NORCO COLLEGE

SAP Concur

User's Guide

October 2019

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Introduction

Effective ***January 1, 2020***, the paper-based current process for approving travel requests and post-travel expense reimbursements will cease at Norco College. This process has been replaced with *SAP Concur Travel* (which we will, going forward, refer to simply as ***Concur***), our new online travel and expense program.

No more tracking down supervisors to approve and sign a paper travel request. Concur brings the entire process and all the data together in one place, so you can see and manage your travel request efficiently.

The accounts payable process is streamlined by automating the process from check request to payment.

The Concur mobile app allows users to scan receipts of expenses while traveling, and attach them to expense reports for easy reimbursement.

Before you begin

Before you can create your travel profile and begin using Concur, you must be added as a new user.

1. To add a New User, the following information must be provided to Riverside Community College District Purchasing Department:

Full Name	
Galaxy Employee ID	
Galaxy Vendor ID (If known, if none, purchasing will assign a new vendor no.)	
Title	
Email Address	
Area VP	
Funding (Budget String)	

2. Purchasing will add the User to Concur using the above information.

3. Purchasing submits the request to Information Technology (IT) for the Concur app to be added to requester's Single Sign-On (SSO) Portal (go.rccd.edu)

4. Purchasing notifies the requester to inform the user that they are now setup and ready to access Concur.

5. Upon successful login, the new Concur User can modify their user Profile and add additional user profile information. (See section on "**Creating Your Travel Profile**.")

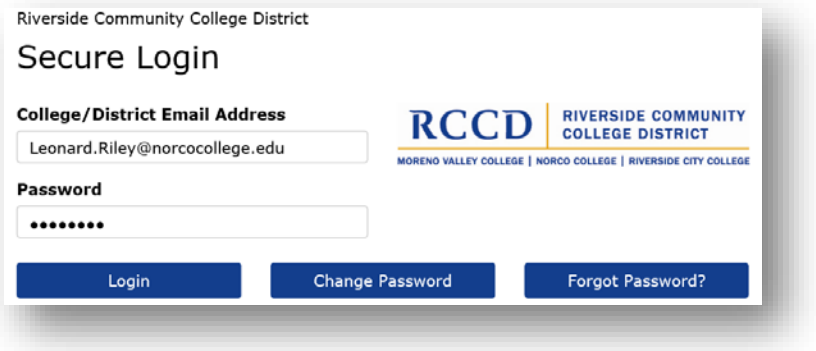
Section II:
Creating Your Travel Profile

Creating your travel profile

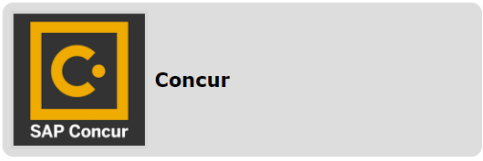
To begin, you must first launch Concur by using the Single Sign-On Portal to login.

Open a web browser and type https://go.rccd.edu in the address bar.

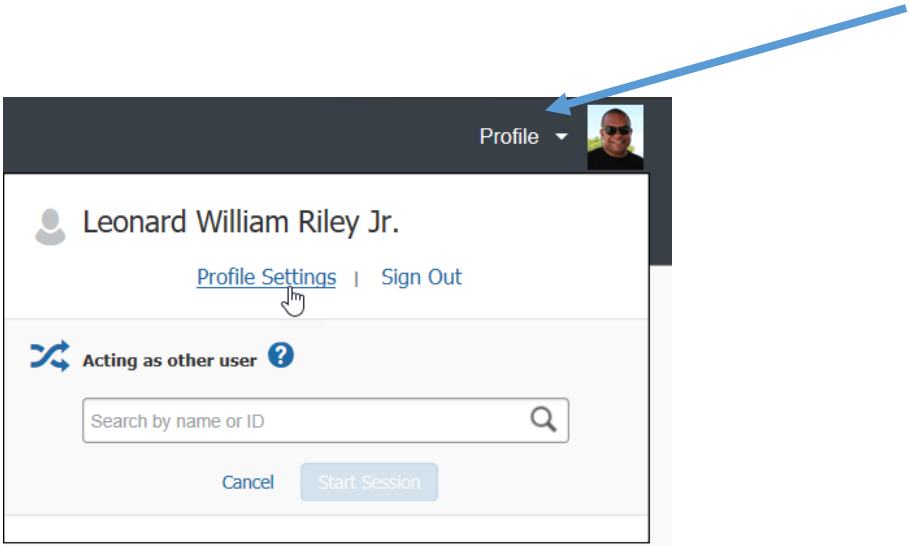
Enter the same username and password you use to login to your computer and/or access your RCCD email:



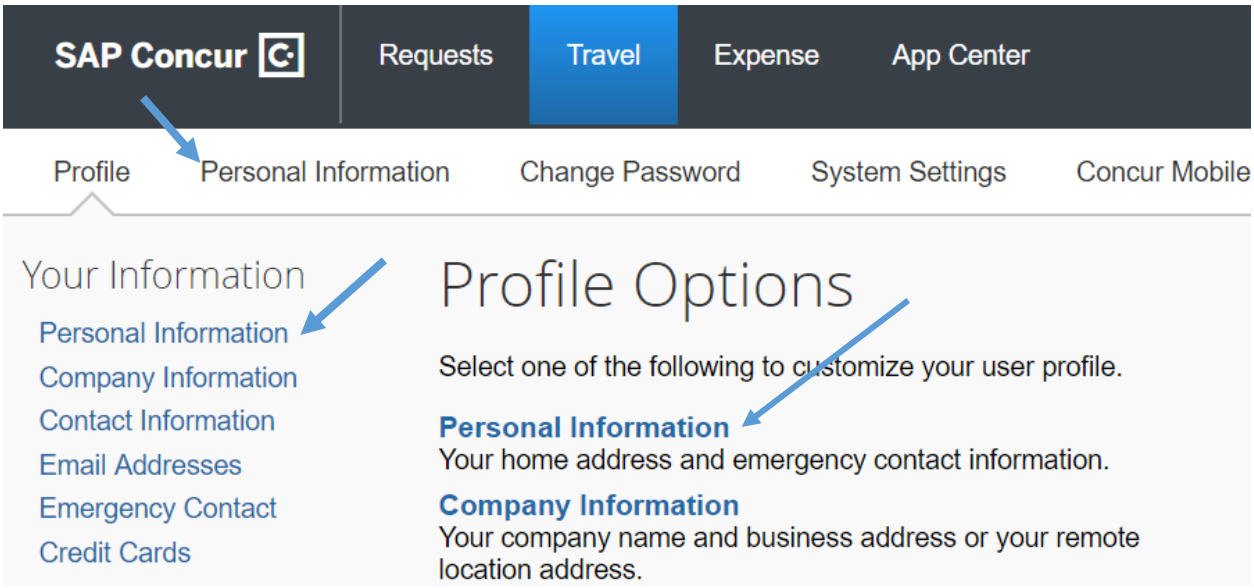
Click on the "Concur" icon. **NOTE: If you do not see the "Concur" icon on your Portal page, contact your local Concur Administrator, Lenny Riley.**



In the upper right hand corner, click **Profile**, and then click **Profile Settings**. **IMPORTANT NOTE: You must complete the required fields of the Profile before you can book a trip.**



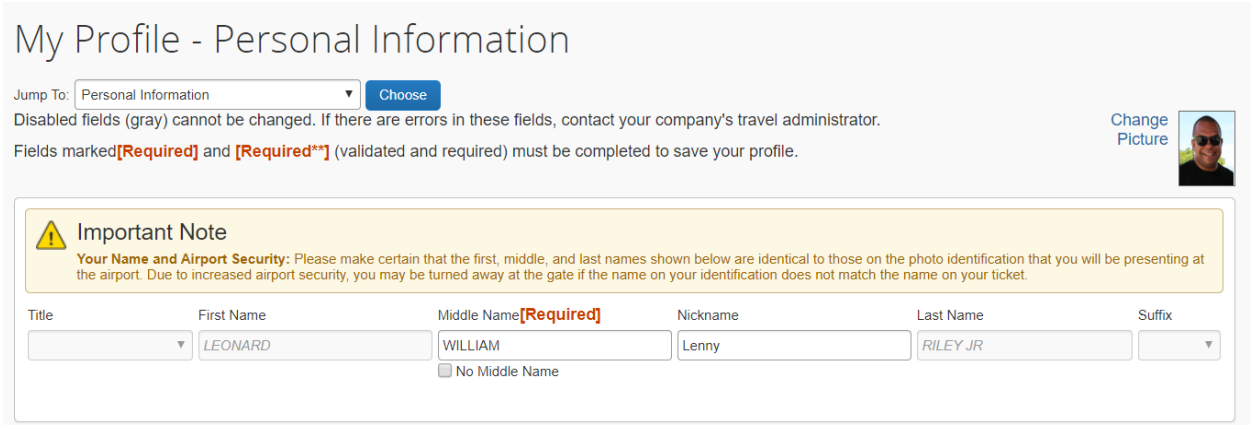
This brings you to the Profile page. There are several sections of the Profile page, and various links to access them.



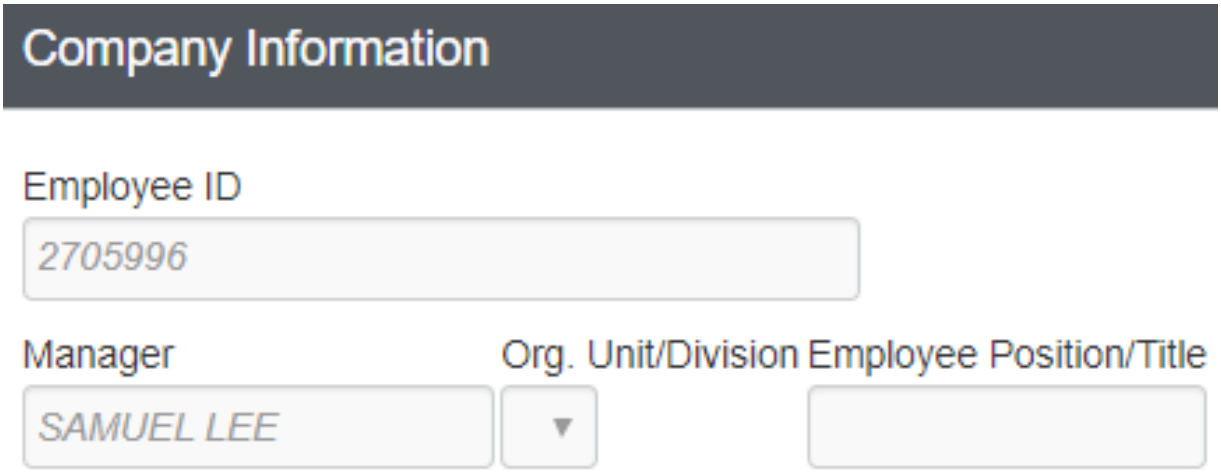
Begin by clicking **Personal Information**.

Your name should already appear in the fields. Please review this information carefully. Your name must appear EXACTLY how it shows on your photo identification. This is how your name will appear on your ticket. Any errors may result in your being turned away by airport security.

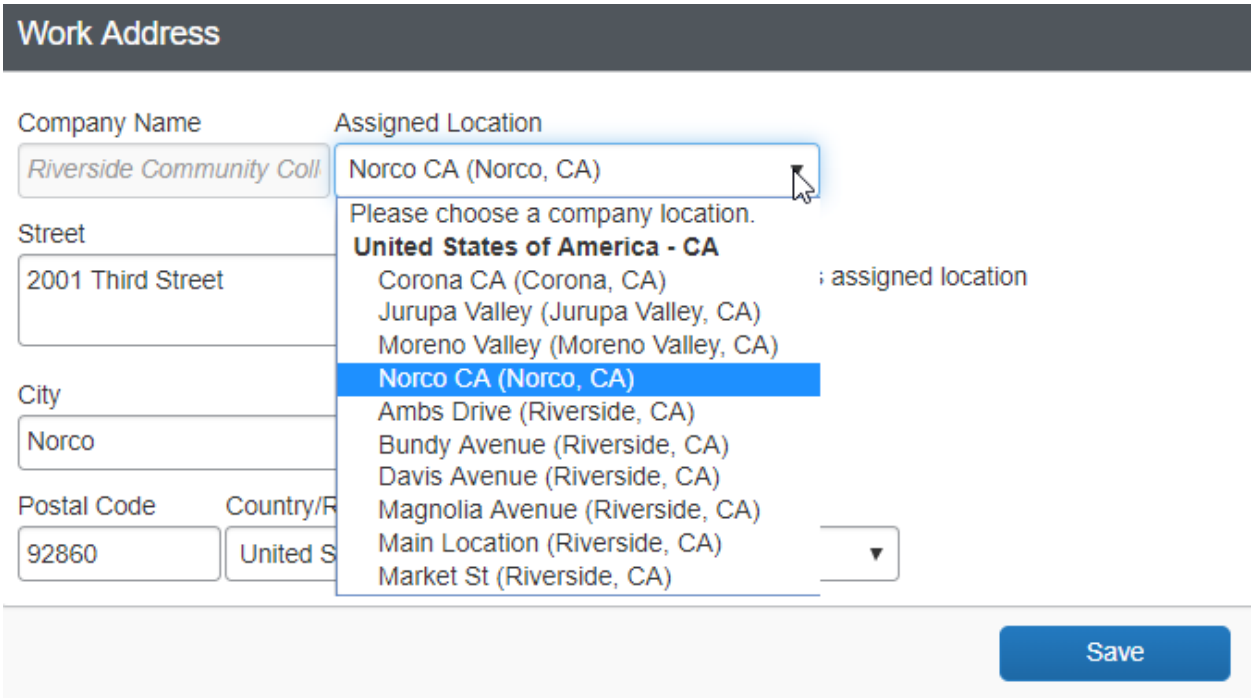
NOTE: If you find there are any errors in this field, please contact your local Concur administrator, Lenny Riley, at 951-372-7075, or Leonard.Riley@norcocollege.edu, to have the information corrected before booking any travel.



