose: If Faculty, is class covered?: Personal Dates of Travel-If none enter NA: Destination City/State: Final Destination Country:

Are you travelling to a banned state?: Comments To/From Approvers/Processors:

Business Unit: Fund: Department: Program: Class: Project:

1-Faculty
2- Staff

Chartfield default is MDS01 & your Dept. ID is populated from HR.

Do you have a plan/substitute for your classes while you are away? Yes, No?



Segments

- There are 3 **Segments** you will need to fill out estimates for if applicable to your travel:



➤ **Airfare**



➤ **Car Rental**



➤ **Hotel**

- The information you provided for your Segments will prepopulate the search criteria if Booking Travel via Concur.

Airfare



- The dates will populate and move over from the Request Header. Fill in all required fields and optional fields if you like and click **Save**.

The screenshot shows the 'Air Ticket' form with the following fields and callouts:

- Amount:** 200.00 USD. Callout: "Enter an estimated Amount".
- Outbound:**
 - From:** San Francisco Intl (Airport - SFO), San Francisco, California. Callout: "From/To fields will bring up a selection of locations once you start typing a location."
 - To:** Los Angeles Intl (Airport - LAX), Los Angeles, California.
 - Date:** 08/16/2018. Callout: "If booking travel via Concur, enter departing times. This will populate your search criteria."
 - Depart at:** [Dropdown]
 - Comment:** [Text area]
- Return:**
 - Date:** 08/18/2018.
 - Depart at:** [Dropdown]
 - Comment:** [Text area]

Buttons: Save, Cancel



Car Rental



- The dates will populate and move over from the Request Header. Fill in all required fields (location where you want to pick-up & drop off vehicle) and optional fields if you like and click **Save**.

The screenshot shows a 'Car Rental' form with the following fields and callouts:

- Amount:** 150.00 USD (Callout: Enter an estimated Amount)
- Pick-up:**
 - City: Long Beach, California
 - Date: 08/16/2018 At 10:00 pm
 - Detail: (empty)
- Drop-off:**
 - City: Long Beach, California (Callout: City fields will bring up a selection of cities once you start typing the city name.)
 - Date: 08/18/2018 At 02:00 pm
 - Detail: (empty)
- Comment:** (empty)
- Buttons:** Save, Cancel (Callout: Click Save when done.)



Hotel



- Fill in all required fields and optional fields if needed and click **Save**.
- Enter **Maximum Nightly Rate** that you anticipate your hotel room will be. If your hotel total is above \$275 before tax, you will need to attach the Authorization for Exception to Travel form to your Expense Report. Please have the form approved prior to booking your hotel stay to ensure full reimbursement.

Hotel Reservation Amount: 200.00 USD

Check-In
City: Long Beach, California
Date: 08/16/2018 At []
Detail: []

Check-Out
Date: 08/18/2018 At []
Comment: []

Enter estimated max nightly rate you may have.

Maximum Nightly Rate: \$100.00

Enter an estimated Amount

Tip indicator: this message will appear..
Nightly rates exceeding \$275 (excluding taxes) will require written justification and approval to be attached to your Expense Report. Reimbursement will not be processed without the appropriate campus approval.

Save Cancel



Expenses

You can provide estimates for the following additional expense types:

01. Travel Expenses	03. Transportation	05. Hospitality
Other Accommodation	Ground Transportation	Hospitality
Team/Group Travel	04a. Meals & Incidentals - International, Alaska & Hawaii	09. Other
02. Personal Car Mileage	04b. Meals - Domestic	Other Expense
		Registration/Fees

- Not all Expense Types are available in the request module. In this case, you can enter an estimated amount under **Other Expense** and then claim the actual expenses on your Expense Report to have the requested amount closer to the actual expenses.
- After clicking on the Expense Type and entering the required and optional information if needed, you can then **Allocate** (if needed) and **Save**.



Expenses

- Add your additional expenses. Once each expense is saved, it will appear on the left hand side.
- If you need to attach a document, click on **Attachments > Attach Documents**.
- **Please Note:** Attachments will not carry over to your Expense Report.

The screenshot shows the SAP Concur interface for Request 336F. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', and 'App Center'. The main content area is titled 'Request 336F' and shows a table of expenses for 'Long Beach Trip'. The table has columns for Date, Expense Type, Amount, and Requested. The total amount is \$550.00 and the total requested is \$550.00. A green callout bubble points to the 'Expenses' tab with the text 'Segments will now be part of your expenses.' Another green callout bubble points to the 'Attachments' button with the text 'Need to add an attachment?'. A third green callout bubble points to the expense type selection area with the text 'Click on each expense you want to add'. The expense type selection area includes a search field and a list of expense types: 01. Travel Expenses, 02. Personal Car Mileage, 03. Transportation, 04a. Meals & Incidentals - International, Alaska & Hawaii, 04b. Meals - Domestic, 05. Hospitality, 09. Other, and Registration/Fees.

