SAP Concur : Travel & Expense

- How to Access Concur
- Updating Your Travel Profile
- Acting as a Delegate
- Creating/Submitting Travel Requests
- Reviewing/Approving Travel Requests
- Requesting Cash Advance
- Booking Travel
- Creating/Submitting Expense Reports
- Reviewing/Approving Expense Reports

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How to Access Concur

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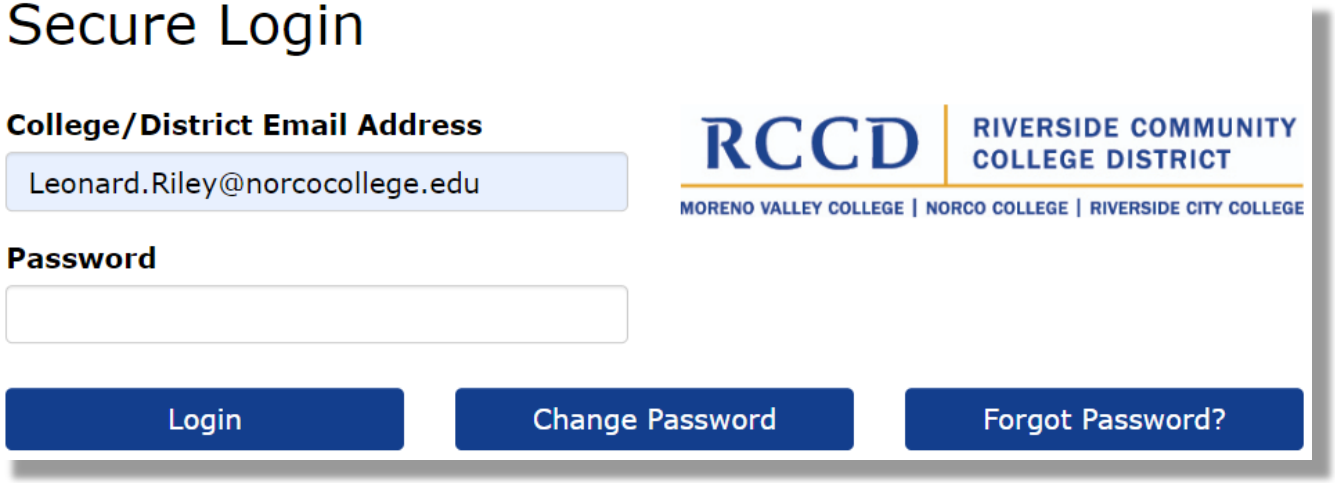
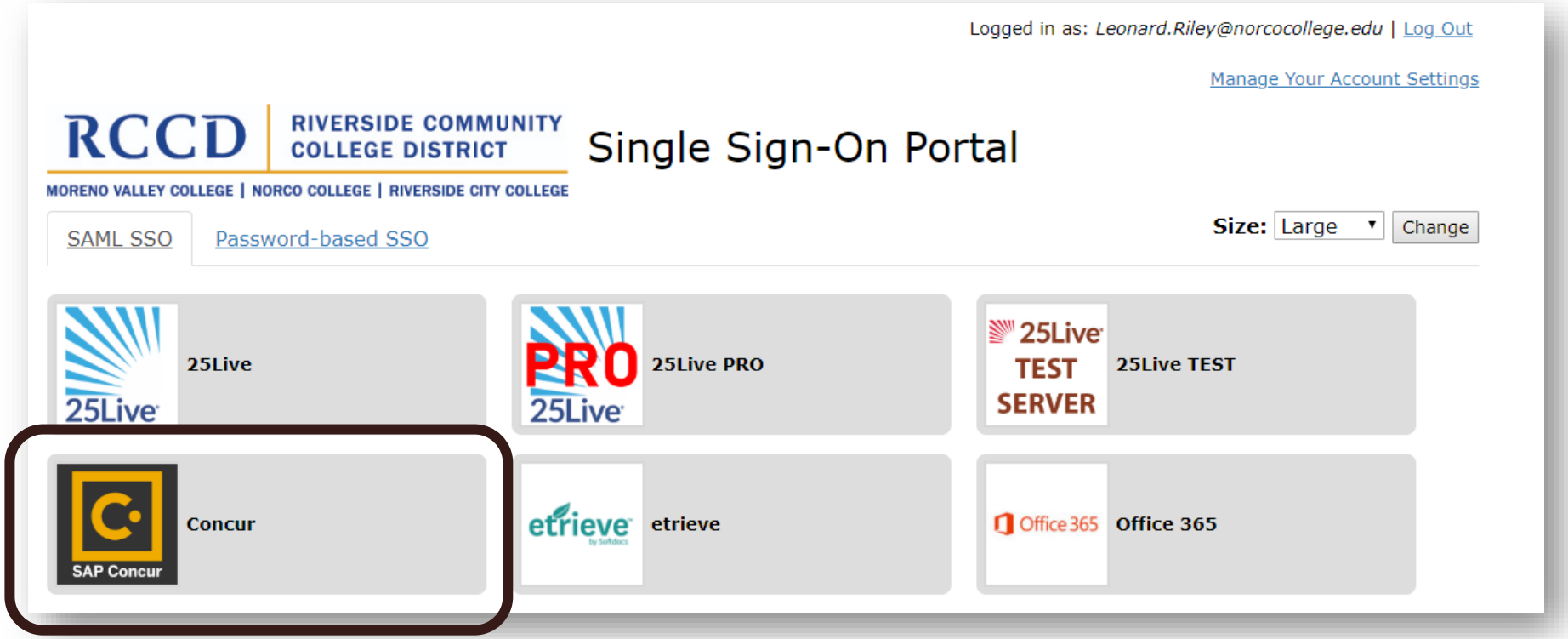
GO.RCCD.EDU – https://go.rccd.edu

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



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

Click on the Concur icon



Updating Your Travel Profile

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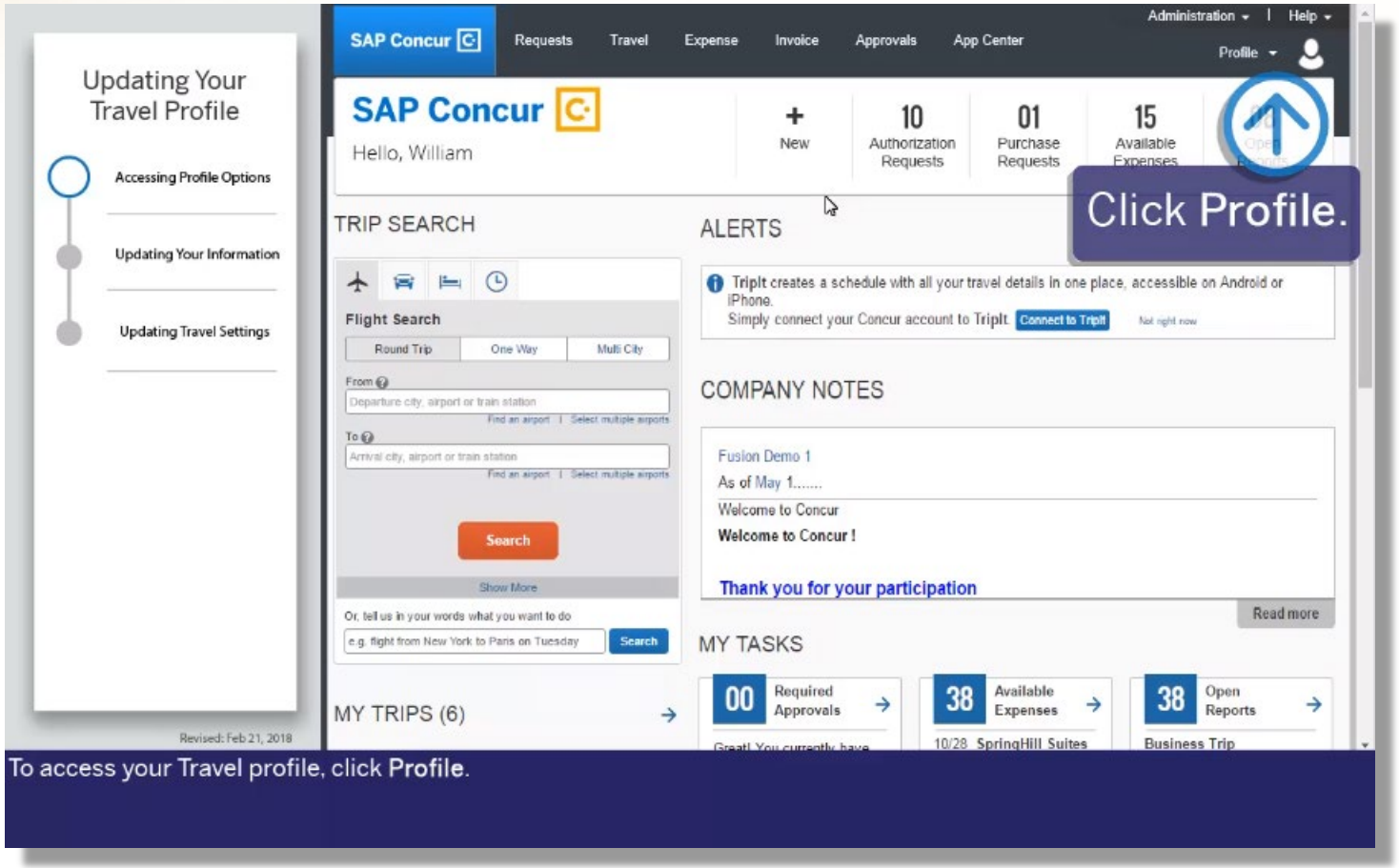
UPDATING YOUR TRAVEL PROFILE