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



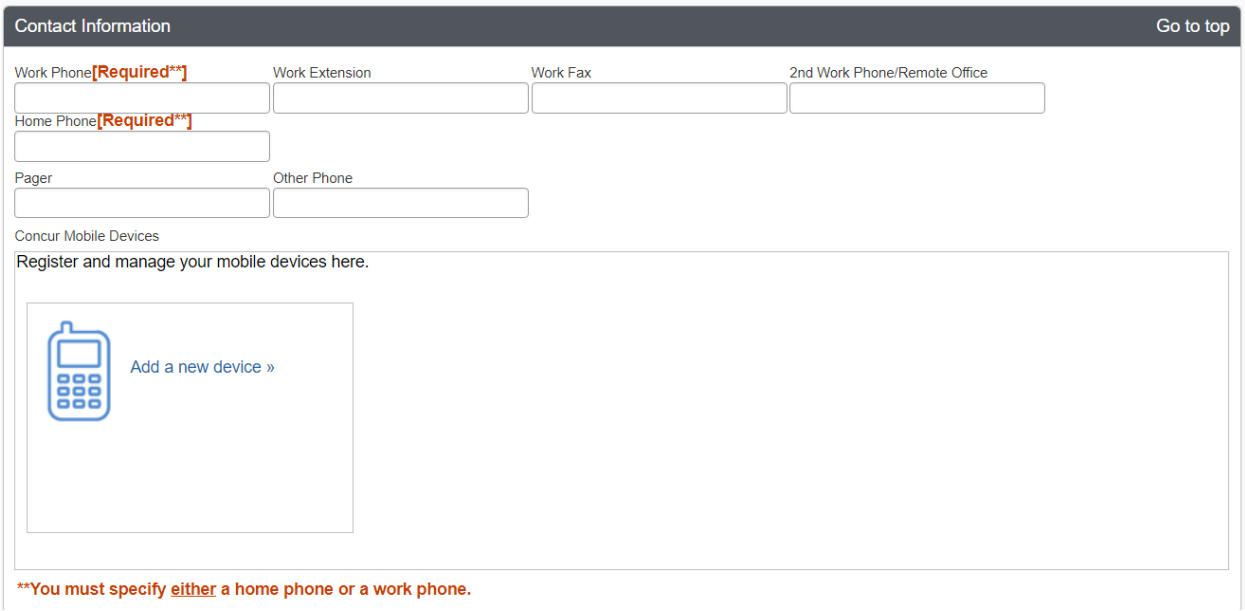
The **Work Address** section automatically populates the company name of *Riverside Community College District.* Under **Assigned Location**, select from the drop-down menu the street name of the physical location of where you work. Enter the street address of your work location. If you work at a satellite location, such as Rubidoux Annex, enter that street address.



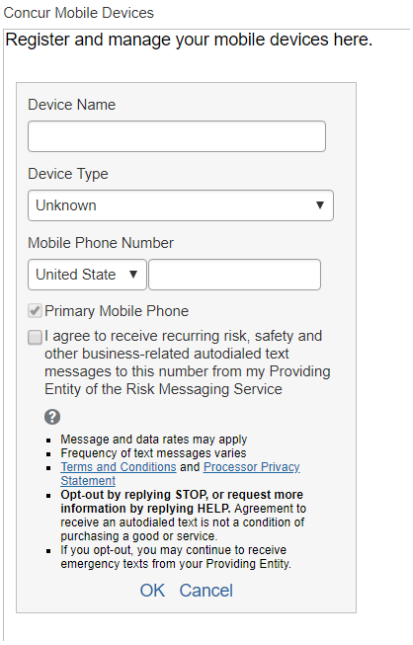
You may notice there are **Save** buttons at the bottom of each section. You may save each section as you move along, however, you will not be able to create a travel request and begin using the system until all required fields have been completed.

You may enter your **Home Address**, however, this is not a required field.

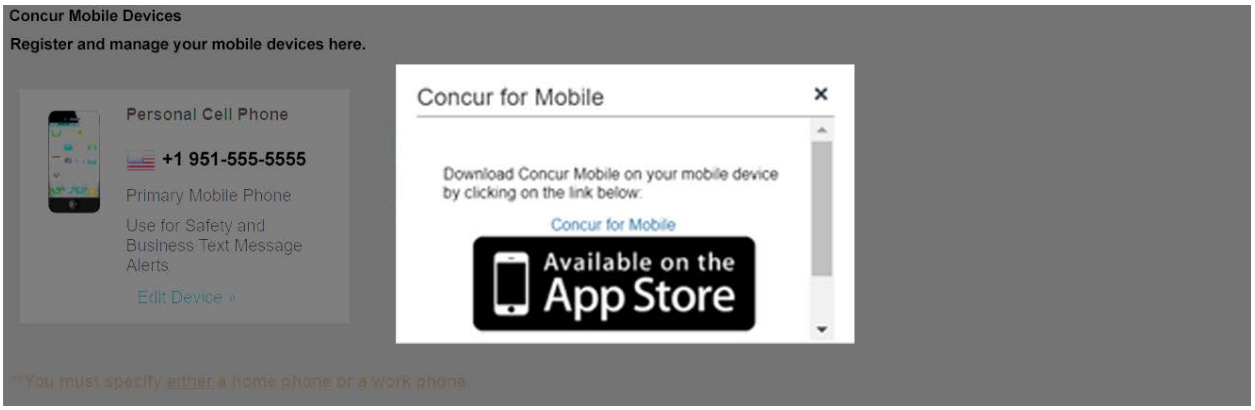
The next section contains two required fields: **Work Phone** and **Home Phone**. You can substitute your mobile phone number for your home phone. An additional option available for travelers is the choice to register your mobile device with Concur. By registering your cell phone number, this allows District Risk Management to send you important safety or security information via text or voice message when you are traveling. To register your mobile device click on **Add a new device >>**.



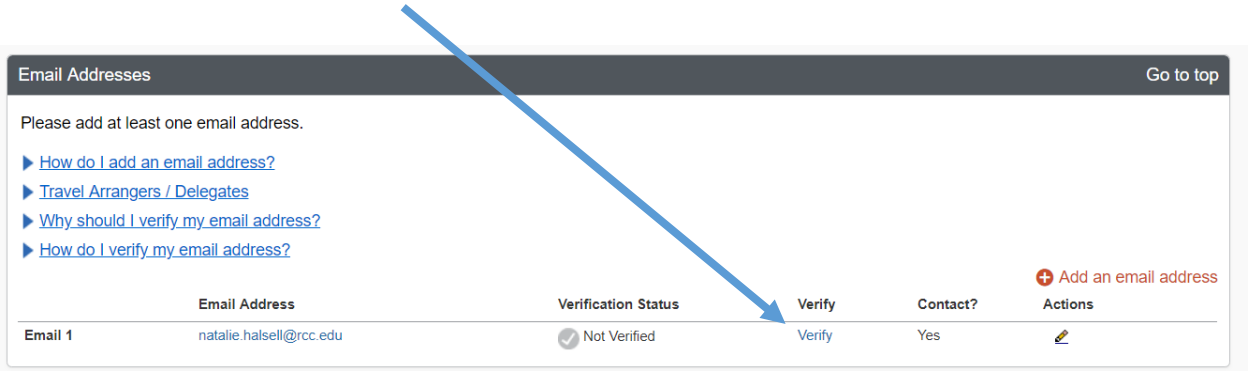
Choose a device name such as "{your name}'s cell phone". Next, choose your device type (i.e. iPhone, Android, etc.), and enter your cell phone number. Read and click to agree to the risk messaging statement, then click **OK**.



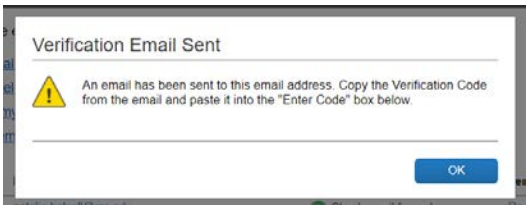
Depending on your device type, you will receive a message to download the *Concur for Mobile* app on your cell phone. This is optional.

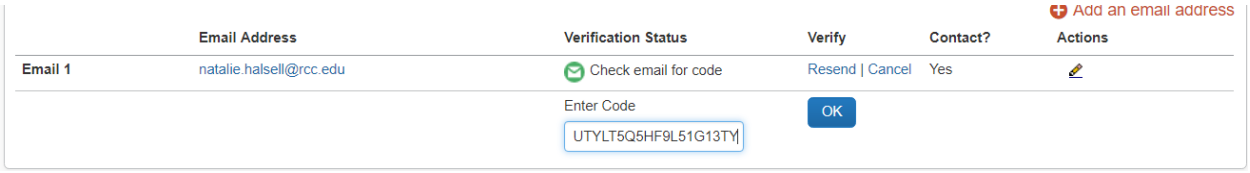


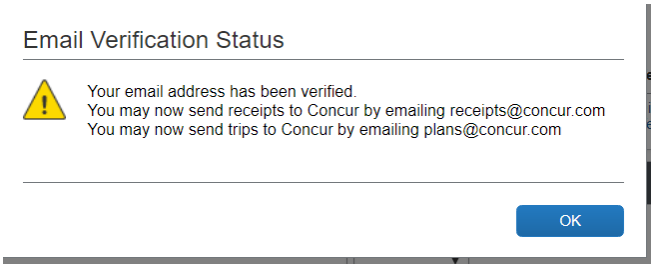
Next, you will need to verify your email address. First, check to see that the pre-populated email address is correct. Then, click on the **Verify** link.



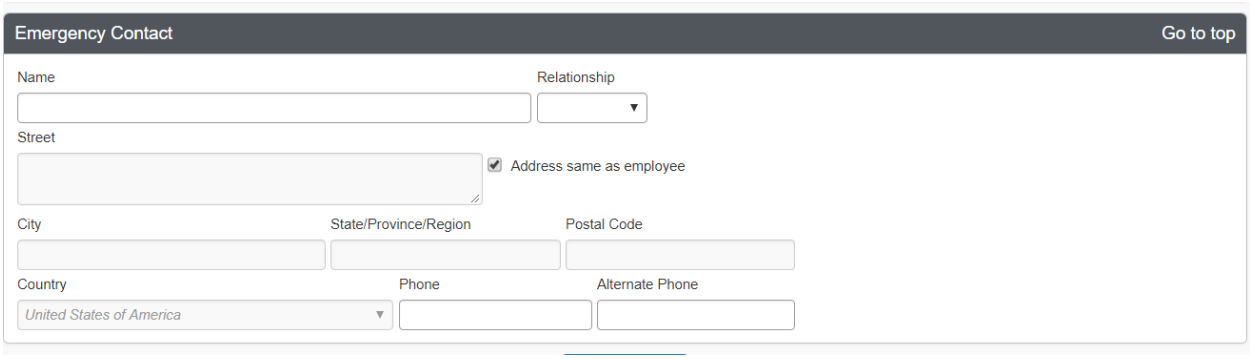
A verification code will be sent to your email. Copy and paste the code into the verification field and click **OK**.







Complete the fields in the **Emergency Contact** section. While this is not required, the information will be used in the event of an emergency, and so it is encouraged.

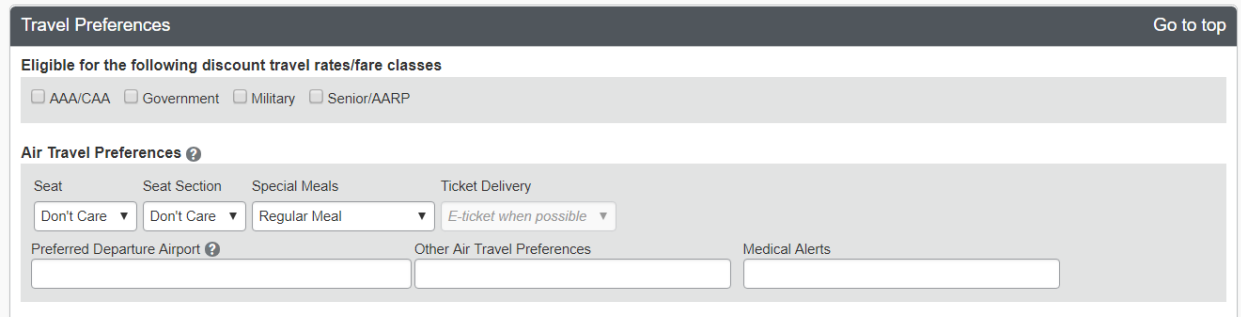


The **Travel Preferences** section allows you to enter your travel preferences, and will filter searches by your desired amenities.

Begin by checking any discount travel rates you might be eligible for. The government discount rate refers to federal government rates. Unless you have a Federal ID, do not check this box. Concur automatically searches for state government rates.

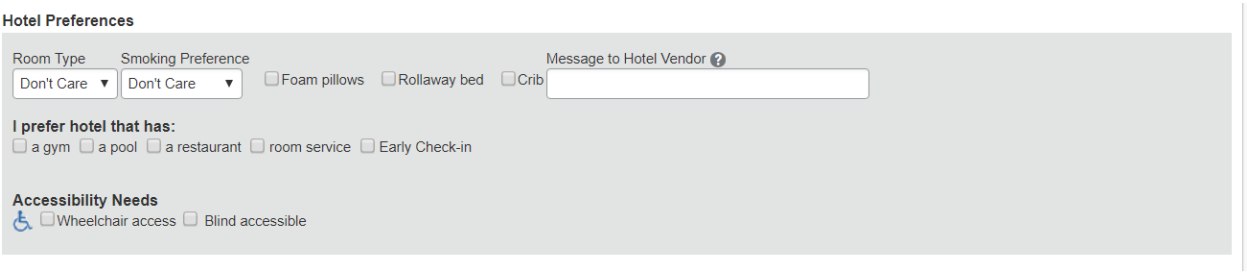
Air Travel Preferences

Enter your seat, section, and meal preferences. The E-ticket delivery method is already pre-filled and cannot be changed. To enter your preferred departure airport, type in a city name or 3-letter airport code in the txt box. The system will look up airport matches for you to choose from. There is also a field available for you to enter any medical restrictions you may have. This information will be used to filter searches however it can be altered in the travel request segment if necessary.



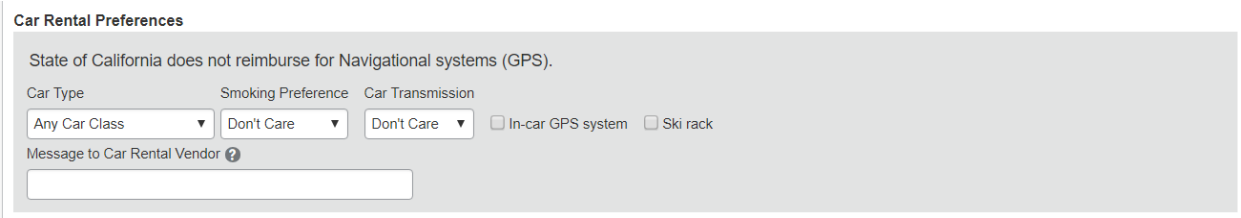
Hotel Preferences

Select your hotel preferences. If you would like to provide a special message to potential vendors regarding specific needs, utilize the field provided.



