

# **Riverside Community College District**

## **SAP Concur**

## **User's Guide**

**Spring 2020**

**(Version 1.3 - 2/21/2020)**

## Table of Contents

<b>Version and Team Members .....</b>	<b>3</b>
<b>Introduction.....</b>	<b>4</b>
<b>Accessing Concur .....</b>	<b>5</b>
<b>Section I: Creating your Travel Profile.....</b>	<b>6</b>
<b>Section II: Instructions for Travelers .....</b>	<b>19</b>
Creating a Travel Request.....	20
Estimating Expenses using Cal Travel Store.....	23
Book online: Concur Travel.....	27
Submitting for Approval.....	36
Book with Agent: Cal Travel Store .....	37
Book Outside of Concur & Cal Travel Store .....	37
Completing the Booking Process .....	38
Contacting Purchasing for Payments.....	44
Delete/Cancel/Recalling/Closing Requests.....	44
<b>Section III: Creating your Expense Reimbursements .....</b>	<b>46</b>
Creating your Expense Reimbursements .....	47
Creating your Monthly Mileage Report .....	55
Using Concur Mobile App .....	58
<b>Section IV: Instructions for Delegates .....</b>	<b>59</b>
Assigning a Delegate .....	60
Acting as a Delegate.....	61
<b>Section V: Instructions for Reviewers/Approvers.....</b>	<b>63</b>
Approving Travel Requests .....	64
Approving Expense Reports.....	67
Approving Mileage Reports .....	70
<b>Appendix.....</b>	<b>72</b>
Icon Legend.....	73

## Version and Team Members

Version 1.3  
Published 2/21/2020

We want to thank all the individuals that have contributed to the Concur project. This project is an organization wide effort to move the Riverside Community College District to a modern paper-less system for travel reimbursement. This project also includes an integrated travel booking component, Travel Store, that allows travelers to directly purchase airline tickets, reserve hotels, and rental cars.

Below are the individuals who have participated to make this a successful project.

### **Norco College**

Esmeralda Abejar  
Misty Cheatham  
Lenny Riley

### **Riverside City College**

Jennifer Bielman  
Natalie Halsell  
Liz Tatum

### **Moreno Valley College**

Laurie Crouse  
MaryAnn Doherty  
Susan Lauda  
Sharlena Segura

### **District Office**

Majd Askar  
Rene Balingit  
Paula Barrera  
William Chang  
Melinda Chavez  
Gabriela Estrada-Toro  
Adrienne Fisher  
John Geraghty  
Melissa Griffith  
Sandra Gutierrez  
Philip Muljana  
Aprilyn Tulod  
Mireya Vargas

### **Outside / Consultants**

Gilda Izad-Panahi (Huron Consulting Group)  
Erica Ashburn (CA Department of General Services) - State-wide Travel Program  
Alissa Navarro (CA Department of General Services) - State-wide Travel Program  
Kelly Bouchard (CA Department of General Services) - State-wide Travel Program  
Travel Store (outside vendor)

## Introduction

Concur is a web-based, integrated travel and expense management solution that centralizes and consolidates the travel request, booking, out-of-pocket expense reimbursement, and cash advance processing.

With faculty, staff, and students traveling for a wide-range of academic and professional development purposes, the Concur automated solution will help simplify and expedite the travel process, provide cost savings, increase efficiency, reduce reimbursement times, and eliminate paper. Concur was selected through a collaborative (District and College) proposal process and approved by the RCCD Board of Trustees.

This manual provides users guidance for processing travel requests, booking travel, and processing expense reimbursements in accordance with RCCD Board Policy 6900.

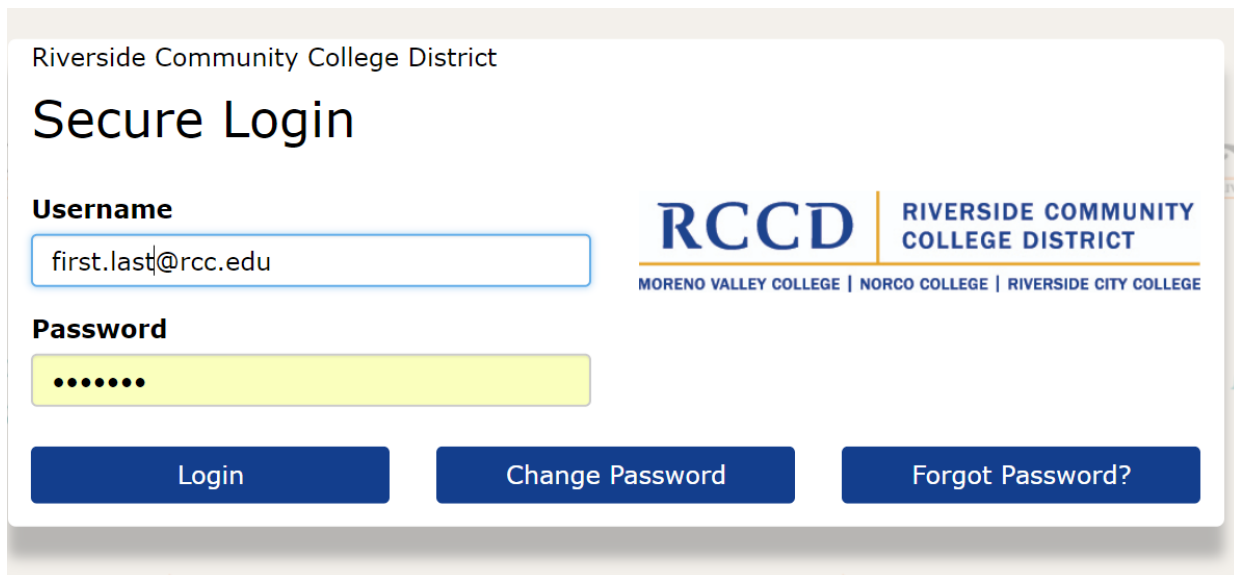
If you have any questions regarding the travel and expense reimbursement process or general Concur questions, please contact your location Concur administrator.

Location	Contract	Email Address	Phone Numbers	Backup
District Offices	Medlina Chavez Melissa Griffith April Tulod	<a href="mailto:puchasingtravel@rccd.edu">puchasingtravel@rccd.edu</a>	(951) 222 - 8042 (951) 222 - 8645 (951) 222 - 8776	
Moreno Valley College	Laurie Crouse	<a href="mailto:Laurie.Crouse@mvc.edu">Laurie.Crouse@mvc.edu</a>	(951) 571 - 6342	Susan Lauda Sharlena Segura
Norco College	Esmeralda Abejar	<a href="mailto:Esmeralda.Abejar@norcollege.edu">Esmeralda.Abejar@norcollege.edu</a>	(951) 372 - 7075	Lenny Riley Patty Sanchez
Riverside City College	Liz Tatum	<a href="mailto:Liz.Tatum@rcc.edu">Liz.Tatum@rcc.edu</a>	(951) 222 - 8012	Jennifer Bielman Natalie Halsell

## Accessing Concur

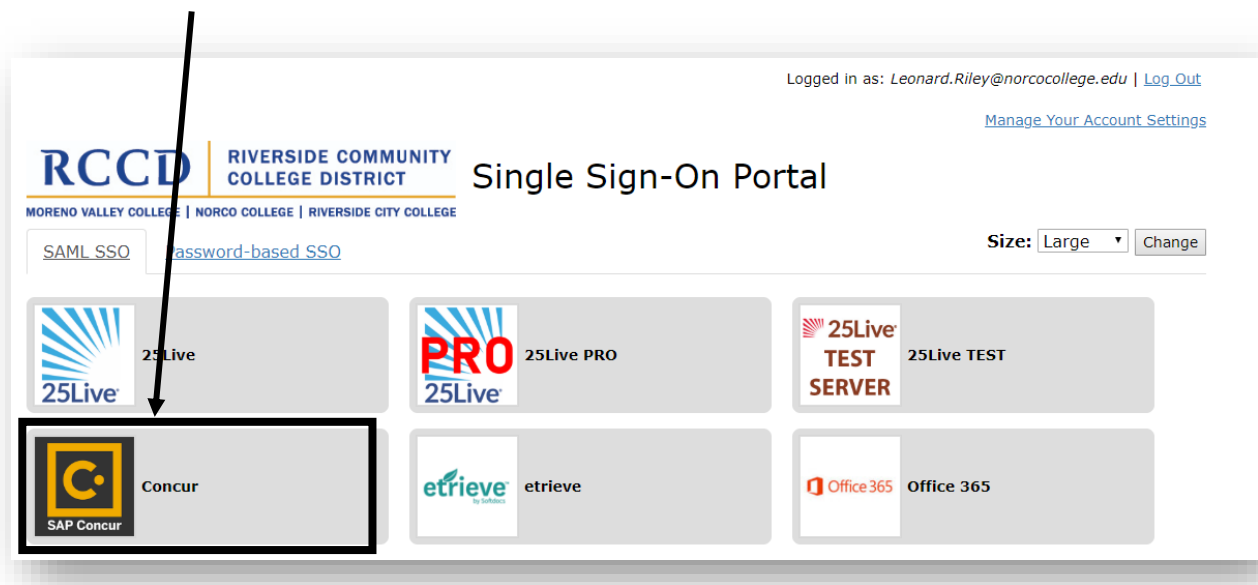
Employees can access Concur at any time through the District's Single Sign-on (SSO) Portal. To find the single sign-on portal open a web browser and go to [go.rccd.edu](http://go.rccd.edu). If you find your credentials do not work in the single sign-on portal, please contact your local Concur administrator.

Once there, enter the same username and password you use to login to your computer and/or access your RCCD email:



The image shows the 'Secure Login' page for the Riverside Community College District. At the top, it says 'Riverside Community College District' and 'Secure Login'. Below this, there are two input fields: 'Username' with the placeholder 'first.last@rcc.edu' and 'Password' with masked dots. To the right of the fields is the RCCD logo and the text 'RIVERSIDE COMMUNITY COLLEGE DISTRICT' and 'MORENO VALLEY COLLEGE | NORCO COLLEGE | RIVERSIDE CITY COLLEGE'. At the bottom, there are three buttons: 'Login', 'Change Password', and 'Forgot Password?'.