Date	Expense Type	Amount	Requested	
<input type="checkbox"/>	08/16/2018	Airfare	\$200.00	\$200.00
<input type="checkbox"/>	08/16/2018	Car Rental	\$150.00	\$150.00
<input type="checkbox"/>	08/16/2018	Hotel	\$200.00	\$200.00

TOTAL AMOUNT: \$550.00 | TOTAL REQUESTED: \$550.00



Travel Request Submission

- After you have completed the Request Header, Segments and Expenses tabs, you can submit your request by clicking **Submit Request**.

Request 336F

Attachments ▾ Print / Email ▾ Delete Request Submit Request

Status: Not Submitted
Amount: \$550.00

Request/Trip Name: Long Beach Trip

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Expense Type:

Date	Expense Type	Amount	Requested
------	--------------	--------	-----------

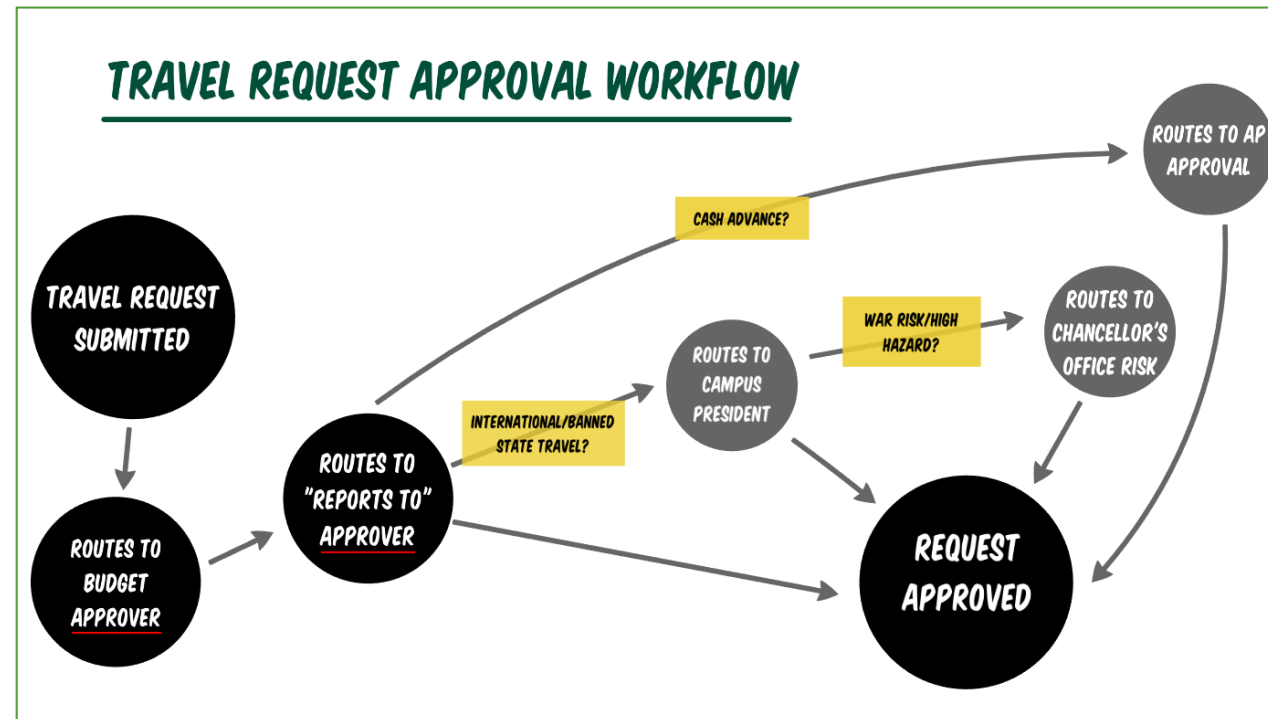
You can do this on the Expense side too!

- **Additional options:**

- **Print/Email**- PDF version of the Travel Request will pop up and you can make your selection.
- **Approval Flow**- shows who approved the Travel Request and date.
- **Audit Trail**- shows all actions of the Travel Request including comments added, approvals, forwarding, etc.
- **Delete Request** – You will not be able to delete a request once the request is approved. However you can cancel the request at anytime. You can also recall the request once you submit as long as it hasn't been approved.

Travel Request Approval Workflow

- Once your travel request has passed the approval workflow, you can book your trip!
- Approval Workflow will route via email notifications.







