

Concur Training: New User Interface (UI) Coming to RCCCD October 1, 2022

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September 8, 2022



**NORCO
COLLEGE**

SAP Concur : Travel & Expense

What is New?

REQUESTS

How to Access Concur

Updating Your Travel Profile

Creating/Submitting Travel Requests

Travel Request Review/Approval Process

Booking Travel

EXPENSE REPORTS

Creating/Submitting Expense Reports

Expense Report Approval Process

Student Travel

Monthly Mileage Reports

Reviewing/Approving Expense Reports

Delete, Cancel, Recall or Copy Request and Report

What is New?

- SAP Concur has a new look!
- Segments **tab** not available in the Request side
- Airfare and hotel reservation group budget allocation.
- Drop down menus added to Request and Report Library
- Reports show segments and expenses
- Reports can be emailed



NORCO
COLLEGE

How to Access Concur

MyApps Portal – Single Sign-On (SSO)

<https://myapplications.microsoft.com>

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

MyApps Portal - Single Sign-On (SSO) Portal



Outlook



People



Photoshelter Libris



Planner



Power Apps



Power Automate

Click
on the
Concur
icon



Power BI



PowerPoint



Project



RCCD Printing &
Graphics



RCCD Service Desk



RCCD VDI



SAP Concur Travel
and Expense



SharePoint



Staff Notebook



Stream



Sway

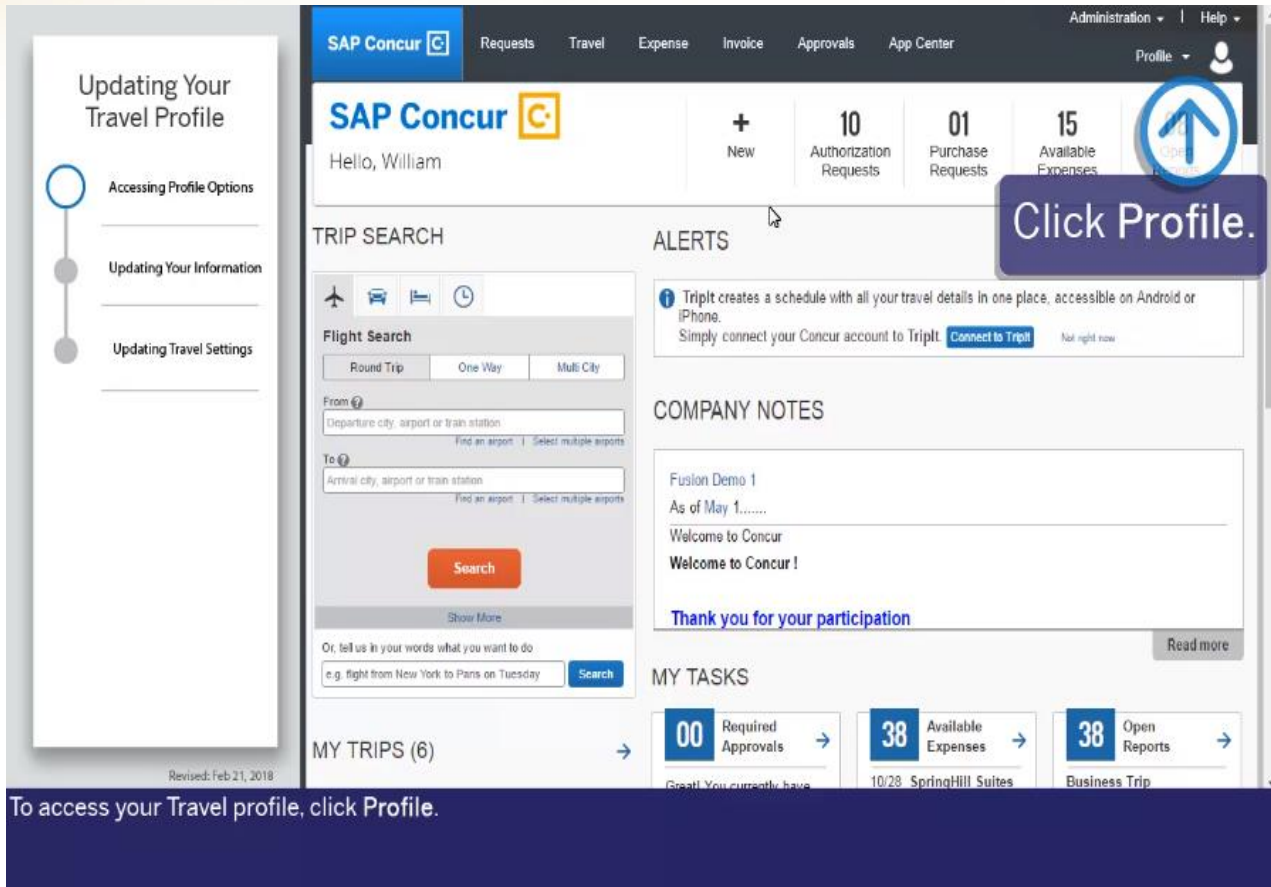


Teams

Updating Your Travel Profile

UPDATING YOUR TRAVEL PROFILE

PROFILE > PROFILE SETTINGS



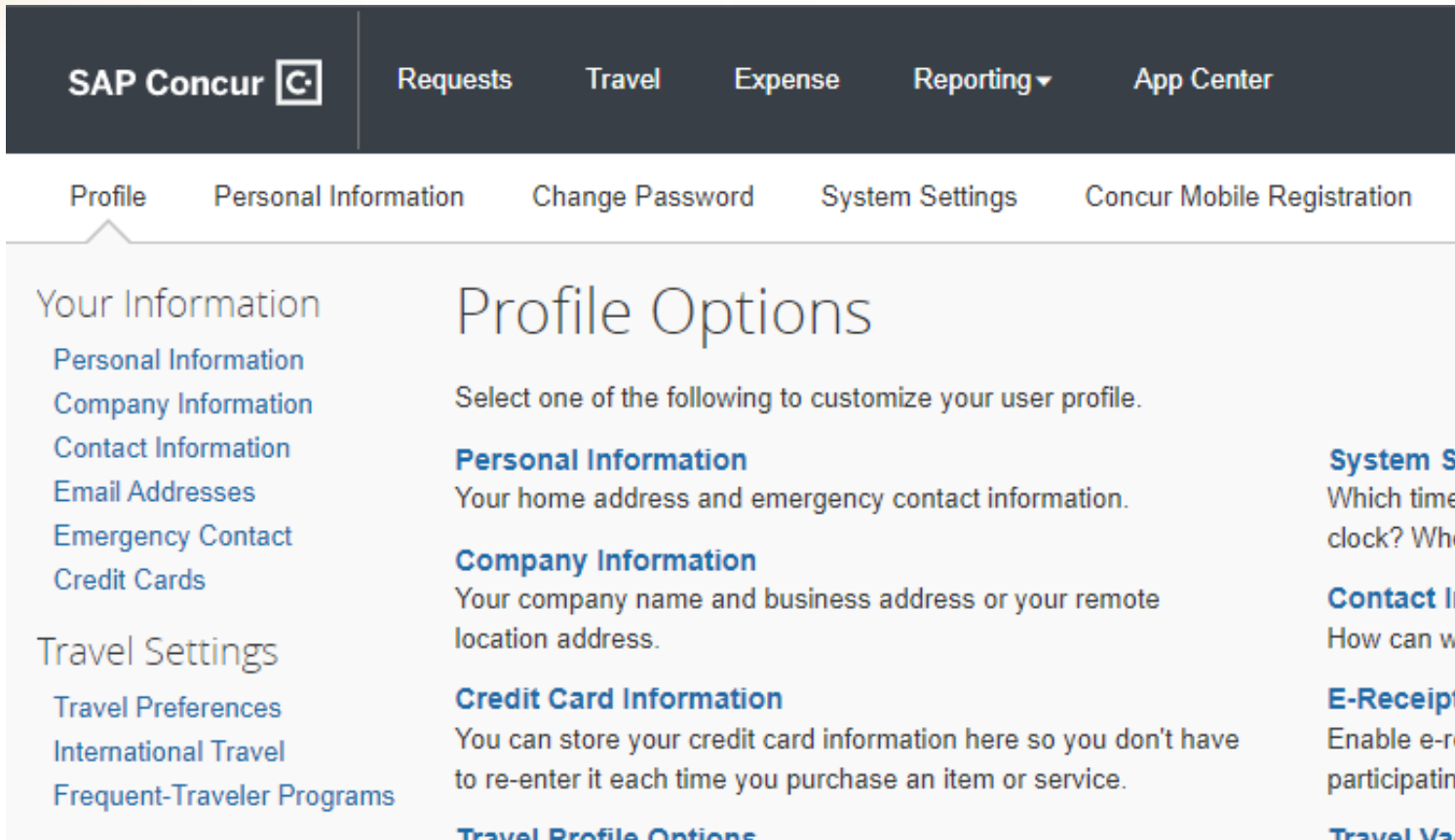
The screenshot shows the SAP Concur user interface. On the left, a sidebar titled 'Updating Your Travel Profile' has three steps: 'Accessing Profile Options' (highlighted), 'Updating Your Information', and 'Updating Travel Settings'. The main dashboard includes a navigation bar with 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. A user greeting 'Hello, William' is shown. A summary bar displays '10 New Authorization Requests', '01 Purchase Requests', and '15 Available Expenses'. A blue callout box with an upward arrow icon and the text 'Click Profile.' points to the 'Profile' dropdown menu in the top right. Below the navigation bar, there are sections for 'TRIP SEARCH' (with flight search filters and a 'Search' button), 'ALERTS' (with a notification about connecting to TripIt), 'COMPANY NOTES' (with a welcome message), and 'MY TASKS' (with '00 Required Approvals', '38 Available Expenses', and '38 Open Reports').