Click on the "Concur" app:

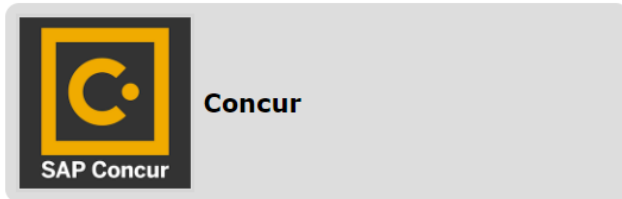


# **Section I:**

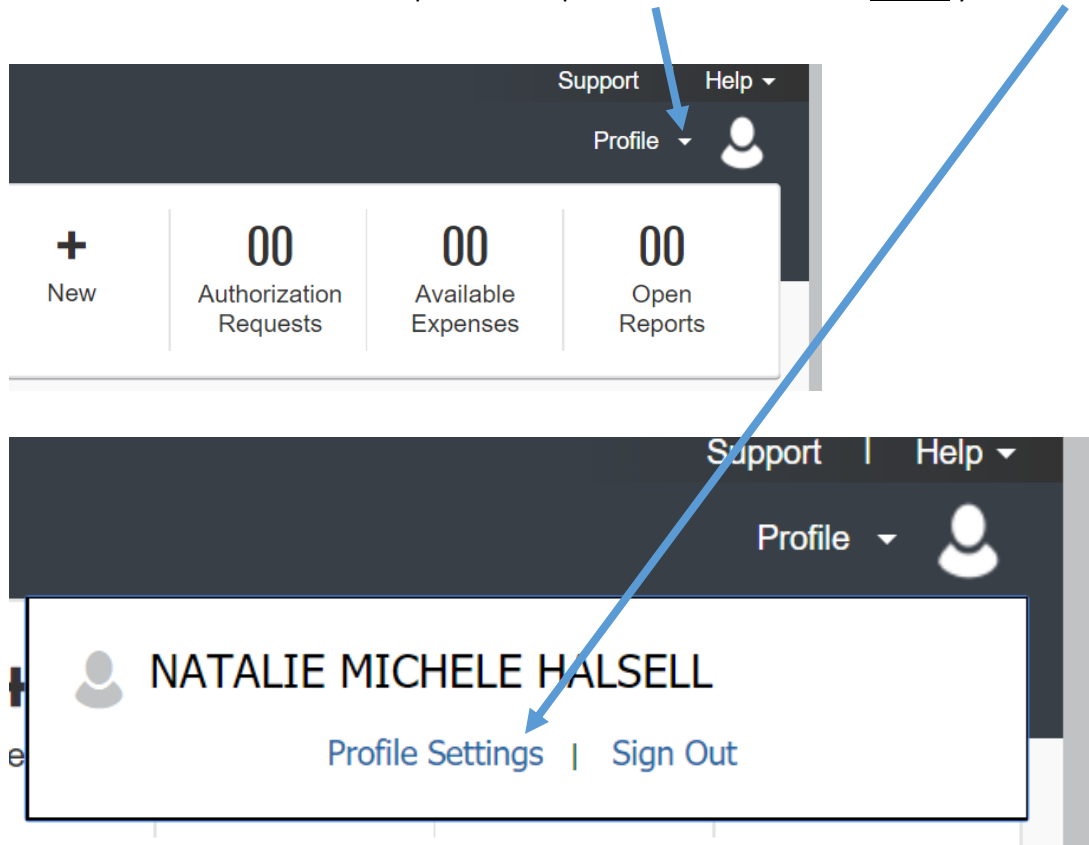
## **Creating your Travel Profile**

## Creating your travel profile

Login to the single sign-on portal and launch Concur by clicking on the icon:



In the upper right-hand corner, click on the “Profile” down arrow and 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 with the **“Personal Information Section”**.

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. If you find there are any errors in this field, please submit a Human Resources work order via servicedesk.rccd.edu to have the information corrected before booking any travel.

## My Profile - Personal Information

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required\*\*]** (validated and required) must be completed to save your profile.

[Change Picture](#)



**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 identification 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 ticket.

Title	First Name	Middle Name	Nickname	Last Name	Suffix
<input type="text"/>	<input type="text" value="NATALIE"/>	<input type="text" value="MICHELE"/>	<input type="text"/>	<input type="text" value="HALSELL"/>	<input type="text"/>

## Company Information

The next section is your company information and should also already be pre-populated with your Colleague employee ID number and the name of your manager/direct supervisor. If you



are a faculty member or athletics employee, this field does not apply to you. If you notice any errors, please contact your local Concur administrator for assistance.

Company Information

Go to top

Employee ID

2394521

Manager

Raymond West

Org. Unit/Division

▼

Employee Position/Title

Save

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

Work Address

Go to top

Company Name

Riverside Community Co

Assigned Location

Magnolia Avenue (Riverside, CA) ▼

Street

4800 Magnolia Avenue

☐ Address same as assigned location

City

Riverside

State/Province/Region

CA - California

Postal Code

92506

Country

United States of America ▼

Save

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.

Next, you may choose to enter your home address; however, this is not a required field.

Home Address

Go to top

Street

City

State/Province/Region

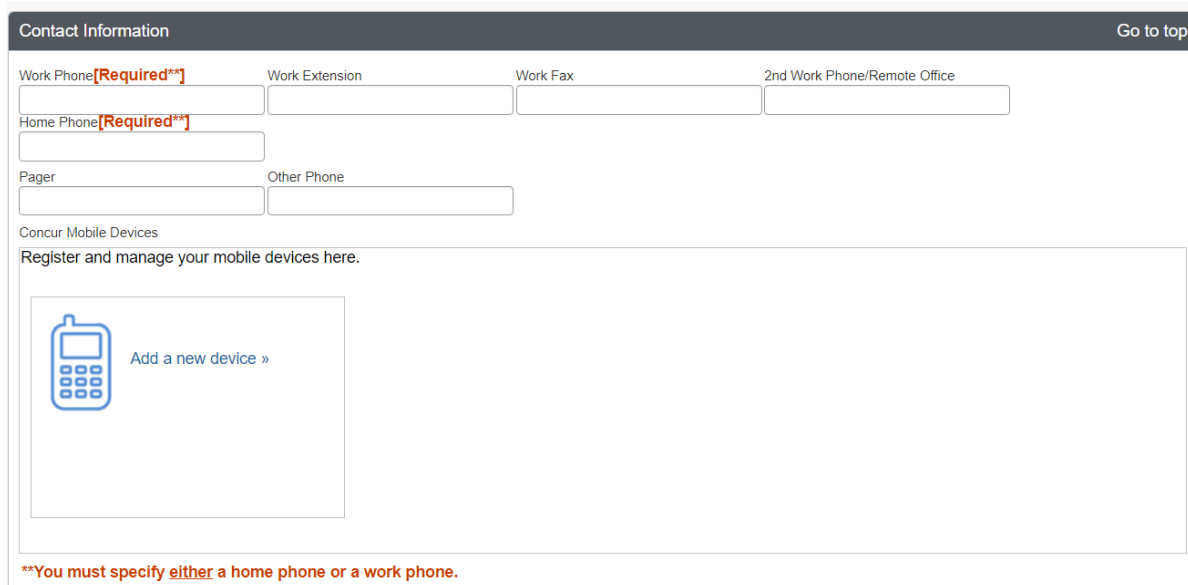
Postal Code

Country

▼

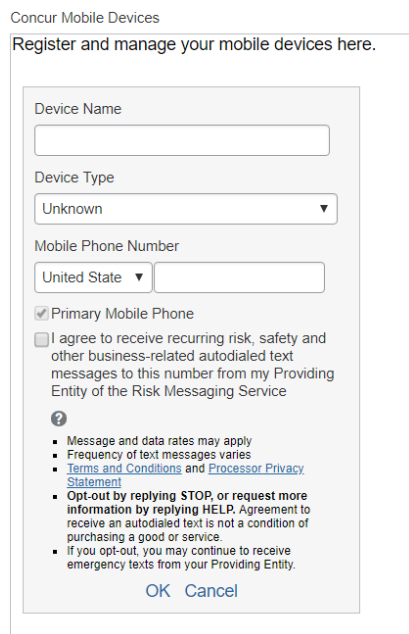
## Contact Information/Mobile Phone Registration

The next section contains two required fields: **Work phone** and **Home phone**. You can substitute your mobile phone number for your home phone, but please note a home phone number is required. 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”

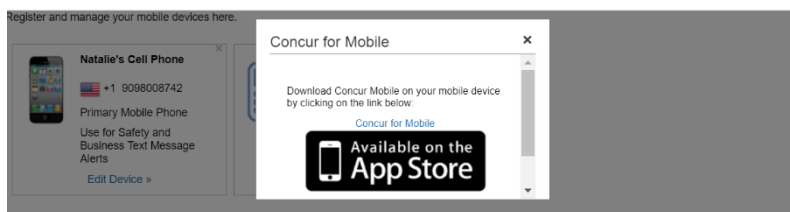


The 'Contact Information' form includes fields for Work Phone (Required\*\*), Work Extension, Work Fax, 2nd Work Phone/Remote Office, Home Phone (Required\*\*), Pager, and Other Phone. Below these is a section for 'Concur Mobile Devices' with the instruction 'Register and manage your mobile devices here.' and a button 'Add a new device »' accompanied by a mobile phone icon. A red note at the bottom states: '\*\*You must specify either a home phone or a work phone.'

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.