Before you enter a travel request, enter company and credit card information, travel preferences, frequent-traveler program info, and delegates who can enter travel requests on your behalf.

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Profile Options

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.

Travel Profile Options

Airline Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates

Delegates are employees who are allowed to enter requests on behalf of others.

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Profile Options

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.

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?

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Profile Options

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.

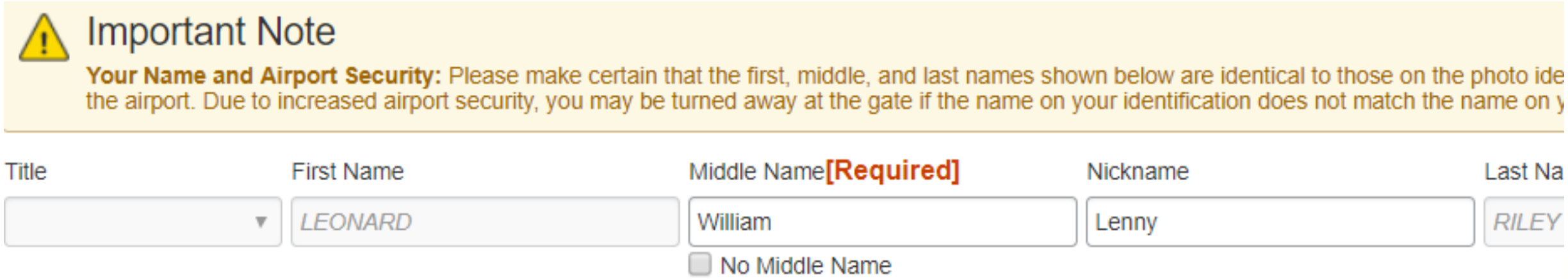
Request Preferences

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.

Change Password

Change your password.

UPDATING YOUR TRAVEL PROFILE



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 SAP Concur Site Admin if it needs to be updated.

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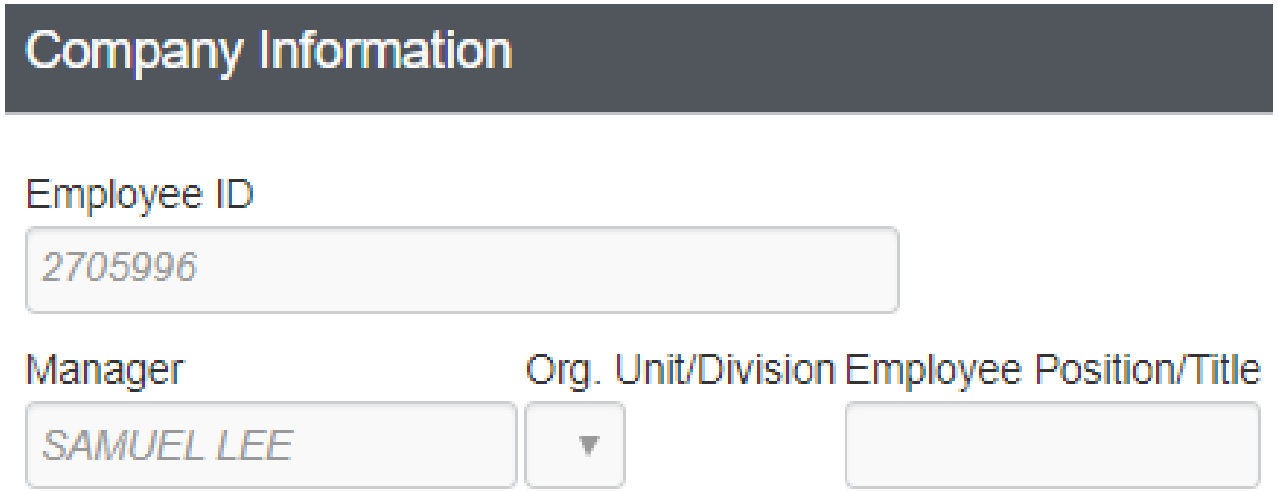
UPDATING YOUR TRAVEL PROFILE

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 the travel administrator.



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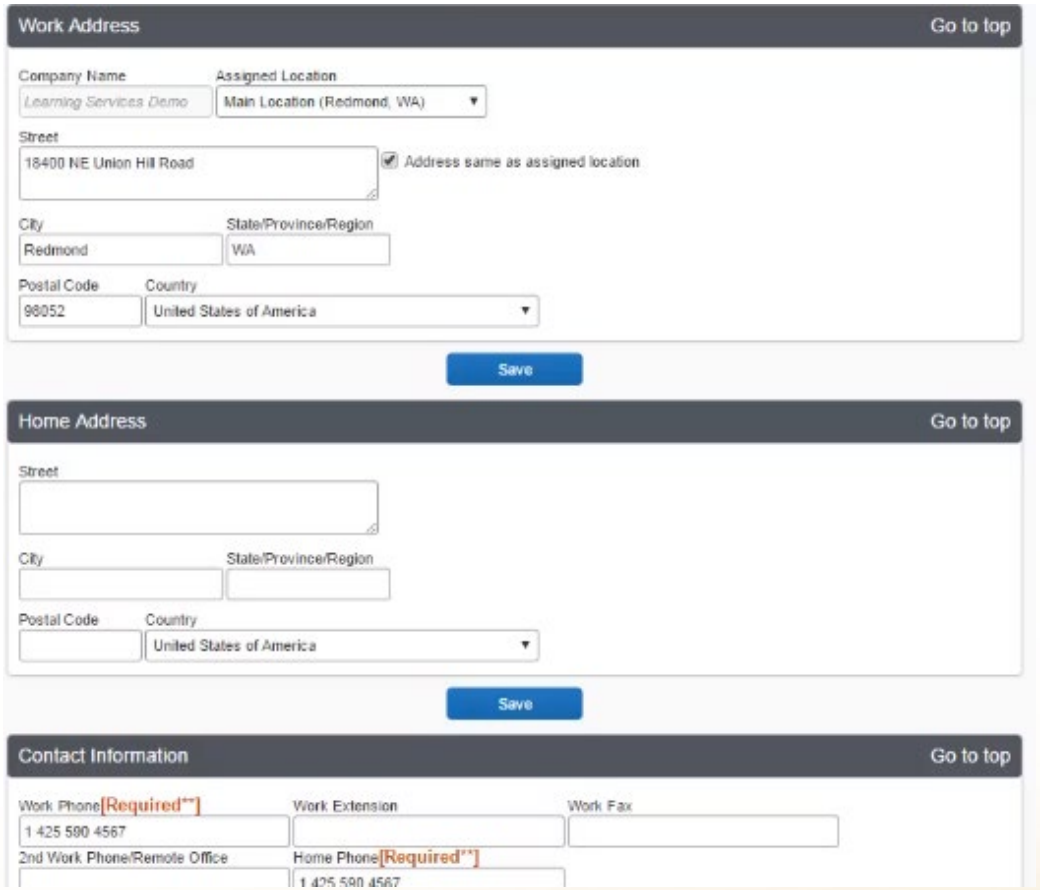
UPDATING YOUR TRAVEL PROFILE