Approving a Travel Request/Expense Report



- After a Travel Request/Expense Report has been submitted, the approver will receive an email including a link to log in to Concur, that a Travel Request/Expense Report is pending approval. Email notifications will continue throughout the approval workflow process.

Email Example Only


SAP Concur  

Dear SF Approver Test, You have 1 expense reports pending your approval.
<http://www.concursolutions.com>

Expense reimbursement(s) can't be processed until the related expense report is fully approved. Contact Accounts Payable/Travel with questions.

If approval does not occur within two days this report will be forwarded to your designated approver.

Quick Task Bar

SAP Concur  Requests Expense Approvals Reporting App Center Help

CSU The California State University

Hello, SA Traveler


+ New

05 Required Approvals

00 Authorization Requests

00 Available Expenses

00 Open Reports

Profile 



Booking Travel via Concur Overview

- Humboldt State has contracted Christopherson Business Travel (CBT) as our Travel Booking Agency. It is recommended to book travel (**airfare, hotel and Car rental reservation**) via Concur. either by using the online booking tool in Concur Travel or calling a CBT Agent.
- In order to Book Travel via Concur you need to choose **1-Book via Concur** on the Travel Request Header and your Travel Request must be approved prior to booking your travel reservations.
- If you prefer to call a CBT Agent and book your travel, please make sure to provide the **Request ID** of your Travel Request. The **Request ID** can be found above the **Request/Trip Name** of the request.

How will you book your trip?

- 1 - Book via Concur Travel
- 2 - Book Outside of Concur Travel

Request 336F

Request/Trip Name: Long Beach Trip

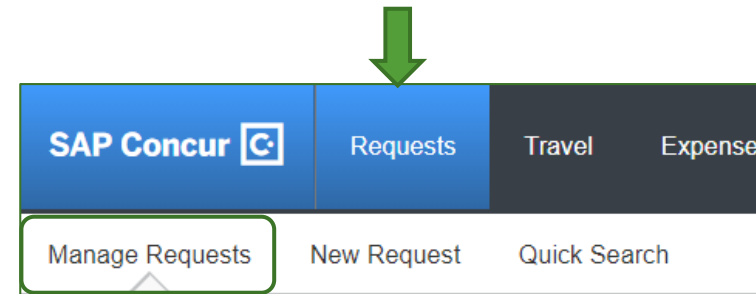
Request Header Segments Expenses Approval Flow Audit Trail



Getting Started

Step 2: Once Travel Request is approved...

- Click on **Requests** > **Manage Requests**
- Locate your Request you want to book travel for
- Click on **Book** (under Action)



Active Requests (2)

View ▾

Delete Request Copy Request Close/Inactivate Request

Request Name ▾ Begins With ▾ Go

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Long Beach Trip	336E	Pending on-line Booking	08/17/2018 08/19/2018	08/07/2018	\$885.00	\$0.00	\$0.00	Book

Pending on-line booking means your request is approved and travel ready to book.



Booking Itinerary

Step 3: Booking your Itinerary

- Your itinerary will appear based on the information you provided in your Segments.
- Add any additional information required such as departure times or pick up locations.
- Click on **Proceed to Booking**.
- System will search based on your itinerary. Booking order: Airfare, Car Rental, then Hotel.

Car Rental

Long Beach, California

Pick-up
Friday, 08/17/2018 10:00 AM ▼

Return
Sunday, 08/19/2018 10:00 AM ▼

Choose a rental station
Enterprise -- 111 W OCEAN BOULEVARD STE 115, LONG BEACH, CA 90802

Choose a rental station
Enterprise -- 111 E OCEAN BLVD, LONG BEACH, CA 90802

Hotel Reservation

Long Beach, California

Check-In
Friday, 08/17/2018

Check-out
Sunday, 08/19/2018

Only show me this page when I need to provide extra information

[Proceed to booking](#)



Booking Airfare

- Coach or any other discounted economy class fare shall be selected that meets the traveler's schedule needs.
- The system will save the lowest cost airfare in the search results. For any flights with a price 20% greater than the lowest cost airfare, the system will display a warning icon (out of policy) next to the blue reserve button.
- Your name in Concur is the name that will be on your airline ticket. If this is not the name on your photo identification you travel with, please contact the Concur Coordinator **prior** to booking your flight.
- US Bank Travel Ghost Card will be automatically charged for airfare. University will prepay the expense and there is no reconciliation required on the department.

To edit search criteria, display settings and filters.

Matrix available for easy view of availability

Choose to Shop by Schedule or Shop by Fares.