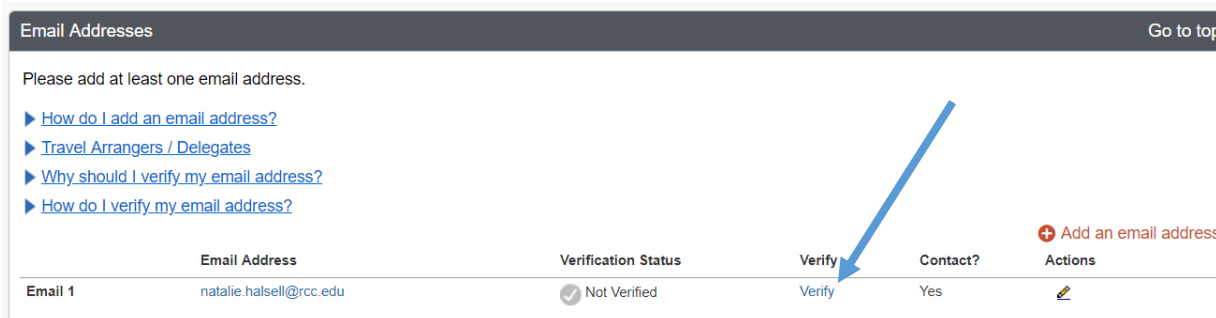


The 'Concur Mobile Devices' form includes fields for Device Name, Device Type (dropdown menu), and Mobile Phone Number (with a dropdown for the state). It also has a checkbox for 'Primary Mobile Phone' and a section for agreeing to receive recurring risk, safety and other business-related autodialed text messages to this number from my Providing Entity of the Risk Messaging Service. Below this is a help icon and a list of terms and conditions, including: 'Message and data rates may apply', 'Frequency of text messages varies', 'Terms and Conditions and Processor Privacy Statement', 'Opt-out by replying STOP, or request more information by replying HELP. Agreement to receive an autodialed text is not a condition of purchasing a good or service.', and 'If you opt-out, you may continue to receive emergency texts from your Providing Entity.' At the bottom are 'OK' and 'Cancel' buttons.



## Email Verification

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.



Email Addresses Go to top

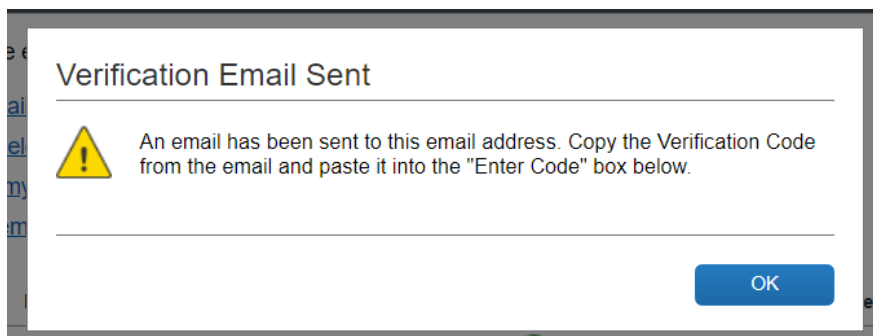
Please add at least one email address.

- ▶ [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?	Actions
Email 1	natalie.halsell@rcc.edu	Not Verified	Verify	Yes	

[+ Add an email address](#)

A verification code is sent to your email. Copy and paste the code into the verification field and click “ok”.

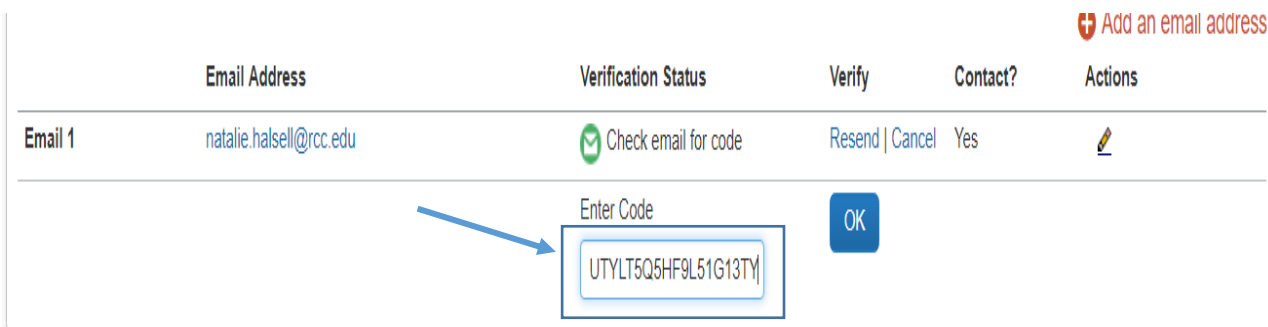


**Verification Email Sent**

An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.

Enter Code

OK



	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	natalie.halsell@rcc.edu	Check email for code	Resend   Cancel	Yes	

[+ Add an email address](#)

Enter Code

UTYLT5Q5HF9L51G13TY

OK

### Email Verification Status



Your email address has been verified.  
You may now send receipts to Concur by emailing [receipts@concur.com](mailto:receipts@concur.com)  
You may now send trips to Concur by emailing [plans@concur.com](mailto:plans@concur.com)

OK

You will receive this dialog box informing you the verification process has been successful.

## Emergency Contact Information

Complete the Emergency Contact Information field. While this is not required, the information is used in the event of an emergency and is highly encouraged.

Emergency Contact

Go to top

Name	Relationship	
<input type="text"/>	<input type="text"/>	
Street	<input checked="" type="checkbox"/> Address same as employee	
<input type="text"/>		
City	State/Province/Region	Postal Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	Phone	Alternate Phone
<input type="text" value="United States of America"/>	<input type="text"/>	<input type="text"/>

## Travel Preferences

The travel preferences section allows you to enter your personal travel preferences. Entries made here are applied when utilizing the embedded travel store and will filter searches by your desired amenities.

Begin by checking the boxes for your eligible discount travel rates. 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 the 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.

Travel Preferences
Go to top

Eligible for the following discount travel rates/fare classes

☐ AAA/CAA
☐ Government
☐ Military
☐ Senior/AARP

Air Travel Preferences ?

Seat
Seat Section
Special Meals
Ticket Delivery

Don't Care ▼
Don't Care ▼
Regular Meal ▼
E-ticket when possible ▼

Preferred Departure Airport ?
Other Air Travel Preferences
Medical Alerts

## 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.

### Hotel Preferences

Room Type
Smoking Preference

Don't Care ▼
Don't Care ▼

☐ Foam pillows
☐ Rollaway bed
☐ Crib

Message to Hotel Vendor ?

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

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).

Car Rental Preferences

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

Car Type
Smoking Preference
Car Transmission

Any Car Class ▼
Don't Care ▼
Don't Care ▼

☐ In-car GPS system
☐ Ski rack

Message to Car Rental Vendor ?

## Frequent Traveler Program Information

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

### Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

No programs defined

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.

## Add Travel Programs

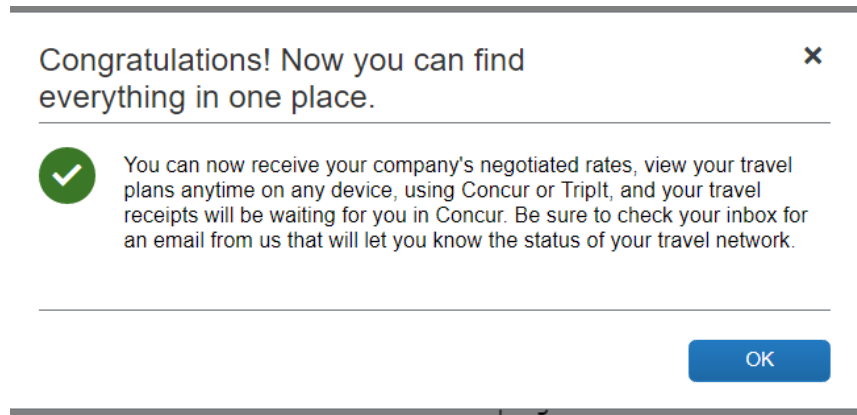


Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or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

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

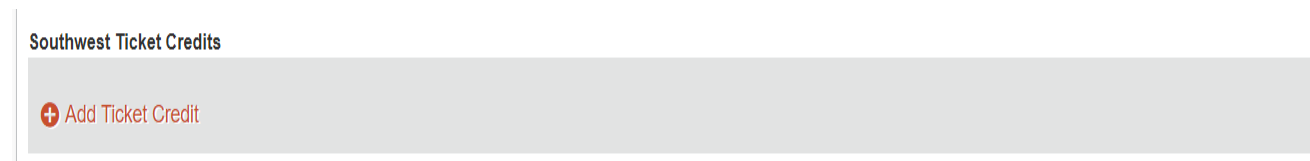
1	<div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div></div>	<div>Air/Rail Carrier</div> <div>Select a carrier</div>	<div>Frequent Traveler / Driver/ Guest Number</div> <div></div>	<div>Search this vendor</div> <div><input checked="" type="checkbox"/></div>
2	<div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div></div>	<div>Air/Rail Carrier</div> <div>Select a carrier</div>	<div>Frequent Traveler / Driver/ Guest Number</div> <div></div>	<div>Search this vendor</div> <div><input checked="" type="checkbox"/></div>

To create a travel network and allow Concur to share information with travel partners, such as Triplt, 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.

A screenshot of the "Add Ticket Credit" dialog box. It contains four input fields: "Southwest Record Locator", "Valid Until" (with a calendar icon), "Ticket Amount", and "Ticket Currency" (a dropdown menu currently showing "US-Dollar (\$)"). At the bottom are "Cancel" and "Add Ticket Credit" buttons.

## TSA Secure Flight Information

TSA requires entry of gender and date of birth. NOTE: You will not be able to book your flight until this information has been completed and saved to your profile. You can also enter a Redress Number or your TSA PreCheck Known Traveler Number if you have one. Click on the Quick Help icon for additional information about these options.

## TSA Secure Flight

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

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

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

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

☐ I do not have a passport

+ Add a Passport

International Visas

+ Add a Visa

## Credit Card Information

Do NOT enter personal credit card information.