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

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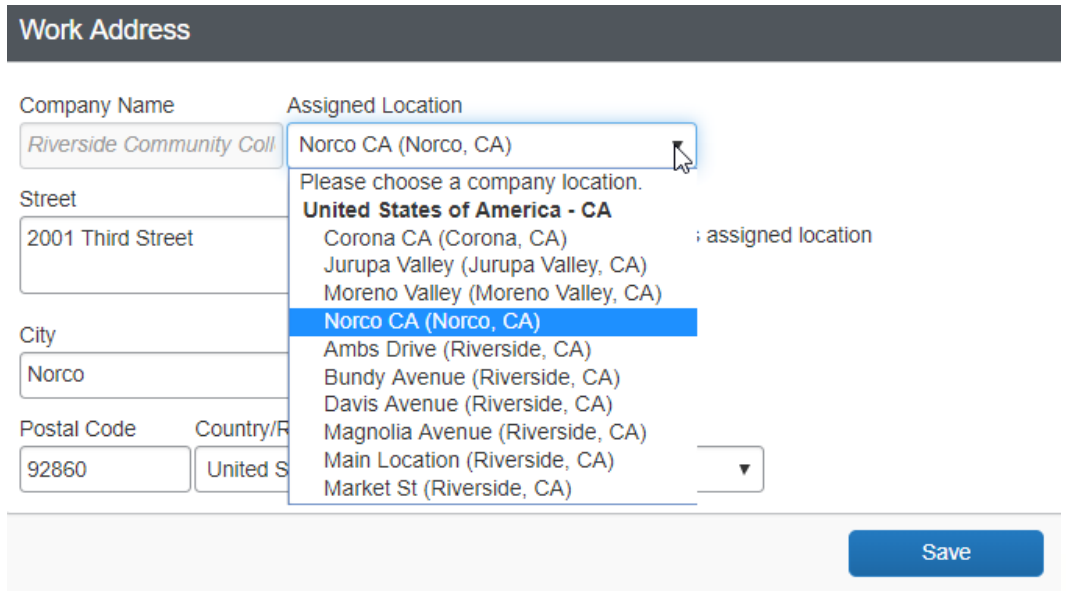
UPDATING YOUR TRAVEL PROFILE



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.

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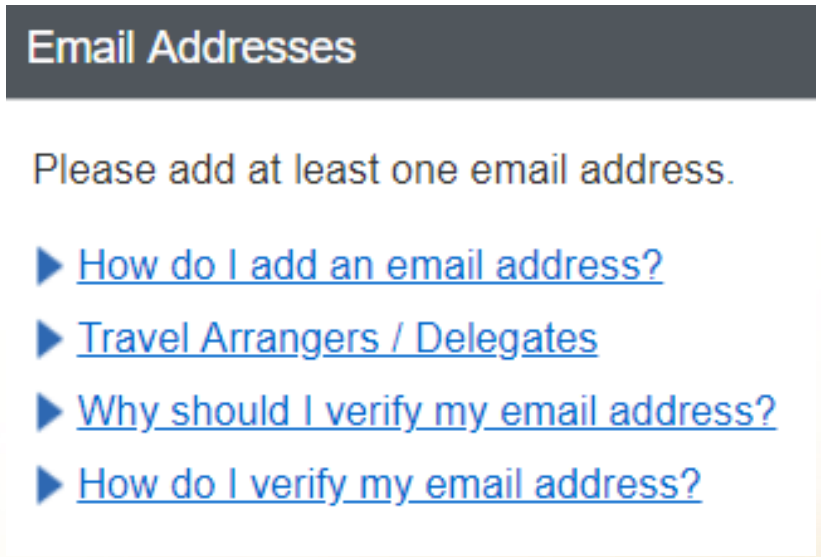
UPDATING YOUR TRAVEL PROFILE

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



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

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UPDATING YOUR TRAVEL PROFILE

When you verify your email address, we 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.

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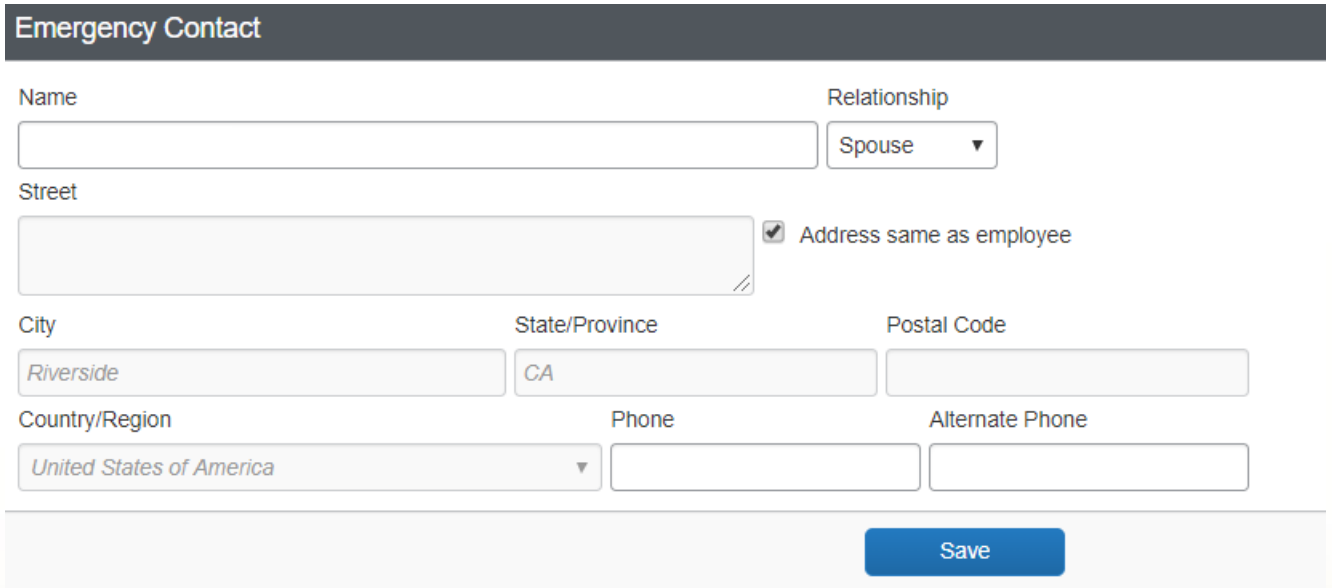
UPDATING YOUR TRAVEL PROFILE

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



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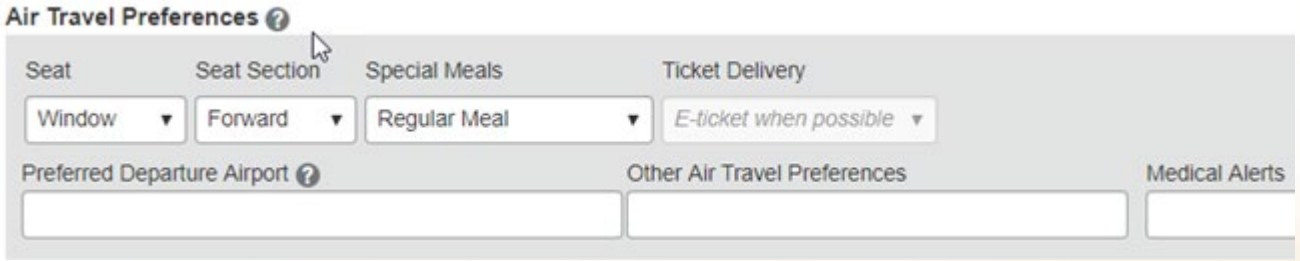
UPDATING YOUR TRAVEL PROFILE