Trip Summary
SFO - LAX
Depart: Thu, 08/02/2018
Return: Sat, 08/04/2018

Select Flights or Trains
Round Trip
Finalize Trip

Change Search
Depart - Thu, Aug 2
Return - Sat, Aug 4
Price: \$318.40 - \$766.40
Display Settings
Airport Filters
Connecting Airport Filters

SAN FRANCISCO, CA TO LOS ANGELES, CA
THU, AUG 2 - SAT, AUG 4

	Alaska Airlines	American Airlines	United	Southwest	Delta
All 117 results					
Nonstop 97 results	318.40 14 results	318.40 12 results	318.40 40 results	319.95 16 results	343.40 15 results
1 stop 20 results	512.00 4 results	744.00 4 results	484.00 12 results	-	-

Shop by Fares | Shop by Schedule

Please note: search results are based on your selected criteria and other factors including company policies. Fare, schedule or availability information may not be complete or in neutral order.

Flight Number Search | Sorted By: Price - Low to High | Displaying: 117 out of 117 results

Airline	Flight	Class	Duration	Price
United	06:00a SFO → 07:34a LAX	Nonstop	1h 34m	\$318.40
United	03:00p LAX → 04:32p SFO	Nonstop	1h 32m	\$318.40
United	06:00a SFO → 07:34a LAX	Nonstop	1h 34m	\$318.40
United	06:00p LAX → 07:33p SFO	Nonstop	1h 33m	\$318.40
United	06:00a SFO → 07:34a LAX	Nonstop	1h 34m	\$318.40
United	12:00p LAX → 01:27p SFO	Nonstop	1h 27m	\$318.40
United	06:00a SFO → 07:34a LAX	Nonstop	1h 34m	\$318.40
United	02:00p LAX → 03:26p SFO	Nonstop	1h 26m	\$318.40
Alaska Airlines	06:42a SFO → 08:20a LAX	Nonstop	1h 38m	\$318.40
Alaska Airlines	06:15p LAX → 07:43p SFO	Nonstop	1h 28m	\$318.40



Car Rental Reservation

- All Car Rental reservations should be booked through Enterprise or National as they are the contracted vendors by the CSU.
- Rental up to an intermediate size vehicle is allowable under the CSU Travel Policy. Larger vehicles may be allowable if there is a no-cost upgrade provided or if the recommended sizes are not adequate to meet the business purpose of the trip.
- Preferred vendors will list at the top of the matrix.
- You do not need to add a card in order to book a car rental reservation. You will need to provide a credit card at the time of car pick up.


PICK UP: (LAX) ON WED, AUG 15 09:15 AM
RETURN: FRI, AUG 17 11:00 AM
Show as USD

Hide matrix Print / Email

All 116 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Mini Van	Intermediate SUV	Standard SUV	Full-size SUV
Enterprise Preferred	--	33.96	33.96	36.02	36.02	--	--	--	--
National Preferred	132.60	33.96	33.96	36.02	36.02	--	57.62	90.55	118.34
car rentals	44.14	38.73	38.73	38.79	41.56	58.20	56.64	--	--
USAIR	--	39.48	41.42	42.86	44.28	61.57	--	52.48	65.07

Matrix available for easy view of availability

Displaying: 1 out of 116 results.

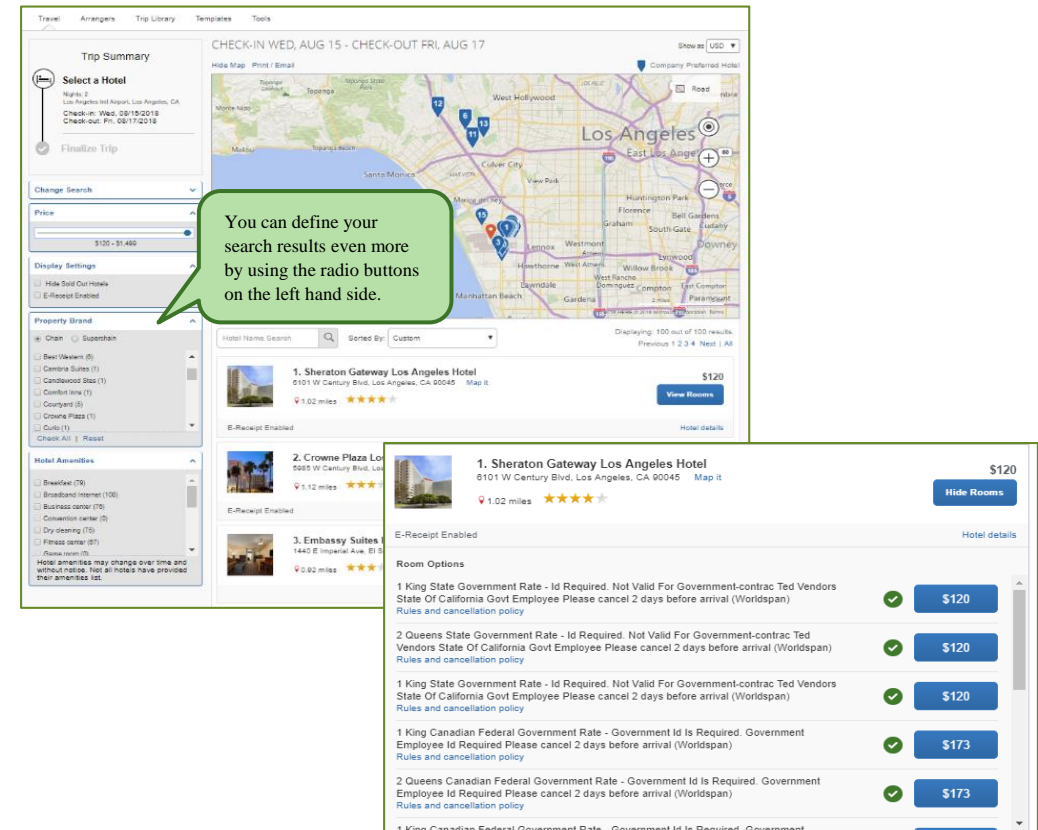
**Compact Car - \$33.96 per day (Worldspan)**
Automatic transmission
Unlimited miles, Pick-up: Terminal: LAX
Adults: 2, Children: 2, Large bags: 1, Small bags: 2
(Corporate rate)

