

# SAP Concur : Travel & Expense

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# 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

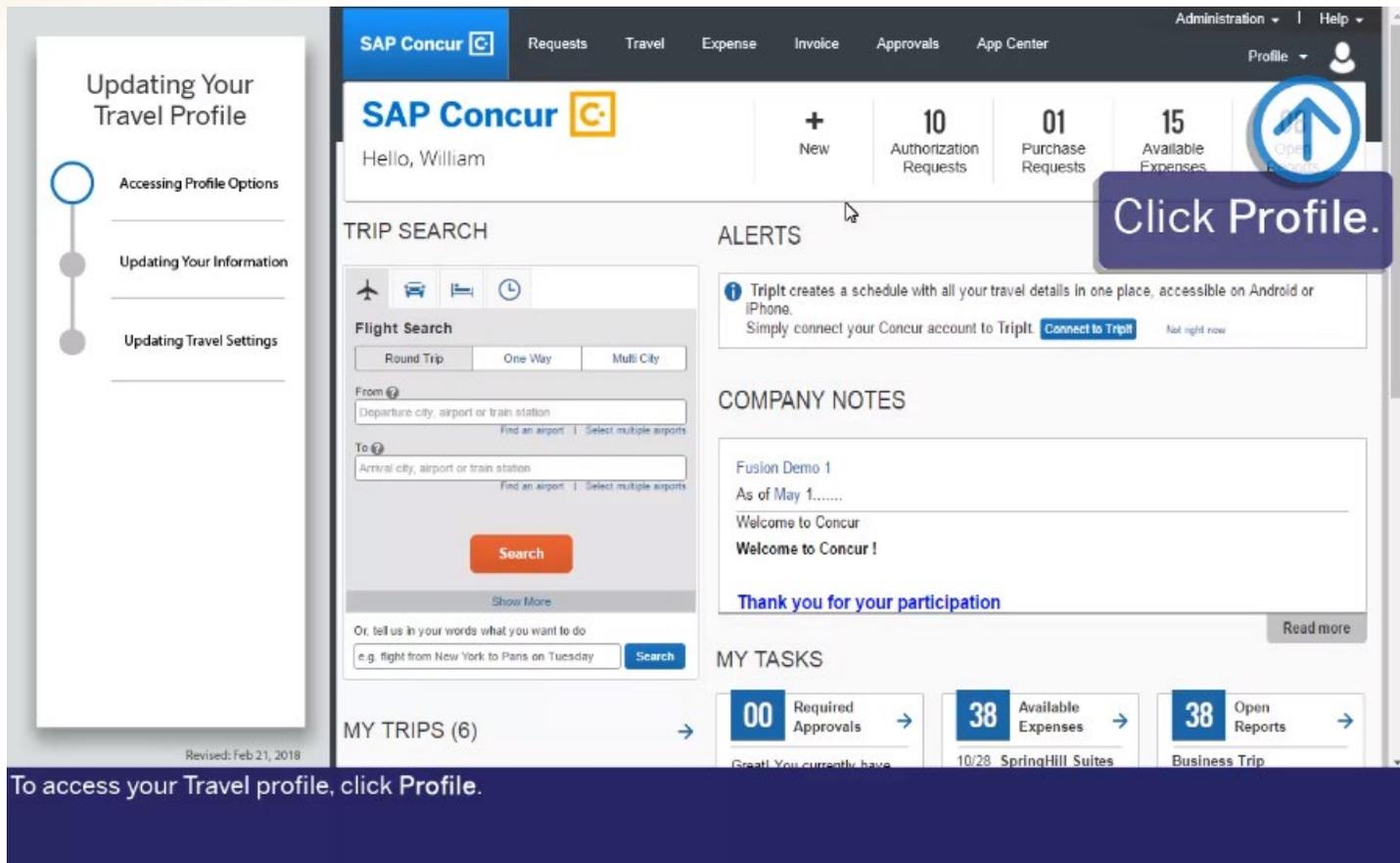
Click on the Concur icon



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@norcocollege.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 the constituent colleges: 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 content area displays a grid of application icons: 25Live, 25Live PRO, 25Live TEST SERVER, SAP Concur (highlighted with a red box), etrieve, and Office 365.