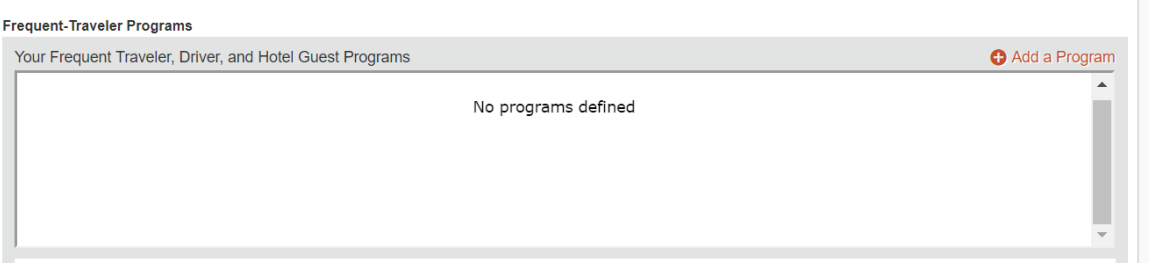
Car Rental Preferences

Enter your car rental preferences and include any special messages to the vendor. Please note that the State of California does not reimburse for navigation systems (GPS).

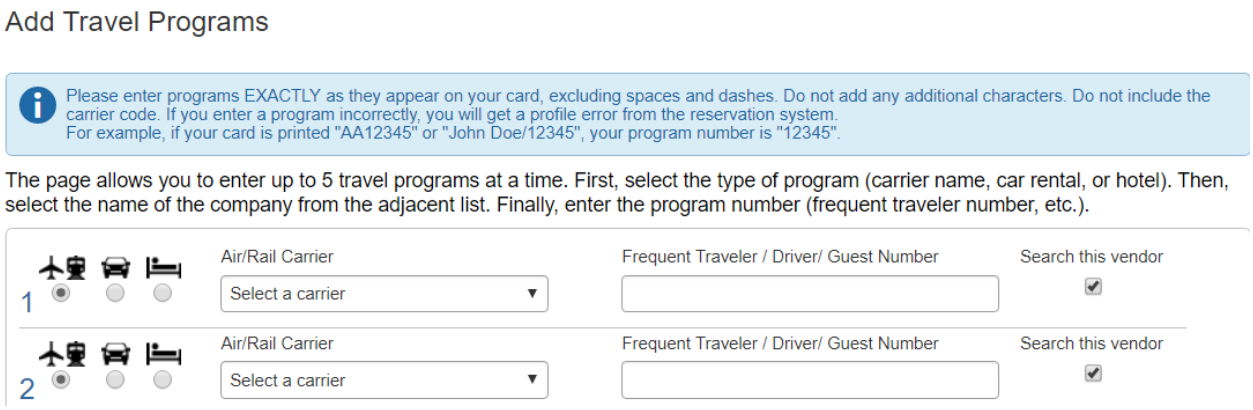


Frequent Traveler Program Information

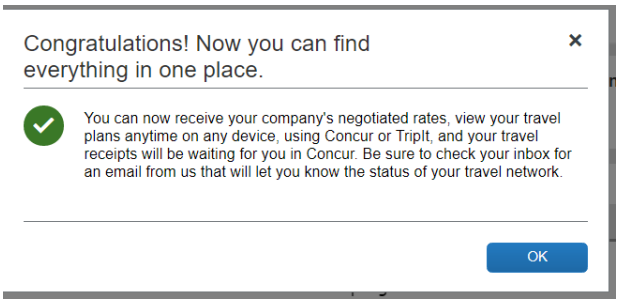
This section allows you to retain your frequent traveler benefits for personal use. You can also add any reward programs.



To enter information for any frequent traveler programs you may have, click on the “Add a Program” link. You may enter up to five travel programs at a time. Follow the directions and click “Save”. If you have more than five rewards program numbers, you may click the “Add a program” link again to add additional numbers.

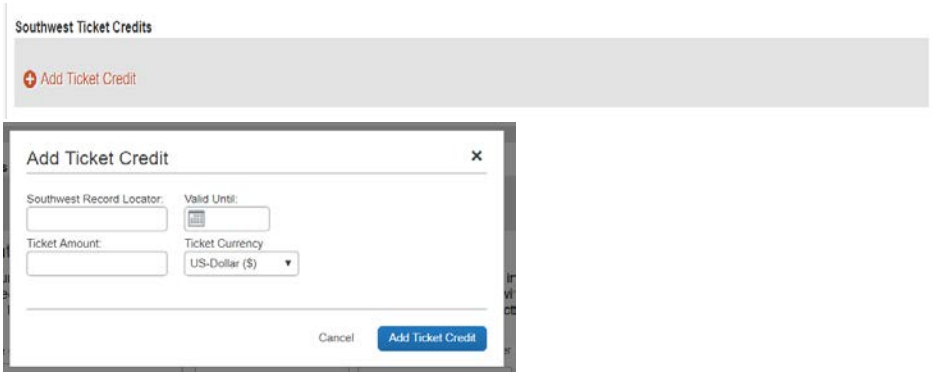


To create a travel network and allow Concur to share information with travel partners, such as *TripIt*, read the terms and conditions provided at the link and click “I Agree”. You can un-enroll at any time.



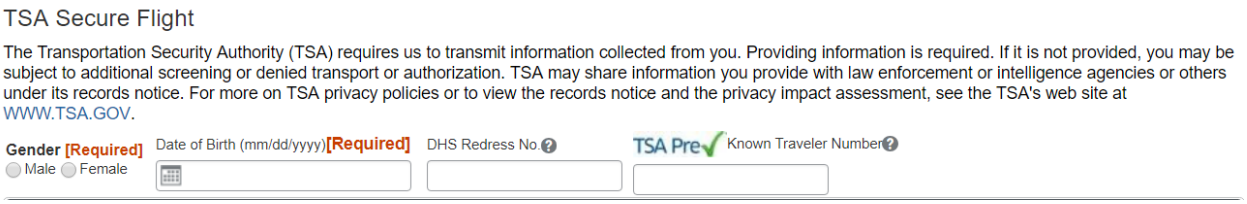
Unused Tickets

If you have pending Southwest ticket credits from before creating your Concur profile, you can enter them here by clicking the **+ Add Ticket Credit** link. Enter the information and click **Add Ticket Credit** to save.

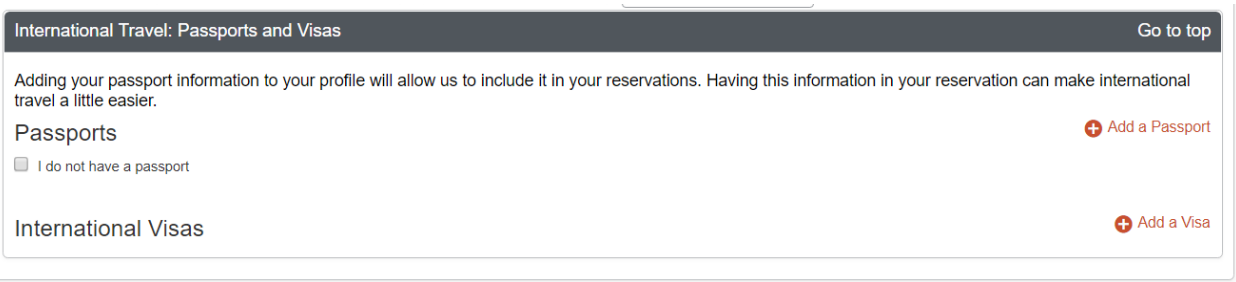


TSA Secure Flight Information

TSA requires entry of gender and date of birth. 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.



If you have a passport or visa, enter the information here:



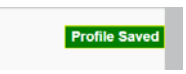
Travel Assistants

Individuals are expected to make their own travel arrangements with the exception of some managers. Please do not assign someone as your travel assistant unless specifically designated and without checking with that individual and the travel administrator.

Credit Card Information

This section allows you to enter your personal credit card information. Flights, rail, and rental cards are all billed to the District's travel account, however your card may be needed to reserve any hotel rooms. Once entered, the card information will remain encrypted. To enter your credit card information, click the **+ Add a Credit Card** link and follow the instructions. Click **Save** to save the information and return to the profile page.

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 message will appear on the upper right hand portion of the screen.



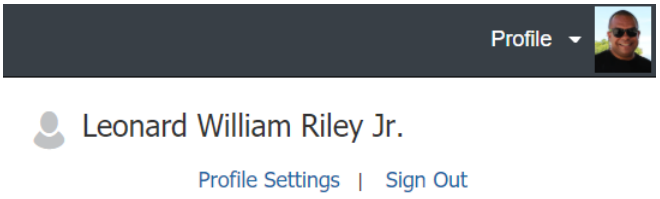
Click the **Travel** link at the top of the toolbar to return to the homepage.
If you have questions about completing the Concur Profile, please contact your local Concur administrator or the DGS Statewide Travel Program at 916-376-3974, or by email at statewidetravelprogram@dgs.ca.gov.

Assigning Delegates

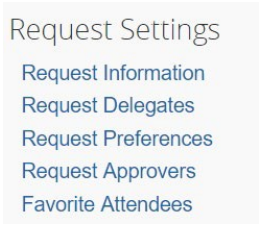
A delegate is an individual you assign to act on your behalf for both the travel request process as well as the expense reimbursement process. Delegate settings are shared between the travel and reimbursement.

Travel Request Delegates

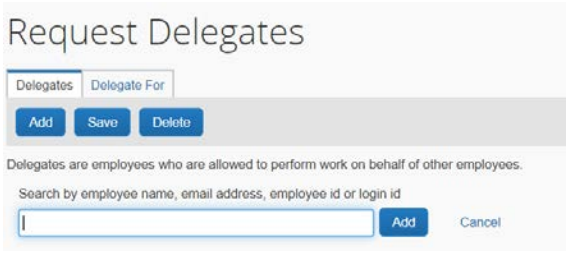
To assign someone to be your travel request delegate, click **Profile** and select **Profile Settings**:



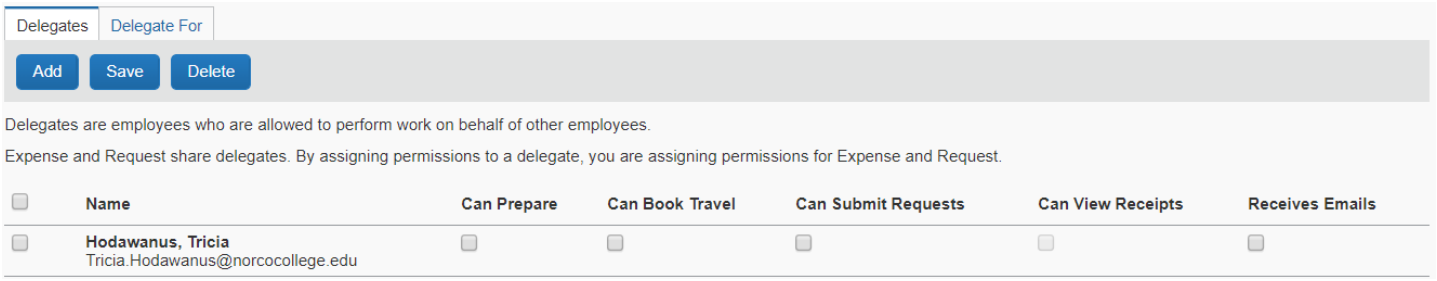
On the left hand side of your screen, under **Request Settings**, click **Request Delegates**:



Click **Add** and begin typing the name of the individual you would like to assign to act as your delegate. Their name will automatically pop-up in the search bar. Click on their name to add them.



Once they are added, you will need to check each function you want the delegate to be able to perform on your behalf:



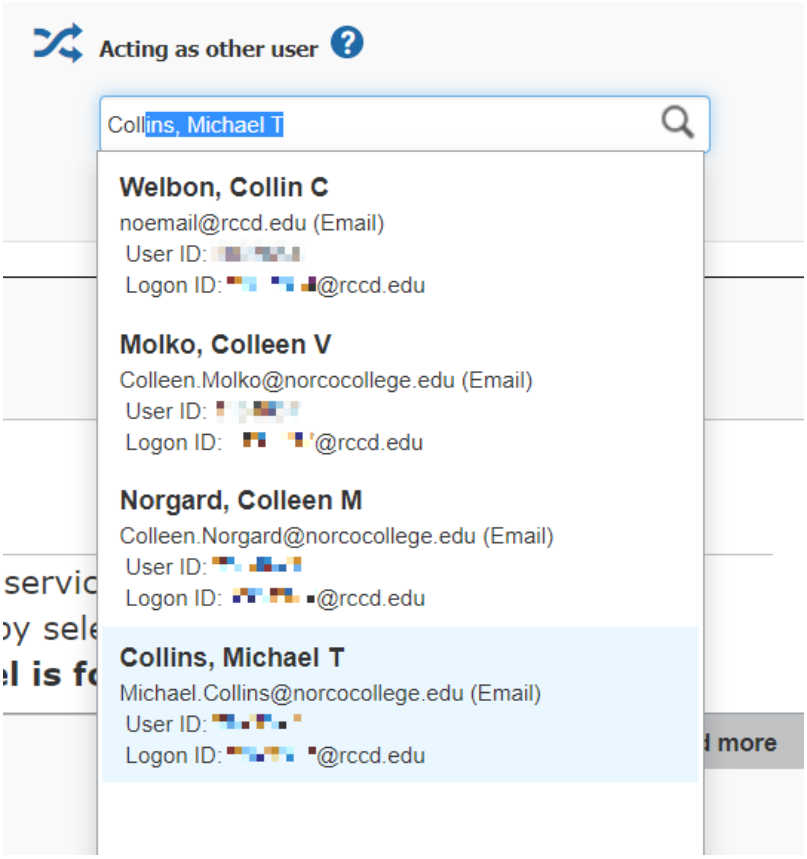
Click **Save** to save your changes. This individual will now be able to perform the functions you have identified on your behalf.

