

# CONCUR TUTORIAL

## SETUP AND PROCESS WORKFLOW FOR CONFERENCE PAPERWORK

ACADEMIC PLANNING CHAIRS MEETING – MAY 12, 2023

SAP Concur 



**NORCO**  
COLLEGE

CONCUR NC TEAM: ESMERALDA ABEJAR, MARIA ROMERO-TANG,  
LENNY RILEY, ANA MOLINA, & LISA MYERS

# AGENDA

- TRAVEL REQUESTS
  - HOW TO ACCESS CONCUR
  - UPDATING YOUR TRAVEL PROFILE
  - CREATING/SUBMITTING TRAVEL REQUESTS
  - TRAVEL REQUEST REVIEWING/APPROVAL PROCESS
  - BOOKING TRAVEL
  - NEED HELP WITH CONCUR?

# MyApps Portal - Single Sign-On (SSO) Portal




[myapplications.microsoft.com](https://myapplications.microsoft.com) OR [go.rccd.edu](https://go.rccd.edu)

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

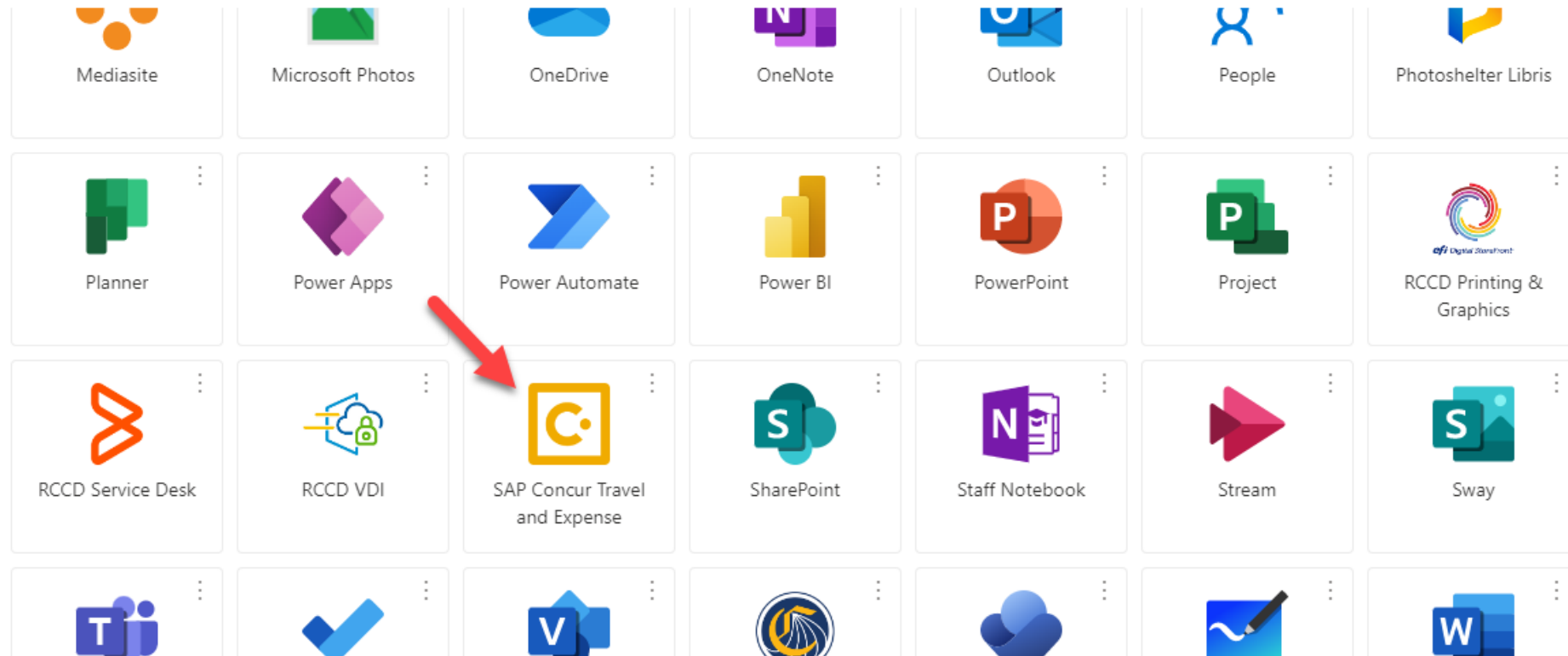
## HOW TO ACCESS CONCUR





























# HOW TO ACCESS CONCUR

## Apps dashboard

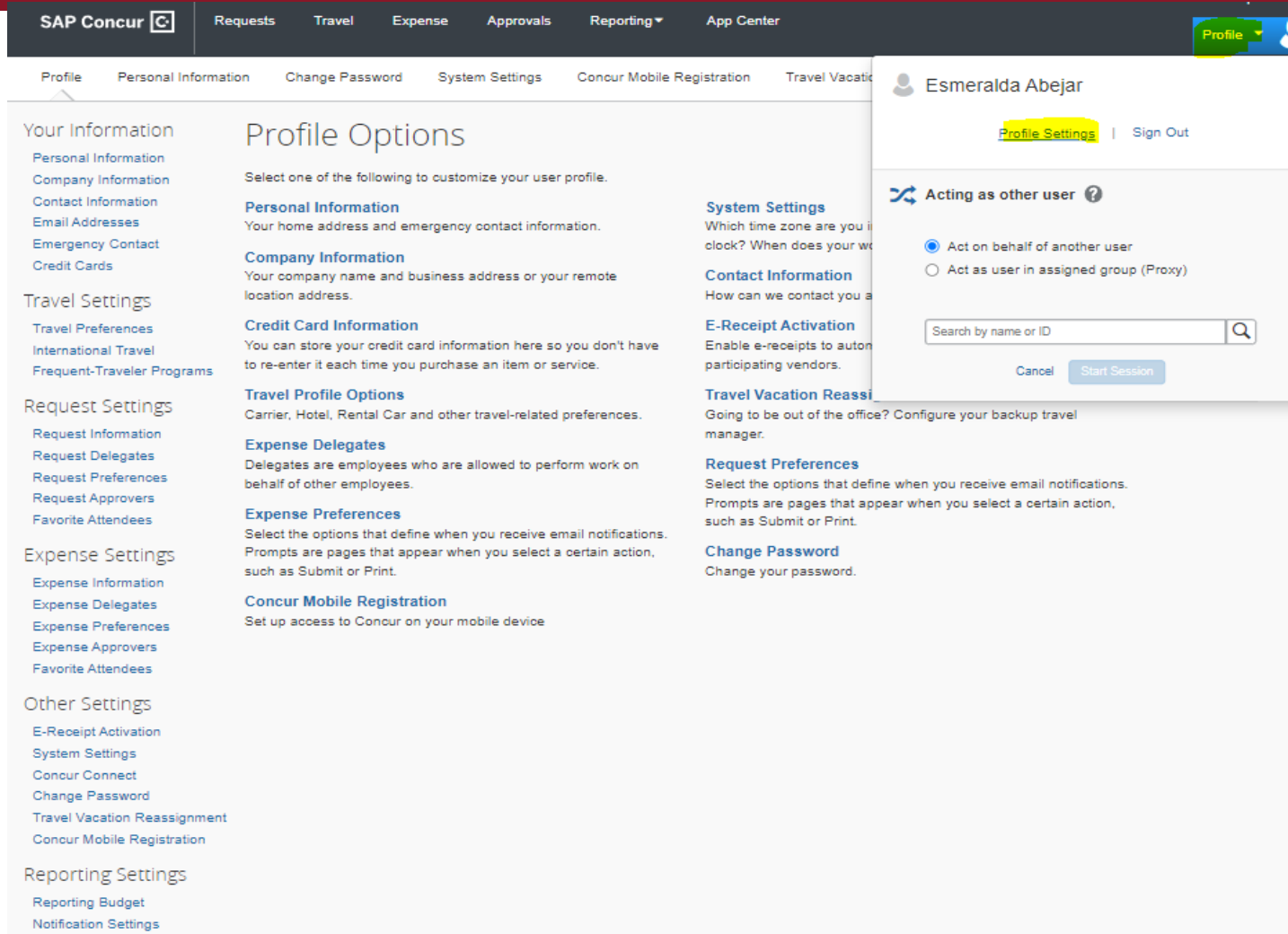
 Add apps  Create collection  Customize view