To access your Travel profile, click Profile.

Before you enter a travel request

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

UPDATING YOUR TRAVEL PROFILE



The screenshot shows the SAP Concur user interface. At the top is a dark navigation bar with the SAP Concur logo and menu items: Requests, Travel, Expense, Reporting (with a dropdown arrow), and App Center. Below this is a lighter navigation bar with links for Profile, Personal Information, Change Password, System Settings, and Concur Mobile Registration. The main content area is titled 'Profile Options' and includes a sub-header 'Your Information' with a list of links: Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, and Credit Cards. Under 'Travel Settings', there are links for Travel Preferences, International Travel, and Frequent-Traveler Programs. The 'Profile Options' section contains the text: 'Select one of the following to customize your user profile.' followed by three sections: 'Personal Information' (Your home address and emergency contact information.), 'Company Information' (Your company name and business address or your remote location address.), and '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.).

PROFILE > PROFILE SETTINGS

Profile options may look different due to access provided

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

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

UPDATING YOUR TRAVEL PROFILE

The next section is your **Company Information** and should also already be pre-populated with your Employee ID and the name of your manager.

Verify that the information is correct. If you notice any errors, contact your local Concur administrator.

Company Information

Employee ID

Manager 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**]	Work Extension	Work Fax
1 425 590 4567	<input type="text"/>	<input type="text"/>
2nd Work Phone/Remote Office	Home Phone [Required**]	
	1 425 590 4567	

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

UPDATING YOUR TRAVEL PROFILE

Work Address

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

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

UPDATING YOUR TRAVEL PROFILE

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

Email Addresses

Please add at least one email address.

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

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

UPDATING YOUR TRAVEL PROFILE

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

With your verified email address, you can:

- Forward travel plans to plans@concur.com to have reservations added to your trips.
- Forward your receipt images to receipts@concur.com to have your receipts uploaded into your Available Receipts. **Please note: Itemized receipts are required.**

Note: *When you use the AmEx Go credit card, the credit card statement for a particular transaction will be automatically uploaded to Concur. **You still need to upload itemized 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
<input type="text" value="Riverside"/>	<input type="text" value="CA"/>	<input type="text"/>
Country/Region	Phone	Alternate Phone
<input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="United States of America"/>	<input type="text"/>	<input type="text"/>

UPDATING YOUR TRAVEL PROFILE

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

Travel Preferences

Eligible for the following discount travel rates/fare classes

AAA/CAA Government Military Senior/AARP

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


Air Travel Preferences ⓘ

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

UPDATING YOUR TRAVEL PROFILE

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

Hotel Preferences


Room Type Smoking Preference Message to Hotel Vendor 

Double Non-smoking Foam pillows Rollaway bed Crib

I prefer hotel that has:

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

Accessibility Needs


 Wheelchair access Blind accessible

Car Rental Preferences

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

Car Type Smoking Preference Car Transmission



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

Message to Car Rental Vendor 

UPDATING YOUR TRAVEL PROFILE

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

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs		
	American Airlines	American Airlines AA Advantage
	HYATT	Hyatt (HY) World of Hyatt

Add Travel Programs

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

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

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

UPDATING YOUR TRAVEL PROFILE

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

Unused Tickets

Southwest Ticket Credits

 [Add Ticket Credit](#)

Add Ticket Credit ×

Southwest Record Locator: Valid Until:

Ticket Amount: Ticket Currency:

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.

Gender [Required]	Date of Birth (mm/dd/yyyy) [Required]	DHS Redress No. 	TSA Pre  Known Traveler Number 
<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>	<input type="text"/>

UPDATING YOUR TRAVEL PROFILE

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

NOTE: The AmEx Go Card assigned to the traveler by the District, is used by the traveler to pay when booking outside of Concur and for meals and incidentals.

When using segments - 01. Book Online- Concur Travel:

- ***The flight will be paid with the District credit card (Citi Card)***
- ***Hotel can be reserved in segments with District CC.***
 - ***Notice: After booking is complete 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.***

When using the expense tab - 02. Book with Agent-Cal Travel Store, OR

03. Book Outside of Concur and Cal Travel Store:

- ***You will need to use your AmEx Go card for all your expenses.***
- ***When you check in/out of the hotel, make sure your Amex Go card is charged.***

UPDATING YOUR TRAVEL PROFILE

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

International Travel: Passports and Visas Go to top

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

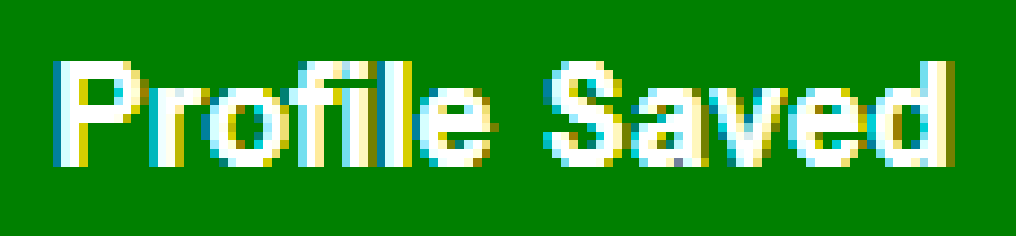
Passports + Add a Passport

I do not have a passport

International Visas + Add a Visa

UPDATING YOUR TRAVEL PROFILE

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



Profile Saved

Creating/Submitting Travel Requests

CREATING/SUBMITTING TRAVEL REQUESTS

BEFORE YOU START A TRAVEL REQUEST

1. Get an agenda and estimate cost of the conference.
 - Are flying or driving?
 - How much is the conference registration?
 - Is breakfast lunch and dinner included in the conference? 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?

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
3. Is this a group conference? Use the **Event Request** feature
4. How are you booking your travel?

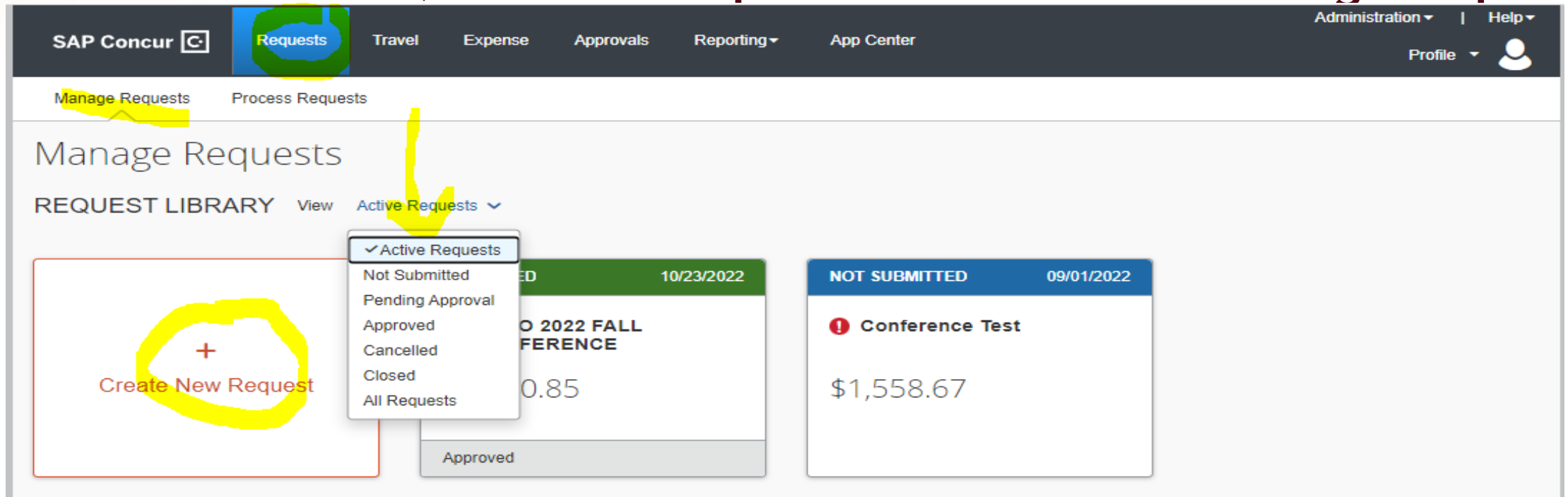
CREATING/SUBMITTING TRAVEL REQUESTS

How will you book your travel? SUMMARY

01. Book Online with Concur	Segments (Via Travel Store) Air Ticket Hotel Reservation Car Rental
02. Book with Agent –Cal Travel Store	-Group Travel -Air tickets, Hotel Reservation and Car Rental. (Student travel) -Multiple Stops and other complicated variations -Personal travel dates
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, click on **Requests** from the Concur home page.
Then, click **New Request** from underneath **Manage Requests**...



