

Concur Training: Travel & Expense Requests

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SAP Concur : Travel & Expense

- [How to Access Concur](#)
- [Updating Your Travel Profile](#)
- [Creating/Submitting Travel Requests](#)
- [Travel Request Approval Process](#)
- [Reviewing/Approving Travel Requests](#)
- [Booking Travel](#)
- [Creating/Submitting Expense Reports](#)
- [Expense Report Approval Process](#)
- [Monthly Mileage Reports](#)
- [Reviewing/Approving Expense Reports](#)
- [Delete, Cancel or Close/Inactivate Request](#)

How to Access Concur

GO.RCCD.EDU – <https://go.rccd.edu>

- College/District Email Address =
FirstName.LastName@norcollege.edu
- Password is the same as your Network and Email
(Office365) password

Secure Login

College/District Email Address

Leonard.Riley@norcollege.edu

Password



Login

Change Password

Forgot Password?

GO.RCCD.EDU - Single Sign-On (SSO) Portal

Click on the Concur icon

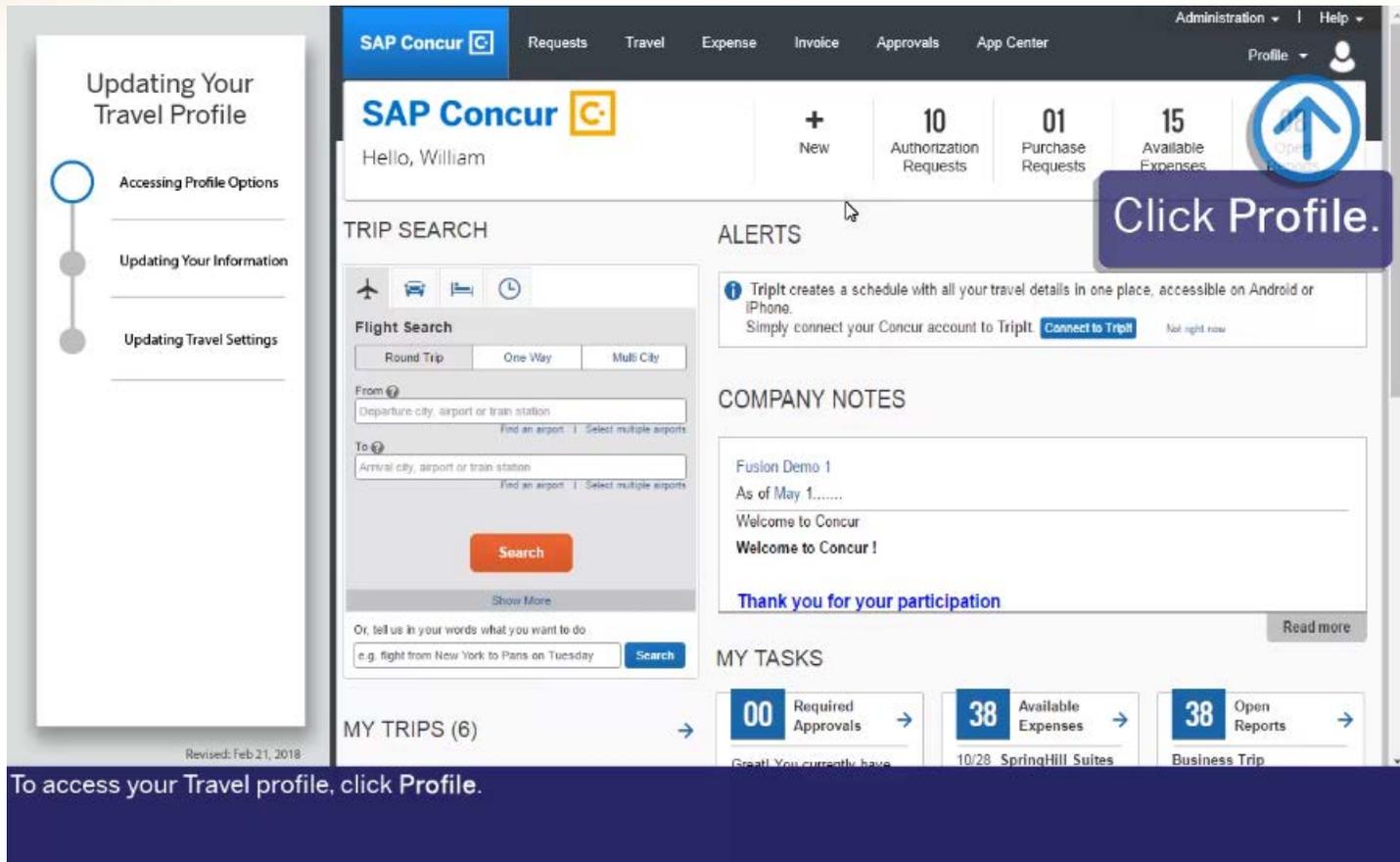


The screenshot shows the Single Sign-On Portal for Riverside Community College District. At the top right, it indicates the user is logged in as Leonard.Riley@norccollege.edu with a Log Out link and a Manage Your Account Settings link. The main header includes the RCCD logo and the text 'RIVERSIDE COMMUNITY COLLEGE DISTRICT Single Sign-On Portal'. Below this, it lists 'MORENO VALLEY COLLEGE | NORCO COLLEGE | RIVERSIDE CITY COLLEGE'. There are two tabs for authentication: 'SAML SSO' (selected) and 'Password-based SSO'. A 'Size: Large' dropdown menu is also present. The main area contains several application icons: 25Live, 25Live PRO, 25Live TEST SERVER, SAP Concur (highlighted with a red box and arrow), etrieve, and Office 365.

Updating Your Travel Profile

UPDATING YOUR TRAVEL PROFILE

Before you enter a travel request, enter your personal and company information, travel preferences, and frequent-traveler program information.



The screenshot displays the SAP Concur user interface. On the left, a sidebar titled "Updating Your Travel Profile" contains three steps: "Accessing Profile Options", "Updating Your Information", and "Updating Travel Settings". The main dashboard features a top navigation bar with "SAP Concur" and "Hello, William". Below this, there are statistics for "10 Authorization Requests", "01 Purchase Requests", and "15 Available Expenses". A blue callout box with an upward arrow and the text "Click Profile." points to the "Profile" dropdown menu in the top right. The dashboard also includes sections for "TRIP SEARCH", "ALERTS" (with a Triplt notification), "COMPANY NOTES" (with a "Thank you for your participation" message), and "MY TASKS" (showing "00 Required Approvals", "38 Available Expenses", and "38 Open Reports").