## Saving Profile Changes

Once your entire profile has been completed, click any of the “save” buttons visible. If an error occurs, a pop up message will inform you of any needed corrections. Correct the errors and click “save” again. Once the profile is saved, a message will appear on the upper right hand portion of the screen.

**Profile Saved**

Click the “Travel” tab 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.

## Request Settings

The next step is to verify that your Galaxy Employee ID, Galaxy Vendor ID number and default budget string are listed correctly. To do this, click on the “Request information” link on the left column of your screen under “Request Settings”:



## Request Settings

[Request Information](#)  
[Request Delegates](#)  
[Request Preferences](#)  
[Request Approvers](#)  
[Favorite Attendees](#)

If you do not have a Galaxy Vendor ID, a default of “999999” will appear. This means you have not been issued a reimbursement for expenses through Galaxy. If you do not know your Galaxy Employee and Vendor ID, please contact your local Concur administrator for assistance.

## Expense Settings

The information, which appears here, should match the information you found under “Request Settings”. To view and verify your Galaxy Employee ID, Galaxy Vendor ID, and default budget string, click on “Expense Information” under “Expense Settings”.

## Expense Information

<input type="button" value="Save"/> <input type="button" value="Cancel"/>			
Employee Group <input type="text" value="RCC"/>	Reimbursement Currency <input type="text" value="US, Dollar"/>	Traveler Type <input type="text" value="Staff"/>	<input type="checkbox"/> No Direct Supervisor?
Fund <input type="text" value="(11) 11 - UNRESTRICTED GENERAL"/>	Job Title <input type="text" value="Coord, Prof Devlpmt"/>	Galaxy Emp ID <input type="text" value="231698"/>	Galaxy Vendor ID <input type="text" value="107268"/>
School <input type="text" value="(DDB) DDB - BUSINESS OPERATING"/>	Resource <input type="text" value="(1000) 1000 - GENERAL FUND"/>	Project Year <input type="text" value="0"/>	Goal <input type="text" value="6729"/>
Function <input type="text" value="(0000) 0000 - CAMPUS ADMINISTRATION"/>			

## Other Settings

Last, you will want to activate E-Receipts, which are complete electronic versions of the paper folio receipts traditionally delivered to travelers. Concur automatically captures this data and makes it available to you when preparing your expense reimbursements.

To activate E-Receipts, click on the E-Receipt Activation link under “Other Settings”.

Click on the “click here” link

## E-Receipt Activation

Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more, click [here](#).

Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company’s Concur account administrator.

The following dialog box will appear, click on “I Agree” after reading the statement.

E-Receipt Activation

Concur can enable the automatic collection of the electronic receipts and folio data (“e-receipts”) generated by your transactions with participating travel suppliers (“Participating Suppliers”). Participating Suppliers in Concur Travel search results are designated with an “e-receipt enabled” label.

By clicking “I Agree” below to turn on the e-receipts functionality, you authorize Concur and its corporate affiliates to receive, transfer and use e-receipts generated by your transactions with Participating Suppliers in connection with Concur services, including air, rail, hotel, car rental, and other ground transportation suppliers, and you authorize such Participating Suppliers and their respective agents and affiliates to share such e-receipts with Concur. To retrieve e-receipts from Participating Suppliers, Concur may need to share certain details about you and your travel plans

I Agree

I Decline

You will receive the following pop-up message once the activation is complete.



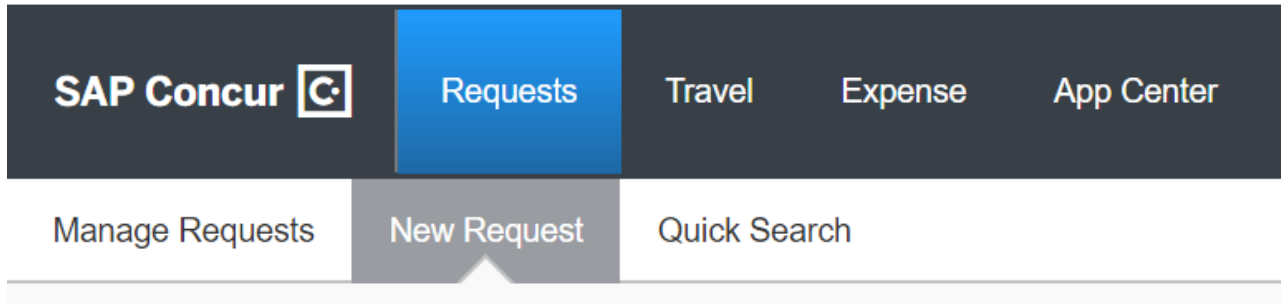
You have successfully enabled e-receipts with participating suppliers. You may disable this functionality at any time by accessing this page from the Profile menu.

## **Section II:**

# **Instructions for Travelers**

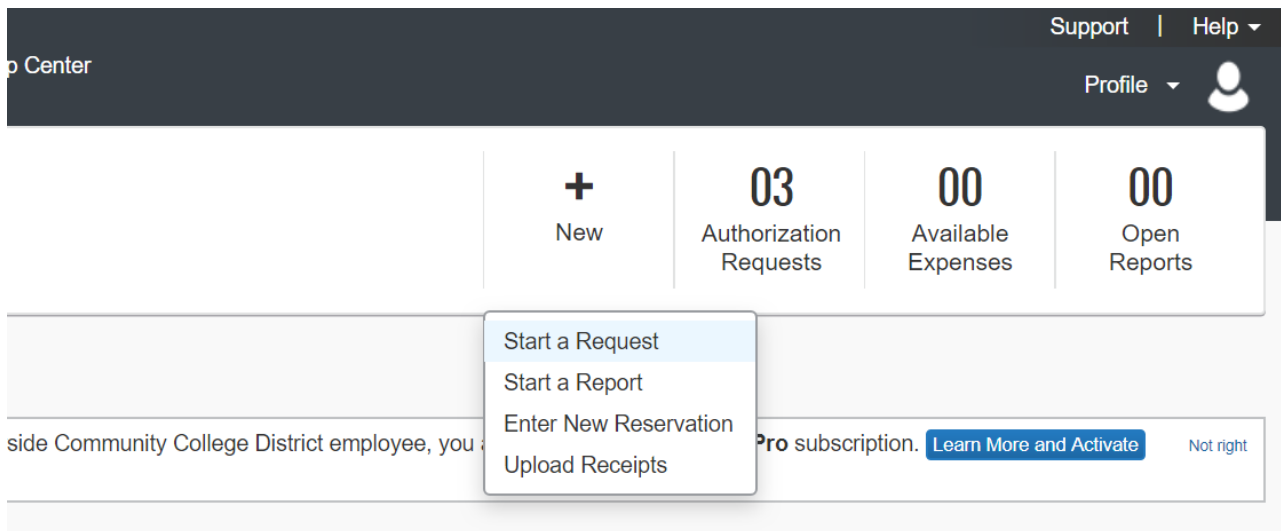
## Creating a Travel Request

There are two ways to begin a new Travel Request. Click on **Requests** > then **New Request** at the top left-hand side of the screen:

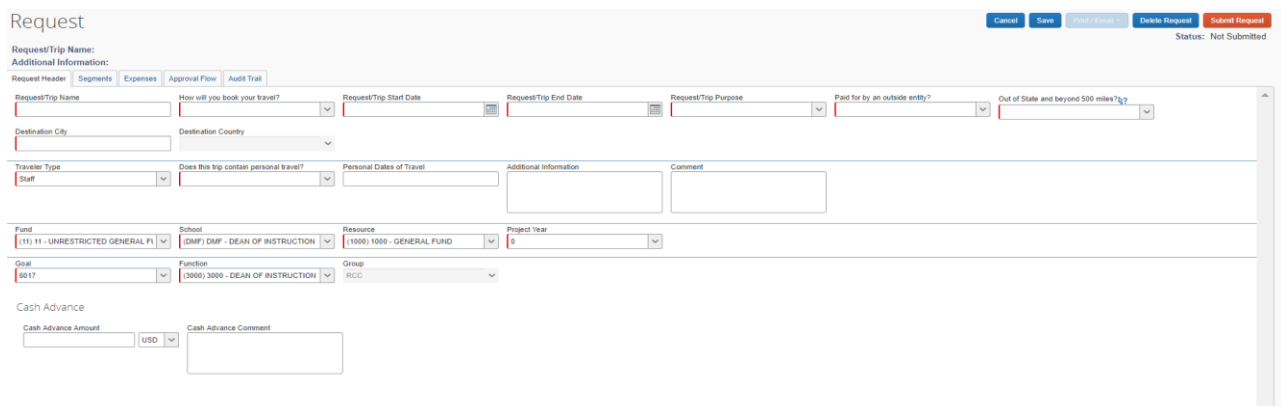


OR

On the Home Page, click “+ New” then select “Start a Request”:



A blank request will appear:



There are five components/tabs to each travel request:



**Request Header** – Provides basic trip information such as trip name, trip start/end date, budget code, etc.

**Segments** – The segments tab should only be used if you are planning to book all or some your travel arrangements through the Cal Travel Store.

**Expenses** – Use this section to note information regarding all anticipated trip expenses such as registration, meals, mileage, hotel, parking, and other travel expenses as well as any travel expenses booked outside of Concur.

**Approval Flow** – This is where you can see whom the request will route to for approvals and where you will add any additional approvers needed.

**Audit Trail** – This is where you can view all transactions associated with your travel request.

#### Completing Request Header Information

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

Request/Trip Name

**Request/Trip Name** – Enter the complete trip name. There is a limit of 30 character that can be entered into the Trip Name field. If you need additional space to spell out acronyms, please enter the information in the “Additional Information” or “Comment” box.

**How will you book your travel?** There are three options for booking your travel:

1. **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, or train) of your travel after the travel request is fully approved.
2. **Book with Agent: Cal Travel Agent** – 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, personal travel, or other complicated variations.