Note: The request library is located in the front page and you have options to search travel requests from the dropdown menu.

CREATING/SUBMITTING TRAVEL REQUESTS

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

CREATING/SUBMITTING TRAVEL REQUESTS

Click **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).

Create New Request

Request/Trip Name * Management Essentials

How will you book your travel? * 01. Book online - Concur Travel

Business Trip Start Date * 10/20/2022

Business Trip End Date * 10/20/2022

Request/Trip Purpose * Professional Development

Paid for by an outside entity? * No

Destination City * San Joaquin, California

Out of State and beyond 500 miles? * No

Destination Country

Traveler Type * Administrator

Does this trip contain personal travel? * No

Personal Dates of Travel

Additional Information
San Joaquin Delta College

Fund * (11) 11 - UNRESTRICTED GENERAL FUND

School * (EDB) BUSINESS OPERATIONS - NORCO

Resource * (1000) 1000 - GENERAL FUND

Project Year * 0

Goal * 6729

Function * (0000) CAMPUS ADMINISTRATIVE SERVICES

Group
NC

Comment

Create Request

Click Create Report >>>>>>

If you are using a different budget other than the default budget, please update it here. Please note: the expense will be encumbered in Galaxy in this GL account

Add Expected Expense in the Next Screen

Add Expected Expense ✕

- Car Rental
- Parking
- Railway Ticket
- Train
- 03. Mileage
- 04. Meals
- ▼ 05. Fees
 - Conference Registration Fees/Agenda
- 06. Other Travel Expenses
- ▼ 09. Non-Employee (Student, Guest) Expenses
 - Non-Employee Airfare
 - Non-Employee Charter Bus
 - Non-Employee Lodging
 - Non-Employee Meals
 - Non-Employee Other Travel Expenses

NOTE: SEGMENTS TAB NO LONGER EXIST IN THE NEW UI

When using the segments expected expense, (booking online with concur), your **Request Printed Report** will show the segments



- Segments:
- Air Ticket
 - Hotel Reservation
 - Car Rental

RCCD Request Printed Report ✕

Request: 6725
 *Function: CAMPUS ADMINISTRATIVE SERVICES (0000)
 *Out of State?: No
 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-6726-0000-11-1000-0

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: Abejas, Esmeraldas (09/02/2022): two nights.
 Allocations: 100% (\$400.00) EDB-6726-0000-11-1000-0

Expenses

Request/Trip Start Date	Expense Type	Entry Description	Amount	Amount
10/20/2022	Airfare		\$400.00	\$400.00

Close [Print](#) [Save as PDF](#) [Email](#)

CREATING/SUBMITTING TRAVEL REQUESTS

Book with Concur

The screenshot shows the 'New Expense: Air Ticket' form in SAP Concur. The form is titled 'New Expense: Air Ticket' and has 'Round Trip', 'One Way', and 'Multi City' tabs. 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 includes fields for 'Date' (MM/DD/YYYY), 'Depart at' (hh:mm A), and 'Comment'. At the bottom, there are fields for 'Amount' and 'Currency' (US, Dollar). A 'Save' button is visible at the bottom left.

Book Outside of Concur- Expense type

The screenshot shows the 'New Expense: Airfare' form in SAP Concur. The form is titled 'New Expense: Airfare' and has an 'Allocate' icon. It includes fields for 'Request/Trip Start Date', 'Request/Trip End Date', 'Paid for by an outside entity?' (None Selected), 'Description', 'Transaction Amount', 'Currency' (US, Dollar), and 'Comment'. A 'Save' button is visible at the bottom left.

NOTE THE DIFFERENCE?

Segments:

- Air Ticket
- Hotel Reservation
- Car Rental

Expense Type:

- Airfare
- Hotel
- Car Rental
- Mileage
- Fees
- Other Travel Expenses

CREATING/SUBMITTING TRAVEL REQUESTS

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

Be advise, the red exclamation sign ! is a hard stop and it won't let you submit until the issue is fixed.

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

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

Expense type	Details
<input checked="" type="checkbox"/> Air Ticket	Santa Ana (SNA) - Sacramento (MCC) : Round Trip
<input checked="" type="checkbox"/> Hotel Reservation	San Joaquin, California
<input type="checkbox"/> 04. Meals	
<input type="checkbox"/> Conference Registration Fees/Agenda	
<input type="checkbox"/> 06. Other Travel Expenses	Uber or taxi

THE AIR TICKET AND HOTEL RESERVATION SHOULD HAVE a GROUP BUDGET ALLOCATION

CREATING/SUBMITTING TRAVEL REQUESTS

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.

Allocate

Expenses: 1 | \$50.00

Percent	Amount

Amount \$50.00 Allocated \$50.00
100%

Default Allocation

Code 11-EDB-1000-0-6729-0000

Add Edit Remove Save as Favorite

Allocate

Expenses: 1 | \$50.00

Percent	Amount

Amount \$50.00

Default Allocation

Code 11-EDB-1000-0-6729-0000

Add Edit Remove Save as Favorite

Add Allocation

New Allocation Favorite Allocations

Fund * (11) 11 - UNRESTRICTED GENERAL FUND

School * (EDB) BUSINESS OPERATIONS - NORCO

Resource * (1000) 1000 - GENERAL FUND

Project Year * 0

Cancel Save

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

CREATING/SUBMITTING TRAVEL REQUESTS

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

The image displays three sequential screenshots of the SAP Concur interface for a travel request titled "Management Essentials \$1,060" (Request ID: 3GGV). The request is in a "Submitted & Pending Approval" state. The interface includes a top navigation bar with "Manage Requests" and "Process Request" tabs, and a yellow alert banner indicating "Alerts: 3".

The first screenshot shows the "Request Details" dropdown menu open, listing options: Request, Request Header, Request Timeline, Audit Trail, and Allocation Summary. The "Request" option is highlighted.

The second screenshot shows the "Print/Share" dropdown menu open, listing options: RCCD Request Printed Report and RCCD Request Printed Report with Flow /Trail. The "RCCD Request Printed Report" option is highlighted.