Revised: Feb 21, 2018

To access your Travel profile, click Profile.

UPDATING YOUR TRAVEL PROFILE



Important Note

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo ID that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your photo ID.

Title	First Name	Middle Name [Required]	Nickname	Last Name
<input type="text"/>	<input type="text" value="LEONARD"/>	<input type="text" value="William"/> <input type="checkbox"/> No Middle Name	<input type="text" value="Lenny"/>	<input type="text" value="RILEY"/>

Verify your **Personal Information**. Make certain that the first, middle, and last names shown are identical to those on the photo ID that you will be presenting at the airport. If it is incorrect, contact your local Concur administrator, Lenny Riley, if it needs to be updated.

UPDATING YOUR TRAVEL PROFILE

The next section is your **Company Information** and should also already be pre-populated with your Employee ID and the name of your manager. Verify that the information is correct. If you notice any errors, contact your local Concur administrator.

Company Information

Employee ID

2705996

Manager

SAMUEL LEE

Org. Unit/Division Employee Position/Title



UPDATING YOUR TRAVEL PROFILE

Work Address [Go to top](#)

Company Name: Learning Services Demo Assigned Location: Main Location (Redmond, WA)

Street: 18400 NE Union Hill Road Address same as assigned location

City: Redmond State/Province/Region: WA

Postal Code: 98052 Country: United States of America

[Save](#)

Home Address [Go to top](#)

Street:

City: State/Province/Region:

Postal Code: Country: United States of America

[Save](#)

Contact Information [Go to top](#)

Work Phone **[Required**]**: 1 425 590 4567 Work Extension: Work Fax:

2nd Work Phone/Remote Office: Home Phone **[Required**]**: 1 425 590 4567

Verify your **Work** and **Home Address**, and your **Contact Information**. Fields marked **[Required]** and **[Required**]** must be completed to save your profile.

UPDATING YOUR TRAVEL PROFILE

Work Address

Company Name	Assigned Location
<input type="text" value="Riverside Community Coll"/>	<input type="text" value="Norco CA (Norco, CA)"/>
Street	Please choose a company location.
<input type="text" value="2001 Third Street"/>	United States of America - CA
City	Corona CA (Corona, CA) ; assigned location
<input type="text" value="Norco"/>	Jurupa Valley (Jurupa Valley, CA)
Postal Code	Moreno Valley (Moreno Valley, CA)
<input type="text" value="92860"/>	Norco CA (Norco, CA)
Country/R	Ambs Drive (Riverside, CA)
<input type="text" value="United S"/>	Bundy Avenue (Riverside, CA)
	Davis Avenue (Riverside, CA)
	Magnolia Avenue (Riverside, CA)
	Main Location (Riverside, CA)
	Market St (Riverside, CA)
	<input type="button" value="Save"/>

The work address section automatically populates the company name of *Riverside Community College District*. Under “**Assigned Location**,” select from the drop-down menu the company location of where you work.

UPDATING YOUR TRAVEL PROFILE

In the **Email Addresses** section, you can add and verify your email address.

Email Addresses

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

Email Address	Verification Status	Verify	Contact?
leonard.riley@norccollege.edu	 Verified	Disable Verification	Yes

UPDATING YOUR TRAVEL PROFILE

When you verify your email address, Concur can associate information forwarded from that email address to your account.

With your verified email address, you can:

- Forward travel plans to plans@concur.com to have reservations added to your trips.
- Forward your receipt images to receipts@concur.com to have your receipts uploaded into your Available Receipts.

UPDATING YOUR TRAVEL PROFILE

Complete the **Emergency Contact** fields, as needed.

Emergency Contact

Name	Relationship	
<input type="text"/>	Spouse ▼	
Street	<input checked="" type="checkbox"/> Address same as employee	
<input type="text"/>		
City	State/Province	Postal Code
Riverside	CA	<input type="text"/>
Country/Region	Phone	Alternate Phone
United States of America ▼	<input type="text"/>	<input type="text"/>

UPDATING YOUR TRAVEL PROFILE

In the **Travel Preferences** section, you can select your discount travel rates and fare classes...

Travel Preferences

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

...specify **Air Travel Preferences**...

Air Travel Preferences ⓘ

Seat	Seat Section	Special Meals	Ticket Delivery
Window ▼	Forward ▼	Regular Meal ▼	E-ticket when possible ▼
Preferred Departure Airport ⓘ	Other Air Travel Preferences	Medical Alerts	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

UPDATING YOUR TRAVEL PROFILE

...specify **Hotel** and **Car Rental Preferences**...

Hotel Preferences

Room Type Smoking Preference Message to Hotel Vendor ?

Double Non-smoking Foam pillows Rollaway bed Crib

I prefer hotel that has:

a gym a pool a restaurant room service Early Check-in

Accessibility Needs

Wheelchair access Blind accessible

Car Rental Preferences

State of California does not reimburse for Navigational systems (GPS).

Car Type Smoking Preference Car Transmission

Economy Car Non-smoking Automatic In-car GPS system Ski rack

Message to Car Rental Vendor ?

UPDATING YOUR TRAVEL PROFILE

...and add **Frequent-Traveler** and **Advantage Programs**...

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

	American Airlines	American Airlines AA Advantage
	HYATT	Hyatt (HY) World of Hyatt

Add Travel Programs

i Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system.
For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 advantage programs at a time. Select the name of the company followed by the program number and the card expiration date.

1	Air/Rail Carrier	Advantage Program	Advantage Program Number	Expiration Date
	<input type="text" value="Amtrak"/>	<input type="text" value="AAA"/>	<input type="text"/>	<input type="text"/>
2	Air/Rail Carrier	Advantage Program	Advantage Program Number	Expiration Date
	<input type="text" value="Select a carrier"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

UPDATING YOUR TRAVEL PROFILE

If you have pending Southwest Airlines ticket credits from before creating your Concur profile, you can enter them, under **Unused Tickets** and **Southwest Ticket Credits**, by clicking the “**Add Ticket Credit**” link. Enter the information and click “**Add Ticket Credit**” to save.