### Apps



 Mediasite	 Microsoft Photos	 OneDrive	 OneNote	 Outlook	 People	 Photoshelter Libris
 Planner	 Power Apps	 Power Automate	 Power BI	 PowerPoint	 Project	 RCCD Printing & Graphics
 RCCD Service Desk	 RCCD VDI	 SAP Concur Travel and Expense	 SharePoint	 Staff Notebook	 Stream	 Sway
 Teams	 Checkmark	 Word	 Unacademy	 Outlook	 Paint	 Word

# UPDATING YOUR TRAVEL PROFILE



The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Approvals, Reporting, and App Center. A user profile dropdown is visible in the top right corner, showing the name 'Esmeralda Abejar' and a 'Profile Settings' link. The main content area is titled 'Profile Options' and contains several sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Concur Connect, Change Password, Travel Vacation Reassignment, Concur Mobile Registration). A modal window titled 'Acting as other user' is open, showing options to 'Act on behalf of another user' (selected) or 'Act as user in assigned group (Proxy)'. A search box for 'Search by name or ID' and buttons for 'Cancel' and 'Start Session' are also visible.

## PROFILE > PROFILE SETTINGS

Before you enter a travel request

- Enter your personal and company information
- Enter travel preferences, and frequent-traveler program information.

# UPDATING YOUR TRAVEL PROFILE

All **[Required]** fields need to be filled out!



## Important Note

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

Title	First Name	Middle Name <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 local Concur administrator, Lenny Riley, if it needs to be updated.

# UPDATING YOUR TRAVEL PROFILE

On the Credit Cards section, **It is recommended not to add anything at this time!**

*How will you book your Travel - **01. Book Online- Concur Travel** or **02. Book with Agent-Cal Travel Store***

- *The Flight will be paid with the District credit card (Citi Card)*
- *Hotel will be reserved with the District Credit card*
  - *After booking is complete in Concur, traveler needs to contact the hotel and request a Credit Card Authorization (CCA) Form, If they require one.*
  - *Complete the form using **your AmEx Go Card information** and forward the CCA form back to the hotel.*
  - *When checking in, make sure the hotel has the traveler AmEx Go card on file.*
- *Car Rental will be reserved with District Credit card in Concur.*
  - *Make sure you provide your AmEx Go card when picking up your car rental.*
- *Meals and Other expenses will be paid with Traveler AmEx Go credit card.*

# UPDATING YOUR TRAVEL PROFILE

NOTE: The AmEx Go Card assigned to the traveler by the District, is used by the traveler to pay when booking is done Outside of Concur for all travel related expenses.

*When booking your travel - 03. Book Outside of Concur and Cal Travel Store:*

- *The Flight will be paid with the traveler AmEx Go card*
- *Hotel will be reserved with the traveler AmEx Go card*
  - *Complete the credit card authorization form using [your AmEx Go Card information](#) and forward the CCA form back to the hotel.*
  - *When checking in, make sure the hotel has the traveler AmEx Go card on file.*
- *Car Rental will be reserved with traveler AmEx Go card.*
  - *Make sure you provide your AmEx Go card when picking up your car rental.*
- *Meals and Other expenses will be paid with Traveler AmEx Go credit card*



# BEFORE YOU START A TRAVEL REQUEST

## 1. Get an agenda and estimate cost of the conference.

- Are you flying or driving?
- How much is the conference registration?
- Is breakfast, lunch and dinner included in the conference registration cost? If not, make sure to include it in the cost of meals.
- How much is the hotel reservation?
- What about rental car, or Uber/Lift services?
- Will parking and toll roads cost be incurred?
- Mileage reimbursement. (Do not use the AmEx Go card for gas purchases)

# CREATING/SUBMITTING TRAVEL REQUESTS

# BEFORE YOU START A TRAVEL REQUEST

## 2. Does this request include Out of State Travel?

- Please check the [states where travel is prohibited](#)
- Follow Out of State approval process.

All out of state travel requests must be approved by the Board of Trustees at their Regular meeting prior to the date of travel.

1. Obtain immediate manager approval via email
2. Once manager approval is obtained, forward up the chain of command to the Dean/VP to obtain President's written approval via email prior to submitting in Concur.
3. VP's should forward requests to President with CC to Denise Terrazas.
4. Once approval is obtained, enter the request in Concur. (
5. Travel requests should be fully approved through the college chain and Concur before the Out of State Travel deadline (first Friday of the month).
6. President's office will add TR to the board report.

**Important: Emails should include the following information, rationale, and a meeting agenda.**

- Mr./Ms. NAME, TITLE, DEPARTMENT, to travel to CITY, STATE,
- MONTH, DAY, YEAR through MONTH, DAY, YEAR,
- to attend the NAME OF EVENT.
- Estimated cost: TOTAL AMOUNT SUBMITTED IN CONCUR.
- Funding Source: GENERAL FUND/GRANT NAME.

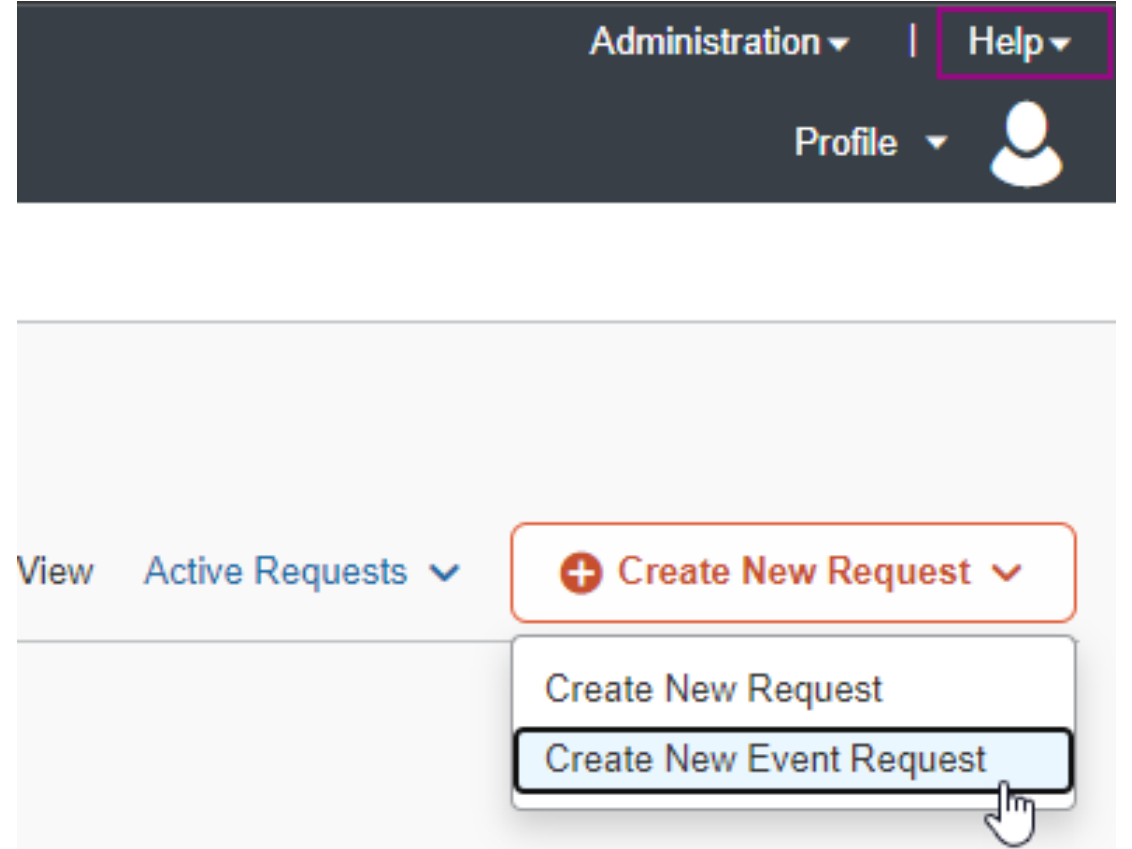
Please direct questions to Denise Terrazas  
[Denise.Terrazas@norcocollege.edu](mailto:Denise.Terrazas@norcocollege.edu)