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

…specify **Air Travel Preferences**…



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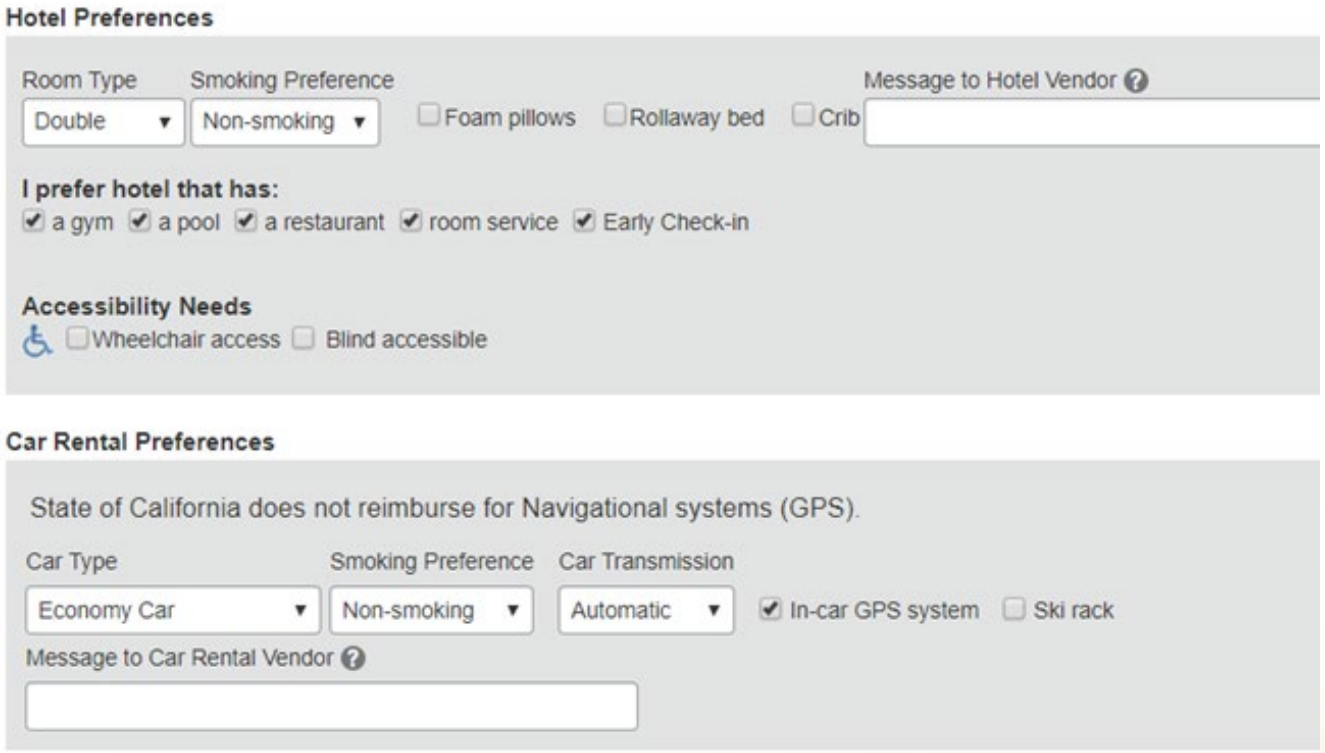
…specify **Hotel** and **Car Rental Preferences**…



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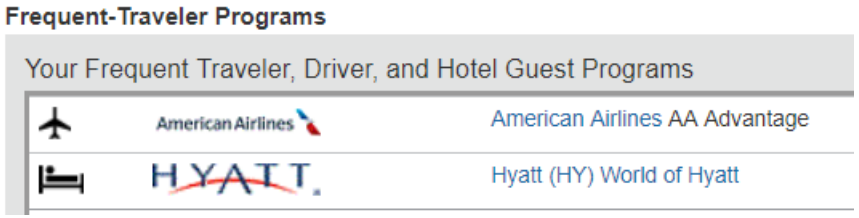
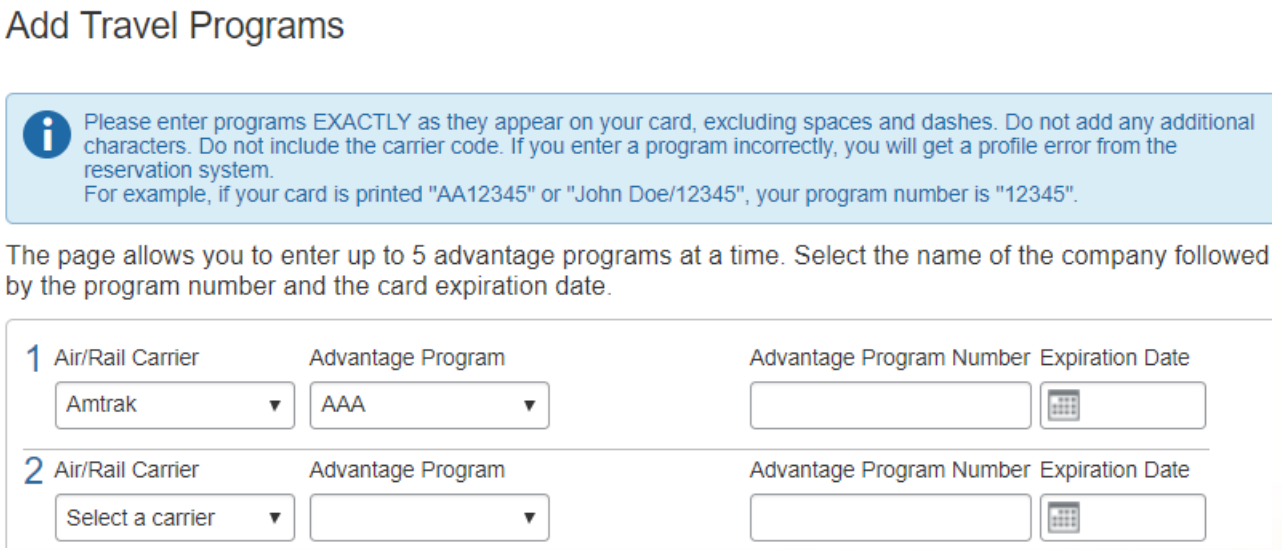
…and add **Frequent-Traveler** and **Advantage Programs**…





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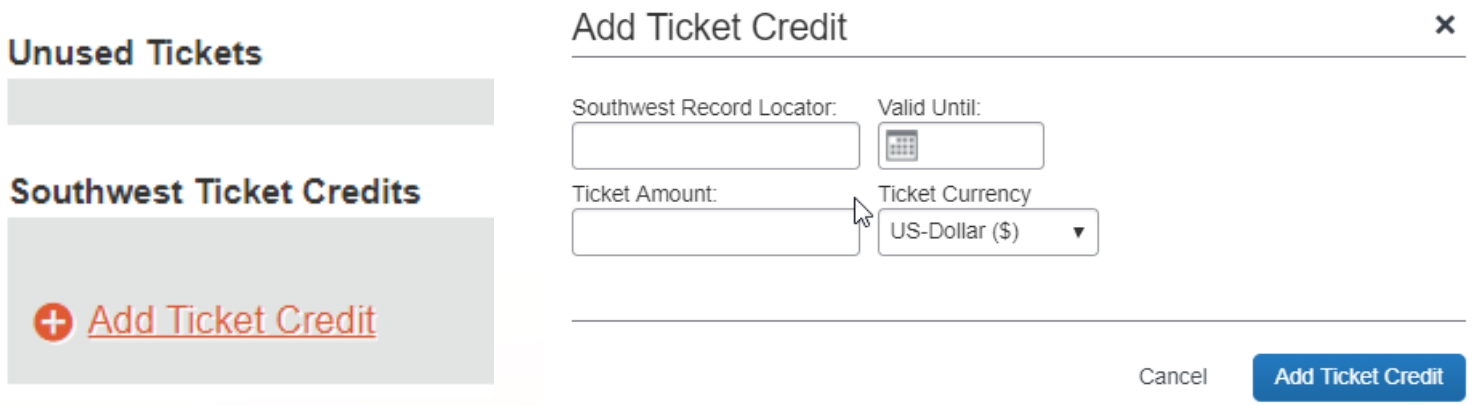
UPDATING YOUR TRAVEL PROFILE

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 "**Add Ticket Credit**" link. Enter the information and click "**Add Ticket Credit**" to save.