Unused Tickets

Southwest Ticket Credits

[+ Add Ticket Credit](#)

Add Ticket Credit ×

Southwest Record Locator: Valid Until:

Ticket Amount: Ticket Currency:

[Cancel](#) [Add Ticket Credit](#)

UPDATING YOUR TRAVEL PROFILE

From the **Credit Cards** section, add or update your credit card information that you use to book travel. ***NOTE: Credit card info is needed only for personal travel or hotel incidentals. Purchasing will pay for conference registrations, hotel reservations and airline tickets.***

Add a Credit Card

* Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) *

Your name as it appears on this card *



Card Type *

Credit Card Number *

Expiration Date *

Use this card as the default card for:

- Plane Tickets Rail Tickets Car Rentals Hotel Reservations

UPDATING YOUR TRAVEL PROFILE

Enter your passport or visa information in the **International Travel: Passports and Visas** section. ***NOTE: This is not required information for domestic travel.***

International Travel: Passports and Visas

[Go to top](#)

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports

[+ Add a Passport](#)

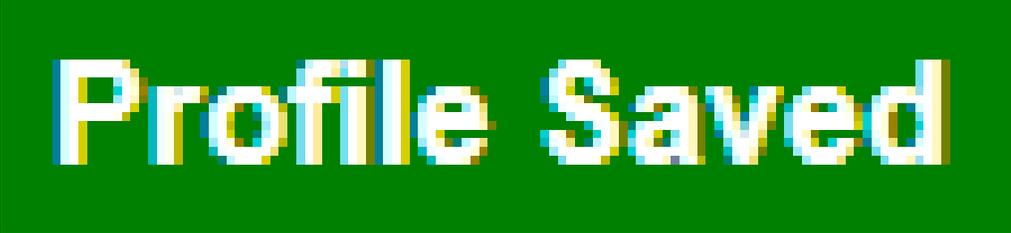
I do not have a passport

International Visas

[+ Add a Visa](#)

UPDATING YOUR TRAVEL PROFILE

Once your entire profile has been completed, click any of the “**Save**” buttons visible. If any errors occur, a pop-up message will inform you of any corrections that are needed. Correct the errors and click “**Save**” again. Once the profile has been saved a “Profile Saved” message will appear in the upper right hand portion of the screen.

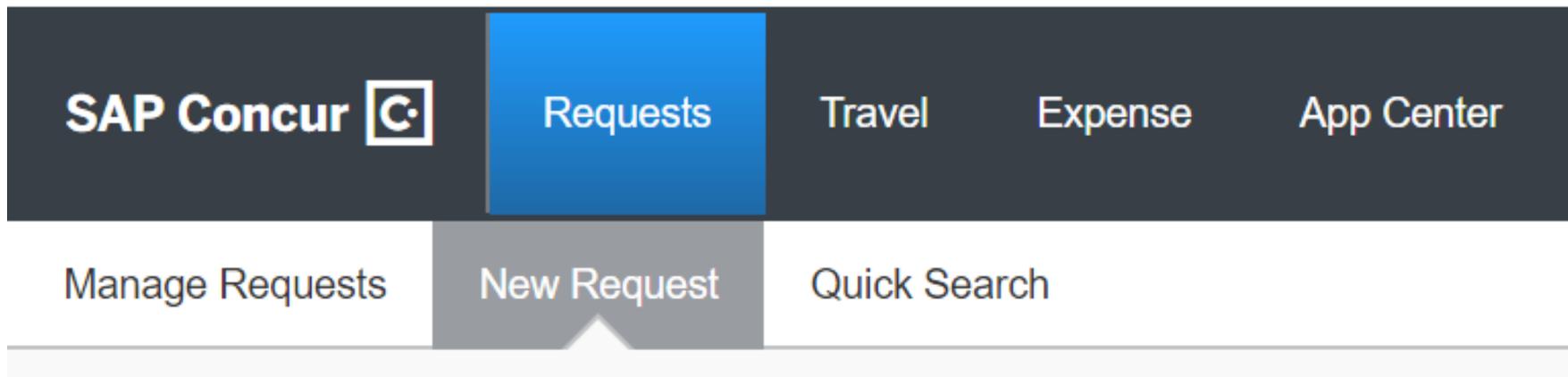


Profile Saved

Creating/Submitting Travel Requests

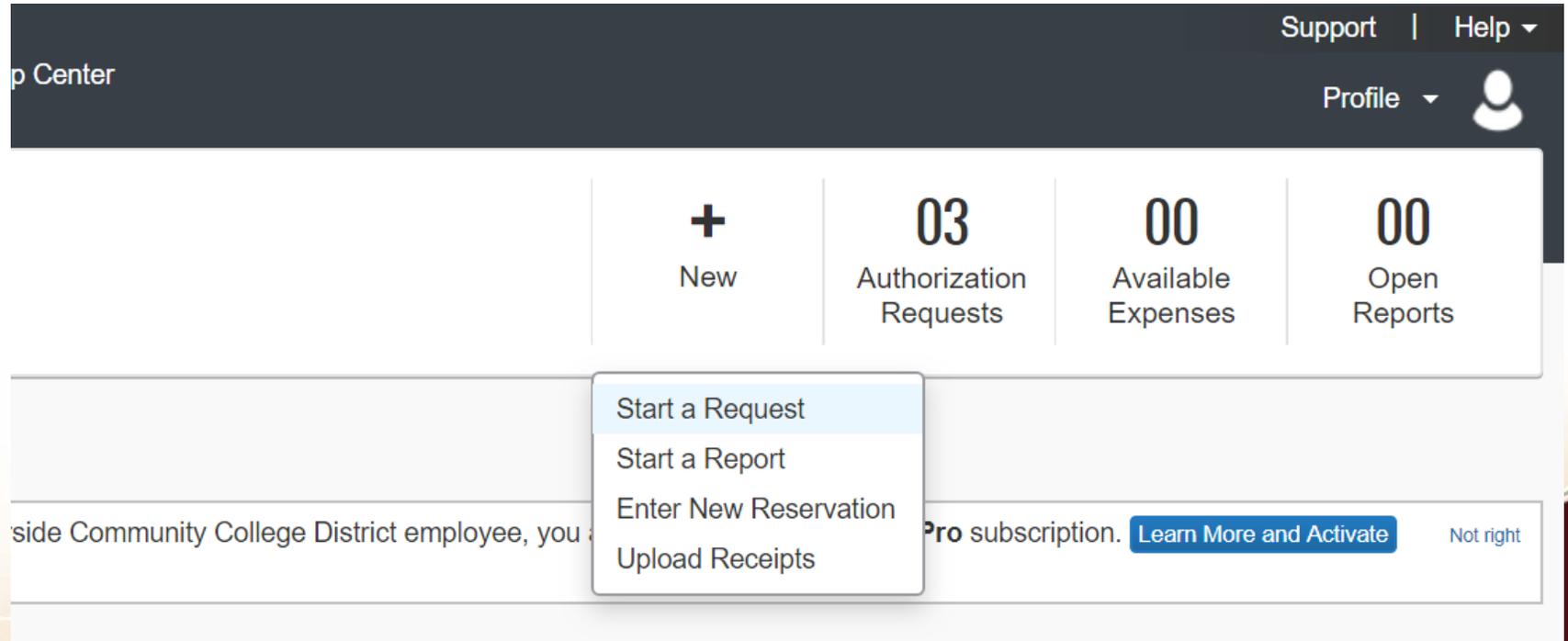
CREATING/SUBMITTING TRAVEL REQUESTS

To create a travel request, click on **Requests** from the Concur home page. Then, click **New Request** from underneath **Requests...**



CREATING/SUBMITTING TRAVEL REQUESTS

...or, from the Concur home page, click **+ New > Start a Request** from the top right hand side of the screen.