Acting as a Delegate

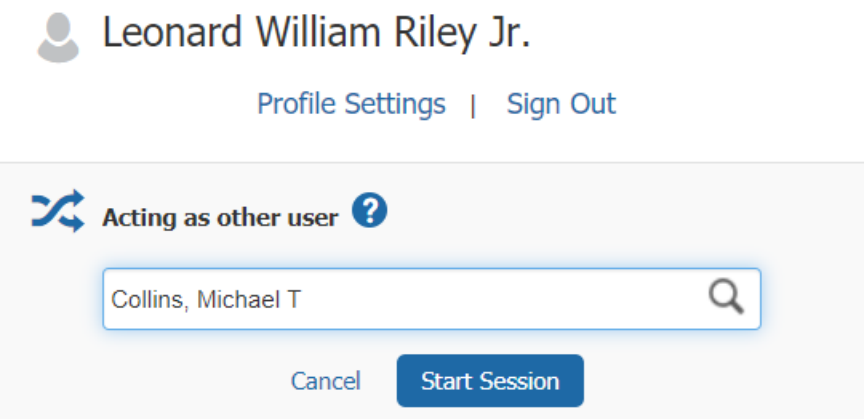
To begin acting as someone's delegate, first you must login to Concur using your own login credentials. If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

To work as a delegate…

1. Click **Profile** in the upper right-hand corner of the screen
2. Click **Acting as other user**
3. Type the user's last name, and select the appropriate user's name from the options that appear

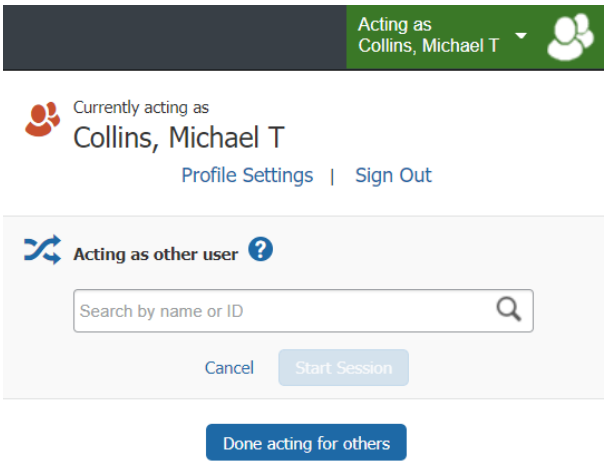


4. Click **Start Session**



NOTE: The **Profile** menu now displays **Acting as**, and shows the name you just selected.

You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.



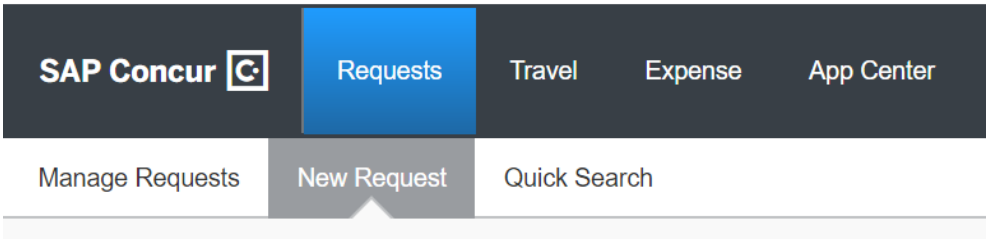
5. To select a different user, follow the same steps but select a different name
6. To return to your own tasks, click **Acting as**, and then click **Done acting for others**

Section II:
Instructions for Traveler

Creating a Travel Request

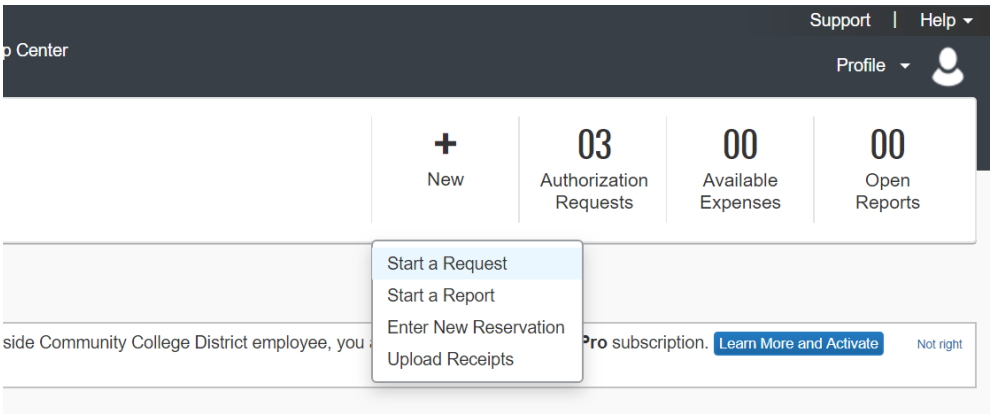
To create a new Travel Request:

Click **Requests**, then **New Request** at the top left hand side of the screen:

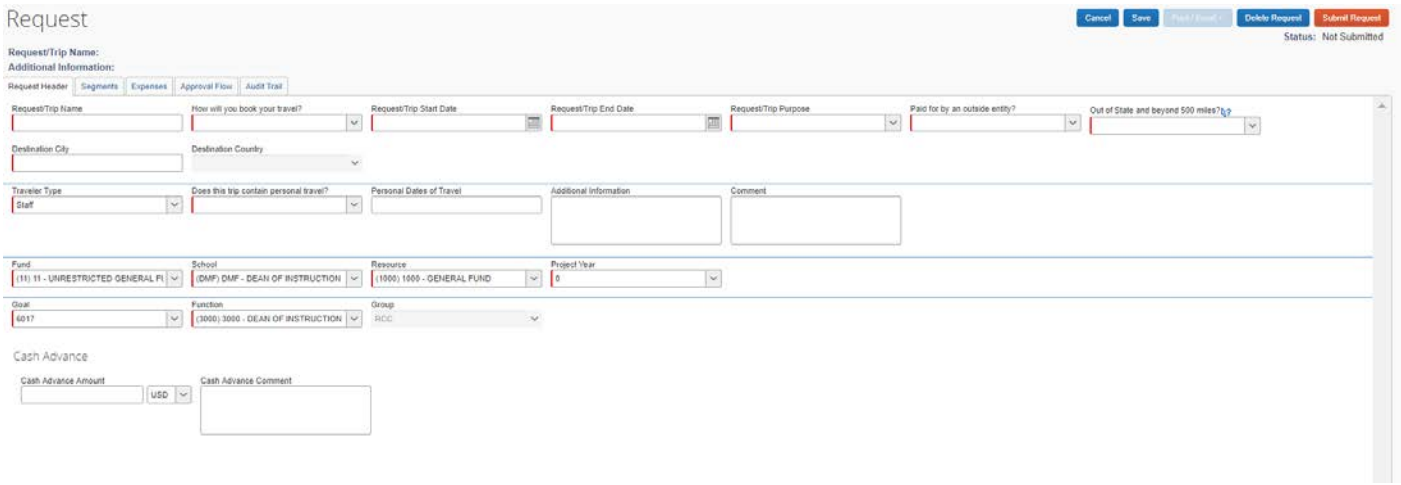


OR

Click **+ New**, then select **Start a Request**:



A blank request will appear:



Completing Request Header Information

When completing the **Request Header** section, fields with a red border are considered required fields:

1. **Request/Trip Name** – Enter the complete trip name. Be sure to spell out the entire conference name if space allows.

2. **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.

    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.

3. **Request Trip Start/End Date** – Please indicate the days you will be traveling based on conference agenda or flyer. These dates should include any additional travel days that may be required. (Ex: If the conference is out of state and begins at 8:00 am on the 4th and ends at 7:00pm on the 8th, your travel days might be the 3rd-9th, to include all days you will be traveling). Only include business trip start and end dates. If there are personal travel dates associated with this trip, there will be another field to include this information.

4. **Request/Trip Purpose** – Select from the drop-down menu the best description of the purpose for your trip. Some options include: "*Conference Attendee*", "*Conference Presenter*", "*Chaperone*", and "*Meeting*".

5. **Paid for by an outside agency?** *Yes* or *No* – Select *Yes* if all the travel expenses will be paid for by an outside agency and enter this information in the expense tab only.

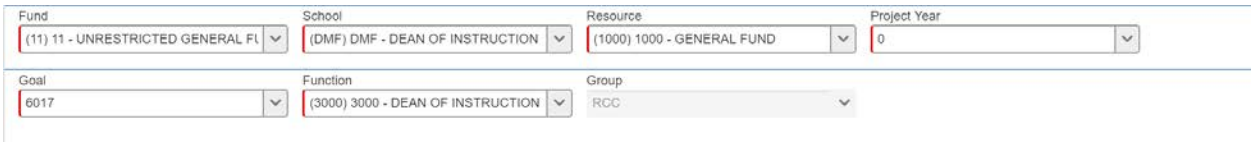
6. **Out of State and beyond 500 miles?** Per Administrative Policy 6900, "Requests for travel outside of the State of California, and beyond 500 miles from primary work site, including out-of-country travel, require that a travel request be completed and approved by an appropriate administrator and by the Board of Trustees before the travel event takes place." Select *Yes* or *No* as appropriate.

7. **Destination City** – Enter the destination city of your trip.

8. **Destination Country** – This option will automatically populate based on destination city entered.

9. **Does this trip contain personal travel?** If there is a portion of your trip that will be personal in nature, select *Yes* and indicate the dates the personal travel will take place in the **Personal Dates of Travel** section. Add any clarifying comments in the **Additional Information** and/or **Comments** sections provided.

10. **Budget Information** – Please select from the drop-down menu the correct components of the budget string funding your travel. **NOTE: Be sure to use the budget string provided by the area/department funding the request.**



11. **Cash Advance Amount** – Enter the amount of the cash advance you are requesting. Please provide a description of the expenses to be covered by the advance in the **Cash Advance**

Comment section. **NOTE: Make sure to also enter the item you are requesting the cash advance for, as an expense on the Expenses tab.**

12. Click **Save** before continuing to the next tab (**Segments**).

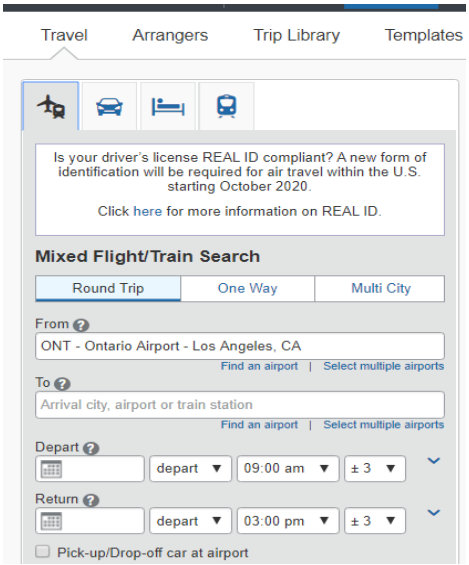
Estimating Expenses Using Cal Travel Store

Prior to completing the segments portion of the travel request, you will need to obtain estimated costs of the portions of the travel that will be booked within Concur. To do this, you will need to visit the travel store. The rates secured through the travel store are optimal rates made available through a contract with the Department of General Services.

To begin, click on the **Travel** tab. This will take you to the travel "store".

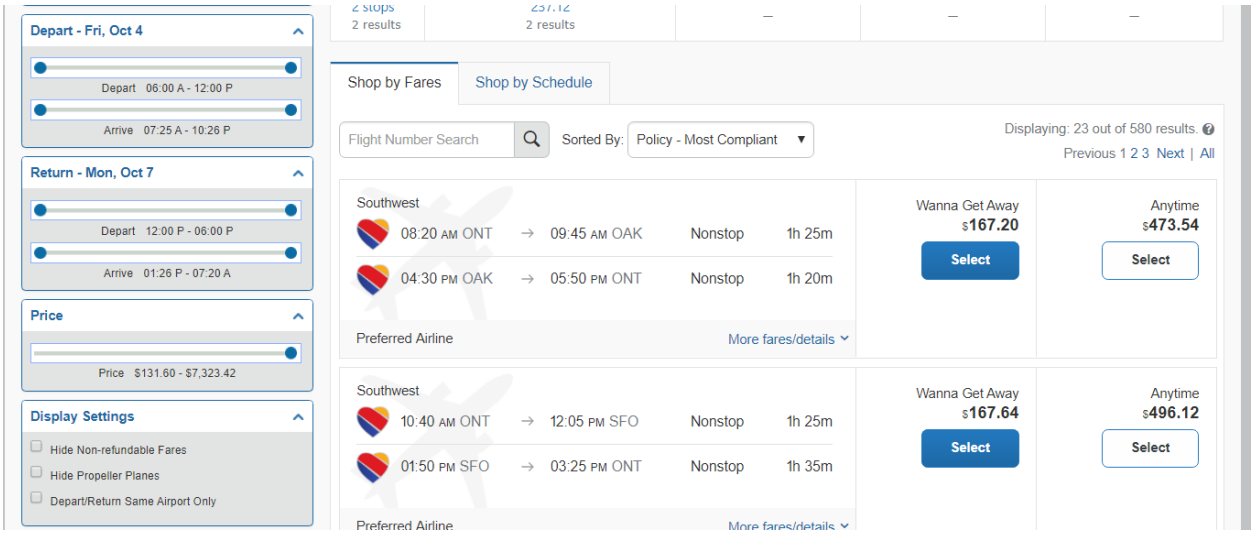
Estimating Air Travel Expenses

On the left-hand side of the screen, you can begin your search for airfares by completing the fields provided. Your departure airport of choice will be automatically populated but can be changed manually.

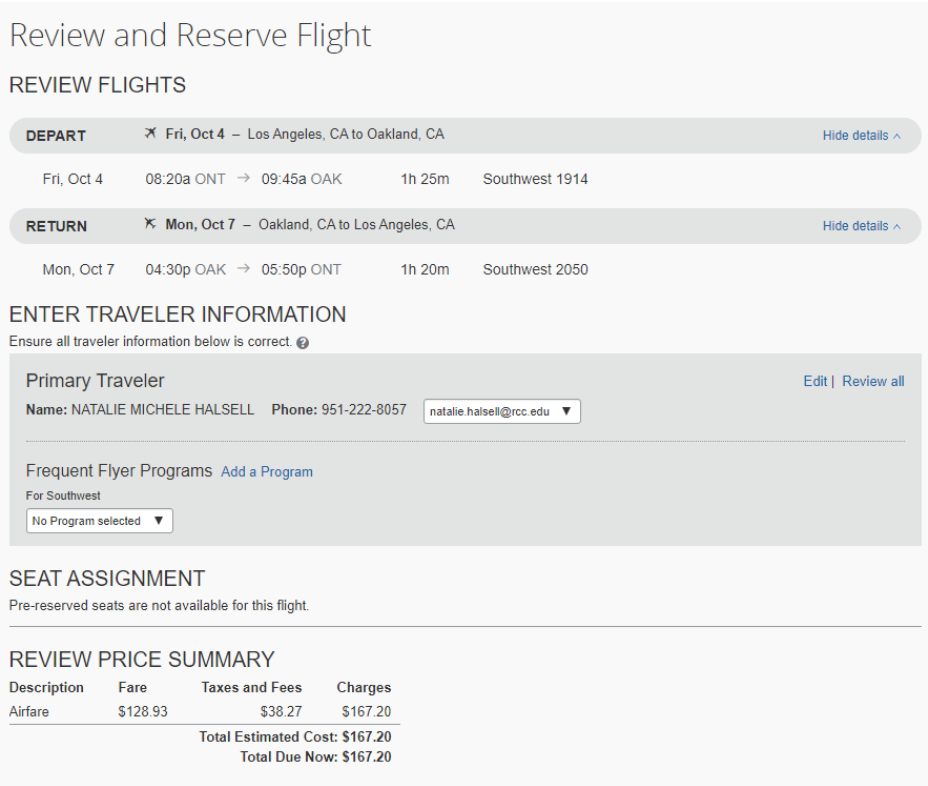


Complete the fields and click **Search**.