3. **Book Outside of Concur & Cal Travel Store** – select this option if you will be making all of your travel arrangements outside of the Concur segments (i.e. not using the Cal Travel Store) For example, you have already purchased airfare, reserved hotel and car rental, registered for conference separately. You will be able to add details about the expenses you have incurred or reservations you made in the Expense section tab.

**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.

**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”, or “Meeting”.

**Paid for by an outside agency?** Yes or No. – Select “Yes” only if all of the travel expenses will be paid by an outside agency (e.g. State Chancellor’s office or conference organizers). You will skip the “Segments” tab and enter the cost of the travel in the expense tab only.

**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.

**Destination City/State** – Enter the destination city of your trip. As you begin typing the city name, the system will automatically display search results.

**Destination Country** – This option automatically populates based on destination city entered.

**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 section “Personal Dates of Travel” field. Add any clarifying comments in the “Additional Comments” section provided.

**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.**

Fund (11) 11 - UNRESTRICTED GENERAL FL	School (DMF) DMF - DEAN OF INSTRUCTION	Resource (1000) 1000 - GENERAL FUND	Project Year 0
Goal 6017	Function (3000) 3000 - DEAN OF INSTRUCTION	Group RCC	

**Cash Advance** – Enter the amount of the cash advance you are requesting. Please provide a description of the expenses covered by the advance in the comments section.

### Cash Advance

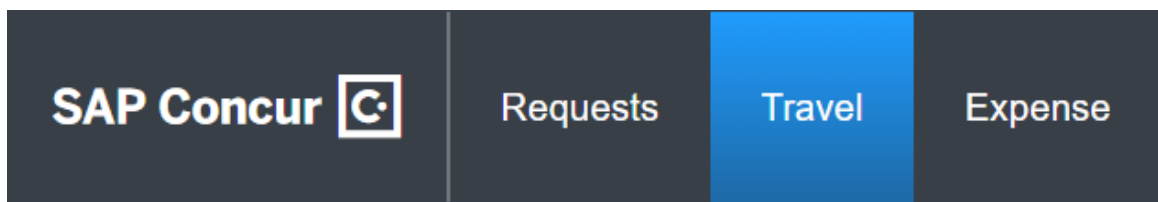
Cash Advance Amount	Cash Advance Comment
200.00	Ground transportation and meals.
USD	

Click **“Save”** before continuing to the next tab called.

### Estimating Expenses Using the Cal Travel Store

If you selected “Book Online: Concur Travel” on the request header, you will need to estimate the travel expenses through the “Cal Travel Store” for the portions of the travel that will be booked within Concur. 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 based on your profile settings but can also be manually changed.

Complete the fields and click “search”

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

Travel Arrangers Trip Library Templates

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.](#)

**Mixed Flight/Train Search**

Round Trip One Way Multi City

From   
[Find an airport](#) | [Select multiple airports](#)

To   
[Find an airport](#) | [Select multiple airports](#)

Depart  09:00 am

Return  03:00 pm

☐ Pick-up/Drop-off car at airport

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

2 stops  
2 results

231.12  
2 results

—

—

—

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.

## Review and Reserve Flight

### REVIEW FLIGHTS

#### DEPART

✈ Fri, Oct 4 – Los Angeles, CA to Oakland, CA

[Hide details ^](#)

Fri, Oct 4 08:20a ONT → 09:45a OAK 1h 25m Southwest 1914

#### RETURN

✈ Mon, Oct 7 – Oakland, CA to Los Angeles, CA

[Hide details ^](#)

Mon, Oct 7 04:30p OAK → 05:50p ONT 1h 20m Southwest 2050

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. ?

#### Primary Traveler

[Edit](#) | [Review all](#)

Name: NATALIE MICHELE HALSELL Phone: 951-222-8057

natalie.halsell@rcc.edu ▼

#### Frequent Flyer Programs [Add a Program](#)

For Southwest

No Program selected ▼

### SEAT ASSIGNMENT

Pre-reserved seats are not available for this flight.

### REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$128.93	\$38.27	\$167.20
Total Estimated Cost: \$167.20			
Total Due Now: \$167.20			

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. Helpful Hint: Save the summary as a PDF document to refer back to.

**DO NOT** click on Reserve Flight and Continue! Travel requests must be fully approved prior to booking.

## METHOD OF PAYMENT

This purchase will be charged to your company directly.



### This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

[Back](#)

[Reserve Flight and Continue](#)

**NO! STOP! HALT!**

Click on the “Travel” link at the top of the page to return to the travel store to continue estimating other expenses.

## Estimating Car Rental Expenses

**Car Search**

Pick-up date  
10/04/2019 12:00 pm ▼

Drop-off date  
10/07/2019 12:00 pm ▼

Pick-up car at  
☒ Airport Terminal ☐ Off-Airport  
Please enter an airport.  
SFO - San Francisco Airport - San Francisco, CA

☐ Return car to another location  
[More Search Options](#)

**Search**

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. It is important to note 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.

PICK UP: (SFO) ON FRI, OCT 4 12:00 PM  
RETURN: MON, OCT 7 12:00 PM



Show as USD ▼

[Hide matrix](#) [Print / Email](#)

All 19 results	 Economy Car	 Compact Car	 Intermediate Car	 Standard Car	 Full-size Car	 Premium Car	 Luxury Car	 Mini Van	 Standard Van	 Full-size Van
	182.96	182.96	187.90	203.95	200.86	223.54	311.29	427.67	470.46	393.82
Preferred										

Sorted By: Policy - Most Compliant ▼

Displaying: 1 out of 19 results. ⓘ



**Economy Car - \$42.54 per day (Sabre)**  
Automatic transmission  
Unlimited miles, Pick-up: Terminal: SFO  
Adults: 2, Children: 2, Large bags: 1, Small bags: 1\*\*  
(Corporate rate)

Total cost\*  
**\$182.96**

Preferred Car Vendor for Riverside Community College District / E-Receipt Enabled ⓘ

[Location details](#)

Continue to follow the steps above to estimate remaining trip components (hotel, train) as needed.

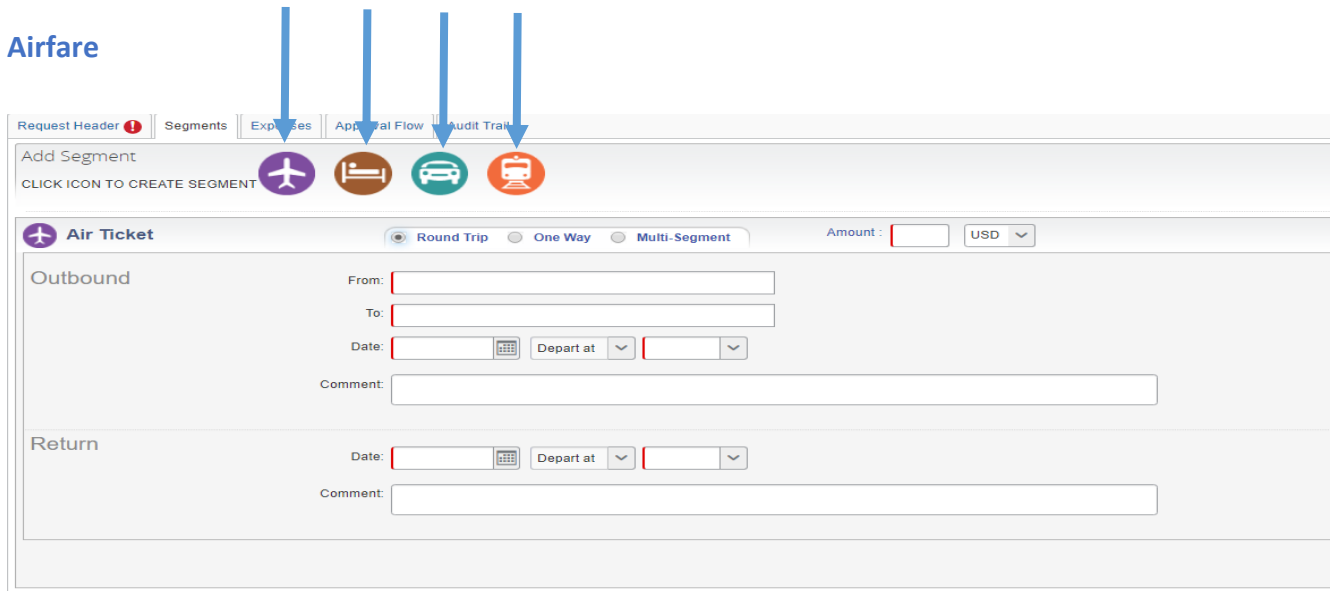
## Book Online: Concur Travel Steps

### Completing the Segments Tab

Once you have obtained estimates through the “Travel Store”, you are ready to enter the information in the “Segments” tab. To create a segment, click on the desired icon. The appropriate segment fields appear. Please complete the fields – including the estimated cost – and click “Save”. Helpful Hint: Refer to the estimates you saved as PDF documents to complete the fields.