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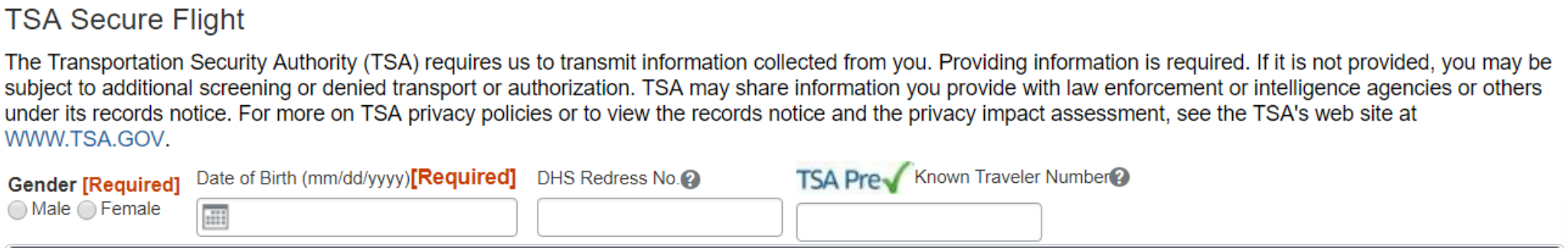
UPDATING YOUR TRAVEL PROFILE

TSA requires entry of gender and date of birth in the **TSA Secure Flight** section. You can also enter a Redress Number or your TSA PreCheck Known Traveler Number if you have one. Click on the Quick Help icon for additional information about these options.



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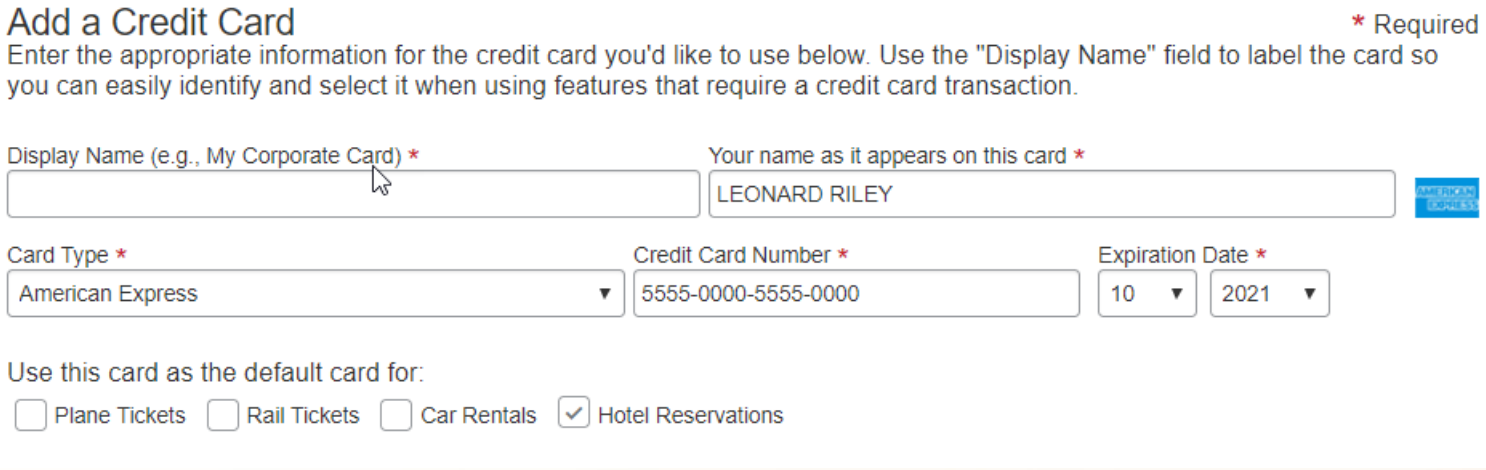
UPDATING YOUR TRAVEL PROFILE

From the **Credit Cards** section, add or update your credit card information that you use to book travel. Note that you are required to have a credit card saved in your profile before you can book with SAP Concur Travel.



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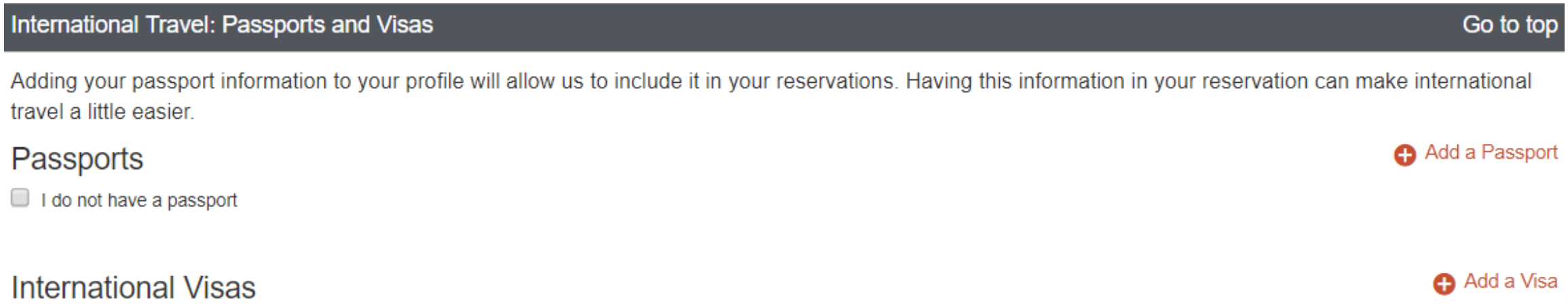
UPDATING YOUR TRAVEL PROFILE

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



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UPDATING YOUR TRAVEL PROFILE

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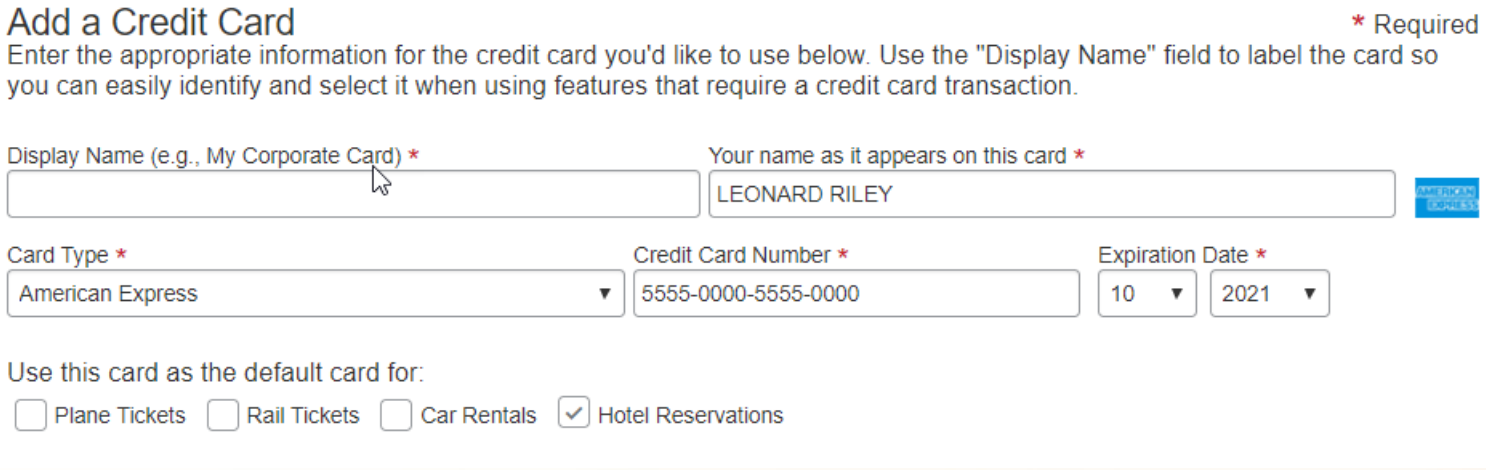