CREATING/SUBMITTING TRAVEL REQUESTS

A blank request will appear on the screen. Enter information in all fields with a red border on the left side (those fields are required).

Request 37GD Cancel Save Attachments Print / Email Delete Request **Submit Request**
Status: Not Submitted

Request/Trip Name: CollegeNET User Conference

Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name CollegeNET User Conference	How will you book your travel? 01. Book online - Concur Travel	Business Trip Start Date 07/18/2020	Business Trip End Date 07/23/2020	Request/Trip Purpose Conference Attendee	Paid for by an outside entity? No
Out of State and beyond 500 miles? No	Destination City Los Angeles, California	Destination Country UNITED STATES			
Traveler Type Staff	Does this trip contain personal travel? No	Personal Dates of Travel	Additional Information	Comment	
Fund (11) 11 - UNRESTRICTED GENERAL FUND	School (EMB) EMB - DEAN OF INSTRUCTION	Resource (1000) 1000 - GENERAL FUND	Project Year 0		
Goal 6017	Function (5000) 5000 - DEAN OF INSTRUCTION	Group NC			

Cash Advance

Cash Advance Amount: USD Cash Advance Comment:

CREATING/SUBMITTING TRAVEL REQUESTS

How will you book your travel? There are three options for booking your travel:

01. Book Online - Concur Travel - Select this option if you will be using the booking feature within Concur to book any portion (airfare, hotel, car rental) of your travel after the travel request has been fully approved

02. Book with Agent - Cal Travel Store – Select this option if you will be contacting the Cal Travel Store Agency for assistance in booking your travel. This option is recommended if your travel will include multiple stops, group travel, or other complicated variations, such as personal travel dates added to the business trip

03. Book Outside of Concur and Cal Travel Store – Select this option if you will be making all of your travel arrangements outside of Concur segments (purchased airfare, reserved hotel and car rental, registered for conference). You will be able to add details about the expenses you've incurred or reservations you made in the Expense segment

CREATING/SUBMITTING TRAVEL REQUESTS

If you're including personal travel to your business trip, select option "02. Book with Agent – Cal Travel Store" under the "**How will you book your travel?**" field on the **Request Header** tab.

Request 37GD Cancel Save Attachments Print / Email Delete Request **Submit Request**
Status: Not Submitted

Request/Trip Name: CollegeNET User Conference

Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name CollegeNET User Conference	How will you book your travel? 02. Book with Agent - Cal Travel Store	Business Trip Start Date 07/18/2020	Business Trip End Date 07/23/2020	Request/Trip Purpose Conference Attendee	Paid for by an outside entity? No
Out of State and beyond 500 miles? No	Destination City Los Angeles, California	Destination Country UNITED STATES			
Traveler Type Staff	Does this trip contain personal travel? Yes	Personal Dates of Travel 	Additional Information	Comment	
Fund (11) 11 - UNRESTRICTED GENERAL FI	School (EMB) EMB - DEAN OF INSTRUCTION	Resource (1000) 1000 - GENERAL FUND	Project Year 0		
Goal 6017	Function (5000) 5000 - DEAN OF INSTRUCTION,	Group NC			

Cash Advance

Cash Advance Amount USD Cash Advance Comment

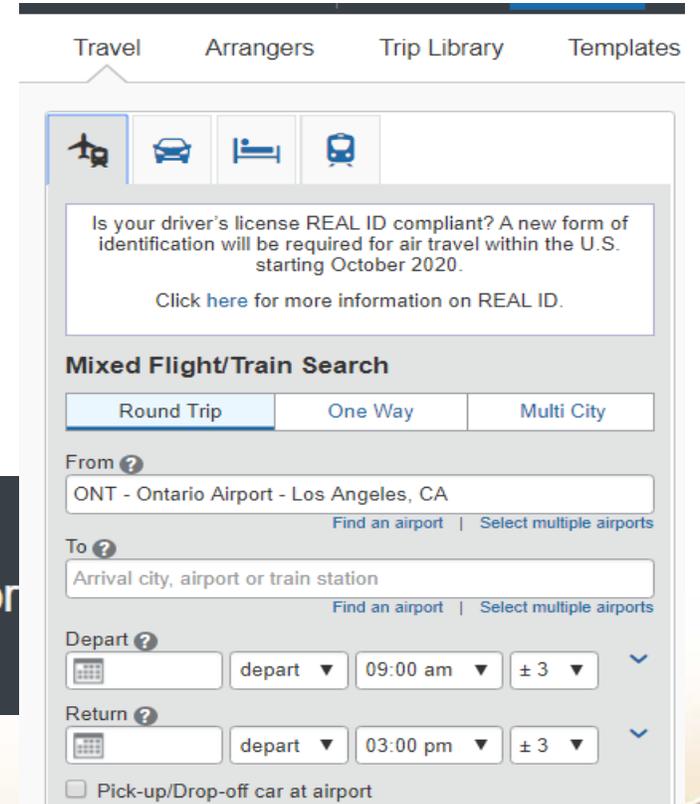
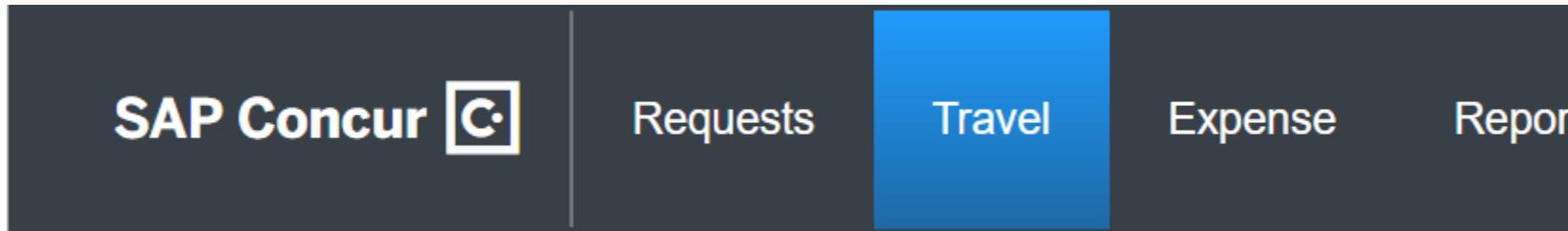
CREATING/SUBMITTING TRAVEL REQUESTS