Total cost*
\$140.09

Preferred Car Vendor for CSU Office of the Chancellor / E-Receipt Enabled Location details

Hotel Reservation

- Maximum nightly room rate is \$275 before tax. If you book a hotel greater than \$275 you will only receive reimbursement for the max rate of \$275 plus any applicable taxes charged, unless an approved Exception to the Travel Policy form is attached to your Expense Report. Please acquire the approval prior to booking a hotel that is over the maximum nightly room rate.
- If a conference is doing room blocks for their attendees, please do not book hotel through Concur. CBT is unable to access the discounted rates you would get with these room blocks.
- You will need to add a credit card on file in order to guarantee your hotel reservation. This card will not be charged and you will need to supply a credit card in person at the time of check-in.



The screenshot displays the Concur hotel reservation interface. On the left, there is a 'Trip Summary' section with a 'Select a Hotel' dropdown, a 'Change Search' button, a price range of '\$100 - \$1,400', and various filters for 'Display Settings', 'Property Brand', and 'Hotel Amenities'. A central map shows the Los Angeles area with several hotel pins. A green callout bubble points to the search filters, stating: 'You can define your search results even more by using the radio buttons on the left hand side.' Below the map, a list of hotel options is shown, including '1. Sheraton Gateway Los Angeles Hotel' and '2. Crowne Plaza Los Angeles'. A detailed view of the Sheraton Gateway Los Angeles Hotel is expanded, showing room options with their respective rates and cancellation policies. The room options include:

Room Option	Rate
1 King State Government Rate - Id Required. Not Valid For Government-contract Ted Vendors State Of California Govt Employee Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$120
2 Queens State Government Rate - Id Required. Not Valid For Government-contract Ted Vendors State Of California Govt Employee Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$120
1 King State Government Rate - Id Required. Not Valid For Government-contract Ted Vendors State Of California Govt Employee Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$120
1 King Canadian Federal Government Rate - Government Id Is Required. Government Employee Id Required Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$173
2 Queens Canadian Federal Government Rate - Government Id Is Required. Government Employee Id Required Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$173
1 King Canadian Federal Government Rate - Government Id Is Required. Government Employee Id Required Please cancel 2 days before arrival (Worldspan) Rules and cancellation policy	\$173



Creating a New Expense Report

Creating an Expense if you Booked via Concur...

- Under **Upcoming Trips tab**, in the **Action** column for the completed trip, click **Expense**.

Creating an Expense if you booked outside of Concur...

- Under **Requests > Manage Requests**, your active Travel Requests will be listed. If your Travel Request is fully approved, click on **Expense** under Action and your Travel Request will automatically link to a new Expense Report as well as populate most required fields.

Active Requests (12) Delete Request Copy Request

View ▾

Request Name ▾ Begins With ▾ Go

<input type="checkbox"/>	Request Name ▾	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Long Beach Trip	336F	Approved	08/16/2018	08/13/2018	\$550.00	\$550.00	\$550.00	Expense
			Comment: Annual LB Conference	08/18/2018					



Expense Report Header

- A Travel Request must be linked to your Expense Report, if there is no Request listed under **Requests**, click **Add**, check the corresponding Request, and click **Add**.