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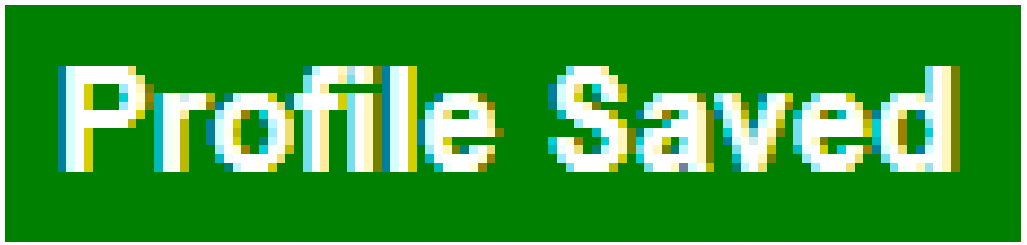
UPDATING YOUR TRAVEL PROFILE

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.



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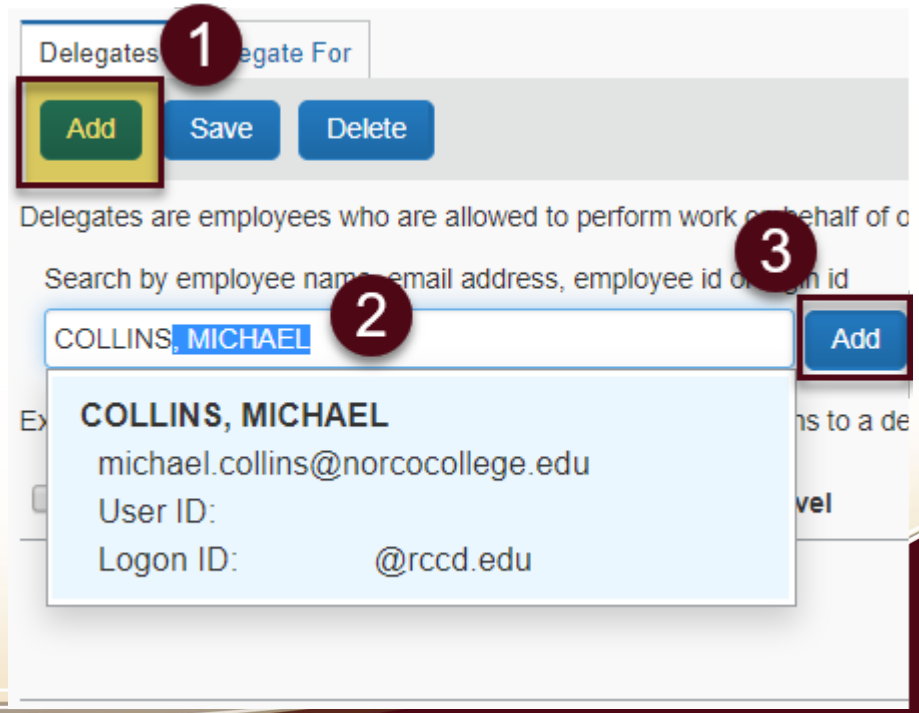
ASSIGNING DELEGATES

Delegates are employees who are allowed to perform work on behalf of other employees. By assigning permissions to a delegate, you are assigning permissions for both the **Expense** and (Travel) **Request** sections of Concur.

1. Click the **Add** button under the **Delegates** tab
2. Type the last name of the employee you want to be a delegate in the Search bar.
3. When the full name and information of the delegate appears, click the Add button to the right of the Search bar.



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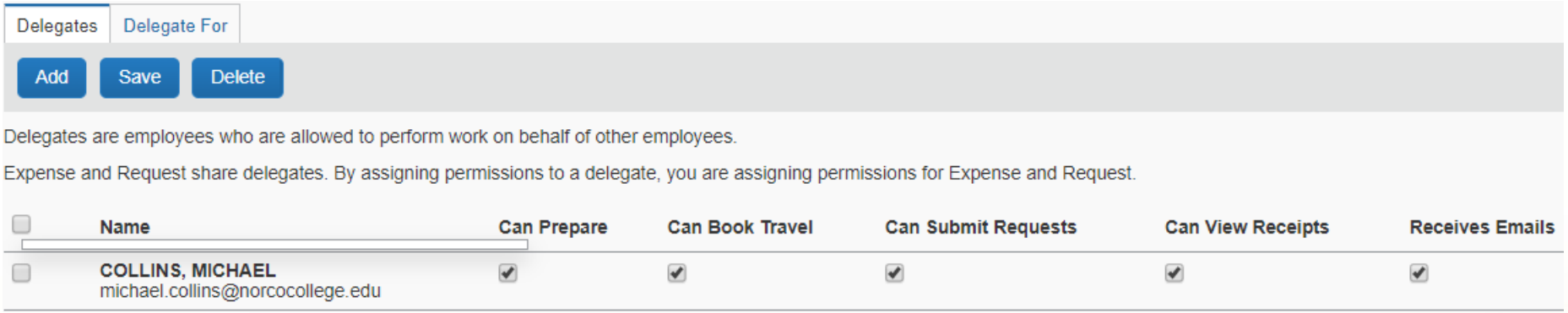
ASSIGNING DELEGATES PERMISSIONS

Once your delegate appears in your delegate list, click the following check boxes:

Can Prepare, **Can Book Travel**, **Can Submit Requests**, **Can View Receipts**, and **Receives Emails**.



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Acting as a Delegate

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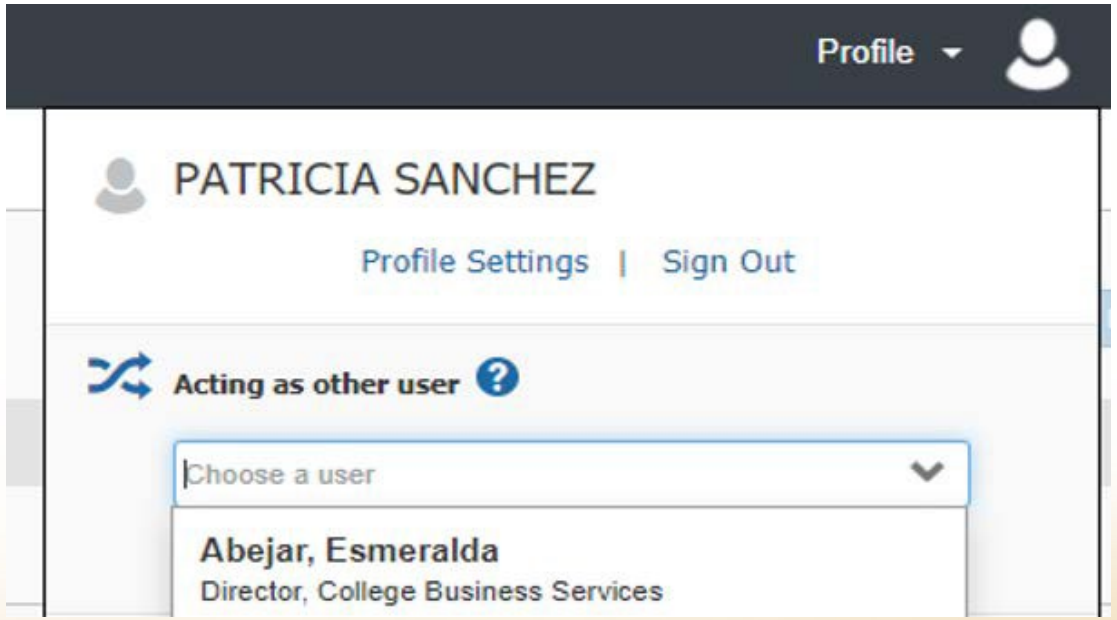
REQUESTING DELEGATES

If someone assigned you to be a delegate, you will see their name on the **Delegate For** tab. When acting as a delegate, you will be able to choose a user from your profile and perform work in Concur on behalf of that user.