The search results will display and can be modified to narrow/change your results.

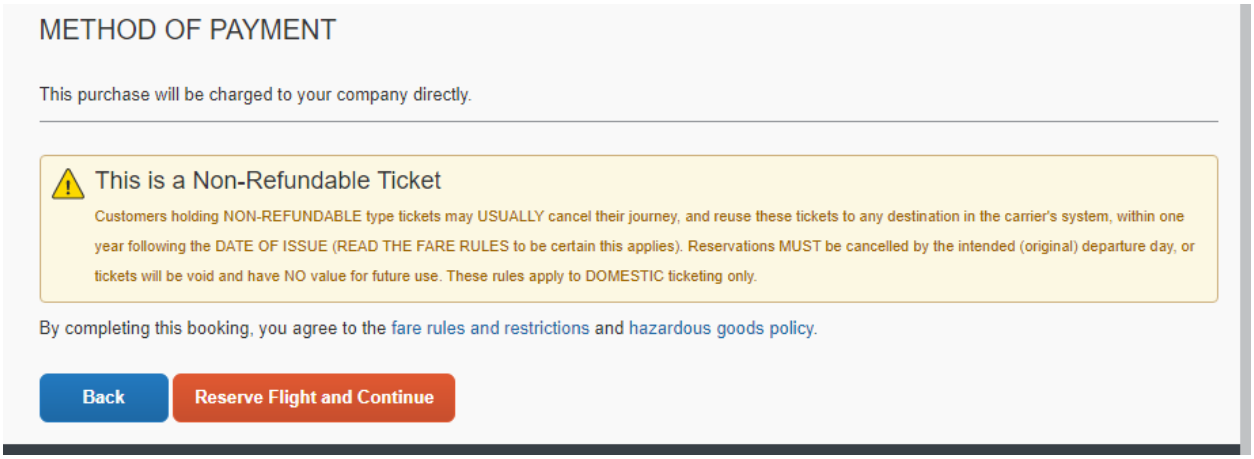

2 stops
2 results
237.12
2 results
Depart - Fri, Oct 4
Depart 06:00 A - 12:00 P
Arrive 07:25 A - 10:26 P
Return - Mon, Oct 7
Depart 12:00 P - 06:00 P
Arrive 01:26 P - 07:20 A
Price
Price $131.60 - $7,323.42
Display Settings
Hide Non-refundable Fares
Hide Propeller Planes
Depart/Return Same Airport Only
Shop by Fares
Shop by Schedule
Flight Number Search
Sorted By: Policy - Most Compliant
Displaying: 23 out of 580 results.
Previous 1 2 3 Next | All
Southwest
08:20 AM ONT → 09:45 AM OAK Nonstop 1h 25m
04:30 PM OAK → 05:50 PM ONT Nonstop 1h 20m
Preferred Airline
More fares/details
Wanna Get Away
$167.20
Select
Anytime
$473.54
Select
Southwest
10:40 AM ONT → 12:05 PM SFO Nonstop 1h 25m
01:50 PM SFO → 03:25 PM ONT Nonstop 1h 35m
Preferred Airline
More fares/details
Wanna Get Away
$167.64
Select
Anytime
$496.12
Select

Select the fare which best meets your departure/arrival time needs. The next screen will display the flight numbers and flight summary for the trip.

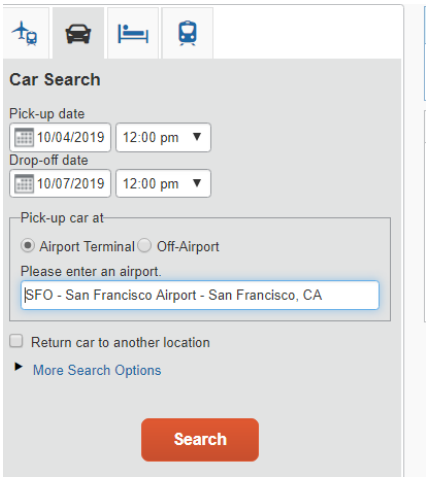


Use this price summary as your estimated cost for completing the segment portion of the travel request. Take note of the flight information to include in the comments portion of the segments tab of your travel request.

DO NOT click on Reserve Flight and Continue! Travel requests must be fully approved prior to booking. Simply click on "travel" to return to the travel store to continue estimating other expenses such as hotel or ground transportation.



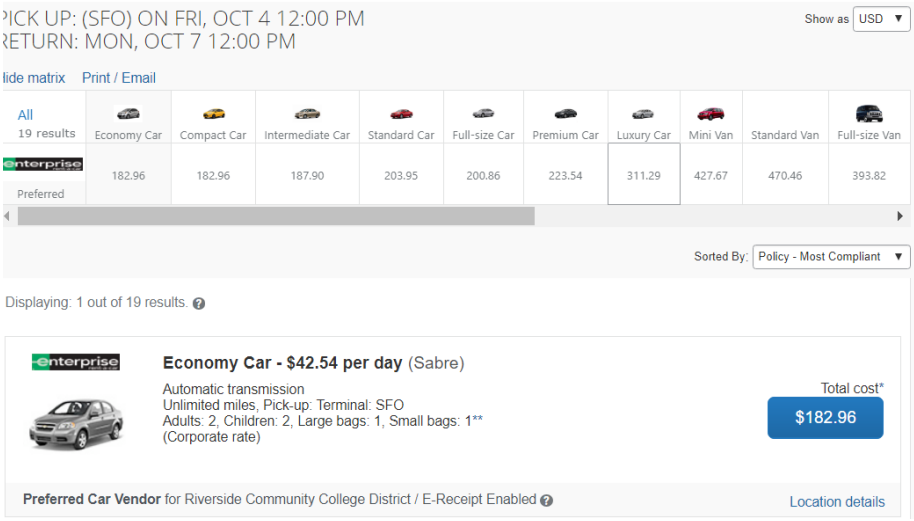
Estimating Car Rental Expenses



To obtain an estimate of car rental expenses, click on the car icon and complete the required fields.

Then click **Search**. The search results will be displayed. **NOTE: It is important to note that RCCD holds an agreement with Enterprise Car Rentals**.

Select the car model you desire and utilize this estimate cost when completing the segment tab of your travel request. Again, DO NOT reserve the car. Click "travel" to return to the travel store and continue estimating your trip.



Follow the same steps to estimate the hotel and train expenses if applicable. In some instances, the conference you are attending may offer a better rate on lodging than what is available through the travel store. In this case, it is not necessary to include a cost estimate for lodging in the segment portion of your travel.

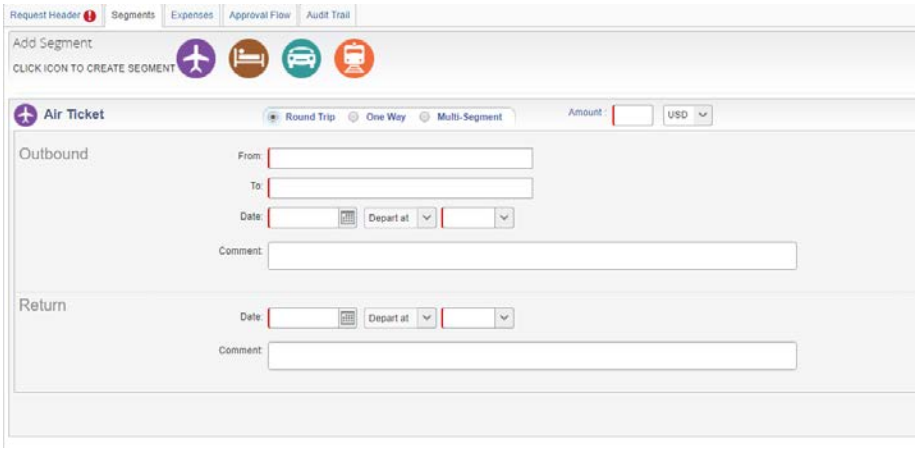
Book Online: Concur Travel Steps

Completing the Segments Section

If you are booking your travel through Concur using the Cal Travel Store, use the estimates obtained through the Travel store to create the segments. To create a segment, click on the desired icon. The appropriate segment fields appear. Please complete the fields – including the approximate requested amount of the segment – and click **Save**.

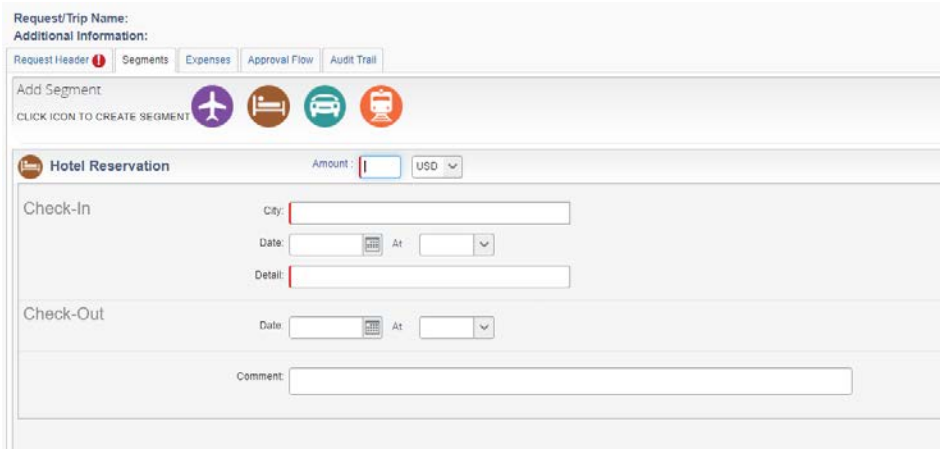
After saving one segment, click another segment icon to add additional information.

Airfare

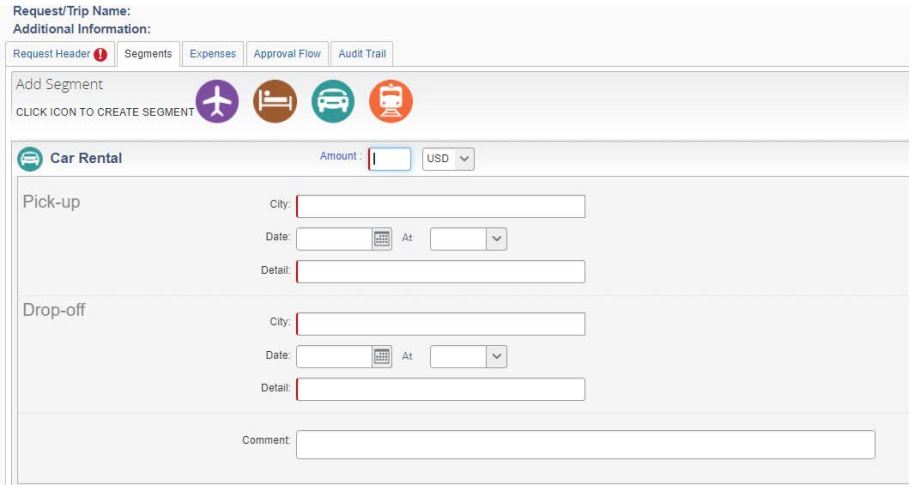


The new segment fields appear below the original segment fields.

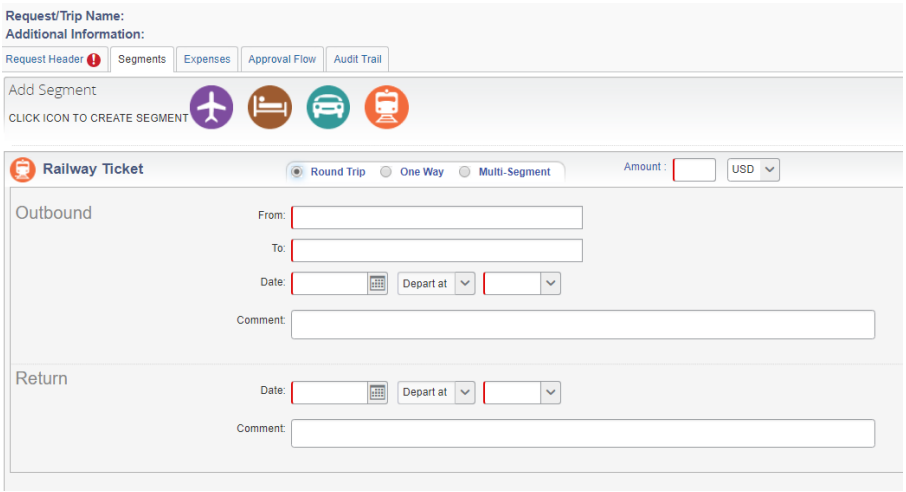
Hotel



Car Rental



Rail Transportation



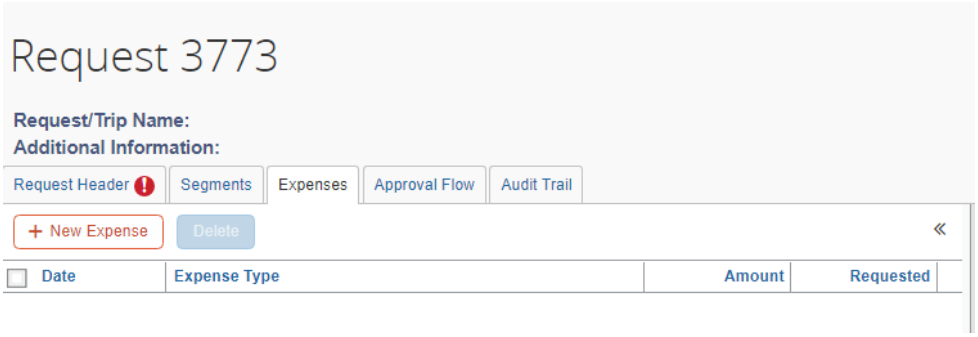
Once you have completed the fields, click **Save**, and follow these same steps to complete any remaining segments that apply to the request.