# CREATING/SUBMITTING TRAVEL REQUESTS

# BEFORE YOU START A TRAVEL REQUEST

## 3. Is this a group conference? Use the Event Request feature

- Note, this is only for conference events that RCCD employees are attending.
- Any other group events are processed via Purchasing. (a/c transmittals might be required).
- Email [ConcurQuestions@norccollege.edu](mailto:ConcurQuestions@norccollege.edu) to request the Event Request feature



# CREATING/SUBMITTING TRAVEL REQUESTS

# BEFORE YOU START A TRAVEL REQUEST

## 4. How will you book your travel? SUMMARY

01. Book Online with Concur	(Via Travel Store) <ul style="list-style-type: none"><li>• Air Ticket</li><li>• Hotel Reservation</li><li>• Car Rental</li></ul>
02. Book with Agent –Cal Travel Store	(Via Travel Store) <ul style="list-style-type: none"><li>• Group Travel -Air tickets, Hotel Reservation and Car Rental. (Student travel)</li><li>• Multiple Stops and other complicated variations</li><li>• Personal travel dates</li></ul>
03. Book Outside of Concur and Travel Store	All travel arrangements Outside of Concur. (Conferences where Group rates have been previously arranged)

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

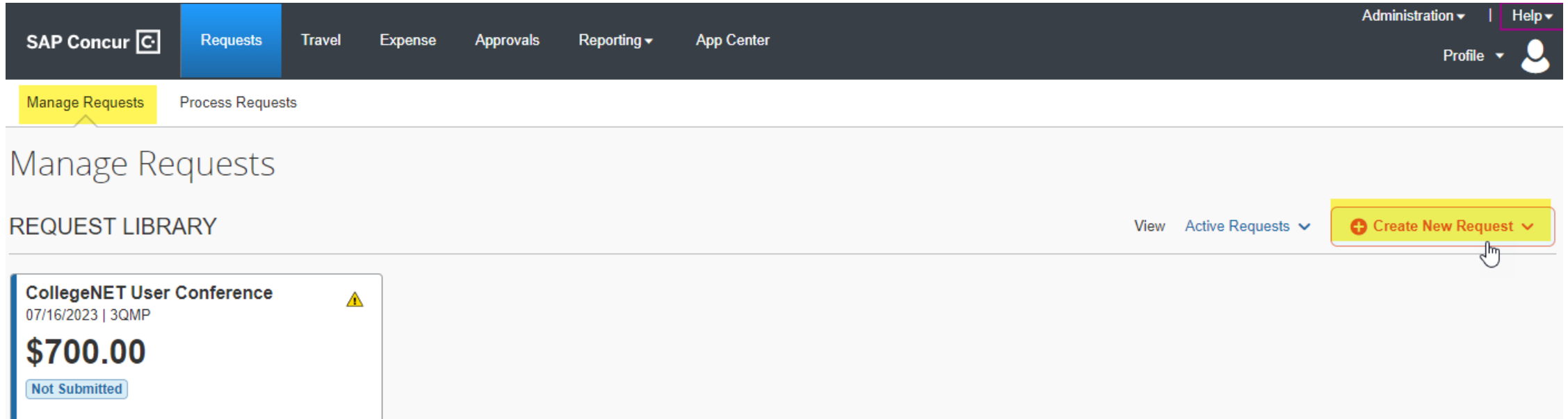
You have the option to search for requests from the drop-down menu on the REQUEST LIBRARY. Active Requests is checked by default.

The screenshot displays the SAP Concur interface. At the top, there is a navigation bar with the SAP Concur logo and several menu items: Requests (highlighted in blue), Travel, Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Administration, Help, and Profile. Below the navigation bar, there are two tabs: Manage Requests (selected) and Process Requests. The main content area is titled 'Manage Requests' and contains a 'REQUEST LIBRARY' section. On the right side of the library, there is a 'View' dropdown menu currently set to 'Active Requests'. A hand cursor is pointing at the dropdown arrow. The dropdown menu is open, showing a list of request statuses: Active Requests (checked), Not Submitted, Pending Approval, Approved, Cancelled, Closed, and All Requests. To the right of the dropdown menu is a red button labeled '+ Create New Request'. Below the library header, a request card is visible for 'CollegeNET User Conference' with a date of '07/16/2023 | 3QMP', a value of '\$700.00', and a 'Not Submitted' status.

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

To create a travel request, click on Requests > Create New Request from the Manage Requests tab.

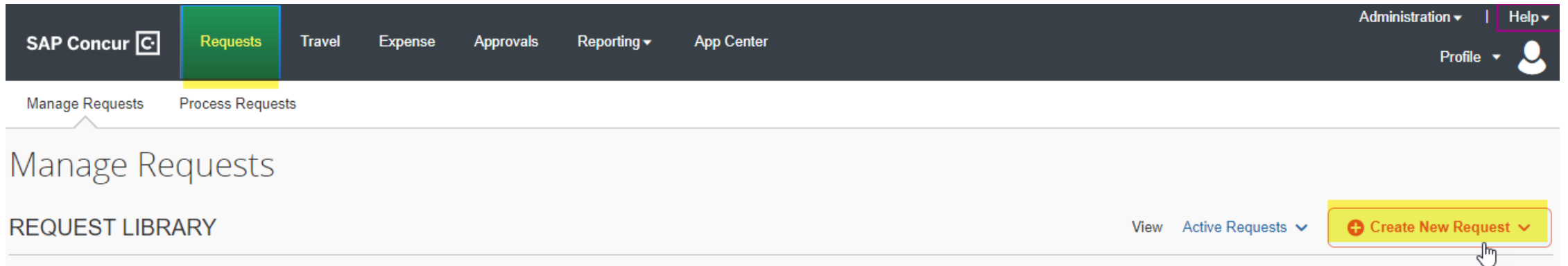


The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and several menu items: Requests (highlighted in blue), Travel, Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Administration, Help, and Profile. Below the navigation bar, there are two tabs: 'Manage Requests' (highlighted in yellow) and 'Process Requests'. The main content area is titled 'Manage Requests' and contains a 'REQUEST LIBRARY' section. In the top right corner of this section, there are links for 'View' and 'Active Requests', and a prominent yellow button labeled '+ Create New Request' with a dropdown arrow. A mouse cursor is pointing at this button. Below the button, there is a card for a request titled 'CollegeNET User Conference' with a date of '07/16/2023 | 3QMP', a value of '\$700.00', and a status of 'Not Submitted'.