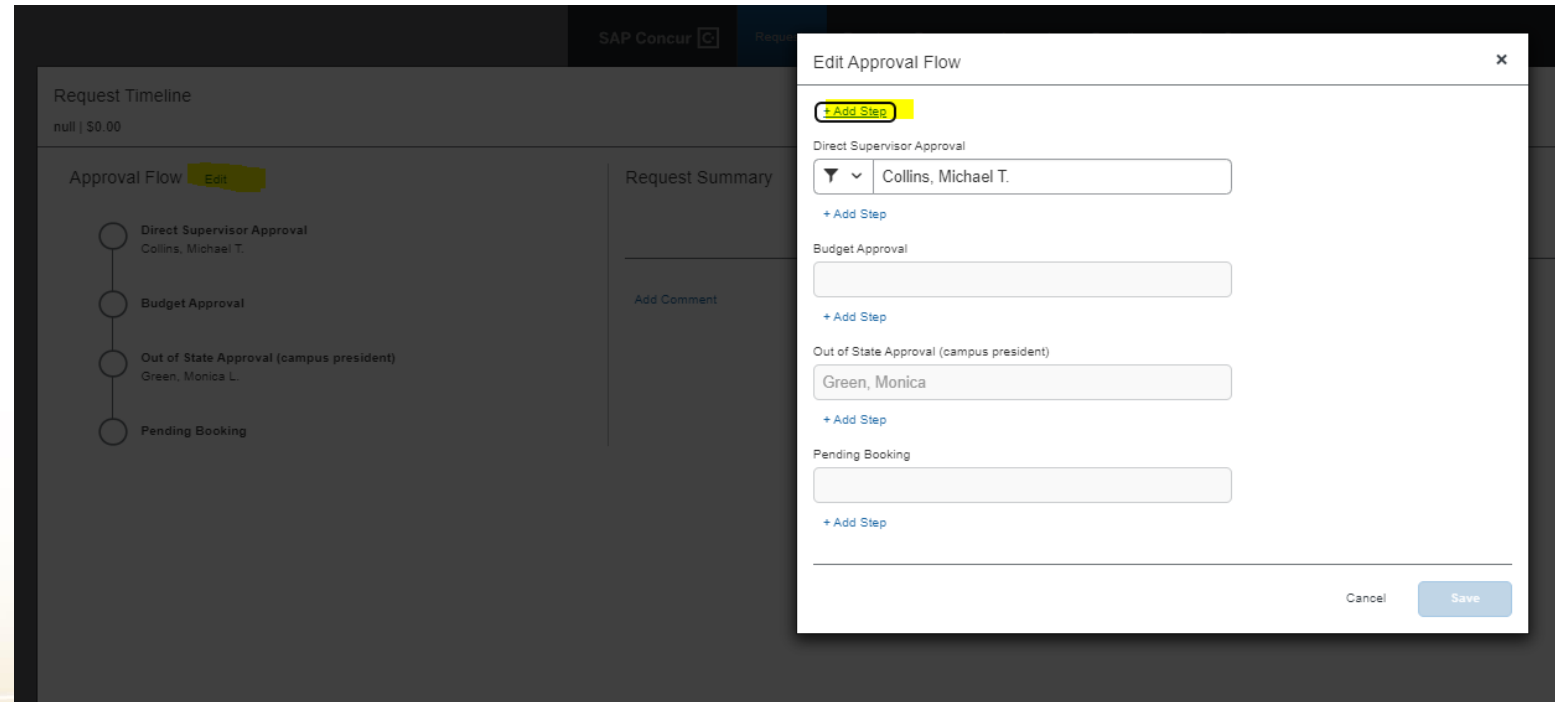
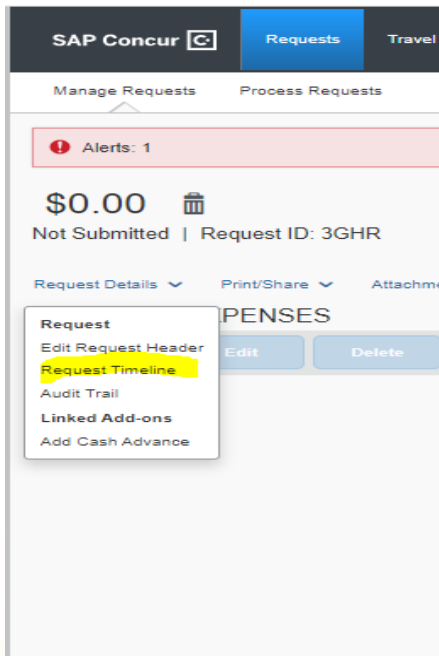
The third screenshot shows the "Attachments" dropdown menu open, listing options: View Documents and Attach Documents. The "View Documents" option is highlighted.

The main content area lists "EXPECTED EXPENSES" with the following items:

Alerts	Expense type
	Air Ticket
⚠	Hotel Reservation
	04. Meals
⚠	Conference Registration Fees/Agenda
	06. Other Travel Expenses

CREATING/SUBMITTING TRAVEL REQUESTS

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



CREATING/SUBMITTING TRAVEL REQUESTS

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 titled "Management Essentials" with a total amount of \$1,060.00. The request is in a "Not Submitted" state with ID 3GGV. The "EXPECTED EXPENSES" section is expanded, showing a table of items with columns for Alerts, Expense type, Details, Date, Amount, and Requested. The items include an Air Ticket, Hotel Reservation, Meals, Conference Registration Fees/Agenda, and Other Travel Expenses, all totaling \$1,060.00.

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

This screenshot shows the "Alerts" section of the SAP Concur interface. It displays three alerts related to the request. The first alert is a yellow warning icon indicating that the user needs to email Purchasingtravel@rccd.edu to request a new AMEX Go Card or funds added to an existing one. The second alert is a yellow warning icon stating that after booking, the user should contact the hotel to request a Credit Card Authorization (CCA) Form. The third alert is a yellow warning icon advising that if the conference vendor does not accept American Express, the user should email Conference Registration payment processing instructions.

CREATING/SUBMITTING TRAVEL REQUESTS

- 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
Allocations : 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 – IF they require one. Complete their form using your AmEx Go Card Information and forward the CCA form back to the hotel

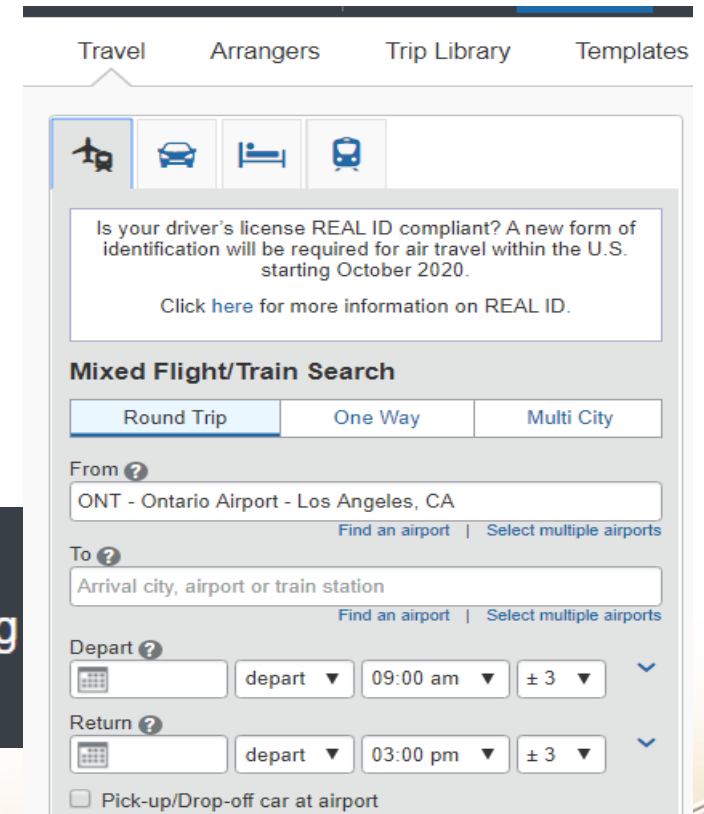
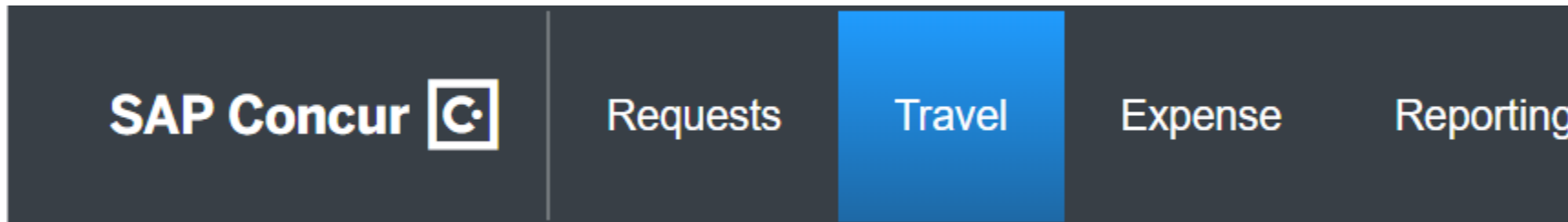
Close Print Save as PDF Email

Report can be printed, saved and emailed.

CREATING/SUBMITTING TRAVEL REQUESTS

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.)