# Updating Your Travel Profile

# UPDATING YOUR TRAVEL PROFILE



The screenshot displays the SAP Concur web application interface. On the left, a sidebar titled 'Updating Your Travel Profile' contains three options: 'Accessing Profile Options', 'Updating Your Information', and 'Updating Travel Settings'. The main content area shows a dashboard with a navigation bar at the top containing 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. A user profile icon is located in the top right corner of the navigation bar. A blue callout box with the text 'Click Profile.' points to this icon. Below the navigation bar, the dashboard includes a 'TRIP SEARCH' section with a flight search form, an 'ALERTS' section with a notification about Triplt, a 'COMPANY NOTES' section with a welcome message, and a 'MY TASKS' section with progress indicators for 'Required Approvals', 'Available Expenses', and 'Open Reports'.

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.

To access your Travel profile, click Profile.

# 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.



# 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?

# 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



## 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 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 <b>[Required]</b>	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 SAP Concur Site Admin 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 the travel 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(es)**, 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"/>	<b>United States of America - CA</b>
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"/>	<b>Norco CA (Norco, CA)</b>
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(es).

## 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, 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](mailto:plans@concur.com) to have reservations added to your trips.
- Forward your receipt images to [receipts@concur.com](mailto: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 “**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:
<input type="text"/>	<input type="text"/>
Ticket Amount:	Ticket Currency
<input type="text"/>	US-Dollar (\$) ▼

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

# 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.

## TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender **[Required]**    Date of Birth (mm/dd/yyyy) **[Required]**    DHS Redress No.      Known Traveler Number 

Male  Female

# 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.

## 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.**

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

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.

## 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 \*

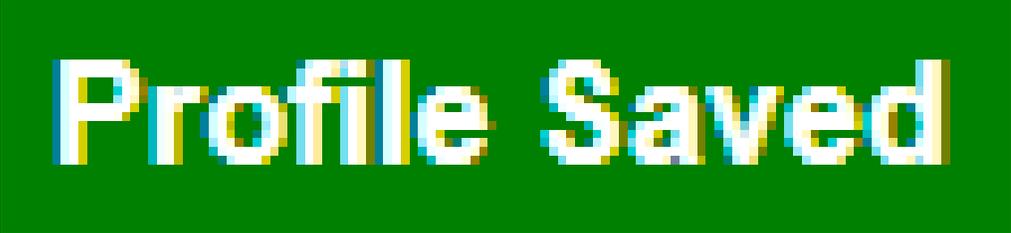
 

Use this card as the default card for:

- Plane Tickets  Rail Tickets  Car Rentals  Hotel Reservations

# UPDATING YOUR TRAVEL PROFILE

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.