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Creating/Submitting Travel Requests

TRAVEL REQUEST PROCESS

1. Traveler requests approval email from direct supervisor
2. Traveler (or delegate) enters new Travel Request (TR) in Concur, by clicking **Requests**, **New Request**, and attaches approval email
   - Approval email to include: Conference information, Place, Date(s), Budget information, estimated travel cost and budget approval from budget director
   - Fill out all required fields
   - Make sure the budget information is correct

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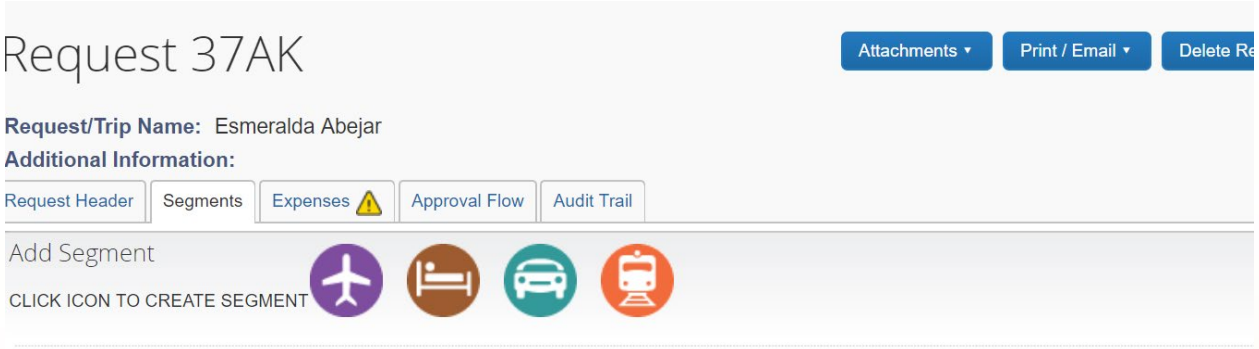
TRAVEL REQUEST PROCESS

3. Use the **Segments** tab to estimate the cost of the travel; this step will create the segments such as flight, hotel and car rental costs



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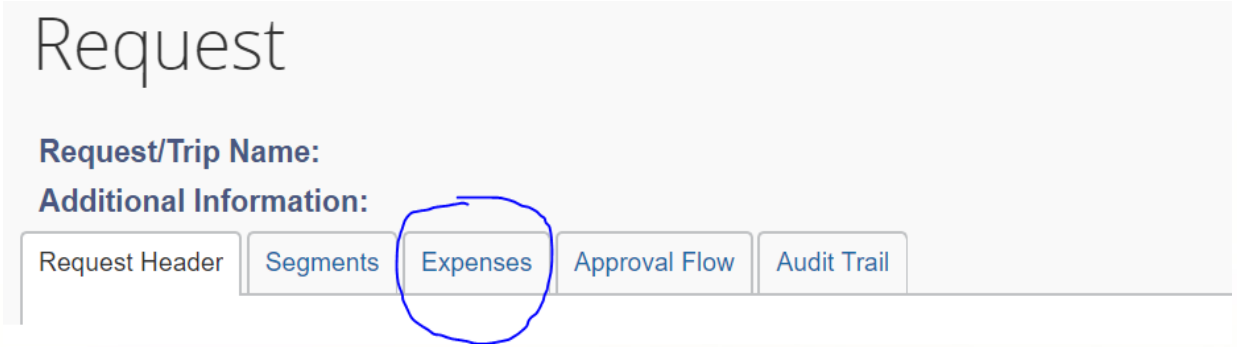
TRAVEL REQUEST PROCESS

4. Use the **Expenses** tab to enter mileage, conference registration cost, food and ground transportation costs



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TRAVEL REQUEST PROCESS

5. Assigned traveler delegate will receive an email about the TR's for review
   - Delegate will make sure e-mail approval is attached to travel request and budget information is accurate
   - Delegate will communicate with traveler if there is missing or incorrect information
   - Delegates should have the following boxes checked in the traveler profile: Can Prepare, Can Book Travel, Can Submit Requests, Can View Receipts, Receive Emails

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TRAVEL REQUEST PROCESS

6. Submit the TR for approval
7. The TR routes to the area VP, then to the VP of Business Services
8. Once the TR is approved, the traveler and delegate are notified
9. Book the travel
    - There is no time limit on booking once a request has been approved and is in the "book" status. It is recommended that booking is done immediately since prices for flights, hotel reservations and conference registration tend to increase rapidly).

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Requesting Cash Advance

Reviewing/Approving Travel Requests

Booking Travel

Creating/Submitting Expense Reports

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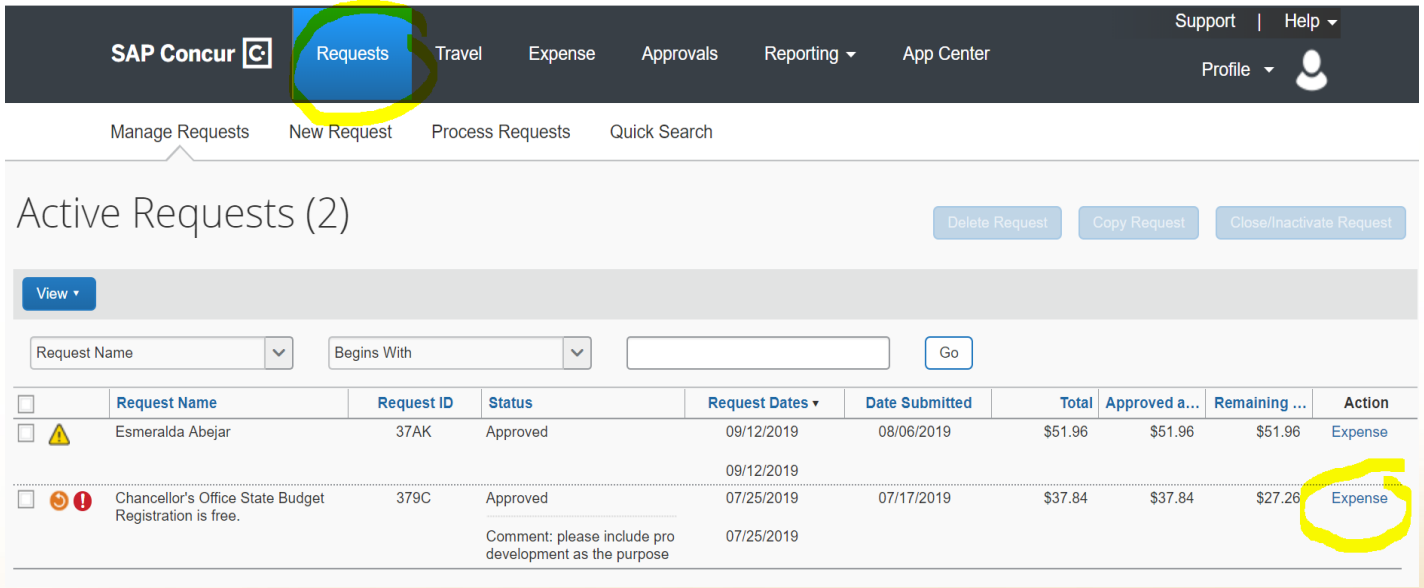
EXPENSE REIMBURSEMENT PROCESS