Travel Request Review/Approval Process

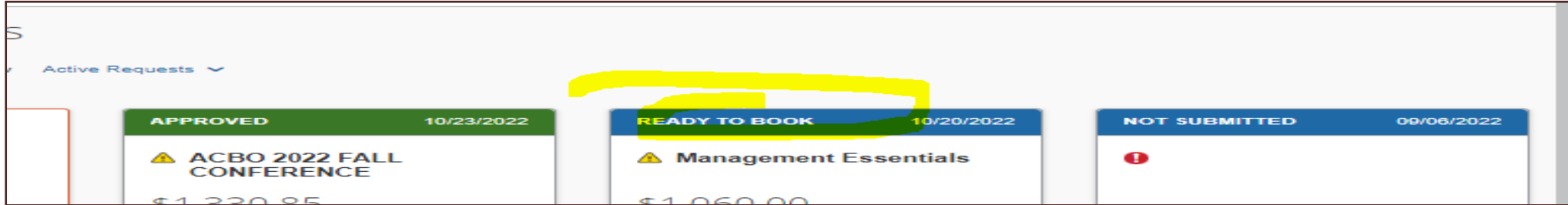
TRAVEL REQUEST REVIEWING/APPROVAL PROCESS

- Travelers have the option to **add additional approvers**, such as Direct Supervisor and or Budget Approver.
- The added budget approver needs to be done **before the TR is submitted** for approval.
- Submit TR for approval.
- Previewer will look for agenda, supervisor approval and budget approval
- The TR routes to: Area VP > VP of Business Services.
- **NOTE: TR can still be approved by the Area VP, if necessary, even if the previewer has not reviewed.**
- Once the TR is approved, the traveler is notified (via email) and can book the travel by clicking the “Book Travel” link.

Booking Travel

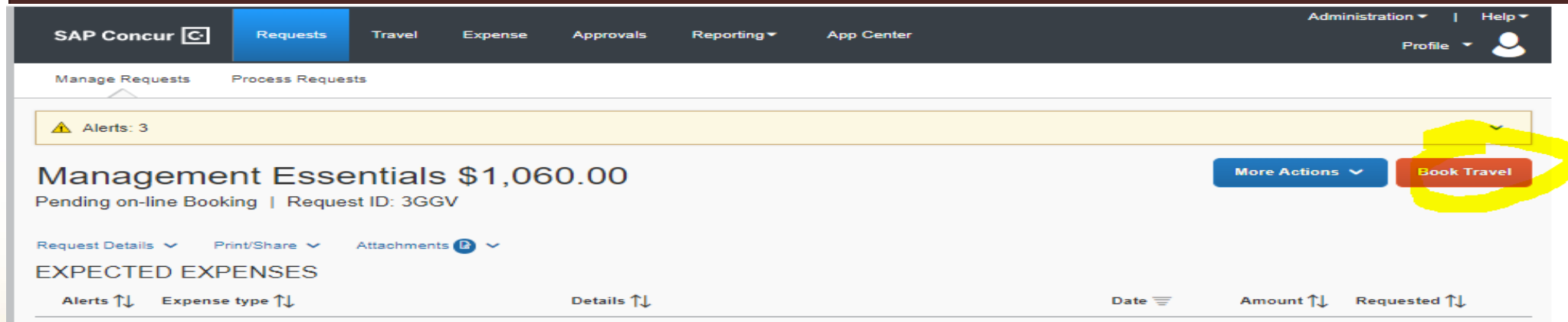
BOOKING TRAVEL

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)



Status	Request Title	Amount	Request Date
APPROVED	ACBO 2022 FALL CONFERENCE	\$1,220.85	10/23/2022
READY TO BOOK	Management Essentials	\$1,060.00	10/20/2022
NOT SUBMITTED			09/08/2022

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.



SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Requests | Process Requests

Alerts: 3

Management Essentials \$1,060.00

Pending on-line Booking | Request ID: 3GGV

More Actions | **Book Travel**

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Alerts ↑↓ | Expense type ↑↓ | Details ↑↓ | Date | Amount ↑↓ | Requested ↑↓

Creating/Submitting Expense Reports

CREATING/SUBMITTING EXPENSE REPORTS

Things to consider when creating your expense reports

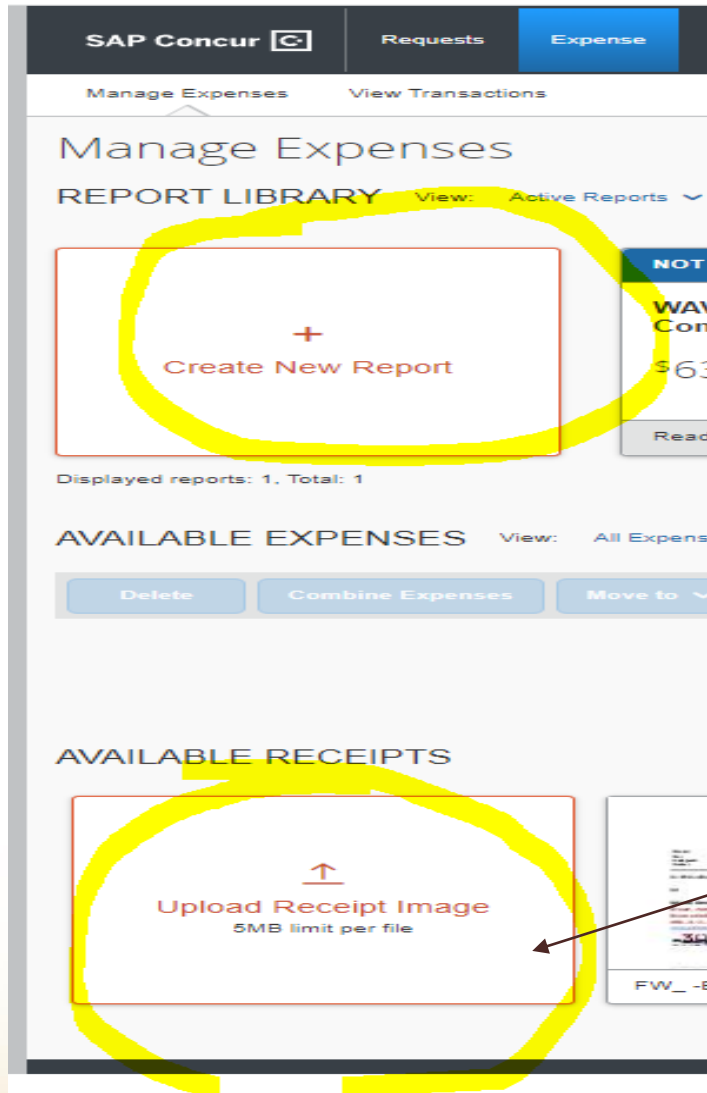
1. Have all the receipts for the travel such as flight, car rental, hotel folio, conference registration, parking, meals, transportation expenses etc., **uploaded to concur.**
2. Upload agenda to concur.
3. When calculating mileage reimbursement **use the mileage calculator.**
 - Click the **deduct commute** box if traveler started the trip from home, (Please note: the District does not reimburse for home to work mileage.)

CREATING/SUBMITTING EXPENSE REPORTS

Things to consider when creating your expense reports

4. Verify the travel request amount is greater than the actual expenses for the trip.
 - If actual total expenses exceeded the approved amount by more than 10% or more than \$200 then an additional TR for the amount exceeded is required.
5. Don't forget to link the TRs to the expense report.
6. Select the appropriate payment type when preparing your expense report.
 - For flights and car rentals, choose Citibank. (if Segments were used)
 - For hotel and conference registration, meals, etc., choose AmEX Go
 - For expenses paid by the traveler, choose Out of Pocket
 - For expenses paid by Accounts Payable, choose other entity

CREATING/SUBMITTING EXPENSE REPORTS



Create From an Approved Request

The 'Create New Report' form is shown with a yellow highlight on the 'Create From an Approved Request' option. The form contains several fields: 'Report/Trip Name', 'Report/Trip Business Start Date' (MM/DD/YYYY), 'Report/Trip Business End Date' (MM/DD/YYYY), 'Report/Trip Purpose' (None Selected), 'Traveler Type' (None Selected), 'Paid for by an outside entity?' (None Selected), 'Does this trip contain personal travel?' (None Selected), 'Personal Travel Dates', 'Additional Information', 'Report Total', 'Fund' (Search by Text), 'School' (Search by Text), 'Resource' (1), 'Project Year' (None Selected), 'Goal' (2), 'Function' (3), and 'Comment'.

Receipts can also be uploaded here.

CREATING/SUBMITTING EXPENSE REPORTS

1. Click **Requests, Manage Requests**,
2. Select desired TR for Expense Report to be submitted.
3. Click **Create Expense Report**.

This process automatically links the TR with the Expense Report.(recommended)

The screenshot displays the SAP Concur interface for an expense report. At the top, there is a yellow alert bar with a warning icon and the text 'Alerts: 4'. Below this, the main header shows 'IE/DRC Annual Planning Retreat \$250.00' in a large font. To the right of the header are two buttons: 'More Actions' (blue) and 'Create Expense Report' (orange). Below the header, the status is 'Approved' and the 'Request ID: 3FT9' is highlighted in yellow. There are three menu items: 'Request Details', 'Print/Share', and 'Attachments'. A 'REPORTS: 1' box contains a table with two columns: 'Amount' and 'Remaining'. The 'Amount' is \$48.95 and the 'Remaining' is \$201.05. Below this is the 'EXPECTED EXPENSES' section with a table. The table has columns for 'Alerts', 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. A single row is visible with a warning icon, 'Conference Registration Fees/Agenda', '06/28/2022', '\$0.00', and '\$0.00'.