- Make sure you enter your travel request on the **Request** tab; the **Travel** tab is used for obtaining estimated costs. (**NOTE: Do not book travel at this point.**)
- If you can't spell out the entire conference name in the **Request/Trip Name** field, make sure to spell it out in the **Additional Information** and/or the **Comment** field
- Make sure the budget information on the **Request Header** tab is correct, including the budget string provided by the area/department funding the request

CREATING/SUBMITTING TRAVEL REQUESTS

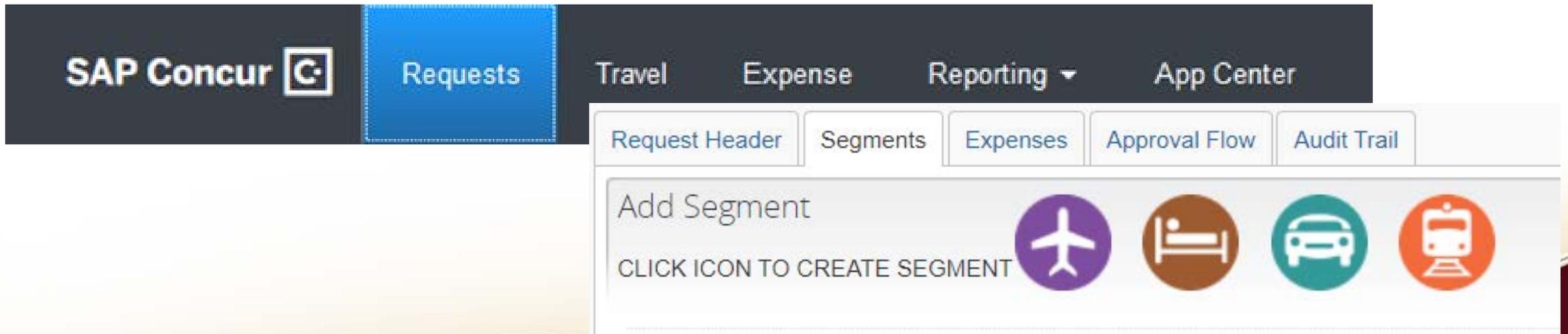
Use the **Travel** section on the Concur ribbon to get estimates that you will enter on your segments.

(NOTE: DO NOT click BOOK from the Travel section.)



CREATING/SUBMITTING TRAVEL REQUESTS

Once you've collected your estimates from the **Travel** section, return to the **Request** section on the Concur ribbon and click on the **Segments** tab, and click on the desired icon. This will create the segments such as flight, hotel and car rental costs.



CREATING/SUBMITTING TRAVEL REQUESTS

Complete the required fields – including the estimated cost (in the **Amount** field) of the segment – and click **Save**.

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT    

 Air Ticket Round Trip One Way Multi-Segment Amount: USD

Outbound

From:

To:

Date: Depart at

Comment:

Return

Date: Depart at

Comment:

CREATING/SUBMITTING TRAVEL REQUESTS

Click the **Expenses** tab to enter mileage, conference registration cost, food and ground transportation costs. (**NOTE: Airfare and Hotel should only be entered on the Expenses tab if you select option “02. Book with Agent – Cal Travel Store” or “03. Book outside of Concur and Cal Travel Store,”** under the **“How will you book your travel?”** field on the Request Header tab.)

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

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

TOTAL AMOUNT \$0.00 | TOTAL REQUESTED \$0.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- 01. Travel Expenses
 - Airfare
 - Hotel
- 02. Transportation
 - Car Rental
 - Parking
 - Train
- 03. Mileage
- 04. Meals
- 05. Fees
 - Registration Fees
- 06. Other Travel Expenses

CREATING/SUBMITTING TRAVEL REQUESTS

- Click the **Attachments** button to upload the conference flyer (or conference registration invoice), agenda (if available), direct supervisor approval email and/or budget approval email
- Click **Submit Request** to send the travel request for approval from your supervisor



TRAVEL REQUEST APPROVAL PROCESS

- Travelers have the option to add additional approvers, such as Direct Supervisor and Budget Approver (do this before you submit)
- Submit the TR for approval,
- The TR routes to the area VP, then to the VP of Business Services
- Once the TR is approved, the traveler is notified (via email) and can book the travel by clicking the “Book” link
- Book the travel
 - There is no time limit on booking once a request has been approved and is in the “book” status. However, it is recommended that booking is done immediately since prices for flights, hotel reservations and conference registration tend to increase rapidly)

NOTE: Make sure the booking is done through the “Book” link and not from the **Travel** section

Reviewing/Approving Travel Requests

REVIEWING/APPROVING TRAVEL REQUESTS

- Previewer will look for agenda, supervisor approval and budget approval
- Area Vice Presidents reviews request and attachments (Direct supervisor approval, budget information and budget approval) and approves/rejects the request
- **NOTE: TR can still be approved by the Area VP, if necessary, even if the previewer has not reviewed**
- VP of Area approved Requests will route to VP of Business Services for approval. VP of Business Services reviews request and attachments (Direct supervisor approval, budget information and budget approval) and approves/rejects the request

Booking Travel

BOOKING TRAVEL

- Submit the TR for approval
- The TR routes to the area VP, then to the VP of Business Services
- Once the TR is approved, the traveler and delegate are notified (via email) and can book the travel by clicking the “Book” link
- Book the travel
 - There is no time limit on booking once a request has been approved and is in the “book” status. However, it is recommended that booking is done immediately since prices for flights, hotel reservations and conference registration tend to increase rapidly)
- Concur will generate itinerary and confirmation

NOTE: Make sure the booking is done through the “Book” link and not from the **Travel** section

Creating/Submitting Expense Reports

CREATING/SUBMITTING EXPENSE REPORTS

Things to Consider when creating your expense reports

1. Have all the receipts for the travel such as flight, car rental, hotel folio, conference registration, parking, meals, transportation expenses etc., uploaded to concur.
2. Have the agenda uploaded to concur.
3. When calculating mileage reimbursement use the mileage calculator.
 - Click the deduct commute box if traveler started the trip from home, (Please note: the District does not reimburse for home to work mileage.
4. Verify the travel request amount is greater than the actual expenses for the trip. If actual total expenses are 10% or 200 dollars more than the amount previously approved, a TR for the additional amount is required.
5. Don't forget to link the TRs to the expense report.
6. Select the appropriate payment type when preparing your expense report.
 - For flights and car rentals, choose Citibank.
 - For hotel and conference registration, choose Amex.
 - For expenses paid by the traveler, choose Out of pocket

CREATING/SUBMITTING EXPENSE REPORTS

1. Click **Requests**, **Manage Requests**, and then click **Expense** in the **Action** column. All travel related expenses must be initiated at the **Requests** tab, by clicking **Expense** under the **Action** header. This prepopulates the header and will link the request to the expense.