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

- Make sure you enter your travel request on the Requests tab; the Travel tab is used for obtaining estimated costs. **(NOTE: Do not book travel at this point.)**
- Click Create New Request, a blank request will appear on the screen. Enter information in all fields with a red border on the left side (those fields are required).



## CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

- If you can't spell out the entire conference name in the Request/Trip Name field, make sure to spell it out in the Additional Information or Comment fields.

Create New Request ×

**\* Required field**

<b>Request/Trip Name *</b> <input type="text"/>	<b>How will you book your travel? *</b> None Selected	<b>Business Trip Start Date *</b> MM/DD/YYYY
<b>Business Trip End Date *</b> MM/DD/YYYY	<b>Request/Trip Purpose *</b> None Selected	<b>Paid for by an outside entity? *</b> None Selected
<b>Destination City *</b> <input type="text"/>	<b>Out of State and beyond 500 miles? * ?</b> None Selected	<b>Destination Country</b> NC
<b>Traveler Type *</b> Staff	<b>Does this trip contain personal travel? *</b> None Selected	<b>Personal Dates of Travel</b> <input type="text"/>

**Additional Information**

**Comment**

Cancel **Create Request**

# CREATING/SUBMITTING TRAVEL REQUESTS



# TO CREATE A TRAVEL REQUEST

If you are using a different budget other than the default budget, please update it in the Request Header.

**Please note: The expense will be encumbered in Galaxy in this GL account.**

Create New Request

Fund \* (1) (11) 11 - UNRESTRICTED GENERAL FUND

School \* (1) (EJA) EDUCATIONAL SERVICES - NORCO

Resource \* (2) (1000) 1000 - GENERAL FUND

Project Year \* 0

Goal \* (2) (6010) EDUCATIONAL SERVICES - NORCO

Function \* (3) (2000) ACADEMIC AFFAIRS

Group NC

Comment

Cancel Create Request

Click Create Request >>>>>>

Verify the budget account by running a report from Print/Share before submitting your request.

Request Details Print/Share Attachments

EXPECTED EXPENSE

Add

RCCD Request Printed Report

RCCD Request Printed Report with Flow /Trail

Expense type ↑↓ Det

Parking

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

Add Expected Expense on the next screen

Choose the Expected Expenses highlighted in yellow

WHEN choosing - **01. BOOK ONLINE – Concur Travel**

- Air Ticket
- Hotel Reservation
- Car Rental

Choose the Expected Expenses

WHEN choosing - **02. Book with Agent-Cal Travel Store and 03. Book Outside of concur and Cal Travel Store.**

- Airfare (Not Booked in Concur)
- Hotel (Not Booked in Concur)
- Car Rental (Not Booked in Concur)

**NOTE: SEGMENTS TAB NO LONGER EXIST IN THE NEW UI BUT IT WILL APPEAR IN YOUR REPORT WHEN 1. BOOK ONLINE –Concur Travel option is used.**

RCCD Request Printed Report

Request ID: 6729  
Function: CAMPUS ADMINISTRATIVE SERVICES (0000)  
Main Destination City: San Joaquin (US)  
Main Destination Country: UNITED STATES (US)

**Segments**

**Air Ticket**  
Amount: \$400.00  
10/20/2022 John Wayne (Airport - SNA), Santa Ana (US) – Sacramento McClellan (Airport - MCC), Sacramento (US) Departure time: 2:00 PM  
10/22/2022 Sacramento McClellan (Airport - MCC), Sacramento (US) – John Wayne (Airport - SNA), Santa Ana (US) Departure time: 3:00 PM  
Allocations: 100% (\$400.00) EDB-6729-0000-11-1000-0

**Hotel Reservation**  
Amount: \$400.00  
10/20/2022 San Joaquin (US) 10/22/2022 Check-In: 4:00 PM – Check-Out: 11:00 AM  
Check-In Detail: hotel near san joaquin delta college  
Comment: Abatec, Emeraldas (09/02/2022); two nights.  
Allocations: 100% (\$400.00) EDB-6729-0000-11-1000-0

**Expenses**

Request/Trip Start Date	Expense Type	Entry Description	Amount	Amount
10/20/2022	Airfare	100% (\$400.00) EDB-6729-0000-11-1000-0	\$400.00	\$400.00

Buttons: Close, Print, Save as PDF, Email

Add Expected Expense

Search for an expense type

- ✓ 01. Travel Expenses
  - Air Ticket
    - Airfare (Not Booked In Concur)
    - Hotel (Not Booked in Concur)
    - Hotel Reservation
- ✓ 02. Transportation
  - Car Rental
    - Car Rental (Not Booked in Concur)
    - Car Rental Fuel
    - Parking
    - Train
- 03. Mileage
- 04. Meals
- ✓ 05. Fees
  - Conference Registration Fees/Aenda

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

## Book with Concur

The screenshot shows the SAP Concur interface for creating a new expense request. The title is "New Expense: Air Ticket". There are tabs for "Round Trip", "One Way", and "Multi City". The "Outbound" section includes fields for "From" (John Wayne (Airport - SNA), Santa Ana, California), "To" (required field), "Date" (MM/DD/YYYY), "Depart at" (hh:mm A), and "Comment". The "Return" section has similar fields for "Date" and "Depart at". At the bottom, there are fields for "Amount" and "Currency" (US, Dollar). A purple callout box is overlaid on the bottom right of the form.

### Expected Expense Type:

- Air Ticket
- Hotel Reservation
- Car Rental

## Book Outside of Concur- Expense type

The screenshot shows the SAP Concur interface for creating a new expense request. The title is "New Expense: Airfare (Not Booked In Concur)". It includes fields for "Departure City", "Date" (09/28/2022), and "At" (hh:mm A). There are "Detail" and "Comment" text areas. The "Arrival City", "Date" (09/28/2022), and "At" (hh:mm A) fields are also present. At the bottom, there are fields for "Amount" and "Currency" (US, Dollar). A purple callout box is overlaid on the bottom right of the form.

### Expected Expense Type:

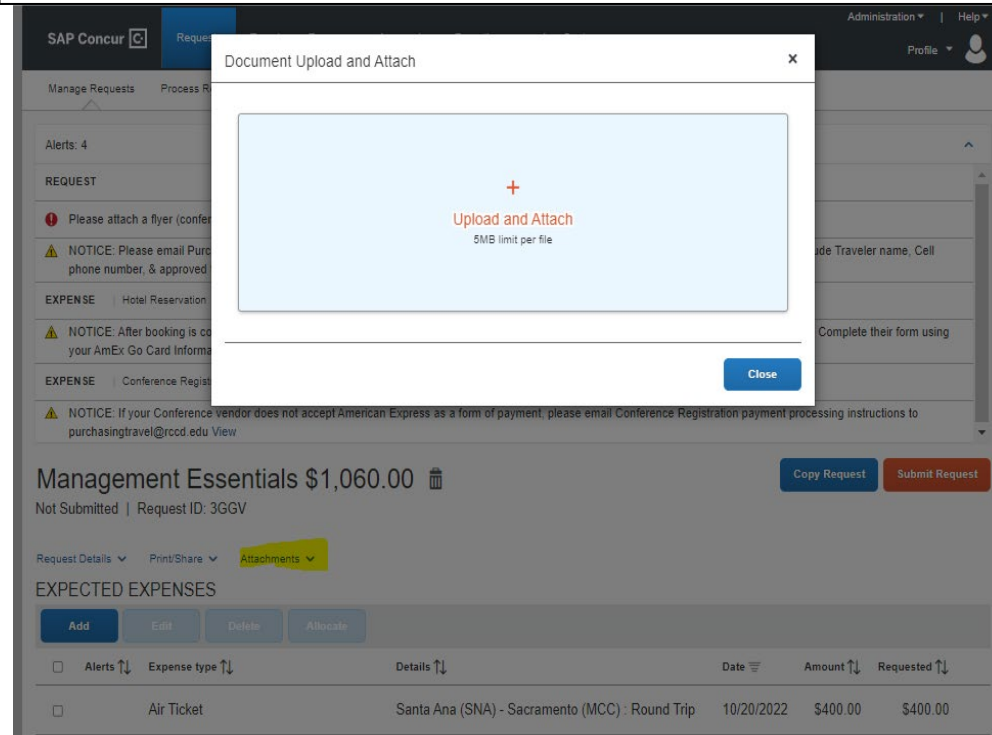
- Airfare (Not Booked in Concur)
- Hotel (Not Booked in Concur)
- Car Rental (Not Booked in Concur)
- Mileage
- Meals
- Fees
- Other Travel Expenses
- Non-Employee (Student, Guest) Expenses