Alerts	Expense type	Details	Date	Amount	Requested
	Conference Registration Fees/Agenda		06/28/2022	\$0.00	\$0.00

CREATING/SUBMITTING EXPENSE REPORTS

The screenshot shows the SAP Concur interface for an expense report titled "Wheelhouse Leadership Summit \$0.00". The report is in a "Not Submitted" state. A callout box with a red border points to the "REQUEST" summary table, containing the following data:

REQUEST	
Approved	Remaining
\$2,400.00	\$1,150.14

Below the table is a row of action buttons: "Add Expense", "Edit", "Delete", "Copy", "Allocate", "Combine Expenses", and "Move to". At the bottom, it says "No Expenses" and "Add expenses to this report to submit for reimbursement."

Check the approved amount is greater than the actual expenses.

The screenshot shows the "Add Expense" modal window overlaid on the expense report page. The modal has a header "Add Expense" and a sub-header "0 Available Expenses". A button labeled "Create New Expense" with a "+" icon is highlighted with a red box. Below this is a search bar "Search for an expense type" and a list of expense types under "Recently Used" and "01. Travel Expenses".

4. Click on [Add Expense](#).

CREATING/SUBMITTING EXPENSE REPORTS

Make sure you add all expenses related to the conference/travel not only the ones claimed as personal

The screenshot shows the SAP Concur 'New Expense' form. The 'Expense Type' is set to 'Train'. The 'Transaction Date' is in MM/DD/YYYY format. The 'Report/Trip Purpose' is 'Conference Attendee'. The 'Payment Type' is 'Out of Pocket'. The 'Currency' is 'US, Dollar'. There is a 'Comment' field and a 'Upload Receipt Image' button. The form has tabs for 'Details' and 'Itemizations'.

1. When uploading AmEx Go activity statement, most of the information will be automatically filled out.
2. If claiming out of pocket expenses, please fill out the information completely.
3. All fields with red asterisks are required to be completed
4. Add notes to clarify purchase
5. Make sure you **Add Itemized Receipts**

CREATING/SUBMITTING EXPENSE REPORTS

5. Add Receipts to each expense, use the **Manage Receipts > Manage attachments**

- Delete existing documents
- Append new receipts and
- Open existing documents

The screenshot displays the SAP Concur Expense Report interface. At the top, there are tabs for 'Requests' and 'Expense'. Below this, there are options to 'Manage Expenses' and 'View Transactions'. A notification bar shows 'Alerts: 2'. The main heading is 'WAVES Annual Training Conference \$632.06' with a status of 'Ready For Review'. Below the heading, there are options for 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'REQUEST' summary shows 'Approved \$2,416.35' and 'Remaining \$1,019.13'. There are buttons for 'Add Expense', 'Edit', and 'Delete'. Below these are icons for 'Alerts', 'Comments', and 'Receipts'. A modal window is open, showing an email receipt from Southwest Airlines. At the bottom of the modal, there are three buttons: 'Delete', 'Append', and 'Open'. The 'Append' button is highlighted with a yellow circle.

CREATING/SUBMITTING EXPENSE REPORTS

The screenshot shows the SAP Concur Expense Report Library interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense' (highlighted in green), and 'Approvals'. Below these are sub-tabs for 'Manage Expenses', 'View Transactions', and 'Process Reports'. The main heading is 'Manage Expenses'. Underneath, there's a 'REPORT LIBRARY' section with a 'View: Active Reports' dropdown. A large red box with a plus sign and the text 'Create New Report' is visible. To the right, a 'NOT SUBMITTED' summary card shows a red warning icon and the text 'September mileage' with a value of '\$0.00'. Below this, it says 'Displayed reports: 2, Total: 2'. The 'AVAILABLE EXPENSES' section has a 'View: AmEx Go Card - XXXX' dropdown. There are buttons for 'Delete', 'Combine Expenses', and 'Move to' (highlighted in green). A yellow highlight is also present under the 'AVAILABLE RECEIPTS' section, which includes an 'Upload Receipt Image' button with a 5MB limit per file.

Before Expense Report is submitted,

1. Review the **Expense Tab**
2. Check **Available Expenses**; AmEx Go and all credit card transactions will be displayed here.
3. Ensure all CC transactions for a given request have been linked.
4. If not, select the available expense and
5. Click **Moved to** and select the expense report from the drop down menu to move the transaction.

CREATING/SUBMITTING EXPENSE REPORTS

The screenshot shows the SAP Concur interface for an expense report. At the top, there are navigation tabs for 'Requests' and 'Expense', with 'Expense' selected. The user is logged in as 'Deasis, Mark J'. Below the navigation, there are tabs for 'Manage Expenses' and 'View Transactions'. A yellow alert banner indicates 'Alerts: 2'. The main title of the report is 'WAVES Annual Training Conference \$632.96', with a status of 'Ready For Review'. There are 'Copy Report' and 'Submit Report' buttons. Below the title, there are dropdown menus for 'Report Details', 'Print/Share', and 'Manage Receipts'. A summary box shows 'REQUEST Approved \$2,416.35' and 'Remaining \$1,019.13'. A yellow circle highlights the 'Remaining' amount, with an arrow pointing to a text box on the right. Below the summary, there are buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. At the bottom, there is a table with columns for 'Alerts', 'Comments', 'Receipt', 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. The table contains one row for an 'Out of Pocket' expense of '\$632.96' for 'Airfare' from 'Southwest Airlines' on '04/27/2022'.

If the remaining amount is not close to zero, you might be missing an expense type in the expense report

CREATING/SUBMITTING EXPENSE REPORTS

The Current Norco College expense report approval process follows School-Goal-Function

Approver Type	Approver Ty	Approver Name	Level	Is Ac	Group	Schoo	Goal	SPP
Report Cost Object	CO_REPORT	Lee, Virgil James	1	Yes	ACADEMIC SENATE - NORCO-6015-6000 - CALIFORNIA TEACHERS' ASSOCIATION	EAG	6015	6000
Report Cost Object	CO_REPORT	Lee, Samuel T	2	Yes	ACADEMIC SENATE - NORCO-6015-6000 - CALIFORNIA TEACHERS' ASSOCIATION	EAG	6015	6000
Report Cost Object	CO_REPORT	Romero-Tang, Maria Fe	3	Yes	ACADEMIC SENATE - NORCO-6015-6000 - CALIFORNIA TEACHERS' ASSOCIATION	EAG	6015	6000
Report Cost Object	CO_REPORT	Abejar, Esmeralda	4	Yes	ACADEMIC SENATE - NORCO-6015-6000 - CALIFORNIA TEACHERS' ASSOCIATION	EAG	6015	6000

EXPENSE REPORT APPROVAL PROCESS

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

Program/Area Budget Director
For expense approval

Area VP where funding resides
For expense approval

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



Travel Auditor
Financial and Technical Analyst & Accounting Services Clerk

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

Director, College Business Services
For final review and approval



Student Travel

STUDENT TRAVEL

1. Create New Request.
2. How will you book your Travel? - Select **02. Book with Agent-Cal Travel Store**
3. Traveler Type- Select **Non-Employee (Guest/Chaperone)**