The screenshot shows the SAP Concur interface. The top navigation bar includes 'SAP Concur', 'Requests' (highlighted with a yellow circle), 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. Below the navigation bar, there are links for 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The main content area is titled 'Active Requests (2)' and contains a table of requests. The table has columns for 'Request Name', 'Request ID', 'Status', 'Request Dates', 'Date Submitted', 'Total', 'Approved a...', 'Remaining ...', and 'Action'. Two requests are listed: 'Esmeralda Abejar' and 'Chancellor's Office State Budget Registration is free.'. The 'Expense' link in the 'Action' column for the second request is highlighted with a yellow circle.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Esmeralda Abejar	37AK	Approved	09/12/2019	08/06/2019	\$51.96	\$51.96	\$51.96	Expense
<input type="checkbox"/>	Chancellor's Office State Budget Registration is free.	379C	Approved	09/12/2019	07/17/2019	\$37.84	\$37.84	\$27.26	Expense

CREATING/SUBMITTING EXPENSE REPORTS

2. Review information and click **Next**

Create a New Expense Report

Report Header

Fund: (11) 11 - UNRESTRICTED GI | School: (EDB) EDB - BUSINESS OPI | Resource: (1000) 1000 - GENERAL FUI | Project Year: 0 | Goal: 6729

Function: (0000) 0000 - CAMPUS ADM

Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remain
<input type="checkbox"/>	Chancellor's Office State B...	379C	No	\$37.84	\$37.84	\$27

CREATING/SUBMITTING EXPENSE REPORTS

Link the expense report to all outstanding TRs related to this expense. Select the request(s), and click add then click next.

Create a New Expense Report

Report Header

Fund: (11) 11 - UNRESTRICTED GI | School: (EDB) EDB - BUSINESS OPI | Resource: (1000) 1000 - GENERAL FUI | Project Year: 0 | Goal: 6729

Function: (0000) 0000 - CAMPUS ADM

Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remain
<input checked="" type="checkbox"/>	Chancellor's Office State B...	379C	No	\$37.84	\$37.84	\$27

Buttons: Add, Remove, Next >>

It is important to attach additional TRs to the expense report, this will allow you to see that enough funds have been approved to cover the total cost of the travel.

CREATING/SUBMITTING EXPENSE REPORTS

3. Create new expenses related to the travel request by selecting the Expense Type. (Make sure you add all expenses related to the conference/travel not only the ones claimed as personal reimbursements.)

Manage Expenses

Chancellor's Office State Budget

Delete Report Submit Report

+ New Expense + Quick Expenses Import Expenses Details ▾ Receipts ▾ Print / Email ▾

Expenses Move ▾ Delete Copy View ▾ << New Expense Available Receipts

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
No Expenses Found				
			TOTAL AMOUNT	TOTAL REQUESTED
			\$0.00	\$0.00

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- ✓ Recently Used Expense Types
 - Parking
 - Personal Car Mileage
 - Hotel
 - Registration Fees
 - Lunch

CREATING/SUBMITTING EXPENSE REPORTS

4. Fill out the required fields. *NOTE: The required fields have red lines.*

Manage Expenses

Chancellor's Office State Budget

Delete Report Submit Report

+ New Expense + Quick Expenses Import Expenses Details Receipts Print / Email

Expenses Move Delete Copy View

Date	Expense Type	Amount	Requested
Adding New Expense			
No Expenses Found			

TOTAL AMOUNT \$0.00 TOTAL REQUESTED \$0.00

New Expense

Expense Type: Registration Fees

Transaction Date: [Calendar Icon]

Report/Trip Purpose: Professional Development

Additional Information: [Text Field]

Paid for by an outside entity?: No

Enter Vendor Name: [Text Field]

City of Purchase: [Text Field]

Payment Type: Out of Pocket

Amount: [Text Field]

Comment: [Text Field]

Save Itemize Allocate Attach Receipt Cancel

CREATING/SUBMITTING EXPENSE REPORTS

5. Attach receipts at Expense Entry line item (Upload receipts or emailing the receipts to receipts@concur.com. Click on available receipts and attached receipts to each line item.)
6. When done matching receipts to each line item, click **Submit Report**
7. The Current Norco College expense report approval process follows School-Goal-Function

Approver Type	Approver Type Code	Approver Name	Approver ID	Level	Is Active	Group	School Segment	Goal Segment 2	Function Segment 3	Group
Report Cost Object	CO_REPORT	LEE, SAMUEL THOMAS	280908	1	Yes	EAG - ACADEMIC SENATE - NORCO-6015-0000 - FACULTY SENATE	EAG	6015	0000	NC
Report Cost Object	CO_REPORT	COLLINS, MICHAEL THOMAS	283270	2	Yes	EAG - ACADEMIC SENATE - NORCO-6015-0000 - FACULTY SENATE	EAG	6015	0000	NC
Report Cost Object	CO_REPORT	GRIFFIN, MISTY ANN	109345	3	Yes	EAG - ACADEMIC SENATE - NORCO-6015-0000 - FACULTY SENATE	EAG	6015	0000	NC
Report Cost Object	CO_REPORT	Abejar, Esmeralda	294024	4	Yes	EAG - ACADEMIC SENATE - NORCO-6015-0000 - FACULTY SENATE	EAG	6015	0000	NC

EXPENSE REPORT APPROVAL PROCESS

Traveler/Delegate
Reviews expenses.
Please note: Only traveler can submit expense report.

Program/Area Budget Director
For expense approval

Area VP where funding resides
For expense approval

Traveler to use SAP Concur app to upload receipts during conference or e-mail receipts to receipts@concur.com with the traveler e-mail address on the subject line.