1. Click **Requests**, **Manage Requests**, and then click **Expense** in the **Action** column



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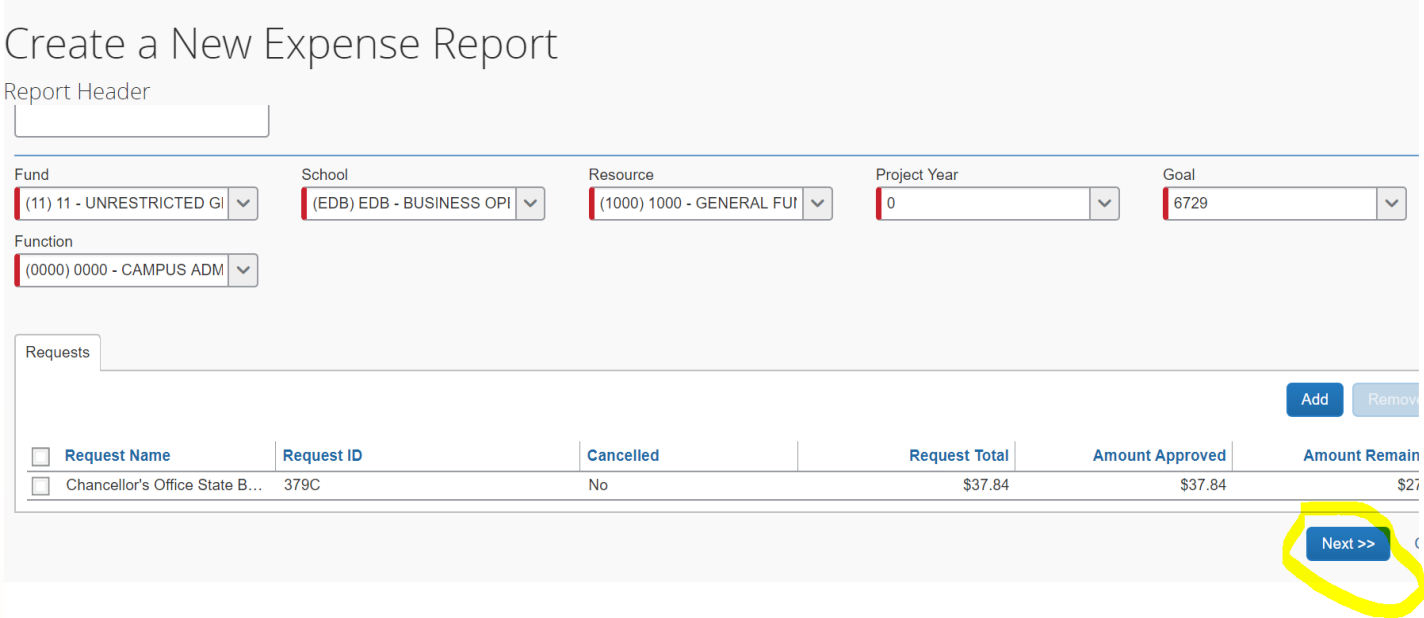
EXPENSE REIMBURSEMENT PROCESS

2. Review information and click **Next**



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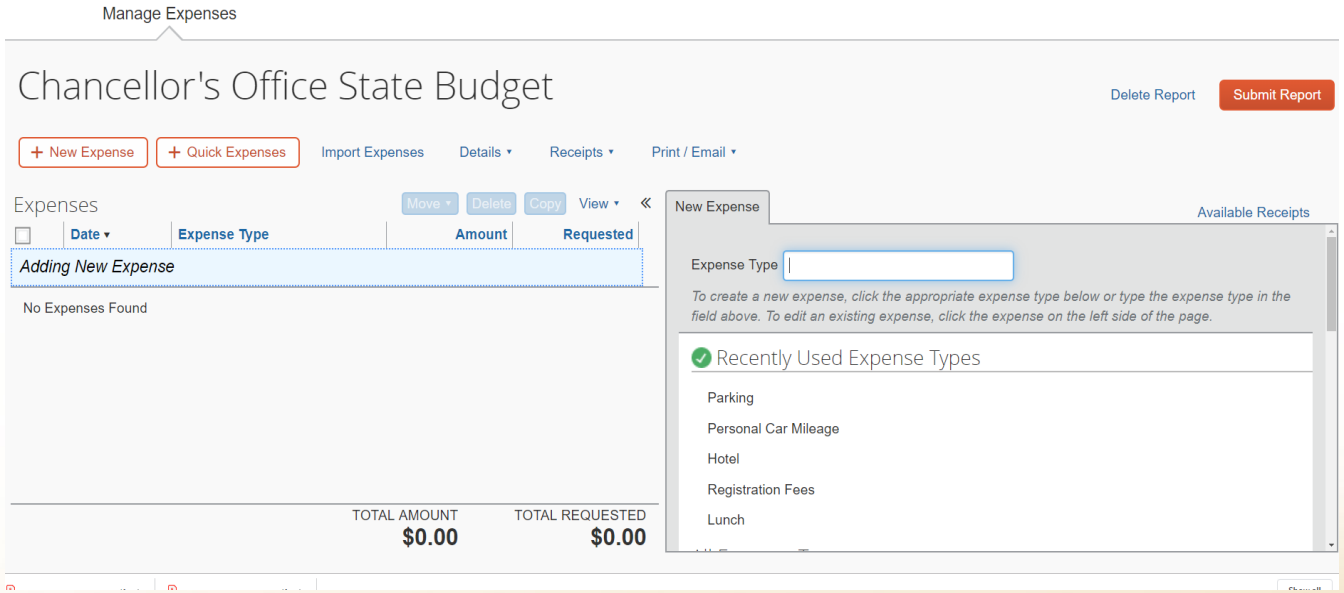
EXPENSE REIMBURSEMENT PROCESS

3. Create new expenses related to the travel request by selecting the Expense Type



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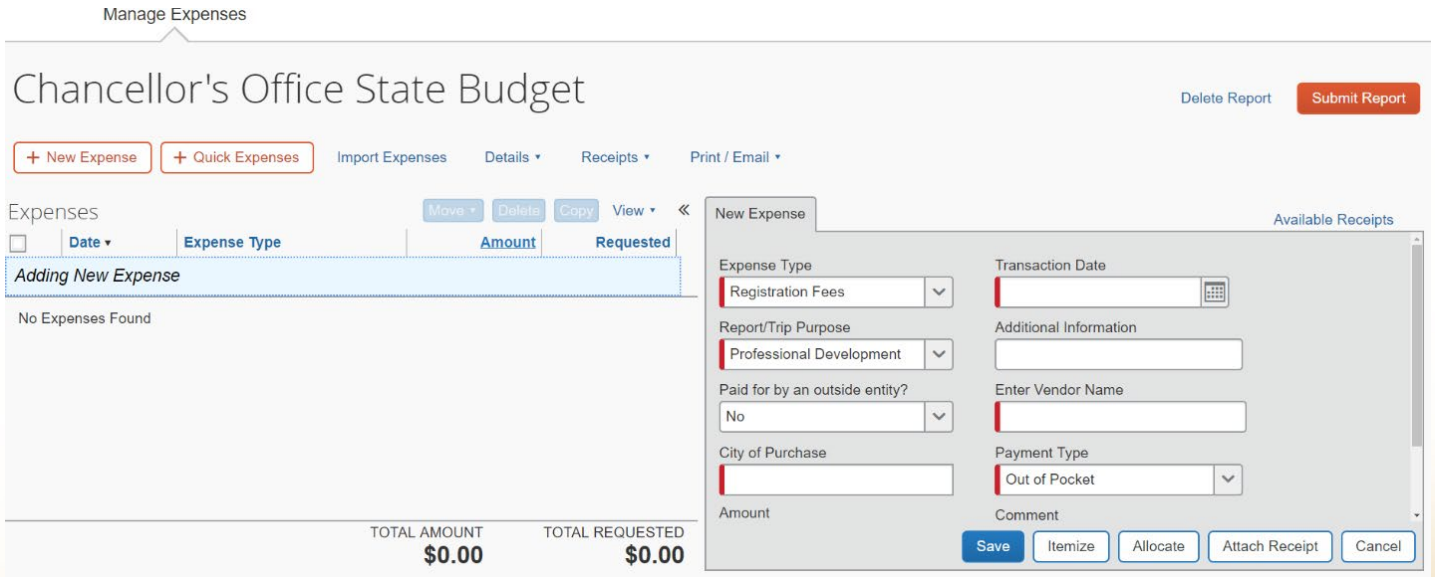
EXPENSE REIMBURSEMENT PROCESS

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



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EXPENSE REIMBURSEMENT PROCESS

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**

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Reviewing/Approving Expense Reports