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

- Once a Travel Request is linked, all the header information from the request will move over and populate the required fields except for:
 - **Travel < 24 hrs.?** Yes / No?
 - **Is this trip going to be reimbursed by the Chancellor's Office?** Yes / No?



Adding Expenses

The next step is to add all your travel expenses. The Expense Types include:

All Expense Types			
01. Travel Expenses	...03. Transportation	...04b. Meals - Domestic	...08. Fees
Hotel	Car Rental	Lunch - Domestic	Passports/Visa Fees (International Only)
Incidentals	Car Rental Fuel	05. Hospitality	09. Other
Laundry	Custom Mileage	Hospitality	Memberships
Other Accommodation	Ground Transportation	06. Office Expenses	Newspapers/Magazines/Books
Team/Group Travel	Parking/Tolls	Postage/Freight	Other Expense
02. Personal Car Mileage	04a. Meals & Incidentals - International, Alaska & Hawaii	Printing/Photocopying/Stationery	Personal/Non Reimbursable
Personal Car Mileage	International, Alaska & Hawaii	07. Communications	Registration/Fees
03. Transportation	04b. Meals - Domestic	Internet/Telephone/Fax	10. Athletics
Airfare	Breakfast - Domestic	Mobile/Cellular Phone (International Only)	Entry Fees
Airline Fees	Dinner - Domestic	08. Fees	Pre Season
		Booking Fees	

- Within each Expense Type you can choose to **Itemize**, **Allocate**, and **Attach Receipt**.
- **Hotel** Expense Type requires **Itemization**.
- You must add a **Personal Car** in your User Profile in order to add **Personal Car Mileage** Expense Type.



New Expense



Adding a Parking Expense

01. Travel Expenses

- Hotel
- Incidentals
- Laundry
- Other Accommodation
- Team/Group Travel

05. Hospitality

- Hospitality
- Postage/Freight
- Printing/Photocopying/Scanning

02. Personal Car Mileage

- Personal Car Mileage

06. Office Expenses

- Internet/Telephone/Fax

03. Transportation

- Airfare
- Airline Fees
- Car Rental
- Car Rental Fuel
- Custom Mileage
- Ground Transportation

04a. Meals & Incidentals - International, Alaska & Hawaii

- International, Alaska & Hawaii

Parking/Tolls

New Expense Available Receipts

Expense Type: Transaction Date: Amount:

City of Purchase: Payment Type:

Enter Vendor Name: Comments To/From Approvers/Processors:

Manage Expenses

Long Beach Trip

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses	Date	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	08/18/2018	Parking/Tolls	\$37.00	\$37.00
<input type="checkbox"/>	08/17/2018	Incidentals	\$7.00	\$7.00
<input type="checkbox"/>	08/17/2018	Dinner - Domestic San Francisco, California	\$30.00	\$30.00
<input type="checkbox"/>	08/16/2018	Airfare Delta Air Lines, San Francisco, C	\$200.00	\$200.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$274.00	\$274.00

New Expense

Expense Type:

Recently Used Expense Types

- Parking/Tolls
- Incidentals
- Breakfast - Domestic

All Expense Types



- 01. Travel Expenses
 - Hotel
 - Incidentals
 - Laundry
 - Other Accommodation
 - Team/Group Travel
- 02. Personal Car Mileage
 - Personal Car Mileage
- 03. Transportation
 - Airfare
 - Airline Fees

To add an expense, first click on New Expense. Then choose the Expense Type. Fill in information. Click Save.

You can also Itemize, Allocate, or Attach Receipt



Adding Expenses

- Each Expense Type will have their own set of required fields and configuration.
- CSU and campus specific audit rules are integrated in the system. When adding an expense that is out of policy or requires a certain action, an exception may trigger...
 - **Warning-**  eligible to continue and submit.
 - **Hard Stop-**  cannot move forward and must make correction prior to submission.



Adding Expenses

All Expense Types require a Payment Type. The Payment Type will default to **Out of Pocket**, unless it is a US Bank State Travel Card transaction in which it will default to **CSU-US Bank**.

- **Out of Pocket** – all expenses incurred out of your own pocket. For example: personal credit card, cash, etc.
- **CSU-US Bank** (Travel Ghost & Individual State Travel Card)– Travel paid by US Bank State Travel Card (Airfare booked via Concur Travel) All US Bank Travel Ghost Card transactions will be uploaded to **Available Expenses** once posted. From there, you can add the transaction to your Expense Report.
- **University Paid** – expenses paid by the university, either by P-Card, Dept. State Travel Card, Direct Pay/Bill, etc.