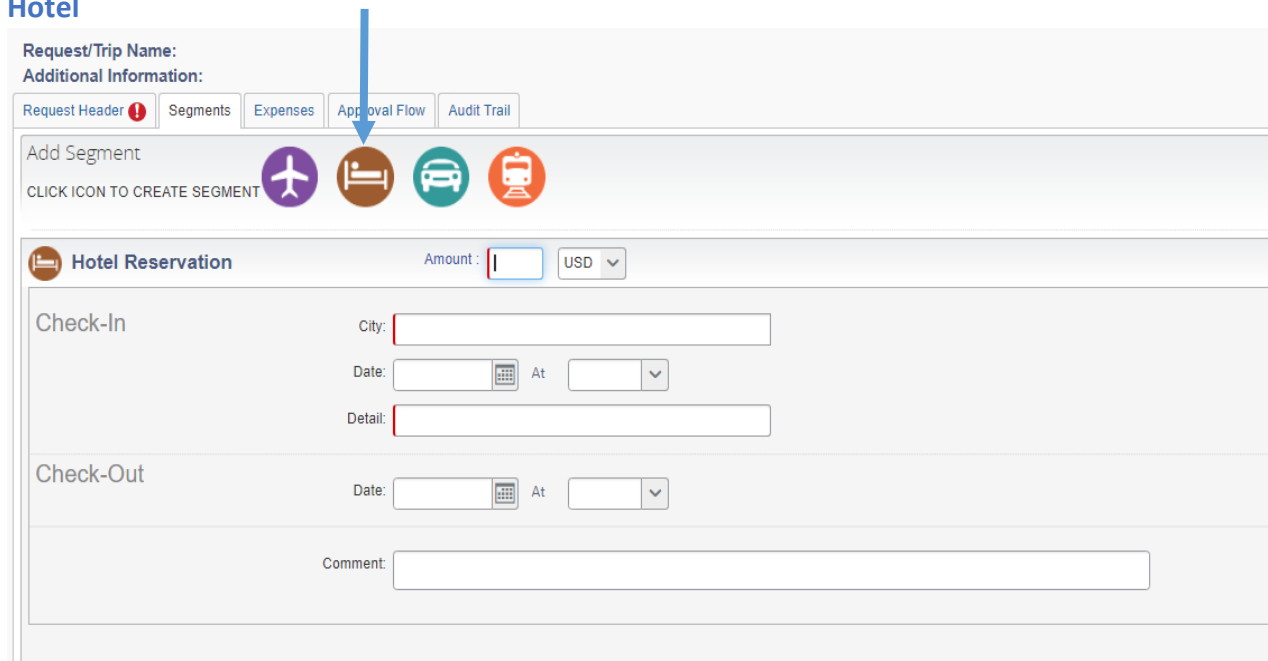
After saving one segment, click another segment icon to add additional information.

## Airfare



The screenshot shows the 'Add Segment' form for an Air Ticket. At the top, there are tabs: Request Header, Segments, Expenses, Approval Flow, and Audit Trail. Below the tabs, there are four circular icons representing different travel segments: Airplane (purple), Hotel (brown), Car (green), and Train (orange). Four blue arrows point to these icons. The 'Air Ticket' form is active, showing options for Round Trip, One Way, and Multi-Segment. It includes fields for Outbound and Return travel, such as From, To, Date, and Comment. The Amount field is set to USD.


## Hotel








The screenshot shows the 'Add Segment' form for a Hotel Reservation. At the top, there are tabs: Request Header, Segments, Expenses, Approval Flow, and Audit Trail. Below the tabs, there are four circular icons representing different travel segments: Airplane (purple), Hotel (brown), Car (green), and Train (orange). A blue arrow points to the Hotel icon. The 'Hotel Reservation' form is active, showing fields for Check-In and Check-Out, including City, Date, and Detail. The Amount field is set to USD.

## Car Rental

**Request/Trip Name:**  
**Additional Information:**


Request Header  Segments Expenses Approval Flow **Audit Trail**

Add Segment  
CLICK ICON TO CREATE SEGMENT    

 **Car Rental** Amount:  USD

**Pick-up**


City:

Date:   At:

Detail:

**Drop-off**

City:


Date:   At:





Detail:


Comment:

## Rail Transportation

**Request/Trip Name:**  
**Additional Information:**

Request Header  Segments Expenses Approval Flow **Audit Trail**


Add Segment  
CLICK ICON TO CREATE SEGMENT    

 **Railway Ticket** ☒ Round Trip ☐ One Way ☐ Multi-Segment Amount:  USD

**Outbound**


From:

To:

Date:   Depart at:

Comment:

**Return**

Date:   Depart at:

Comment:

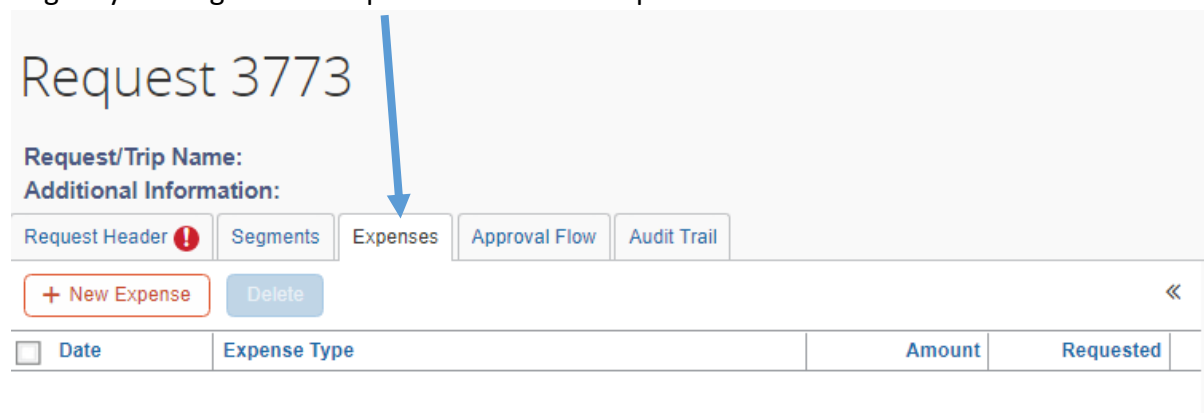
Once you have completed the fields, click “Save”.

## Completing the Expenses Section

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

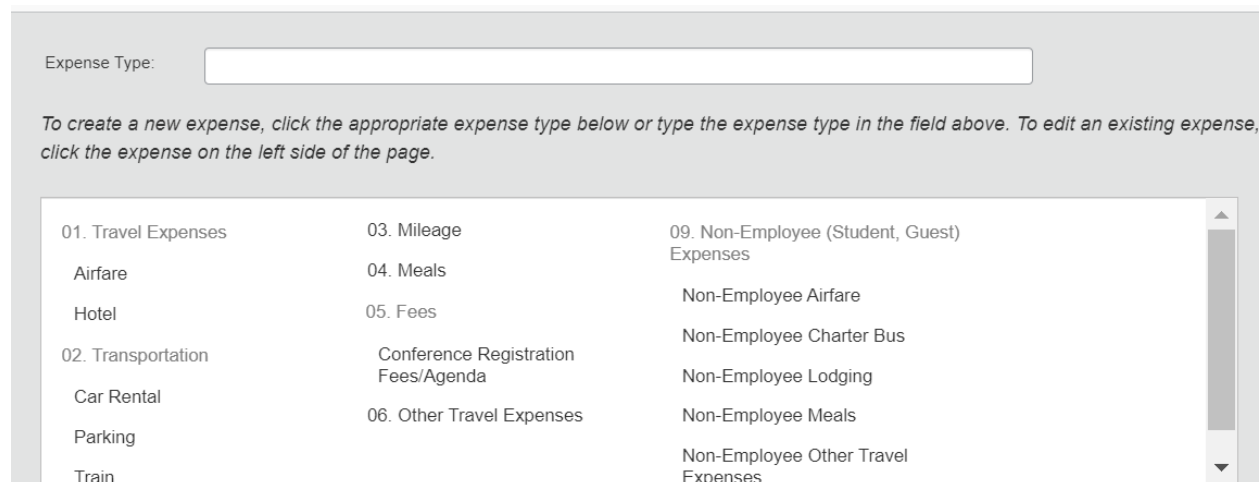
**NOTE:** If you chose “Book Outside of Concur & Cal Travel Store” on the request header (i.e. first tab), you will skip the Segments tab and enter travel expenses directly here using the steps provided here.

Begin by clicking on the “Expense” tab of the request:



The screenshot shows the 'Request 3773' interface. At the top, there's a title 'Request 3773' and a section 'Request/Trip Name: Additional Information:'. Below this is a tabbed interface with five tabs: 'Request Header' (with a red warning icon), 'Segments', 'Expenses' (which is highlighted with a blue arrow), 'Approval Flow', and 'Audit Trail'. Under the 'Expenses' tab, there are two buttons: '+ New Expense' (in a red box) and 'Delete'. Below the buttons is a table with four columns: 'Date', 'Expense Type', 'Amount', and 'Requested'. The table is currently empty.

There are several expense types available.



The screenshot shows the 'Expense Type' selection interface. At the top, there's a label 'Expense Type:' followed by a text input field. Below this is a paragraph of instructions: 'To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.' Below the instructions is a list of expense types organized into three columns. The first column lists '01. Travel Expenses' (with sub-items: Airfare, Hotel), '02. Transportation' (with sub-items: Car Rental, Parking, Train), and '03. Mileage'. The second column lists '04. Meals', '05. Fees' (with sub-items: Conference Registration, Fees/Agenda), and '06. Other Travel Expenses'. The third column lists '09. Non-Employee (Student, Guest) Expenses' (with sub-items: Non-Employee Airfare, Non-Employee Charter Bus, Non-Employee Lodging, Non-Employee Meals, Non-Employee Other Travel Expenses). A vertical scrollbar is visible on the right side of the list.

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.

**Note:** If you added airfare information in the Segments tab, the expense will automatically appear as an expense. This also applies to hotel, car rental, or train expenses.

Expense Type Airfare	Request/Trip Start Date	Request/Trip End Date
Paid for by an outside entity? I	Description	Transaction Amount 0.00 USD
Comment		

Save Allocate Cancel

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

Expense Type Hotel	Request/Trip Start Date	Request/Trip End Date
Paid for by an outside entity? I	Description	Transaction Amount 0.00 USD
Comment		

Save Allocate Cancel

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.

Expense Type Car Rental	Request/Trip Start Date 11/02/2019	Request/Trip End Date 11/06/2019	Paid for by an outside entity? No
Description	Transaction Amount 0.00 USD	Comment	

**NOTE:** Use the “other travel expenses” to enter other types of ground transportation such as Uber, Lyft, Taxi, Super Shuttle, 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.