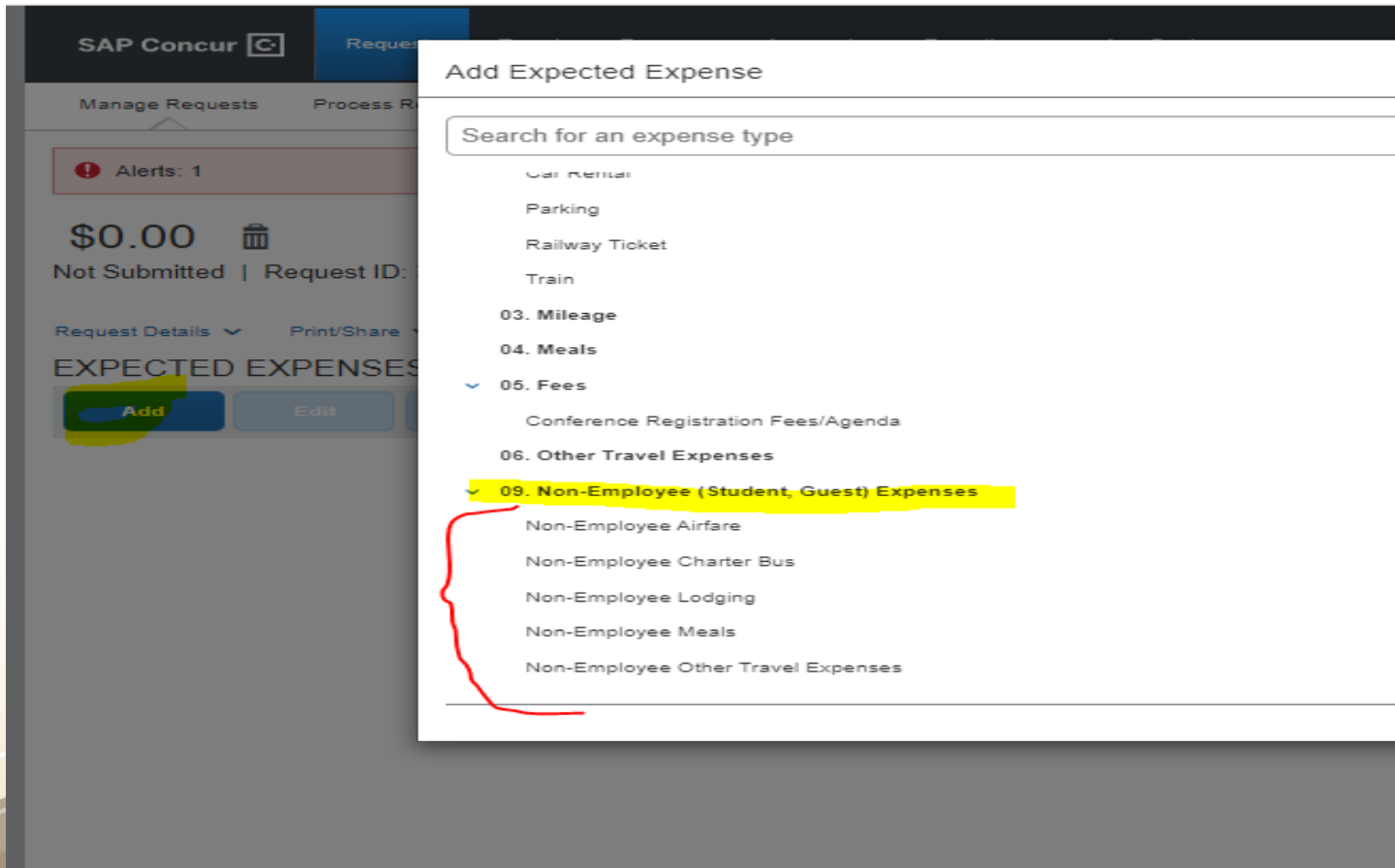
The screenshot shows the 'Edit Request Header' page in SAP Concur. The form is for a travel request with ID 3GHR. Key fields and their values are:

- Request/Trip Name: ASNC Travel
- Request/Trip Purpose: Conference Attendee
- Destination Country: UNITED STATES (US)
- Traveler Type: Non-Employee (Guest/Chaperone)
- How will you book your travel?: 02. Book with Agent - Cal Travel Store
- Paid for by an outside entity?: No
- Does this trip contain personal travel?: No
- Business Trip Start Date: 09/26/2022
- Business Trip End Date: 09/28/2022
- Destination City: Sacramento, California
- Out of State and beyond 500 miles?: None Selected

Chaperones do not need to enter a separate TR for zero dollars unless they are claiming expenses

STUDENT TRAVEL

4. When Adding Student Related Expected Expenses select **ONLY** from:
09. Non-Employee (Student, Guest) Expenses list



- Counselors, Advisors and Directors can enter student travel as Chaperones.
- Students Do not have a profile set up in Galaxy, therefore, individual Student Travel can not be submitted in Concur.

STUDENT TRAVEL

ASNC Student Travel, Required steps

1. Traveler/delegate must update the request header budget string and each individual expense to reflect GL account 11-EZK-1000-0-6960-0501
2. Add a Comment referencing the AS Budget or Trust Account charging the travel.
3. Add the approval workflows
For ASNC Budget accounts, follow the requisition procedure.
For Trust Accounts refer to the approvals listed on the Trust.

Please note: It is not recommended to intermingle the general budget with an ASNC account, they have different workflows and it will be difficult to reconcile

STUDENT TRAVEL

When TR is fully approve, please call **CalTravelStore at 877-454-8785** to book airfare for all attendees.

The screenshot shows the SAP Concur interface for creating a new expense request. The title is "New Expense: Non-Employee Airfare \$5,000.00" with a date of 09/26/2022. The form includes fields for "Request/Trip Start Date" (09/26/2022) and "Request/Trip End Date" (09/28/2022). The "Paid for by an outside entity?" dropdown is set to "No". The "Transaction Amount" is 5,000.00 and the "Currency" is "US, Dollar". There is a "Comment" field at the bottom. The "Save" button is highlighted in blue.

- Make sure you add the student names to the TR.
- Have the students names and last names ready
- Have students birth dates ready when calling CalTravelStore.
- Student Roster is needed for Expense Report purposes.

*Send the list of names of students traveling and the TR number to Controller [John Geraghty](#) for AmEx Go reconciliation purposes

Make sure you select an approved vendor from the approved vendor list for bus transportation.

The screenshot shows the SAP Concur interface for creating a new expense request for a charter bus. The title is "New Expense: Non-Employee Charter Bus" with a date of 09/26/2022. The form includes fields for "Request/Trip Start Date" and "Request/Trip End Date". The "Paid for by an outside entity?" dropdown is set to "None Selected". The "Transaction Amount" is empty and the "Currency" is "US, Dollar". The "Approved Vendor?" dropdown is open, showing a list of vendors: "None Selected", "ALLIANCE BUS LINES, INC.", "CALIFORNIA BUS SERVICE (Shalimar Inc.)", "CERTIFIED TRANSPORTATION SERVICES, INC.", and "H & L CHARTER COMPANY, INC.". The "Save" button is highlighted in blue.

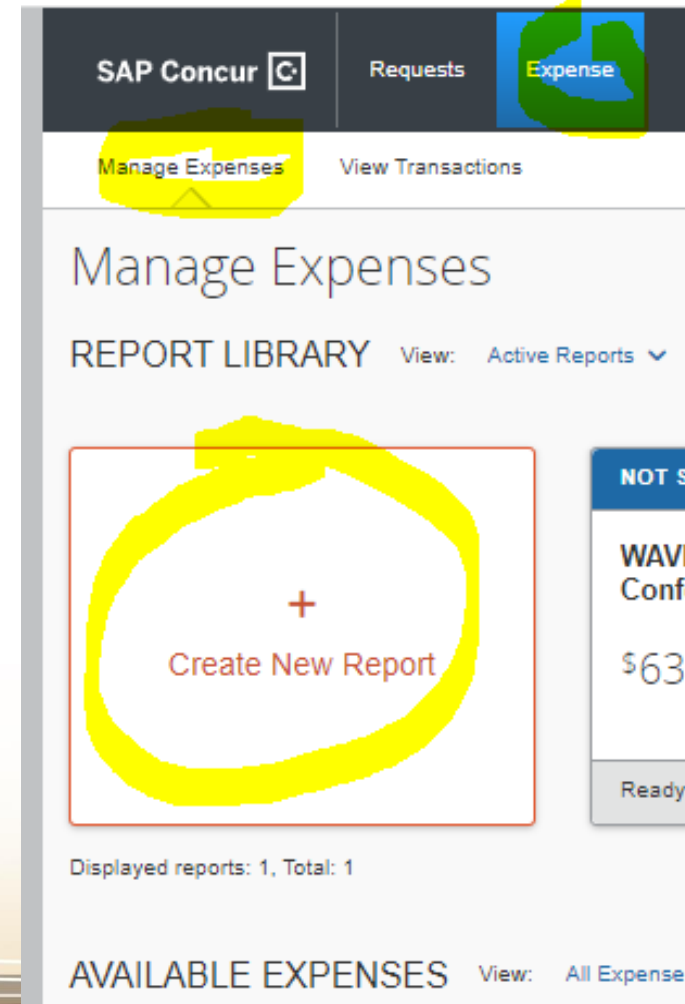
- Upload quote from Bus Company
- Add as much information as possible about the travel in the comment box. (destination, departure and return date, etc.)