Attaching Receipts/Attachments

- **There are several ways to attach a receipt:**
 - Scan, Save and upload from your computer.
 - Scan and email to receipts@concur.com.
 - Take a picture using your phone and to email and submit via Concur Mobile App.
- **Attaching a receipt to an individual transaction:**
 - Select the expense type transaction, then click the **Attach Receipt** button on the bottom right hand corner.
 - Browse, locate, and upload the image from your files.
 - Choose an image from your **Available Receipts**.
- To add an attachment, other than a receipt, you will need to use the Attach Receipt option.

New Expense Available Receipts

Expense Type: Registration/Fees Transaction Date: 08/22/2018

Vendor Name: Long Beach Conference Assoc City of Purchase: San Francisco, California

Payment Type: Out of Pocket Amount: 120.00 USD

Comments To/From Approvers/Processors

Save Itemize Allocate Attach Receipt Cancel



Allocation

- All expenses will be charged to the chartfield indicated on your Expense Report Header unless allocated.
- You can either allocate by **Percentage** or **Amount**.
- We recommend to allocate at the end after entering all your expenses by clicking on **Details > Allocations**.

Long Beach Trip

+ New Expense Import Expenses Details Receipts

Exceptions		
Expense Type	Date	Amount
Personal Car ...	08/17/2018	\$7.
Hotel	08/17/2018	\$200.

Expenses

Date Expense Type

Adding New Expense

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Allocations

Allocations

Allocations

Allocate By: Add New Allocation Delete Selected Allocations Favorites

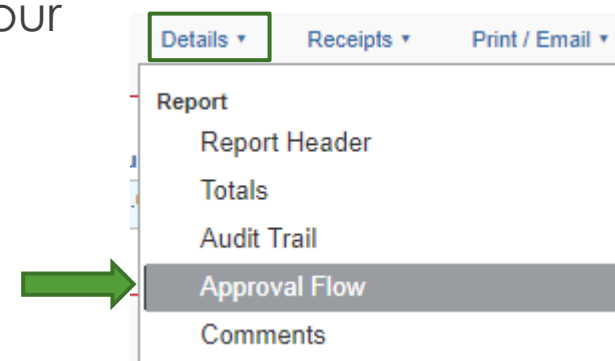
<input type="checkbox"/>	Percentage	* Business Unit	* Fund	* Department	Program
<input type="checkbox"/>	50	(SFCMP) SFC...	(NG001) NG00...	(6097) 6097 - ...	
<input checked="" type="checkbox"/>	50	(SFCMP) SFC...	(NG001) NG00...	(6065) 6065 - ...	



Expense Report Submission

Expense Reports must be submitted within 60 days from the trip end date.

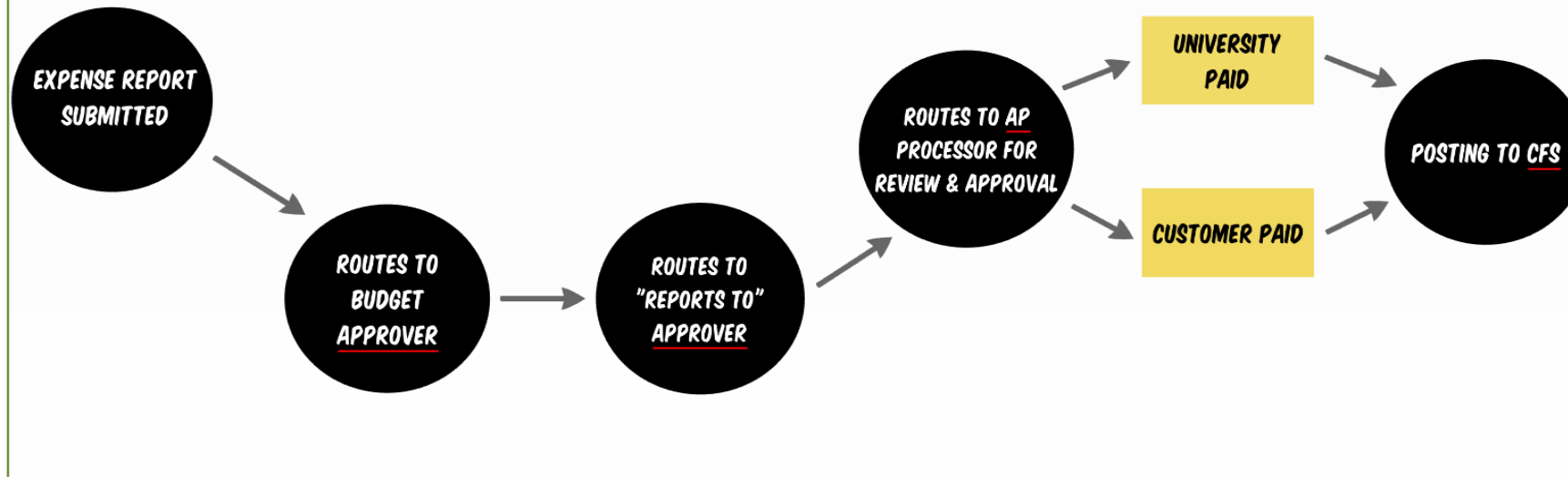
- To submit the Expense Report, on the Expense Report page, click the **Submit Report** button. All red exception flags must be cleared before the report can be submitted. Yellow flags are considered warnings, but will not stop the submittal process.
- To see who is approving your reports or to see where your report is in the workflow, open the Expense Report, click **Details > Approval Flow**.