The screenshot shows the 'Expense Type' dropdown set to '03. Mileage'. The 'Request/Trip Start Date' is 11/02/2019 and the 'Request/Trip End Date' is 11/06/2019. The 'Paid for by an outside entity?' dropdown is set to 'No'. The 'Description' field is empty. The 'Distance' field contains '0.58'. The 'Mileage' field shows '0.58'. The 'Amount' field is '0.00' with a 'USD' currency selector. There is a 'Comment' field below the description. At the bottom right, there are 'Save', 'Allocate', and 'Cancel' buttons.

Entering Meals: Enter the total estimated expenses for all meals not covered by the conference during the trip. Add a description or comments, as needed (e.g. breakfast, lunch, and dinner for three nights).

The screenshot shows the 'Expense Type' dropdown set to '04. Meals'. The 'Request/Trip Start Date' is 11/02/2019 and the 'Request/Trip End Date' is 11/06/2019. The 'Paid for by an outside entity?' dropdown is set to 'No'. The 'Description' field is empty. The 'Transaction Amount' field contains '0.00' with a 'USD' currency selector. There is a 'Comment' field to the right. The form is otherwise identical in layout to the Mileage form.

Fees: Use this area to include registration fees.

The screenshot shows the 'Expense Type' dropdown set to 'Registration Fees'. The 'Request/Trip Start Date' is 11/02/2019 and the 'Request/Trip End Date' is 11/06/2019. The 'Paid for by an outside entity?' dropdown is set to 'No'. The 'Description' field is empty. The 'Transaction Amount' field contains '0.00' with a 'USD' currency selector. There is a 'Comment' field to the right. The form is otherwise identical in layout to the previous expense forms.



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:

Date	Expense Type	Amount	Requested
11/02/2019	04. Meals	\$200.00	\$200.00
11/02/2019	Registration Fees	\$450.00	\$450.00

NOTICE: Please email Conference Registration payment processing instructions to purchasingtravel@rccd.edu

For instructions on emailing purchasing the required information to for conference registration payments, see page 43.

Entering Other Travel Expenses: This is a catch-all for all other allowable travel expenses such as luggage fees, delegate fees, Uber or Lyft expenses, Wi-Fi, etc. per the RCCD Board Policy. You can use this field more than once. Be sure to add a description to each.

Expense Type: 06. Other Travel Expenses

Transaction Date: 11/02/2019

Description: WIFI at conference (none available)

Transaction Amount: 20.00 USD

Comment:

## Allocating Budget

You may have noticed the “Allocate” button when saving the expenses:

Expense Type: 06. Other Travel Expenses

Transaction Date: 11/02/2019

Description: WIFI at conference (none available)

Transaction Amount: 20.00 USD

Comment:

Buttons: Save, Allocate, Cancel

If only one budget string will be charged, you do not have to specifically allocate the funds. Concur 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.

**Request List**

Allocate Selected Expenses Clear Selections Summary

Select Group ▾

<input type="checkbox"/>	Date ▾	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	11/02/2019	04. Meals		\$200.00
<input checked="" type="checkbox"/>	11/02/2019	Registration F...		\$450.00
<input type="checkbox"/>	11/02/2019	06. Other Trav...		\$20.00

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.

Allocations Total:\$650.00 Allocated:\$650.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

<input type="checkbox"/>	Percentage	* Fund	* School	* Resource	* Project Year	* Goal	* Function	Code
<input type="checkbox"/>	100	(11) 11 - UNRE...	(DDB) DDB - B...	(1000) 1000 - ...	0	6729	(0000) 0000 - ...	(11) 11 - UNRE...

Allocate By: ▾

- Percentage
- Amount

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. **NOTE:** There is no limit to the number of budget strings you can add.

Allocations Total:\$650.00 Allocated:\$650.00(100%) R

Allocate By: ▾ | Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

<input type="checkbox"/>	Percentage	* Fund	* School	* Resource	* Project Year	* Goal	* Function
<input type="checkbox"/>	50	(11) 11 - UNRE...	(DDB) DDB - B...	(1000) 1000 - ...	0	6729	(0000) 0000 - ...
<input type="checkbox"/>	50	(11) 11 - UNRE...	(DMF) DMF - ...	(1000) 1000 - ...	0	6017	(3000) 3000 - ...

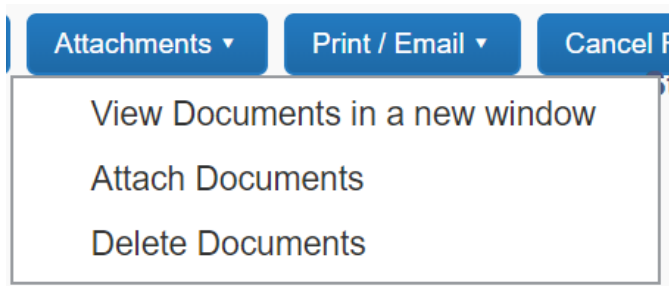
<input type="checkbox"/>	Percentage
<input type="checkbox"/>	75
<input checked="" type="checkbox"/>	25

If you would like to modify the percentages, simply click in the field and change as needed. Remember to Save the allocations. Once you have entered expenses and allocated budget, you are ready to upload the required documents.

## Uploading Required Documents

Prior to submitting your request for approval, you are required to upload a copy of the conference/meeting flyer or agenda. If the traveler is attending a meeting, a copy of an email is sufficient.

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 are uploaded, click on “close”.

Document Upload and Attach

You may attach scanned images.  
You may choose up to 10 files to attach to the request.

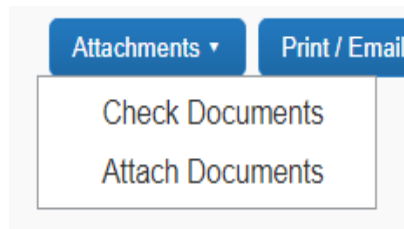
For best results, scan images in black & white with a resolution of 300 DPI or lower.  
Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading:

Browse...
Upload

Required document for Concur test.pdf
Attached

Close

A screenshot of a user interface showing two blue buttons at the top: "Attachments ▾" and "Print / Email". Below them is a white box containing two links: "Check Documents" and "Attach Documents".

To verify the documents are uploaded, return to the “attachments” button 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). NOTE: The maximum file size is 5 mpbs.

## Submitting for Approval

Once you have uploaded all of the required documents, you are ready to submit the request for approval. Classified and manager travel requests will automatically be routed to the traveler’s immediate supervisor as noted in the travel profile. Next, travel requests are routed to the area vice president, Vice President of Business Services, and finally to the college president if the travel is out-of-state. The division dean must be manually added as an approver for faculty travel requests. For grant funded travel requests, the budget/grant manager must also be manually added to the request as an approver.

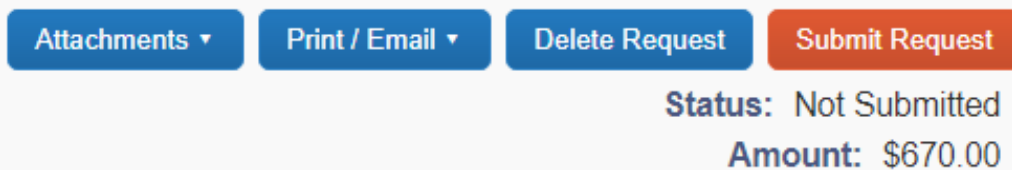
Click on the “Approval Flow” tab. Click the blue plus sign and the “User Added Approver” box appears.

User-Added Approver:

A screenshot of a text input field for adding an approver. The field is empty and has a thin border.

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.

A screenshot of the request submission interface. It shows four buttons: "Attachments ▾", "Print / Email ▾", "Delete Request", and "Submit Request" (highlighted in orange). Below the buttons, the status is displayed as "Status: Not Submitted" and the amount as "Amount: \$670.00".

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

Final Review

User Electronic Agreement

This is a true and accurate estimation of expenses that will be incurred to accomplish official business for Riverside Community College District and this request is in compliance with Riverside Community College District Travel & Expense policy.

Accept & Submit

Cancel

Hotel

Parking

US Fees

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

Active Requests (1)

Delete Request

Copy Request

Class/Inactivate Request

View

Request Name

Begins With

Go

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input type="checkbox"/>	For test purposes	37HP	Pending Cost Object Approval	11/02/2019	10/19/2019	\$670.00
				11/06/2019		

## 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, the Cal Travel Store will receive the Request and will process the reservation. If additional information is needed, an agent will contact the traveler to finalize the reservation. There is no need for the traveler to contact the agent prior to an agent reaching out to them to confirm the reservation.

Once the reservation is confirmed, and agent will send a confirmation email to the traveler.

## 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”.


## Completing the Booking Process

Once the travel request is fully approved, you will receive an email notification from [AutoNotifications@concursolutions.com](mailto: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. To complete the booking process, take the following steps:

Login to Concur.

Click on the “Request” link on the top banner. This will take you to your active travel request dashboard. You will see a comment of “Pending on-line Booking” under the request status.

### Active Requests (4)


View ▾			
Request Name ▾		Begins With ▾	<input type="text"/> Go
<input type="checkbox"/>	Request Name	Request ID	Status
<input type="checkbox"/>	 Association of Awesome Community Association of Awesome Community College Classified Employees Annual Conference	3A4N	Pending on-line Booking  Comment: Not sure if this is a legitimate request . . . I haven't heard of the group, and it appears to be mis-spelled in the first instance.


Select the travel request by double clicking on the request name. Click on the “Book with Concur Travel” button.


## Request 3A4N [West, Raymond]

**Request/Trip Name:** Association of Awesome Community

**Additional Information:** Association of Awesome Community...

Request Header 

Segments 

Expense Summary 

Approval Flow

Audit Trail

Book with Concur Travel

## Booking Airfare

Booking your airfare is a straightforward process. Click on the proceed to booking button.

**Association of Awesome Community**

Start date: Thursday, 02/06/2020  
End date: Monday, 02/10/2020  
Purpose: Association of Awesome Community College Classified Employees Annual Conference

**Your Itinerary**

To Begin Booking your Itinerary, Please provide additional information below, then press the "Proceed to booking" button.