# CREATING/SUBMITTING TRAVEL REQUESTS

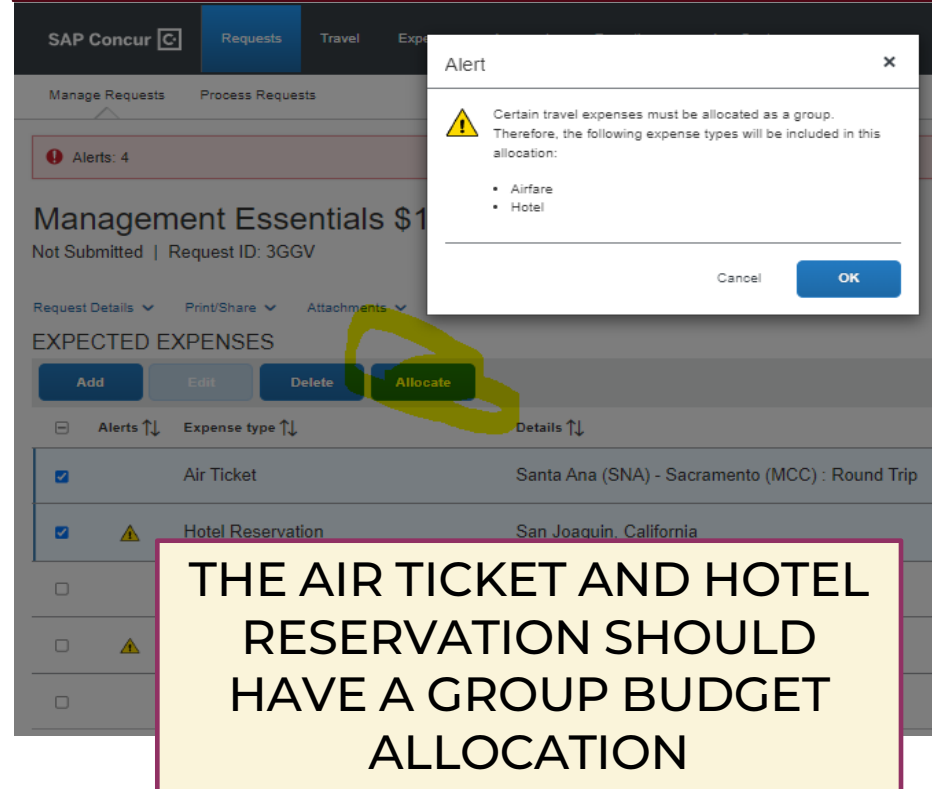
# TO CREATE A TRAVEL REQUEST

- Please attach the agenda! And adjust allocated budget (if necessary) before submitting.

Be advised: the red exclamation sign ! is a hard stop and won't let you submit the request until the issue is fixed.



You can add, delete and allocate budget using the blue buttons



# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

If you are using a different budget other than the default budget, please update it on the request header AND in each expense type individually.

The screenshot shows the 'Allocate' screen in SAP Concur. At the top, it says 'SAP Concur' and 'Requests Travel Expense'. Below that, it says 'Allocate' and 'Expenses: 1 | \$50.00'. There are two tabs: 'Percent' and 'Amount'. The 'Amount' tab is selected, showing 'Amount \$50.00' and 'Allocated \$50.00' with '100%' below it. Under 'Default Allocation', the 'Code' field is highlighted in yellow and contains '11-EDB-1000-0-6729-0000'. At the bottom, there are buttons for 'Add', 'Edit', 'Remove', and 'Save as Favorite'.

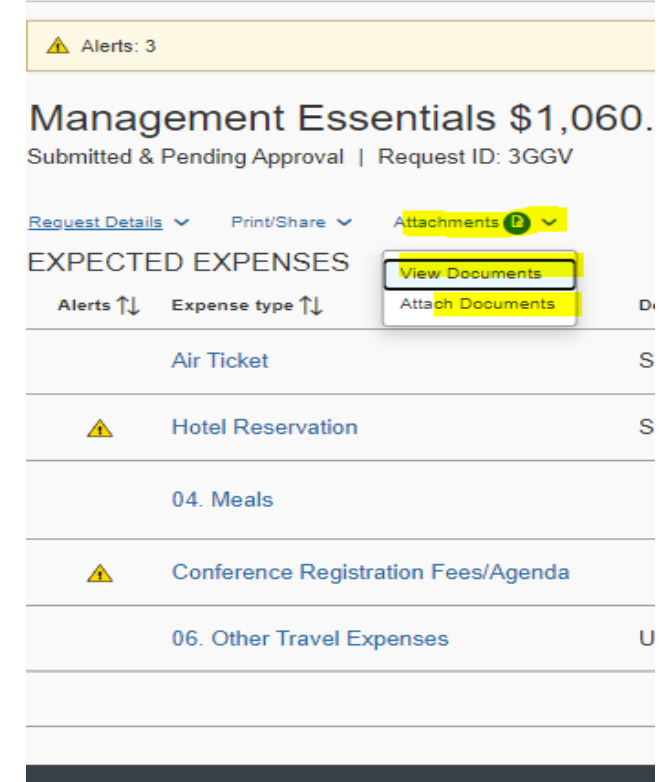
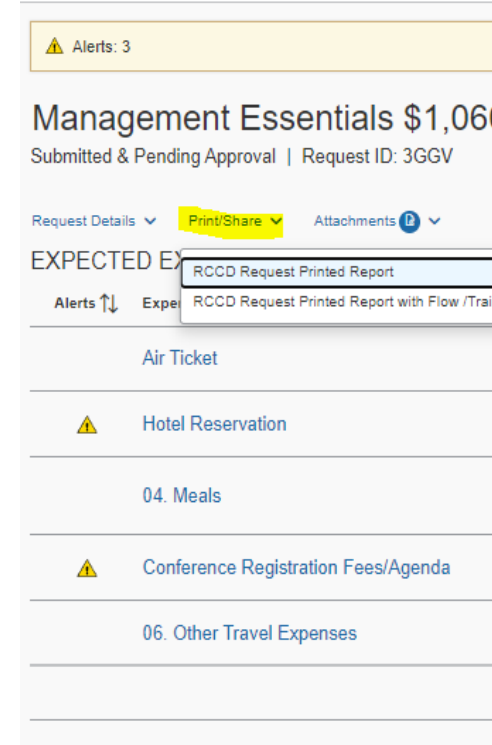
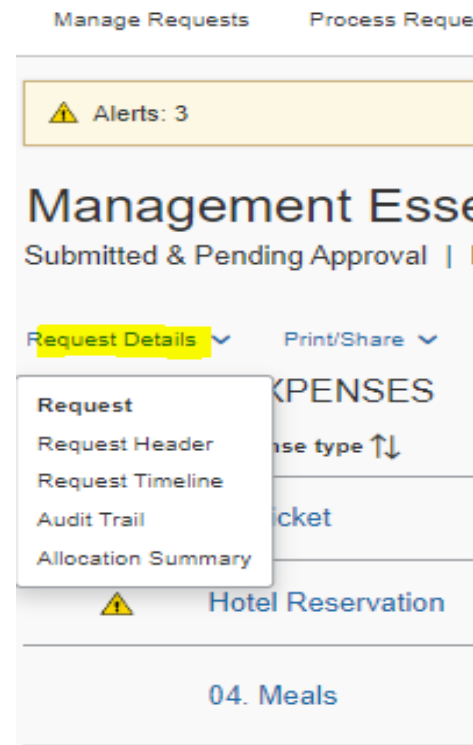
The screenshot shows the 'Add Allocation' dialog box. It has two tabs: 'New Allocation' and 'Favorite Allocations'. The 'New Allocation' tab is selected. The dialog contains several fields: 'Fund' with a dropdown menu showing '(11) 11 - UNRESTRICTED GENERAL FUND', 'School' with a dropdown menu showing '(EDB) BUSINESS OPERATIONS - NORCO', 'Resource' with a dropdown menu showing '(1000) 1000 - GENERAL FUND', and 'Project Year' with a dropdown menu showing '0'. There are 'Cancel' and 'Save' buttons at the bottom right.