Expense Report Approval Workflow

EXPENSE REPORT APPROVAL WORKFLOW





Processing

- If there are any issues with your Expense Report, your report will be sent back along with comments. Once complete, please resubmit your Expense Report so it can go through the approval workflow again.
- Once your Travel Expense Report is fully approved, Travel will process and your reimbursement (if applicable) will be on its way by either Direct Deposit (EFT) or mail!





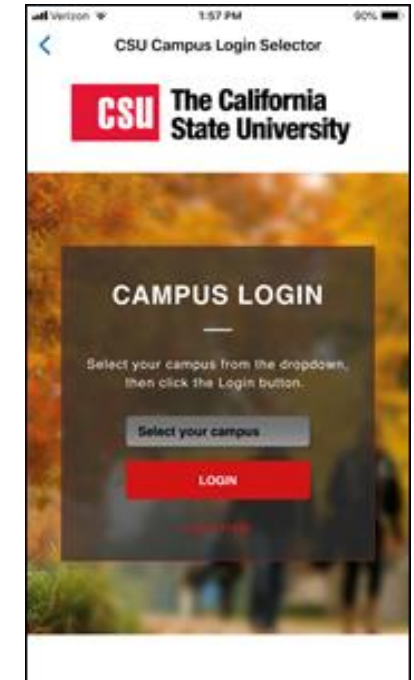
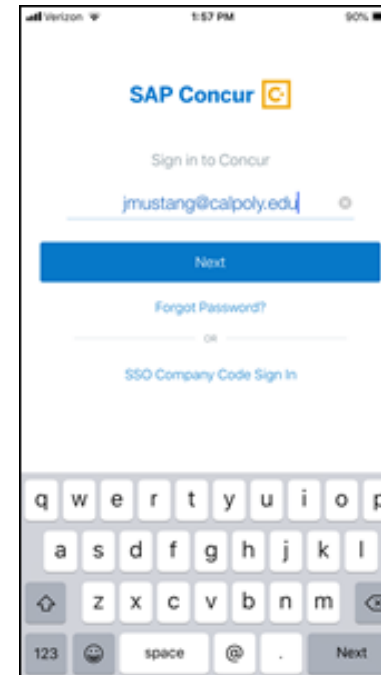
Concur Mobile Application

Step 1: Download the **Concur** application on a phone by going to the App Store.

Step 2: Login to the **Concur Mobile App**.

- Open the Concur app and sign in with your **Humboldt State University email address**.
- In the CSU Campus Login, select **Humboldt**.
- Enter in your **HSU User Name** and **Password**.

Step 3: Welcome to the Concur Mobile App. The App home screen provides access to your trips, expenses, expense reports, approvals, and more.





Triplt Mobile Application

Step 1: Download **Triplt App** for your device.

Step 2: Locate **Triplt** eligibility message on Concur home page, under Alerts.

Step 3: Click **Learn More and Activate** link.

Step 4: Enter your @humboldt.edu email address, and a password and click **Sign Up**.

Step 5: Triplt will send a verification email to your @humboldt.edu email address.

Step 6: Click the link in the email to verify the account.

- For reservations outside Concur, email itinerary to plans@tripit.com to integrate them into this app for easy recall.

ACTIVATE YOUR TRIPIT PRO SUBSCRIPTION

All your travel plans, in one place



Get a master itinerary for every trip

Available on web, Android, and iPhone

Link your Concur and Triplt accounts and get:

- A free subscription to Triplt Pro from your company
- Real-time flight alerts
- Travel plans synced between Concur and Triplt

If you already have a Triplt account click the link to sign in and connect the account to Concur.

Create a Triplt account and connect to Concur

Email Address

satraveler@csus.edu

Choose a New Password

••••••••

Must have at least 8 characters

Country of Residence

United States of America

I accept the Triplt User Agreement, have read the Privacy Policy, and agree to link the Triplt account to Concur.

Create Triplt Account

I already have a Triplt account! [Sign in and link my accounts](#)



Q&A

➤ Questions?

Business Services

x3512 or denise.gentry@humboldt.edu

Or travel@Humboldt.edu