<u>Completing the Expenses Section</u>

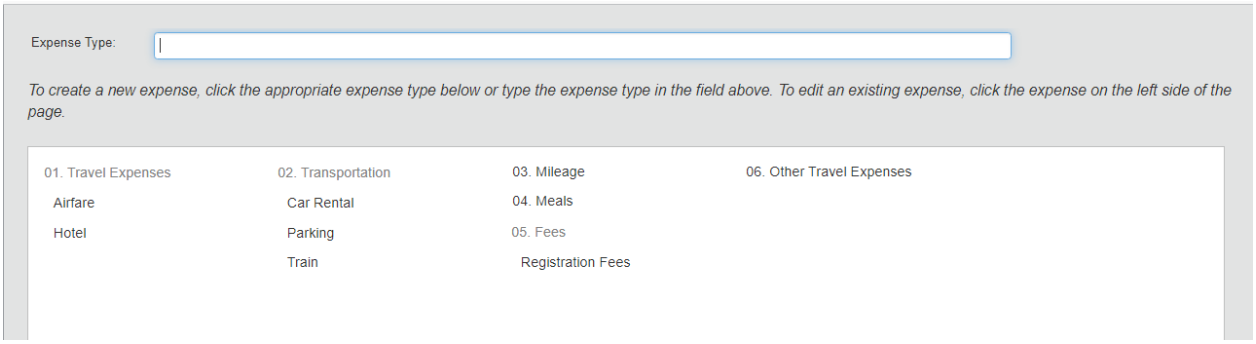
Use this next section to add additional expense information for items such as mileage, conference registration, meals, etc.

<u>NOTE:</u> If you chose “Book Outside of Concur & Cal Travel Store” on the request header (aka first tab), you will skip the Segments tab and enter travel expenses directly here using the steps below.

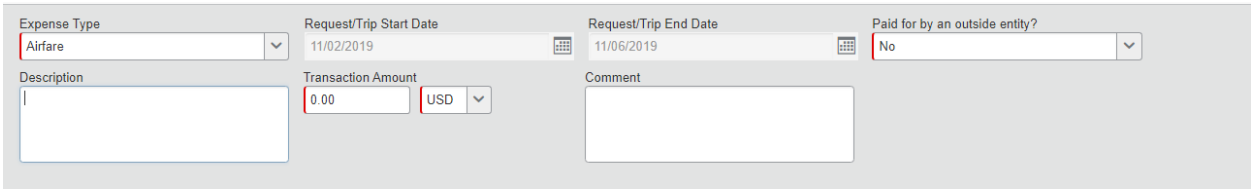
Begin by clicking on the **Expenses** tab of the request:



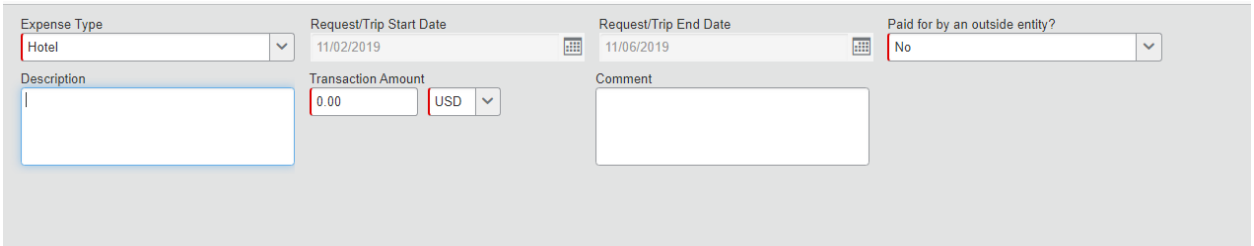
There are five expense types to choose from: Travel Expenses, Transportation, Mileage, Meals, Fees, and Other. (NOTE: Airfare and Hotel should **only** be entered on the Expenses tab if you select option "*02. Book with Agent – Cal Travel Store*" or "*03. Book outside of Concur and Cal Travel Store,*" under the "*How will you book your travel?"* field on the **Request Header** tab.)



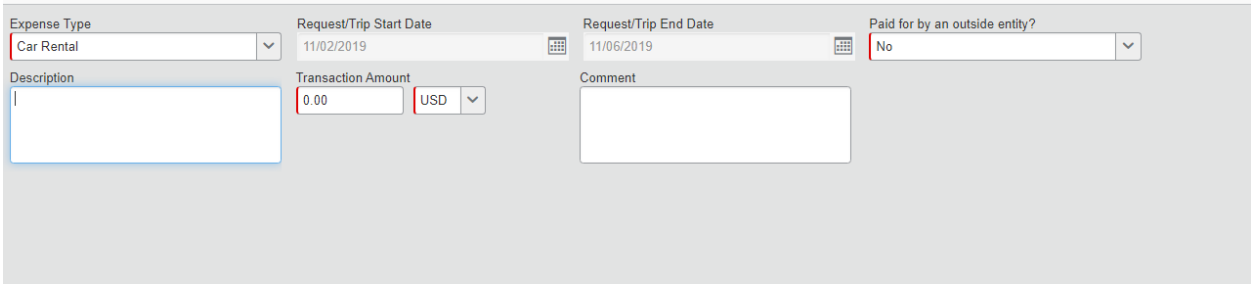
Entering Airfare: Complete the required fields. Be sure to include flight numbers in the "Description" or "Comment" box. Be sure to click "save" after entering the expense.



Entering Hotel: Follow the same process for hotel information. Be sure to include hotel confirmation numbers in the Description" or "Comment" box.

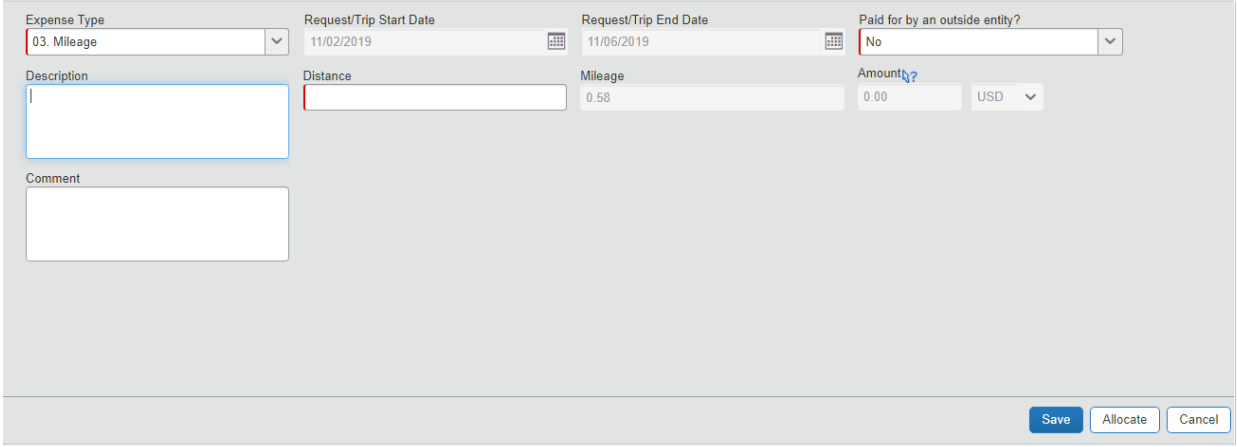


Entering Transportation: Use this field to enter transportation related expenses for car rental, parking, or train. Be sure to include confirmation/reservation numbers in Description" or "Comment" box.

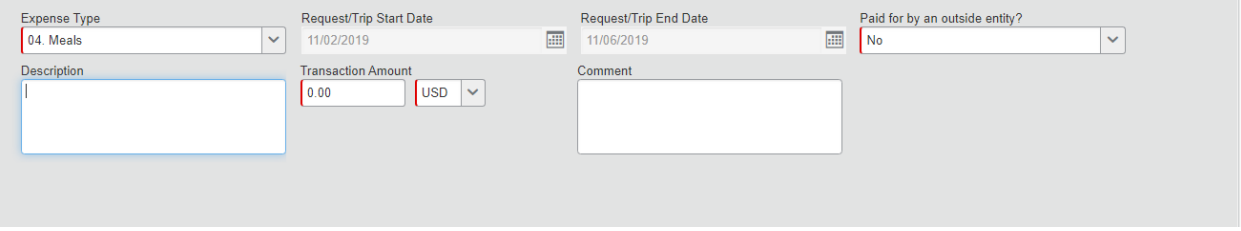


NOTE: Use the "other travel expenses" to enter other types of ground transportation such as Uber, Lyft, etc.

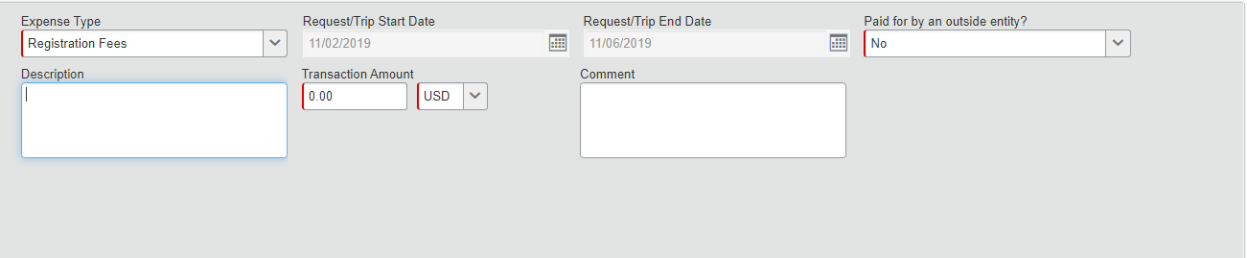
Entering Mileage: Use Google Maps or Map Quest to estimate the mileage. Enter the distance as a round-trip total. In the "Description" field, enter a description such as "roundtrip to and from…" Concur will automatically calculate the mileage cost and will always reflect the current IRS mileage rate.



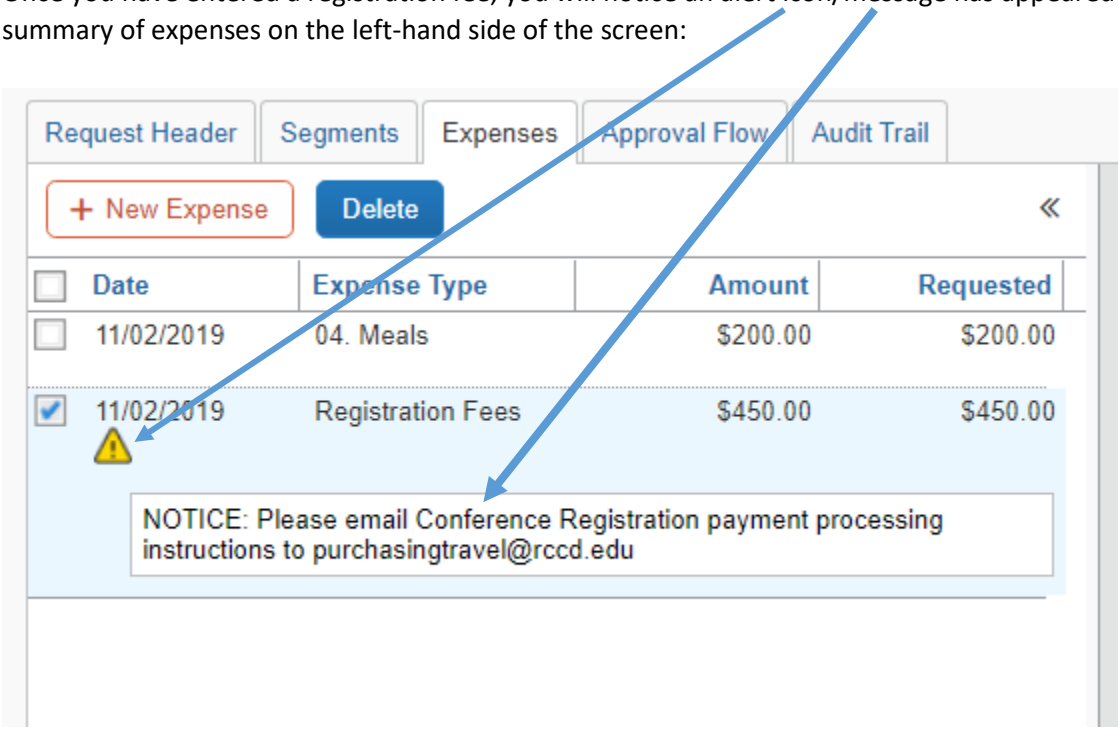
Entering Meals: Enter the total estimated expenses for all meals to be consumed during the trip. Add a description or comments as needed (i.e. breakfast, lunch, and dinner for three nights).



Entering Fees: Use this area to include registration fees. Include “payable to” information as needed.

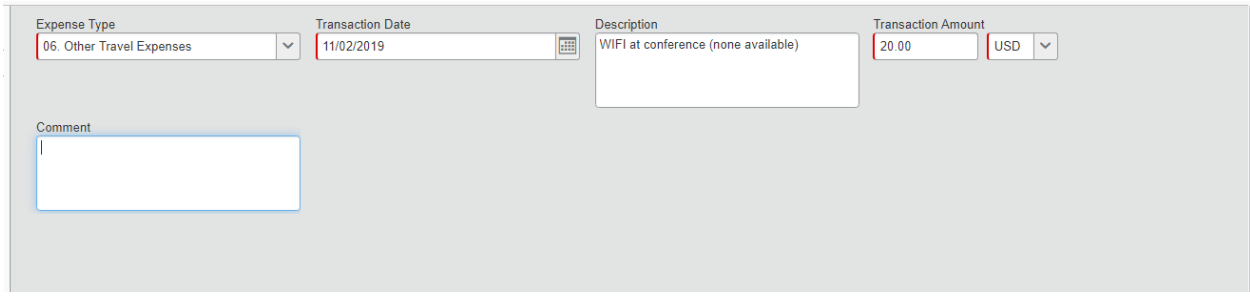


Once you have entered a registration fee, you will notice an alert icon/message has appeared in the summary of expenses on the left-hand side of the screen:



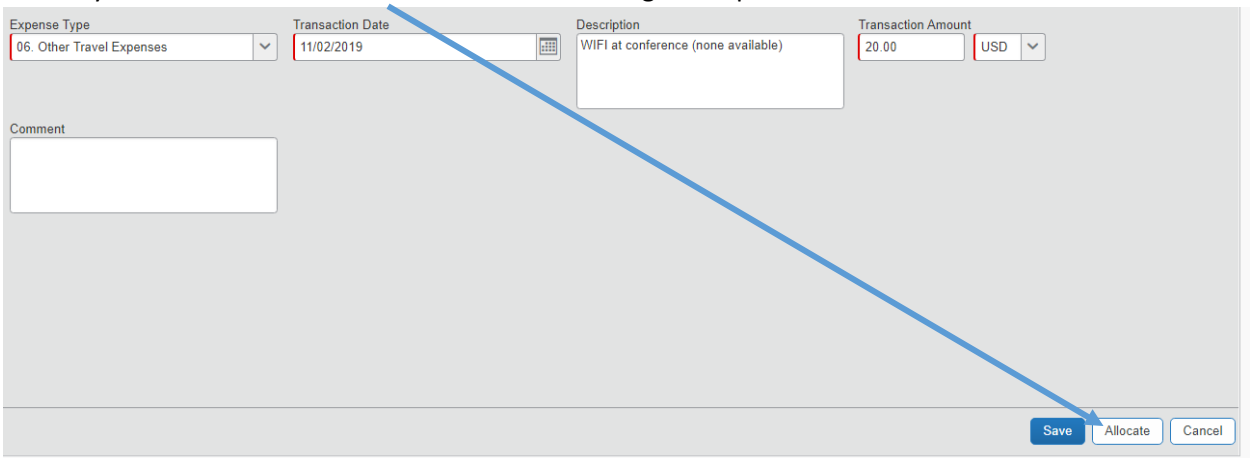
Instructions for emailing purchasing the required information to ensure conference registration payments are made are found on page 34.

