Workflow Overview of Concur

1. Create New Request
   - As soon as you know you are going to travel, create your new request for the trip.
   - Name your Request something specific and unique to your travel.
   - Change your chartfield if necessary to accommodate the correct funding
     - Using Advancement Funds
     - Using Associated Students Funds
     - Allocating Funds (using multiple funding sources/chartfields)
   - Add your Expected Expenses by selecting **"Add Expense"**
     - Keep in mind hotel maximum is $275 per night, excluding taxes and fees
   - If forms such as Faculty Class Coverage, International Travel, Prohibited States, or any other exception forms need to be attached, please do that using the blue **"Attachments"** link.
   - Submit your Request.
2. Book your Travel
   - Use the **"Trip Search"** feature on the left hand side of the Concur homepage to book airfare, hotels, car rentals, and rail tickets.
   - Use your state travel card to pay for any travel expenses you are not able to book in Concur.
   - If you need assistance booking/changing flights for yourself or any non employee, please speak with a travel agent at 855-993-0939 or 801-613-2826.
3. Take your Trip
   - Use your state travel card to pay for travel related expenses.
   - If you have questions about allowable expenses, please reference the CSU Travel Policy.
4. Expense Report
   - Go to your originally approved Request, and select **"Create Expense Report".**
   - Use the **"Add Expense"** button to import available credit card transactions to your Expense Report and create new expenses for anything you paid for out of pocket and need to be reimbursed for or for Personal Car Mileage.
   - Clear any Alerts on your report.
   - Submit your Expense Report to reconcile credit card transactions and initiate reimbursement process.