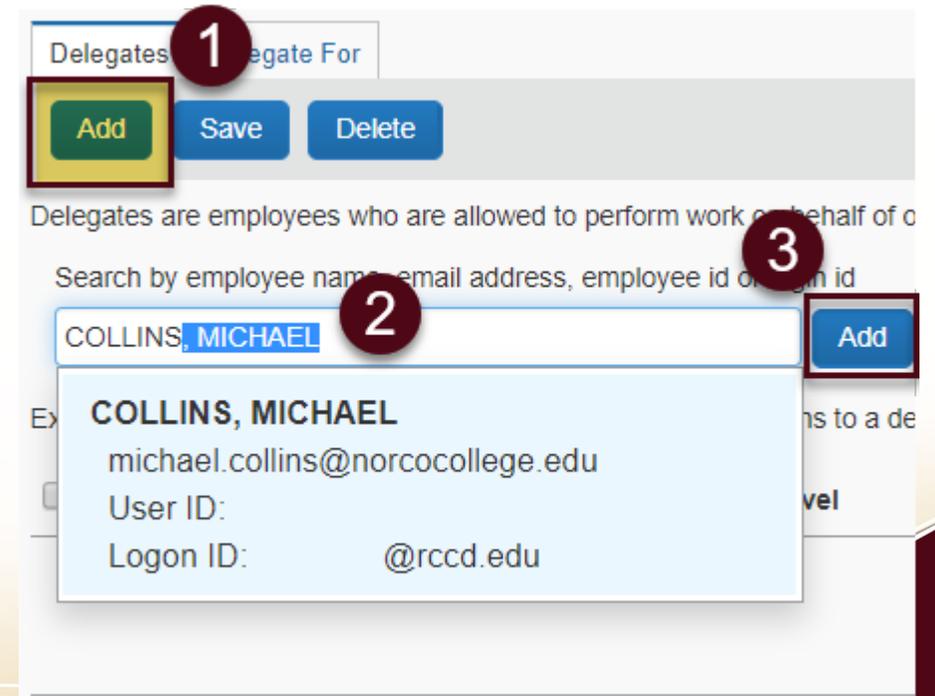


Profile Saved

# 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.



# 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.**

Delegates Delegate For

Add Save Delete

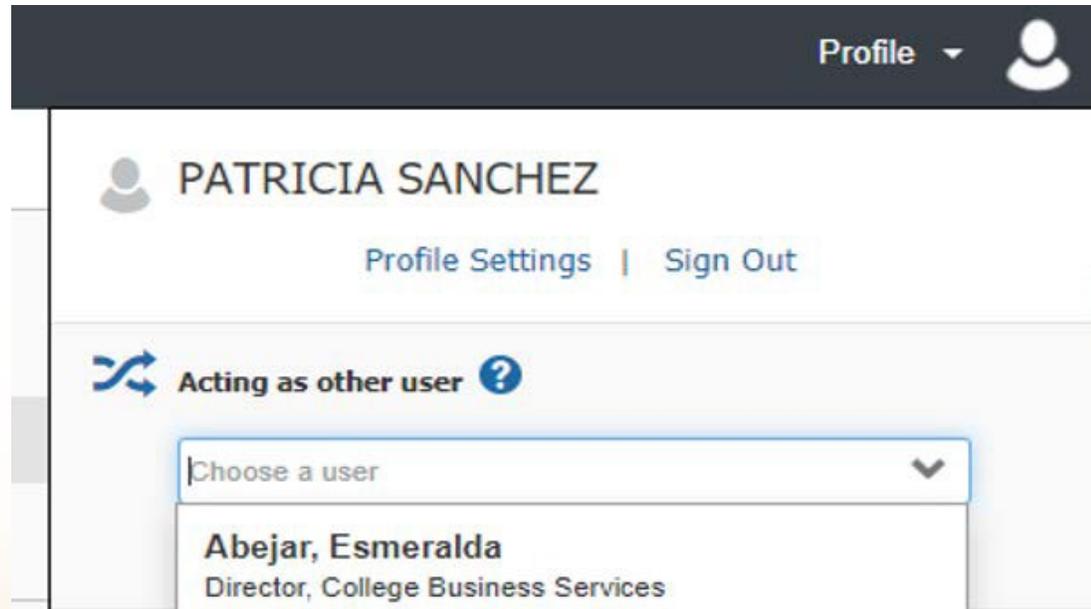
Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	COLLINS, MICHAEL michael.collins@norcollege.edu	<input checked="" type="checkbox"/>				

# Acting as a Delegate

# 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.



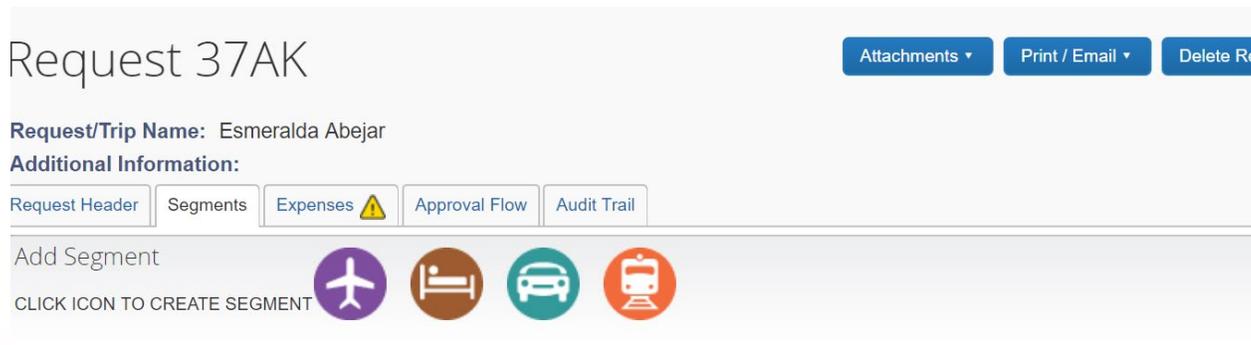
# Creating/Submitting Travel Requests

# 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

# 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



Request 37AK

Attachments ▾ Print / Email ▾ Delete Re

Request/Trip Name: Esmeralda Abejar

Additional Information:

Request Header Segments Expenses ⚠ Approval Flow Audit Trail

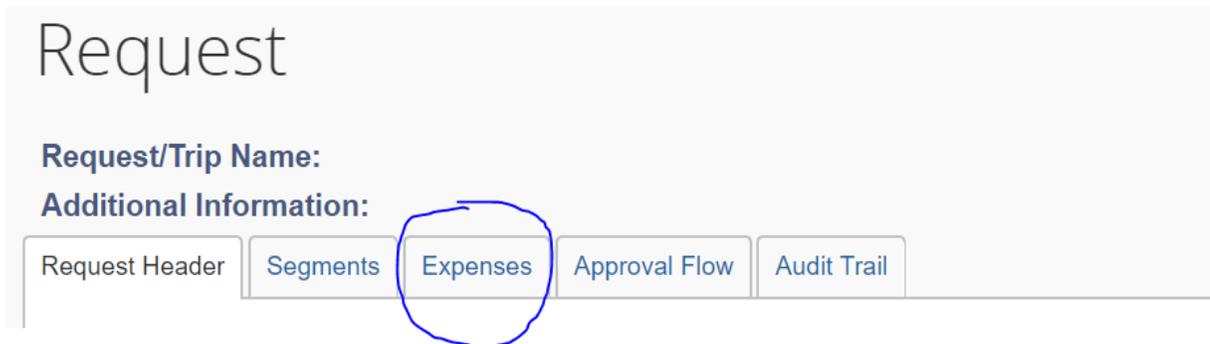
Add Segment

CLICK ICON TO CREATE SEGMENT

# TRAVEL REQUEST PROCESS

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



The screenshot shows the SAP Concur 'Request' interface. At the top, the word 'Request' is displayed in a large, light gray font. Below it, there are two labels: 'Request/Trip Name:' and 'Additional Information:'. Under 'Additional Information:', there is a horizontal row of five tabs: 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Expenses' tab is highlighted with a blue circle, indicating it is the active tab for entering travel costs.

# 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

# 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).

# Requesting Cash Advance

# Reviewing/Approving Travel Requests

# Booking Travel

# Creating/Submitting Expense Reports

# EXPENSE REIMBURSEMENT PROCESS

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

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 this, there are options 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 'Expense' action in the 'Action' column of the second row 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	07/25/2019	07/17/2019	\$37.84	\$37.84	\$27.26	Expense

# EXPENSE REIMBURSEMENT PROCESS

## 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 FU | 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

**Next >>**

# EXPENSE REIMBURSEMENT PROCESS

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

Manage Expenses

Chancellor's Office State Budget

Delete Report Submit Report

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

Expenses

Date	Expense Type	Amount	Requested
Adding New Expense			
No Expenses Found			

TOTAL AMOUNT \$0.00 TOTAL REQUESTED \$0.00

New Expense

Expense Type

Recently Used Expense Types

- Parking
- Personal Car Mileage
- Hotel
- Registration Fees
- Lunch

# EXPENSE REIMBURSEMENT PROCESS

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 <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
Adding New Expense				
No Expenses Found				

TOTAL AMOUNT **\$0.00** TOTAL REQUESTED **\$0.00**

New Expense Available Receipts

Expense Type: Registration Fees  
Transaction Date:

Report/Trip Purpose: Professional Development  
Additional Information:

Paid for by an outside entity?: No  
Enter Vendor Name:

City of Purchase:   
Payment Type: Out of Pocket

Amount:   
Comment:

Save Itemize Allocate Attach Receipt Cancel

# EXPENSE REIMBURSEMENT PROCESS

5. Attach receipts at Expense Entry line item (Upload receipts or emailing the receipts to [receipts@concur.com](mailto: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**

# Reviewing/Approving Expense Reports