Entering *06. Other Travel Expenses*: This is a catch-all for all other allowable travel expenses such as delegate fees, Uber or Lyft expenses, Wi-Fi, etc. per the District’s Board Policy. This field can be used more than once. Be sure to add a description to each.



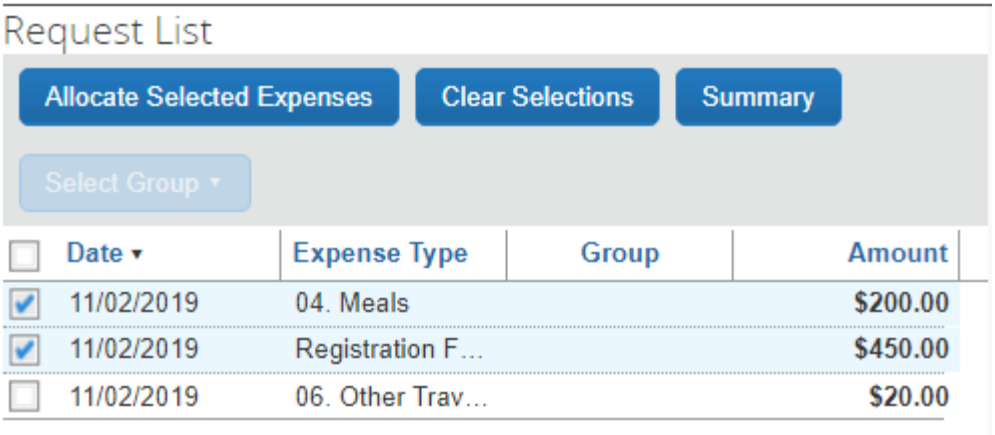
Allocating Budget

You may have noticed the allocate button when saving the expenses:

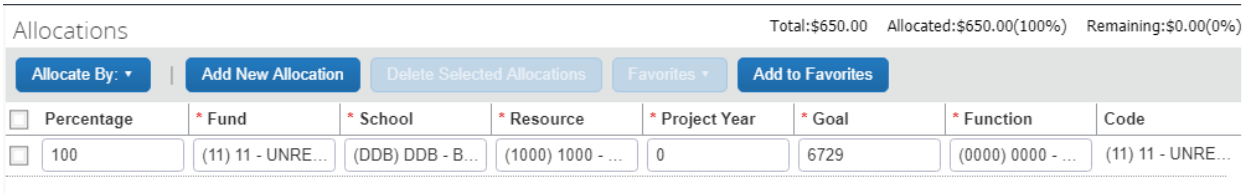


If only one budget string will be charged, you do not have to specifically allocate the funds. The system will use the budget string on the request "header" tab to charge the expenses. If you need to allocate all or a portion of the expenses to more than one budget line, click on "allocate" to open up the dialog box.

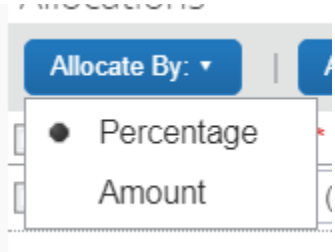
Select the checkboxes to the left of each expense you would like to allocate. You may select one, all, or some of the expenses.



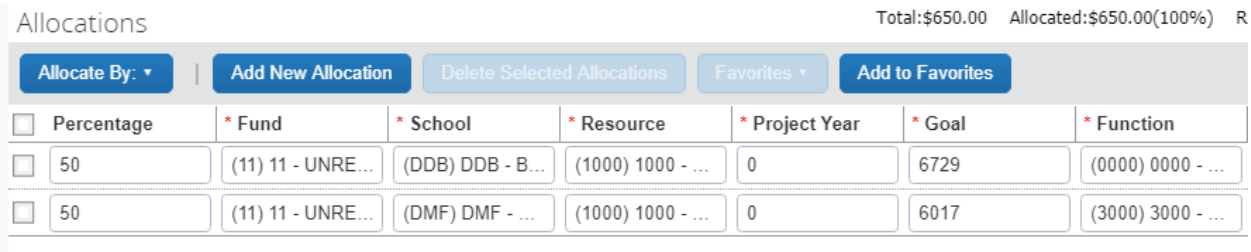
Click on the "Allocate Selected Expenses" button. The following appears on the right-hand side of the screen. Notice the budget string added in the request "header" tab is automatically populated.



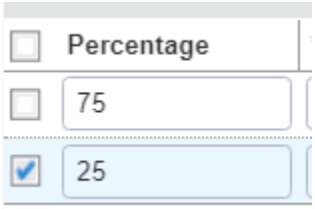
There are two ways to allocate the budget: Percentage or Amount. In this example, we will allocate by percentage.



Click on the "Add New Allocation" button then enter the second budget string you would like to charge.



If you would like to modify the percentages, simply click in the field and change as needed:



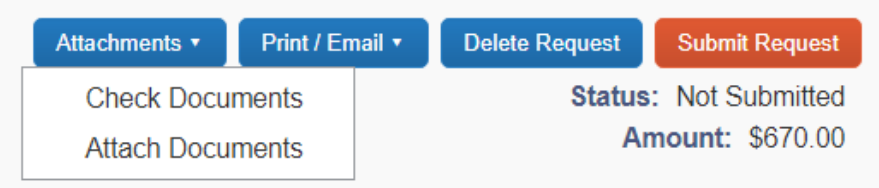
Remember to Save the allocations. If you are done entering expenses and allocating budget, you are ready to upload the required documents.

Uploading Required Documents

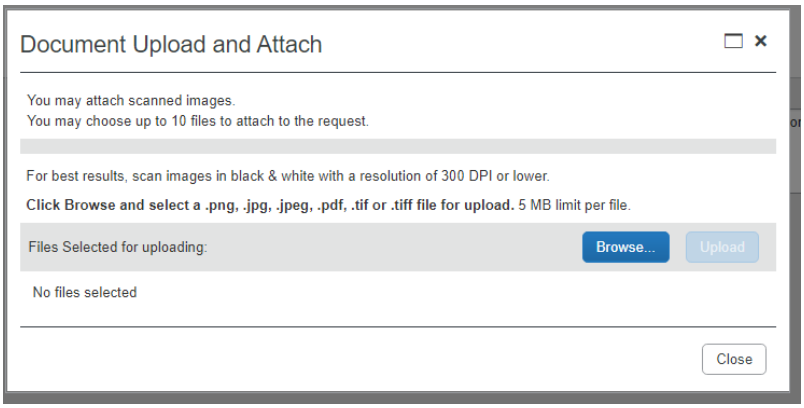
Before submitting the request for approval, there are required documents that need to be uploaded. The request will not move forward without these documents.

- PDF of email acknowledgement of intended travel from department chair (for faculty)
- PDF of email from budget manager (if funding has been requested) indicating total amount approved and budget string to be used (i.e. faculty development approval email, Academic Affairs, Student Equity, etc.)
- Conference flyer or agenda
- Registration form
- Estimated costs (air, hotel, car rental)

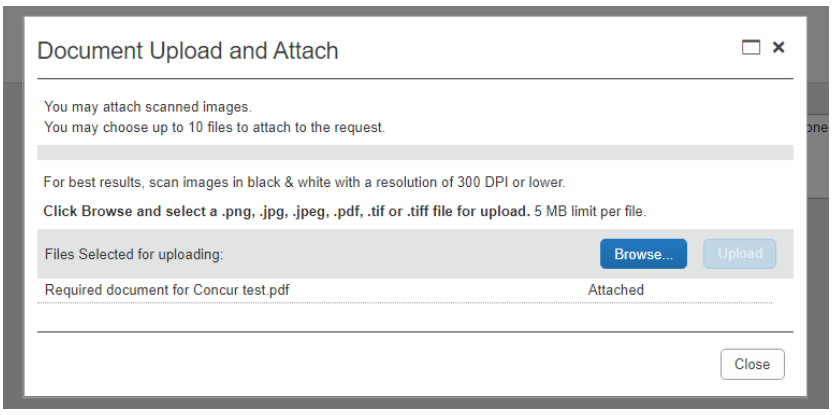
To upload required documents, click on the **Attachments** button and select **Attach Documents**:



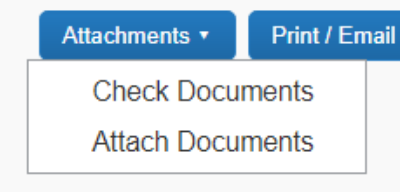
Click on the **Browse** button and attached the documents you need to upload one at a time.



Click on "**Upload**". The document name will appear with a note of "Attached" if successful. Once all required documents have been uploaded, click on "close".



If you would like to verify the documents have been successfully uploaded, click the **Attachments** button again and select **Check Documents** from the drop-down menu. A pop-up window will appear (be sure to enable pop-ups in your web browser).



Book with Agent: Cal Travel Store

If you chose Option 2, *"Book with Agent - Cal Travel Store"* in the **Request Header** section, follow the steps in "Completing the Request Header Information" and "Entering Expenses Section". After the request has been fully approved, contact the CalTravelStore at 877-454-8785, or visit www.caltravelstore.com.

Provide the agent with your travel request ID# for assistance in making your travel arrangements.

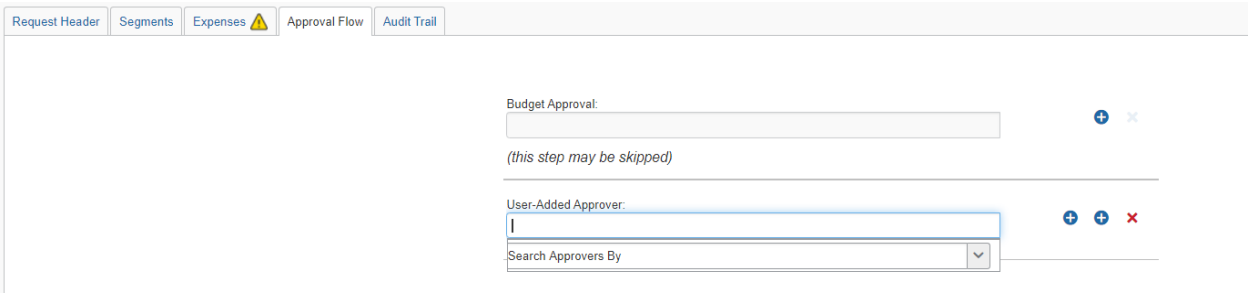
Book Outside of Concur and Cal Travel Store

If you chose Option 3, "*Book Outside of Concur and Cal Travel Store*" in the **Request Header** section, follow the steps in "Completing the Request Header Information" and "Entering Expenses Section".

Submitting for Approval

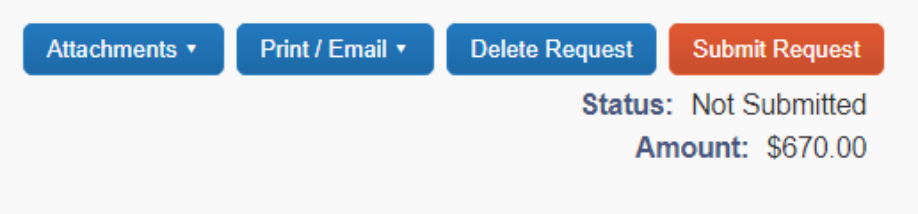
Once you have uploaded all of the required documents (agenda, email approval from direct supervisor, budget approval from budget director), you are ready to submit the request for approval. The system automatically routes travel requests to area vice presidents; you have the option of adding additional approvers to the request.

To do this, click on the "Approval Flow" tab. Click the blue plus sign and the "User Added Approver" box appears. You do not have to make any modifications to the "Budget Approval" field. This is automatically populated based upon the budget string you have selected.

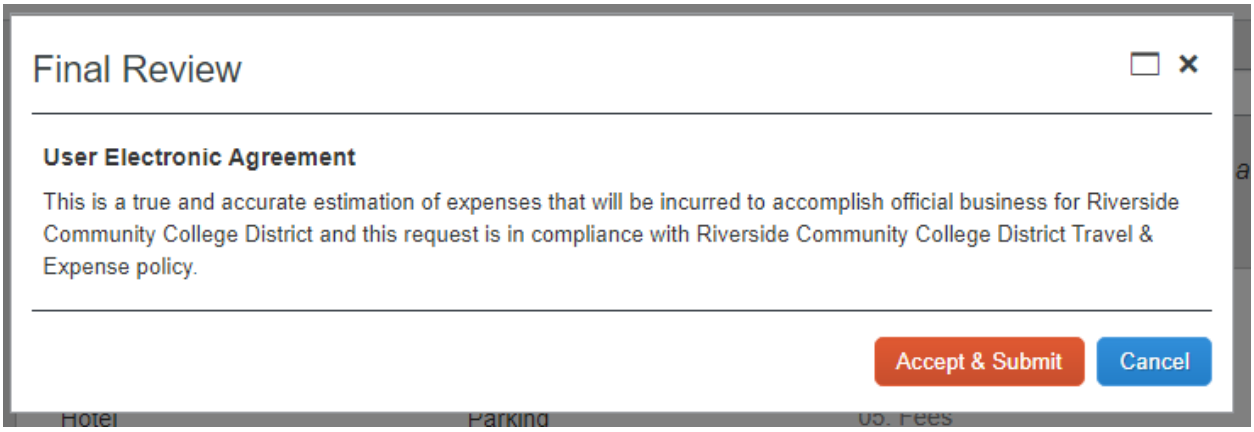


Begin typing the last name of the approver you would like to add, the system will generate search results. Select the individual you are adding as approver from the names generated.