Travel Auditor
Financial and Technical Analyst & Accounting Services Clerk

District A/P
For final audit and issuance of final payment to traveler

Director, College Business Services
For final review and approval

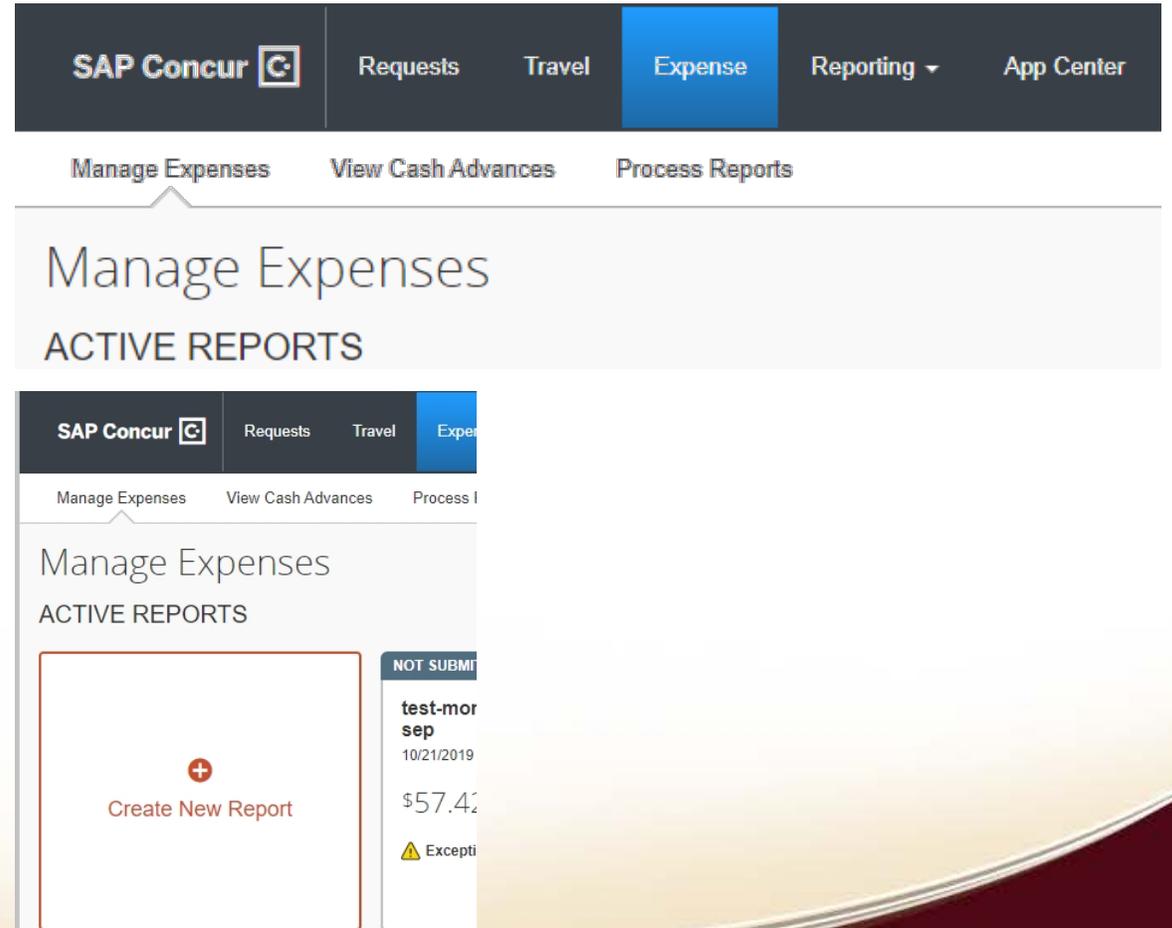


Monthly Mileage Reports

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

1. Click **Expense** from the SAP Concur ribbon at the top of the screen
2. Under **Manage Expenses**, click **Create New Report**



MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

3. Fill out the required fields, using the beginning and end of the month for the **Report/Trip Business Start Date** and **Report/Trip Business End Date** fields and **funding source**.

The screenshot displays the SAP Concur Expense Reporting interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted), 'Reporting', and 'App Center'. Below this, there are links for 'Manage Expenses', 'View Cash Advances', and 'Process Reports'. The main heading is 'Create a New Expense Report' with a sub-heading 'Report Header'. The form contains the following fields:

Report/Trip Name Monthly Mileage Report - Sep	Report/Trip Business Start Date 09/02/2019	Report/Trip Business End Date 09/30/2019	Report/Trip Purpose Meeting		
Traveler Type Staff	Paid for by an outside entity? 	Does this trip contain personal travel? No	Personal Travel Dates 	Additional Information 	Comment
Fund (11) 11 - UNRESTRICTED G	School (EMB) EMB - DEAN OF INS1	Resource (1000) 1000 - GENERAL FUI	Project Year 0	Goal 6017	Function (5000) 5000 - DEAN OF INS*

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

4. Click the **Next** Button at the bottom of the page

5. Under *All Expense Types* and “**03. Mileage**,” click **Monthly Mileage Report**

Create a New Expense Report

Report Header

Report Name: [Field] Business Unit: [Field] Report to Business Unit Code: [Field] Report to Business Unit: [Field] Expense Type: [Field]

Additional Information: [Field] [Field] [Field]

Financial Codes: [Field] [Field] [Field] [Field] [Field] [Field]

Request Summary Table:

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

Next >>

New Expense

Expense Type: [Field]

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense type in the field above.

Recently Used Expense Types

Monthly Mileage Report

All Expense Types

01. Travel Expenses	03. Mileage	05. Fees
Airfare	Monthly Mileage Report	Registration Fees
Hotel	Personal Car Mileage	06. Other Travel Expenses
02. Transportation	04. Meals	Agency Booking Fees
Car Rental	Breakfast	Airline Fees
Parking	Dinner	Currency Exchange Fees
Train	Lunch	Ground Transportation

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

6. Fill out the required fields
7. Click **Mileage Calculator** to add actual mileage

The screenshot shows the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has a link for 'Available Receipts' in the top right corner. Below the title, there is a section for 'View Reimbursement Rates'. The form contains several input fields:

- Expense Type:** A dropdown menu with 'Monthly Mileage Report' selected.
- Transaction Date:** A date field with '09/02/2019' and a calendar icon.
- Purpose of the Trip:** A text field with 'Meeting' entered.
- From Location:** A text field with 'Norco College' entered.
- To Location:** A text field with 'RCCD' entered.
- Payment Type:** A dropdown menu with 'Out of Pocket' selected.
- Distance : Amount:** A field with a currency icon (C), a text input with '0.00', and a dropdown menu with 'USD' selected.
- Comment:** An empty text area.