You can create favorites to easily use the same allocation for future expenses.

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

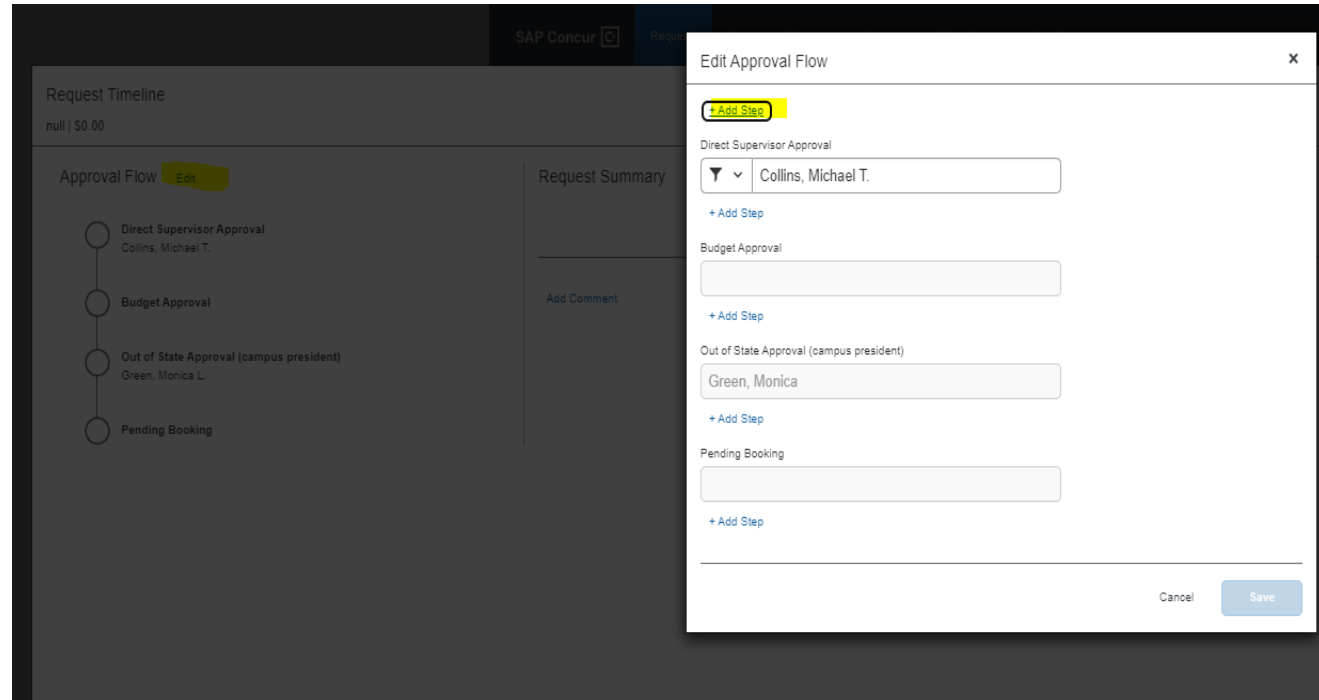
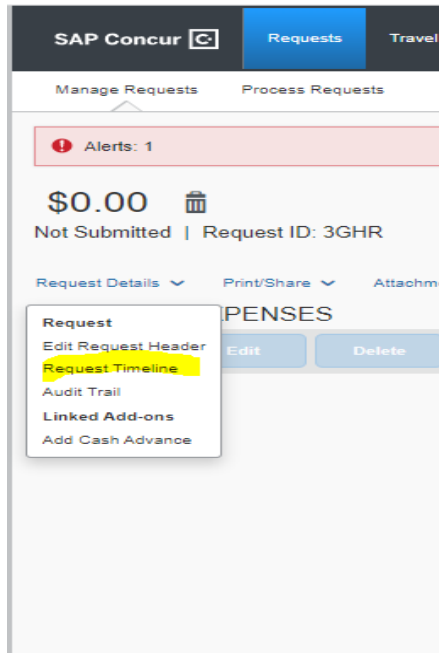
- Note the drop-down menu on Request Details, Print Share and Attachments.
- Click Submit Request to send the travel request for approval from your supervisor.



# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

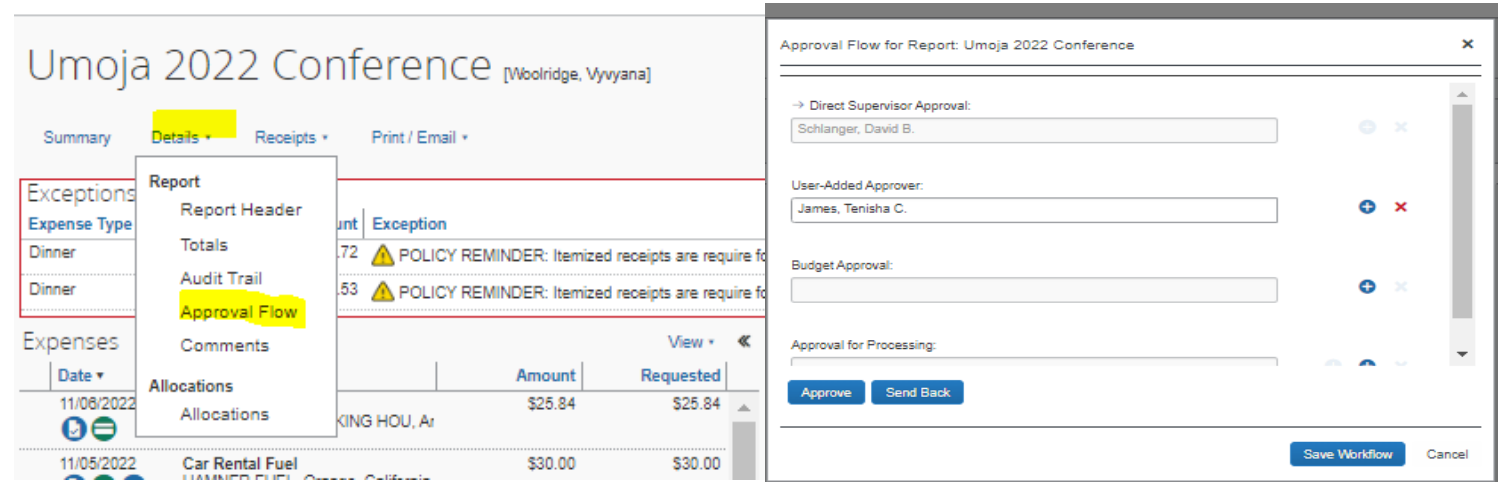
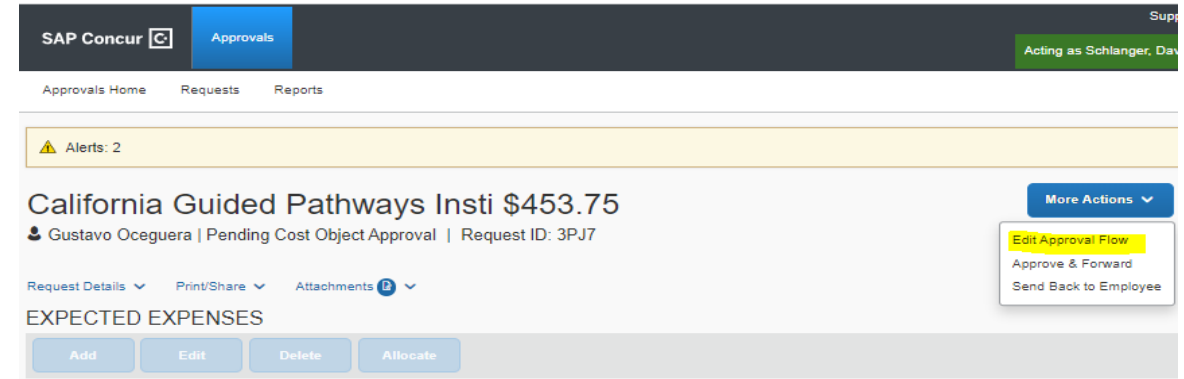
- Note the drop-down menu on Request Details > Request Timeline, allows to add approvers
- Click Request Timeline > Edit > +Add Step



# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

- OR Click More Actions > Edit Approval Flow > + Add Step > Save Workflow
- Approvers can also add user added approvers to the Expense Report
- Click on Details > Approval Flow > + > Save Workflow



# CREATING/SUBMITTING TRAVEL REQUESTS



# TO CREATE A TRAVEL REQUEST

Once you've added all Expected Expenses, review your alerts and correct any issues. You can expand the ribbon to read them all.

The screenshot shows the SAP Concur interface for a travel request. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. Below the navigation, there are tabs for 'Manage Requests' and 'Process Requests'. A yellow alert banner at the top indicates 'Alerts: 3'. The main content area shows 'Management Essentials \$1,060.00' with a trash icon and buttons for 'Copy Request' and 'Submit Request'. Below this, there are options for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section includes an 'Attach Documents' button and a table of expenses.

<input type="checkbox"/>	Alerts ↑↓	Expense type ↑↓	Details ↑↓	Date	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	Santa Ana (SNA) - Sacramento (MCC) : Round Trip	10/20/2022	\$400.00	\$400.00
<input type="checkbox"/>	⚠	Hotel Reservation	San Joaquin, California	10/20/2022	\$400.00	\$400.00
<input type="checkbox"/>		04. Meals		10/20/2022	\$50.00	\$50.00
<input type="checkbox"/>	⚠	Conference Registration Fees/Agenda		10/20/2022	\$150.00	\$150.00
<input type="checkbox"/>		06. Other Travel Expenses	Uber or taxi	10/20/2022	\$60.00	\$60.00
						\$1,060.00

The screenshot shows the 'Alerts' section of the SAP Concur interface. It displays three alerts under the heading 'Alerts: 3'. The first alert is a yellow warning icon with the text: 'NOTICE: Please email Purchasingtravel@rcod.edu to request a new AMEX Go Card or to request funds added to your AMEX Go Card. Please include Traveler name, Cell phone number, & approved travel request ID #. View'. The second alert is a yellow warning icon with the text: 'NOTICE: After booking is completed in Concur, please contact the Hotel and request a Credit Card Authorization (CCA) Form – IF they require one. Complete their form using your AmEx Go Card Information and forward the CCA form back to the hotel. View'. The third alert is a yellow warning icon with the text: 'NOTICE: If your Conference vendor does not accept American Express as a form of payment, please email Conference Registration payment processing instructions to purchasingtravel@rcod.edu View'. Below the alerts, there is a table of expenses.

EXPENSE	Hotel Reservation	10/20/2022	\$400.00
EXPENSE	Conference Registration Fees/Agenda	10/20/2022	\$150.00

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

- Print Share > RCCD Request Printed Report with Flow/Trail

RCCD Request Printed Report with Flow /Trail

10/20/2022	06. Other Travel Expenses	Uber or taxi	\$60.00	\$60.00
<b>Allocations :</b> 100% (\$60.00) EDB 6729 0000 11 1000 0				

Printed on 09/01/2022 8:03 PM

**Approval Flow**

Action	Approver
1 Direct Supervisor Approval	Collins, Michael T.
2 Budget Approval <i>this step may be skipped</i>	
3 Pending Booking <i>this step may be skipped</i>	

**Audit Trail**

Date/Time	Updated By	Action	Description
09/01/2022 8:02 PM	Abejar, Esmeralda	Field Edit	The field "ReceiptImageAvail" was changed from "N" to "Y"
09/01/2022 8:02 PM	Abejar, Esmeralda	Confirmation Agreement Acceptance	*RCCD-User Agreement
09/01/2022 8:02 PM	Abejar, Esmeralda	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
09/01/2022 8:02 PM	Abejar, Esmeralda	Exception	NOTICE: Please email Purchasingtravel@rocd.edu to request a new AMEX Go Card or to request funds added to your AMEX Go Card. Please include Traveler name, Cell phone number, & approved travel request ID #.
09/01/2022 8:02 PM	Abejar, Esmeralda	Exception	NOTICE: After booking is completed in Concur, please contact the Hotel and request a Credit Card Authorization (CCA) Form &ndash; IF they require one. Complete their form using your AmEx Go Card information and forward the CCA form back to the hotel.

Close Print Save as PDF Email

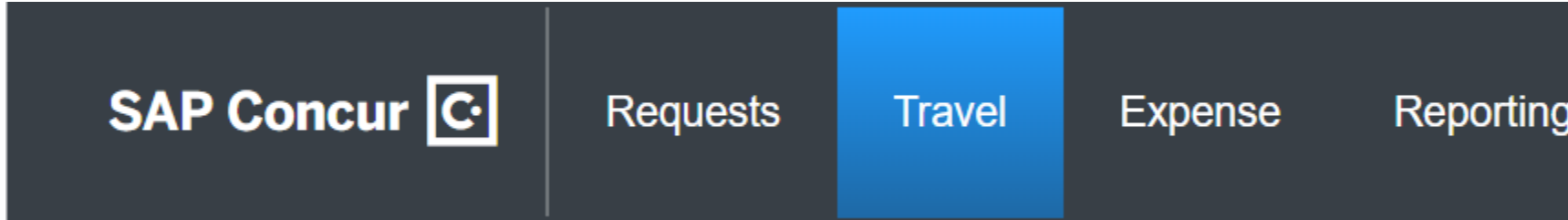
Report can be printed, saved and emailed.