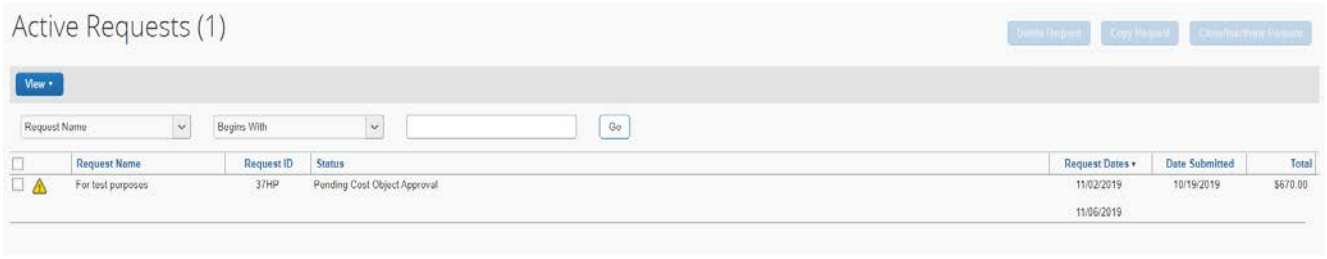
Click on the **Submit Request** button.



The electronic agreement dialog box will appear. Read, and if no changes need to be made, click **Accept & Submit**.



Now, your request will appear under your "Active Requests" with the automatically assigned travel number and status shown.



For a visual representation of the travel request approval workflow, see appendix XX.

Contacting Purchasing for Payments

Once your travel request has been fully approved you will receive an automated email notification from AutoNotifications@concursolutions.com. Be sure to add this email to your contacts to avoid having the message moved to your Clutter or Junk inbox.

Your next step will be to contact the Purchasing department via email at purchasingtravel@rccd.edu for payments to be processed. Be sure to include the travel request number in the subject header for all communications regarding travel. **NOTE:** The steps for registration and hotel payments remains the same regardless of what option was selected for *"How will you book your travel"* on the **Request Header** tab.

Registration - Submit conference registration form or confirmation to the purchasing department. Be sure the payee name and total amount due is noted on the documentation you provide.

Hotel – This is a two-step process.

a. Contact the hotel directly and request their Credit Card Authorization form. Be sure to have the confirmation number for the traveler when you contact the hotel. Fill out the Credit Card Authorization Form (to the best of your ability) leaving the credit card number fields blank.
b. Email purchasing the hotel's Credit Card Authorization form. Purchasing will contact the hotel and pay the hotel expenses. Purchasing will confirm proof of payment via email. NOTE: The traveler will still be required to provide a credit card upon check-in for incidentals.

Once payments have been made by the Purchasing department, no further action is required for your trip – if you selected options "*02. Book with Agent – Cal Travel Store*" or "*03. Book outside of Concur and Cal Travel Store".*

Follow the steps in "Completing the Booking Process" if you chose "Book Online- Concur Travel" in the **Request Header** section.

Completing the Booking Process

Once the travel request has been fully approved, you will receive an email notification from AutoNotifications@concursolutions.com indicating there is a request pending travel booking. You are now ready to book your airfare, hotel, or car rental as appropriate. Follow the steps below.

Login to Concur.

Click on the "Manage Request" link on the banner.

Click on "book now" button.

Add steps for moving through booking process and saving itinerary to forward to grant specialists, etc.

Section III:

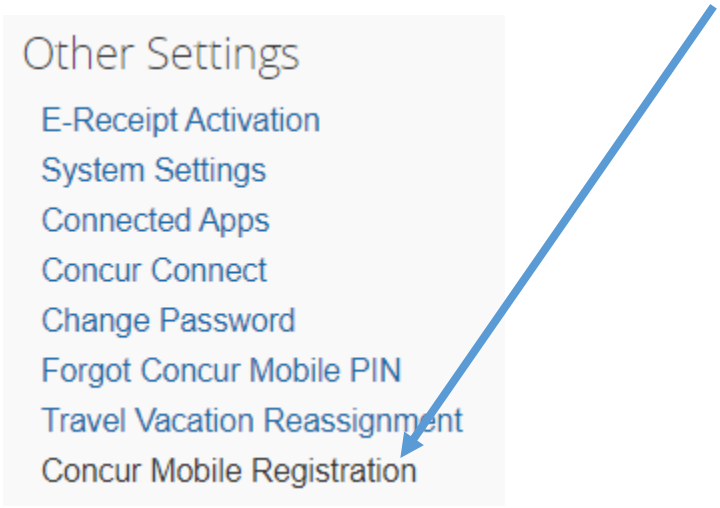
Creating your Expense Reimbursement

Creating your Expense Reimbursement

Using Concur Mobile App

The Concur Mobile App allows travelers to view their trip information and upload their receipts directly from a photo taken on their phone. Before you can begin using the Concur Mobile app, you must download the app through the appropriate app store for your mobile device.

You must also register your mobile device through your Concur Profile. To do this, go to Profile Settings and scroll down to links on the left-hand side of the bottom of the page.



Once your mobile device is registered, you will have access to your username and can create a mobile app pin.

NEED photos, print screens of a new mobile device being registered.

Concur Mobile

Manage your expenses and business travel on your mobile device.

To get started, enter your email address below and we will send you a link to download the app.

natalie.halsell@rcc.edu **Get Started**

Or, review your sign-in details:

To sign in to the Concur Mobile app, simply tap on "Company Code Sign In" after downloading the Concur Mobile app and enter your company code. Then follow the instructions per your company procedure for single sign on.

Company Code: 2UP2B2

Alternatively, you can use your Concur username and a Concur Mobile PIN.
Enter a new Concur Mobile PIN in the fields below to setup a new one.

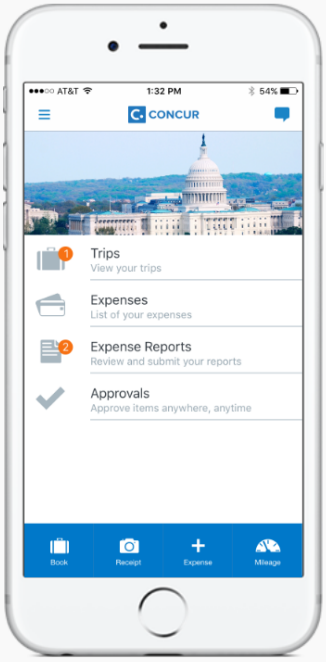
Concur Username: Natalie.Halsell@rcc.edu

Create PIN:

Retype PIN:

PIN may be letters, numbers and special characters such as !,$, or # but no spaces

Set Concur Mobile PIN



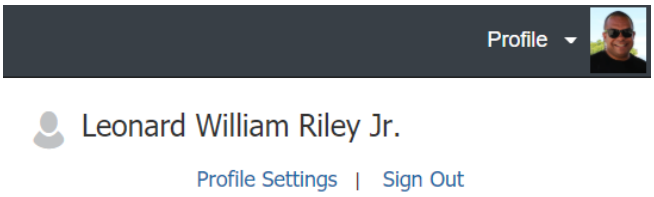
Section IV:
Instructions for Delegates

Assigning Delegates

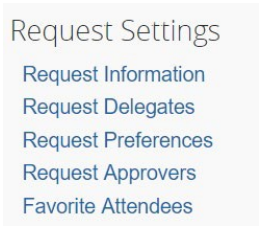
A delegate is an individual you assign to act on your behalf for both the travel request process as well as the expense reimbursement process. Delegate settings are shared between the travel and reimbursement.

Travel Request Delegates

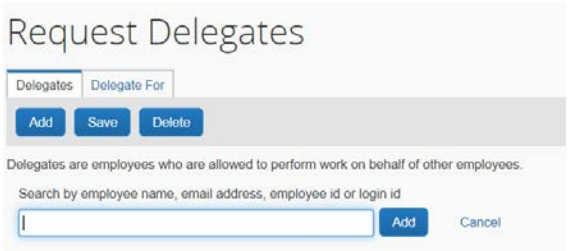
To assign someone to be your travel request delegate, click **Profile** and select **Profile Settings**:



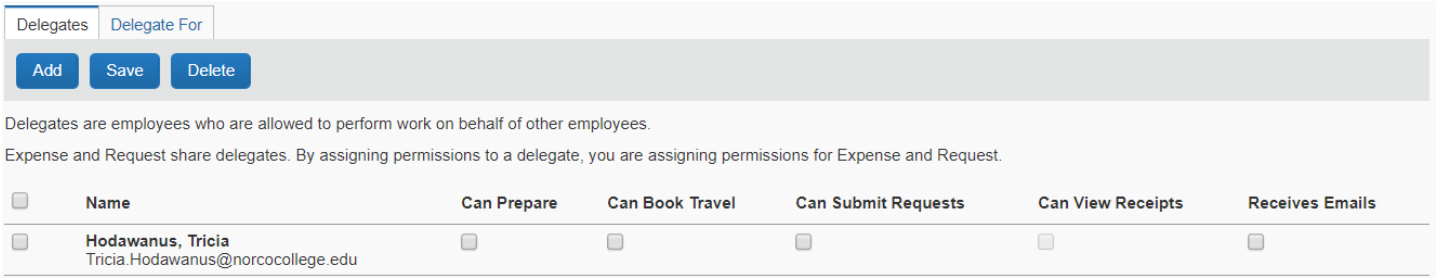
On the left hand side of your screen under **Request Settings**, click **Request Delegates**:



Click **Add** and begin typing the name of the individual you would like to assign to act as your delegate. Their name will automatically pop-up in the search bar. Click on their name to add them.



Once they are added, you will need to check each function you want the delegate to be able to perform on your behalf:



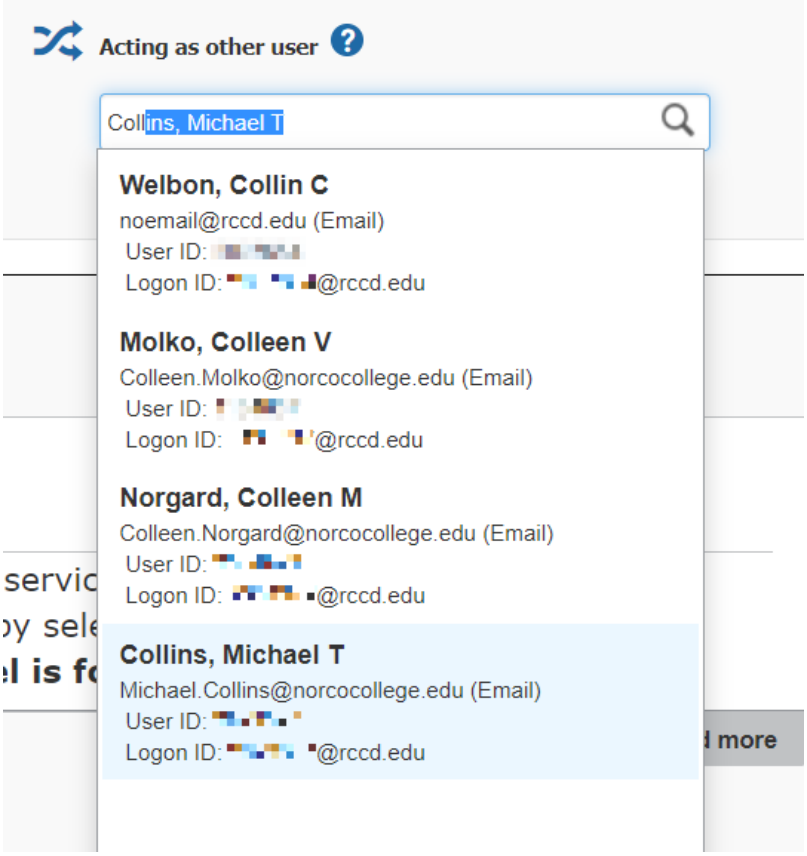
Click **Save** to save your changes. This individual will now be able to perform the functions you have identified on your behalf.

Acting as a Delegate

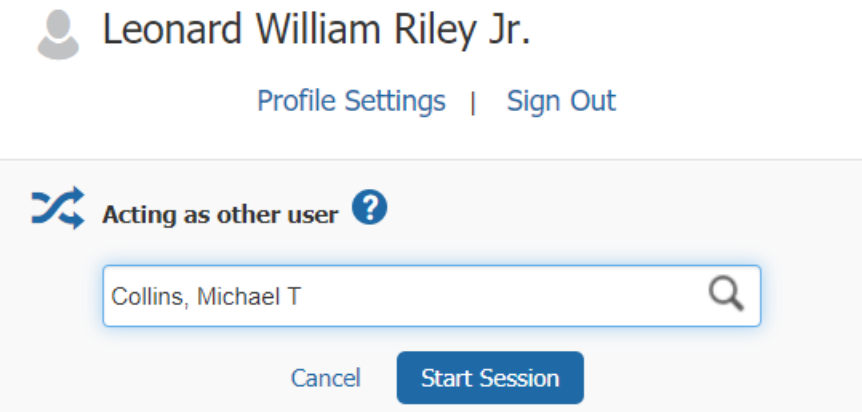
To begin acting as someone's delegate, first you must login to Concur using your own login credentials. If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

To work as a delegate…

1. Click **Profile** in the upper right-hand corner of the screen
2. Click **Acting as other user**
3. Type the user's last name, and select the appropriate user's name from the options that appear

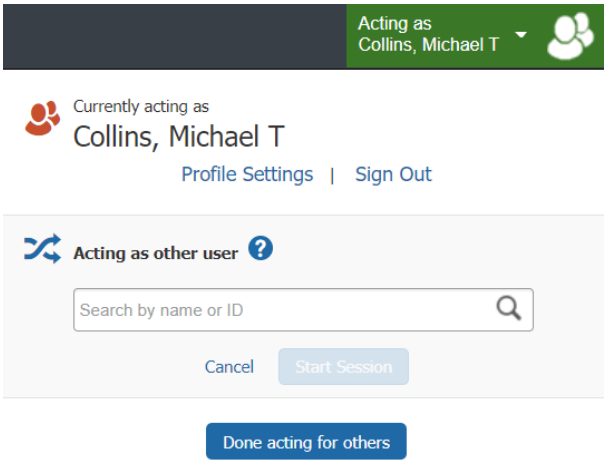


4. Click **Start Session**



NOTE: The **Profile** menu now displays **Acting as**, and shows the name you just selected.

You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.



5. To select a different user, follow the same steps but select a different name
6. To return to your own tasks, click **Acting as**, and then click **Done acting for others**

Section V:
Instructions for Approvers