Monthly Mileage Reports

MONTHLY MILEAGE REPORTS

To create a Monthly Mileage Report:

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



MONTHLY MILEAGE REPORTS

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

Create New Report

Create From an Approved Request

Report/Trip Name * September Mileage

Report/Trip Business Start Date * 09/01/2022

Report/Trip Business End Date * 09/30/2022

Report/Trip Purpose * Conference Attendee

Traveler Type * Faculty

Paid for by an outside entity? No

Does this trip contain personal travel? * No

Personal Travel Dates

Additional Information

Report Total

Fund * (11) 11 - UNRESTRICTED GENERAL FUND

School * (EDB) BUSINESS OPERATIONS - NORCO

Resource * (1000) 1000 - GENERAL FUND

Project Year * 0

Goal * 6729

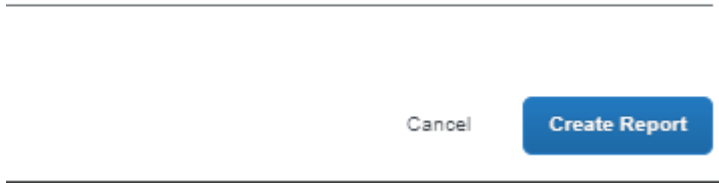
Function * 0563

Comment

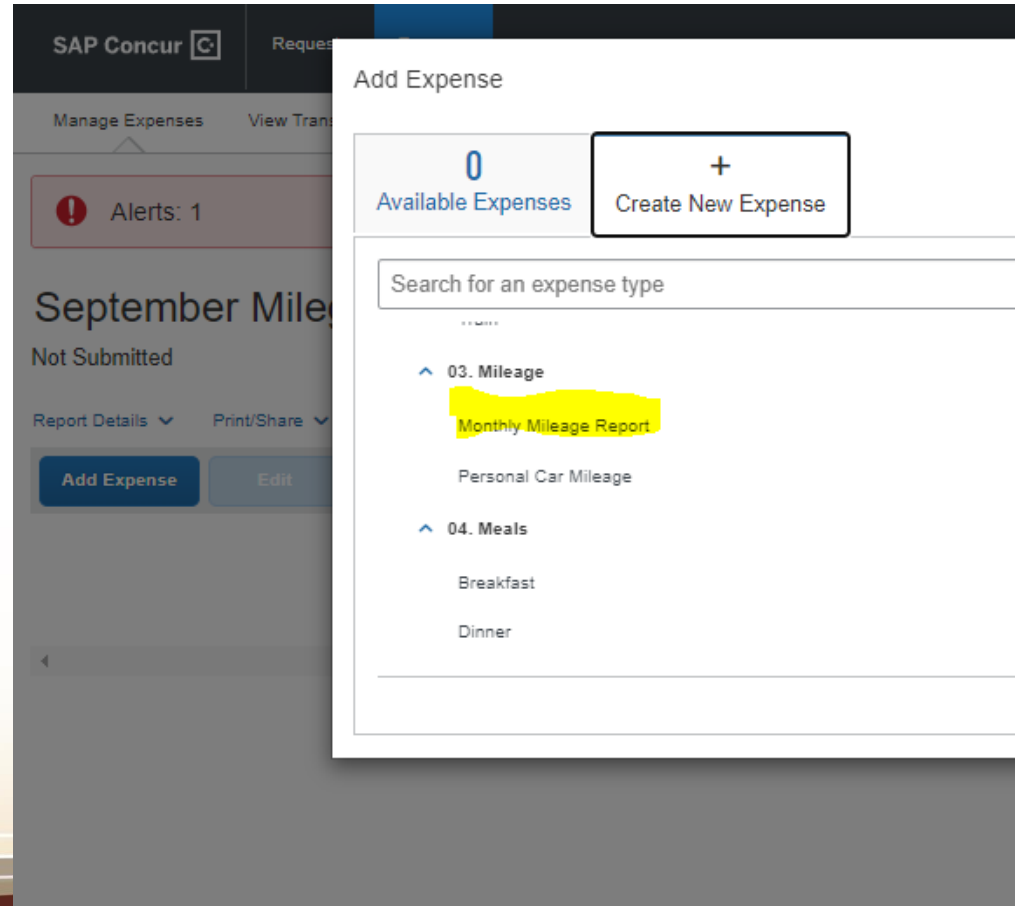
Cancel Create Report

MONTHLY MILEAGE REPORTS

4. Click the **Create Report** Button at the bottom of the page



5. Click Add Expense and under **03. Mileage,** click **Monthly Mileage Report**



MONTHLY MILEAGE REPORTS

6. Fill out the required fields

7. Click **Mileage Calculator** to add actual mileage

The screenshot displays the SAP Concur 'New Expense' form. The 'Expense Type' is set to 'Monthly Mileage Report'. The 'Transaction Date' is '09/02/2022' and the 'Purpose of the Trip' is 'meeting'. The 'From Location' is 'norco college' and the 'To Location' is '3801 Market street riverside ca'. The 'Payment Type' is 'Out of Pocket'. The 'Distance' is '0' and the 'Amount' is '0.00'. The 'Currency' is 'US, Dollar' and the 'Reimbursement Rates' are 'USD 0.625 per mile'. The 'Mileage Calculator' button is highlighted in yellow. The 'Comment' field contains the text 'add comments if necessary'. The form includes 'Save Expense', 'Save and Add Another', and 'Cancel' buttons at the bottom.

MONTHLY MILEAGE REPORTS

Using the Mileage Calculator, Enter FROM and TO locations,

The screenshot shows the 'Mileage Calculator' interface. At the top, there are checkboxes for 'Avoid Tolls' and 'Avoid Highways'. Below that is a 'Waypoints' section with four entries: A (2001 Third St, Norco, CA 92880, USA), B (3801 Market Street, Riverside, CA 9250), C (2001 Third St, Norco, CA 92880, USA), and D (empty). To the right of waypoints A, B, and C are distance and 'Personal' checkboxes: 17.2 MI Personal, 16.9 MI Personal, and 16.9 MI Personal. A 'Calculate Route' button is below the waypoints. The 'Deducted Commute Distance' section shows 'Home' (2001 Third St, Norco, CA 92880, USA) and 'Office' (2001 Third Street, Norco, CA 92880, US) with a 3.5 MI distance and a 'Deduct Round Trip' checkbox. The 'Directions' section at the bottom shows a 'Deduct Commute' checkbox checked and a summary table:

	TOTAL PERSONAL	TOTAL BUSINESS
<input checked="" type="checkbox"/> Deduct Commute	3.5 MI	30.6 MI

***DEDUCT COMMUTE APPLIES WHEN TRAVELING DURING SCHEDULED WORK DAYS.**

- The **Mileage Calculator** will auto-populate the waypoints based on the locations you entered.
- Click **Make Round Trip** to include mileage back from the meeting.
- Click **Deduct Commute** if the trip started from home.
- Click **Deduct Round Trip** If the trip started from home and you returned home at the end of the conference (You did not go to work site at all)

MONTHLY MILEAGE REPORTS

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

2001 Third St, Norco, CA 92860, USA 17.1 MI
3801 Market Street, Riverside, CA 9250 Personal

Calculate Route Make Round Trip

Directions

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

2001 Third St, Norco, CA 92860, USA

17.2 mi. About 23 mins

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

Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	17.1 MI


Map

Map data ©2019 Terms of Use Report a map error




Add Mileage to Expense Cancel


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









MONTHLY MILEAGE REPORTS

September Mileage Report \$0.00  Copy Report Submit Report

Not Submitted

Report Details  Print/Share  Manage Receipts 

Add Expense Edit Delete Copy Allocate Combine Expenses Move to 

<input type="checkbox"/>	Comments 	Receipt 	Payment Type 	Expense Type 	Vendor Details 	Date 	Requested 
<input type="checkbox"/>			Out of Pocket	Monthly Mileage Report		09/02/2022	\$0.00
							\$0.00

9. Verify the mileage in the **Distance: Amount** field

10. Click **Save Expense** to add the trip as a mileage expense

11. Click **Save and Add Another** to add additional trips to the Monthly Mileage Report

12. Verify the information in each expense

13. Click **Submit Report**

Reviewing/Approving Expense Reports

REVIEWING/APPROVING EXPENSE REPORTS

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

DELETE, CANCEL, RECALL OR COPY REQUEST OR EXPENSE REPORT

DELETE, CANCEL, RECALL OR COPY REQUEST

Delete

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

Cancel

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

- If cancelled before approval, you will not see the Expense link
- If Request is cancelled after approval but before booking, the Request will be cancelled
- If Request is cancelled after booking, the **Request and the Booking will be cancelled**

Recall

- A user can recall a request, make changes and resubmit.

Copy

- This feature is helpful when the same event information is utilized.

DELETE, CANCEL, RECALL OR COPY **EXPENSE**

Delete

- An Expense Report can only be deleted if it has never been submitted.

Recall and Resubmit

- Traveler can recall Reports to add/delete additional expenses, review and resubmit.

Copy Report

- This feature can be used if additional expenses need to be added, report can be copied, adjusted, reviewed and submitted.



QUESTIONS?

**Please email the Norco College Concur Team
Esmeralda, Maria, Ana or Lenny**



www.norcocollege.edu/concurtraining

NORCO
COLLEGE