# CREATING/SUBMITTING TRAVEL REQUESTS

# TO CREATE A TRAVEL REQUEST

You can use the Travel section on the Concur ribbon to get estimates that you will enter on your request.

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

A screenshot of the SAP Concur Travel search interface. At the top, there are tabs for 'Travel', 'Arrangers', 'Trip Library', and 'Templates'. Below the tabs are four icons: an airplane, a car, a bed, and a train. A message box states: 'Is your driver's license REAL ID compliant? A new form of identification will be required for air travel within the U.S. starting October 2020. Click here for more information on REAL ID.' Below this is the 'Mixed Flight/Train Search' section. It has three buttons: 'Round Trip' (selected), 'One Way', and 'Multi City'. The 'From' field contains 'ONT - Ontario Airport - Los Angeles, CA' with a search icon and links for 'Find an airport' and 'Select multiple airports'. The 'To' field is empty with a search icon and links for 'Find an airport' and 'Select multiple airports'. The 'Depart' field has a calendar icon, a 'depart' dropdown, '09:00 am', and a '± 3' dropdown. The 'Return' field has a calendar icon, a 'depart' dropdown, '03:00 pm', and a '± 3' dropdown. At the bottom, there is a checkbox for 'Pick-up/Drop-off car at airport'.

# CREATING/SUBMITTING TRAVEL REQUESTS

# TRAVEL REQUEST REVIEWING/APPROVAL PROCESS

- Previewer will look for agenda, supervisor approval and budget availability.
- Once the TR is approved, the traveler is notified (via email) and can book the travel by clicking the “Book Travel” link.
- Email [purchasingtravel@ccd.edu](mailto:purchasingtravel@ccd.edu) to request funds to be loaded to the AmEx Go credit card.

Concur Approval Flow		Traveler submits Travel Request		Traveler submits Expense Report
Data comes from:	Approvers	Travel Request (Out of State)	Travel Request	Expense Reports
Colleague (HRER)	Direct Supervisor	1	1	1
<b>Galaxy Approvals</b>				
	Budget Director	1	1	1
	NC Business Services	2	2	2
	Area Dean	3	3	
	Area Vice President	4	4	
<b>Out of State Approvals</b>				
	VP of Business Services	1		
	College President	2		
Galaxy approvals range from 2 to 5 approvers.				
User added approvers can always be added before the TR is submitted.				

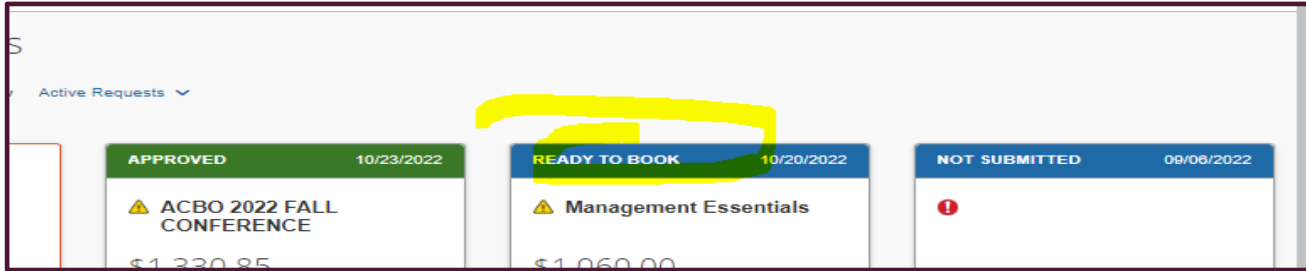
# TRAVEL REQUEST REVIEWING/APPROVAL PROCESS

- Travelers have the option to add additional approvers.
- The added budget approver needs to be done before the TR is submitted for approval

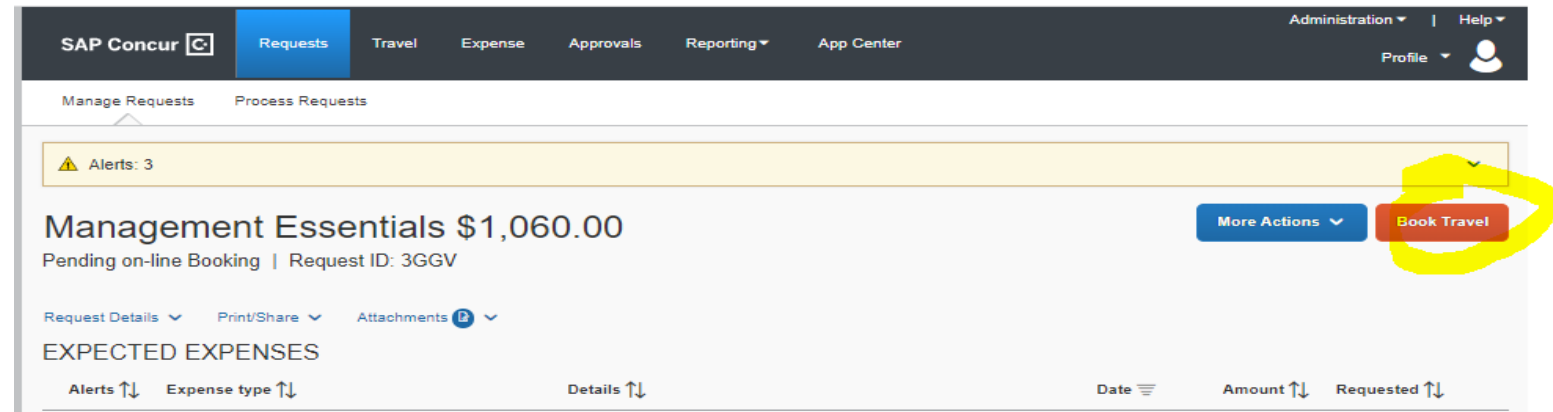
The screenshot displays a travel request management interface. At the top, there are tabs for 'Manage Requests' and 'Process Requests'. A notification bar indicates 'Alerts: 3'. The main header shows 'ASNC Travel \$20.00' with a trash icon, 'Not Submitted | Request ID: 3GHR', and a 'More Actions' dropdown menu. Below this, there are sections for 'Request Details', 'Print/Share', and 'Attachments'. A dropdown menu is open, showing options: 'Request', 'Edit Request Header', 'Request Timeline', and 'Audit Trail'. The 'Request Timeline' option is highlighted. Below the dropdown, there are buttons for 'Edit', 'Delete', and 'Allocate'. A table at the bottom shows the request details with columns for 'Date', 'Amount', and 'Requested'. The table contains one row with the date '09/28/2022', an amount of '\$20.00', and a requested amount of '\$20.00'. A total of '\$20.00' is shown at the bottom of the table.

Date	Amount	Requested
09/28/2022	\$20.00	\$20.00
		\$20.00

Book Travel - There is no time limit on booking once a request has been approved and is in the “Ready to Book” status. However, it is recommended that booking is done immediately (since prices for flights, hotel reservations and conference registration tend to increase rapidly)



**NOTE:** Make sure the booking is done through the “Book Travel” link and not from the Travel section. Concur will generate Itinerary and confirmation when booking is completed.



# BOOKING TRAVEL

## NEED HELP WITH CONCUR?

Please email the Norco College Concur Team  
ConcurQuestions@norcocollege.edu

You can also visit

[www.norcocollege.edu/concurtraining](http://www.norcocollege.edu/concurtraining)



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