At the bottom right of the form, there is a 'Mileage Calculator' button with a small icon of a car and a map.

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

The **Mileage Calculator** will auto-populate the waypoints based on the locations you entered.

Click **Make Round Trip** to include mileage back from the meeting.

Click **Deduct Commute** if the trip started from home.

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

- 2001 Third St, Norco, CA 92860, USA
- 3801 Market Street, Riverside, CA 9250

17.1 MI
 Personal

Calculate Route Make Round Trip

Directions

Suggested routes:

- CA-91 E 17.2 mi. About 23 mins
- I-15 N and CA-60 E 20.8 mi. About 27 mins
- Hamner Ave and CA-60 E 20.4 mi. About 36 mins

2001 Third St, Norco, CA 92860, USA

17.2 mi. About 23 mins

1. Head northeast toward Mustang Cir 89 ft
2. Turn right onto Rodeo Rd 0.1 mi
3. Turn right onto College Way 285 ft
4. Turn left onto Mustang Cir 486 ft
5. Turn left onto Third St 0.5 mi
6. Turn right onto Hamner Ave 0.5 mi
7. Turn left onto Second St 486 ft

<input type="checkbox"/> Deduct Commute	TOTAL PERSONAL 0.0 MI	TOTAL BUSINESS 17.1 MI
---	---------------------------------	----------------------------------

Map data ©2019 Terms of Use Report a map error

Add Mileage to Expense Cancel

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

- 2001 Third St, Norco, CA 92860, USA
- 3801 Market Street, Riverside, CA 9250

17.1 MI
 Personal

Calculate Route Make Round Trip

Directions

Suggested routes:

- CA-91 E 17.2 mi. About 23 mins
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2001 Third St, Norco, CA 92860, USA

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3. Turn right onto College Way 285 ft
4. Turn left onto Mustang Cir 486 ft
5. Turn left onto Third St 0.5 mi
6. Turn right onto Hamner Ave 0.5 mi
7. Turn left onto Second St 486 ft

<input type="checkbox"/> Deduct Commute	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	17.1 MI

Map

Map data ©2019 Terms of Use Report a map error

Add Mileage to Expense Cancel

8. Click **Add Mileage to Expense** after reviewing the mileage calculations.

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

The screenshot shows the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has a link for 'Available Receipts'. It includes the following fields and options:

- Expense Type:** Monthly Mileage Report (dropdown)
- Transaction Date:** 09/02/2019 (calendar icon)
- Purpose of the Trip:** Meeting
- From Location:** 2001 Third St, Norco, CA 92860, US
- To Location:** 3801 Market Street, Riverside, CA 9
- Payment Type:** Out of Pocket (dropdown)
- Distance:** 17 (input field)
- Amount:** 9.86 (input field)
- USD:** (dropdown)
- Comment:** (empty text area)
- Mileage Calculator:** (button with a map icon)
- Buttons:** Save, Allocate, Attach Receipt, Cancel

8. Verify the mileage in the **Distance: Amount** field
9. Click **Save** to add the trip as a mileage expense
10. Repeat steps 5-9 to add additional trips to the Monthly Mileage Report

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

Monthly Mileage Report - Sep

Manage Expenses View Cash Advances Process Reports

+ New Expense + Quick Expenses Import Expenses Details Receipts Print / Email

Expenses	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	09/27/2019	Monthly Mileage Report	\$19.72	\$19.72
<input type="checkbox"/>	09/26/2019	Monthly Mileage Report	\$19.72	\$19.72
<input type="checkbox"/>	09/17/2019	Monthly Mileage Report	\$19.72	\$19.72
<input type="checkbox"/>	09/11/2019	Monthly Mileage Report	\$9.86	\$9.86

TOTAL AMOUNT \$69.02 TOTAL REQUESTED \$69.02

New Expense

Expense Type

Recently Used Expense Types

- Monthly Mileage Report

All Expense Types

- 01. Travel Expenses
 - Airfare
 - Hotel
- 02. Transportation
 - Car Rental
 - Parking
 - Train
- 03. Mileage
 - Monthly Mileage Report
 - Personal Car Mileage
- 04. Meals
 - Breakfast
 - Dinner
 - Lunch
- 05. Fees
 - Registration Fees
- 06. Other Travel Expenses
 - Agency Booking Fees
 - Airline Fees
 - Currency Exchange Fees
 - Ground Transportation
- ...06. Other Travel Expenses
 - Group Meals/Entertainment <10 Attendees
 - Group Meals/Entertainment 10 + Attendees
 - Miscellaneous
 - Tolls/Road Charges
- 08. Other
 - Non Reimbursable/Personal Expense

Submit Report

11. Verify the information in each expense

12. Click **Submit Report**

Submit Report

Reviewing/Approving Expense Reports

REVIEWING/APPROVING EXPENSE REPORTS

1. Confirm agenda, hotel folio, parking and food receipts etc., are included
2. Make sure the amount approved is more or enough to cover all expenses
3. Make sure all expenses are categorized properly
4. Double check your budget

DELETE, CANCEL OR CLOSE/INACTIVATE REQUEST

Delete

A Request can only be deleted if it has never been submitted

Cancel

A user can cancel a Request once it's been submitted

- If cancelled before approval, you will not see the Expense link
- If Request is cancelled after approval but before booking, the Request will be cancelled
 - Expense link will remain visible
 - Request must be Closed/Inactivated in order to prevent expensing
- If Request is cancelled after booking, the **Request and the Booking will be cancelled**
 - Expense link will remain visible
 - Request must be Closed/Inactivated in order to prevent expensing

Cancellation of a Request, after it has been fully approved, will release the encumbrance

DELETE, CANCEL OR CLOSE/INACTIVATE REQUEST

Recall and Resubmit

Traveler should recall Requests that exceed approved/budgeted amounts (after travel is booked) to ensure revised amounts are fully approved

Close/Inactivate

Traveler should manually close/inactivate if they no longer need to expense against the Request

Multiple Requests

If another Request is made due to changes in travel plans and account keys mid-stream, requestors are able to assign all Requests associates with the trip to a single expense report. The user will simply attach the second request to the report created using the first Request



QUESTIONS?

**Please email the Concur Team
Esmeralda, Misty or Lenny**



www.norcocollege.edu/concurtraining

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