**TRAVEL REQUEST ITINERARY**

**Air Ticket**

Ontario Airport (ONT)  
Los Angeles, CA

San Francisco Airport (SFO)  
San Francisco, CA

Departure Thursday, 02/06/2020 Depart at 10:20 AM

**Air Ticket**

San Francisco Airport (SFO)  
San Francisco, CA

Ontario Airport (ONT)  
Los Angeles, CA

Departure Monday, 02/10/2020 Depart at 3:40 PM

**Hotel Reservation**

San Francisco, California

Check-in Thursday, 02/06/2020 Check-out Monday, 02/10/2020

☐ Only show me this page when I need to provide extra information

**Proceed to booking**

Enter your flight criteria (like the process followed when obtaining quotes) to display flight options. Select the your flights by clicking the "Select" button.

**Trip Summary**

**Select Flights or Trains**

Round Trip  
ONT - SFO  
Depart Thu, 02/06/2020  
Return: Mon, 02/10/2020

**Finalize Trip**

**Previous Searches**

Previous Searches

**Change Search**

Depart - Thu, Feb 6

Depart 07:00 A - 01:00 P

**LOS ANGELES TO SAN FRANCISCO**  
THU, FEB 6 - MON, FEB 10

Show as **USD**

Show matrix Print / Email

Shop by Fares Shop by Schedule

Flight Number Search Sorted By: Policy - Most Compliant


Displaying: 78 out of 504 results. Previous | Page: 1 of 8 | Next | All

Airline	Flight	Class	Time	Fare	Action
Southwest	10:20 AM ONT → 11:50 AM SFO	Nonstop	1h 30m	Wanna Get Away \$107.96	Select
Southwest	03:40 PM SFO → 05:10 PM ONT	Nonstop	1h 30m	Anytime \$505.52	Select
Southwest	10:20 AM ONT → 11:50 AM SFO	Nonstop	1h 30m	Wanna Get Away \$107.96	Select
Southwest	12:25 PM SFO → 01:55 PM ONT	Nonstop	1h 30m	Anytime \$505.52	Select


Review your flight selections. Choose your frequent flyer program from the drop-down menu (if you have them).

[Travel](#) [Trip Library](#) [Templates](#) [Tools](#)

### Trip Summary

 **Flights Selected**

Round Trip  
ONT - SFO  
Depart: Thu, 02/06/2020  
Return: Mon, 02/10/2020

 **Finalize Trip**

## Review and Reserve Flight

### REVIEW FLIGHTS

**DEPART** ✕ **Thu, Feb 6** – Los Angeles, CA to San Francisco, CA [Hide details](#)

Thu, Feb 6 10:20a ONT → 11:50a SFO 1h 30m Southwest 1450

**RETURN** ✕ **Mon, Feb 10** – San Francisco, CA to Los Angeles, CA [Hide details](#)

Mon, Feb 10 03:40p SFO → 05:10p ONT 1h 30m Southwest 1260

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. ⓘ

**Primary Traveler** [Edit](#) | [Review all](#)

**Name:** Raymond DULK West **Phone:** 951.222.8307

**Frequent Flyer Programs** [Add a Program](#)

For Southwest

### SEAT ASSIGNMENT

Pre-reserved seats are not available for this flight.

The RCCD credit card automatically pays for the airfare. Click on “Reserve Flight and Continue”.

### SEAT ASSIGNMENT

Pre-reserved seats are not available for this flight.

---

### REVIEW PRICE SUMMARY


Description	Fare	Taxes and Fees	Charges
Airfare	\$73.82	\$34.14	\$107.96
<b>Total Estimated Cost: \$107.96</b>			
<b>Total Due Now: \$107.96</b>			

### APPLY TICKET CREDIT

You can apply your previously canceled tickets (ticket credit) toward this Southwest Direct Connect booking. Select **a maximum of two** ticket credits. [Add Ticket Credit](#)

### METHOD OF PAYMENT

This purchase will be charged to your company directly.

 **This is a Non-Refundable Ticket**  
Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

[Back](#) [Reserve Flight and Continue](#)



## Booking Hotel

To book your hotel accommodations, enter your search criteria.

Travel Trip Library Templates Tools

CHECK-IN THU, FEB 6 - CHECK-OUT MON, FEB 10 Show as USD ▼

Hide Map Print / Email

**Trip Summary**

**Flights Reserved**

Round Trip  
ONT - SFO  
Depart: Thu, 02/06/2020  
Return: Mon, 02/10/2020

**Select a Hotel**

Nights: 4  
San Francisco, CA  
Check-in: Thu, 02/06/2020  
Check-out: Mon, 02/10/2020

**Finalize Trip**

**Total Estimated Cost**

Air	USD	107.96
	USD	107.96
Total	USD	107.96

**Change Search**

San Francisco map showing hotel locations and search results.

Displaying: 100 out of 100 results. Previous 1 2 3 4 Next | All

Select the hotel by clicking on the “View Rooms” button to view room options.

**13. Acqua Hotel**  
555 Redwood Hwy, Mill Valley, CA 94941 [Map it](#)  
9.46 miles ★★★★★ [View Rooms](#)

**14. Orchard Hotel**  
665 Bush St, San Francisco, CA 94108 [Map it](#)  
1.2 miles ★★★★★ [View Rooms](#)

Select the room option by clicking on the blue button.

**13. Acqua Hotel**  
555 Redwood Hwy, Mill Valley, CA 94941 [Map it](#)  
9.46 miles ★★★★★ [Hide Rooms](#)

**Most Preferred Hotel** for Riverside Community College District [Hotel details](#)

*The CA Green Lodging Program encourages State and Local government travelers to seek out and give preference to certified green hotels.*

**Room Options**

Best Available Rate - Dlx Queen Bed Down Comforter CD Player Vcr Fridge Spa Robes Comp Wireless Hspd Cont Brkfst Best Available Rate (Sabre) [Rules and cancellation policy](#) [\\$239](#)

Best Available Rate - Dlx Queen Bed Ada Accessible Fridge Spa Robes Comp Wirelss Hspd Amer Brkfst Best Available Rate (Sabre) [Rules and cancellation policy](#) [\\$239](#)

Review and reserve your hotel room by clicking the “Reserve hotel and continue” button.

Trip Summary

Flights Reserved

Round Trip  
ONT - SFO  
Depart: Thu, 02/06/2020  
Return: Mon, 02/10/2020

Hotel Selected

Nights: 4  
San Francisco, CA  
Check-in: Thu, 02/06/2020  
Check-out: Mon, 02/10/2020

Finalize Trip

Review and Reserve Hotel

REVIEW HOTEL ROOM

Acqua Hotel

Best Available Rate - Dlx Queen Bed Down Comforter CD Player Vcr Fridge Spa Robes Comp Wireless Hspd Cont Brkfst Best Available Rate  
4 Nights | 1 Guest\*

<b>Check-in</b>	<b>Check-out</b>	<b>Address</b>	<b>Phone</b>
Thursday, February 06, 2020	Monday, February 10, 2020	555 Redwood Hwy Mill Valley, California 94941 United States	415-380-0400

\* We reserve every hotel room for 1 guest only, regardless of the number of actual travelers sharing the room. The primary traveler's name is attached to the reservation for hotel check-in.

PROVIDE HOTEL ROOM PREFERENCES

Your preferences and comments will be passed to the hotel.

Comments (30 character max)

Ex: Need early check-in (10am)

☐ Request foam pillows ☐ Request rollaway bed ☐ Request crib

ENTER HOTEL GUEST INFORMATION

Ensure the name below matches the I.D. shown on the day of check-in. ⓘ

Hotel Guest

Name: Raymond DULK West Phone: 951.222.8307 chip.west@rcc.edu ▼

Edit | Review all

Be sure to agree to the rates and rules by checking the box before clicking on reserve hotel and continue.”

REVIEW PRICE SUMMARY

Description	Nightly rate	Dates	Total
Acqua Hotel	\$229.00	Feb 06 - Feb 07	\$229.00
	\$239.00	Feb 07 - Feb 09	\$478.00
	\$229.00	Feb 09 - Feb 10	\$229.00

Total Estimated Cost: \$936.00\*

Total Due Now: \$0.00\*\*

\* May not include taxes or additional fees.  
\*\* Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Citi Bank Mastercard\* (...6011) ⓘ Add credit card

\* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

TOTAL RATE: 1050.15 USD  
EXTRA PERSON: \$25.00  
RATE CHANGES OVER DURATION OF STAY

Hotel Rates  
229.00 06FEB - 07FEB  
239.00 07FEB - 09FEB  
229.00 09FEB - 10FEB

☐ \*I agree to the hotel's rate rules, restrictions, and cancellation policy.

Back

Reserve Hotel and Continue

RCCD Concur Manual

Version 1.3 (released 2/21/2020)

Page 42 of 74

The RCCD credit card reserves your hotel room, however, the hotel will still request a personal debit or credit card be presented at check-in for incidental charges.

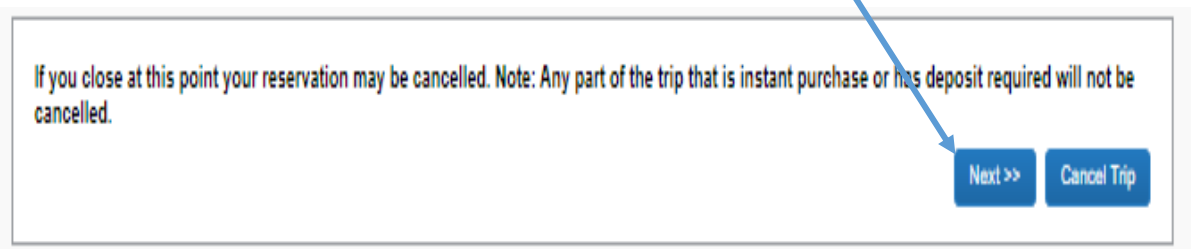
### Booking Car Rental

The process to book your car rental is the same as the process for booking your airfare and hotel.

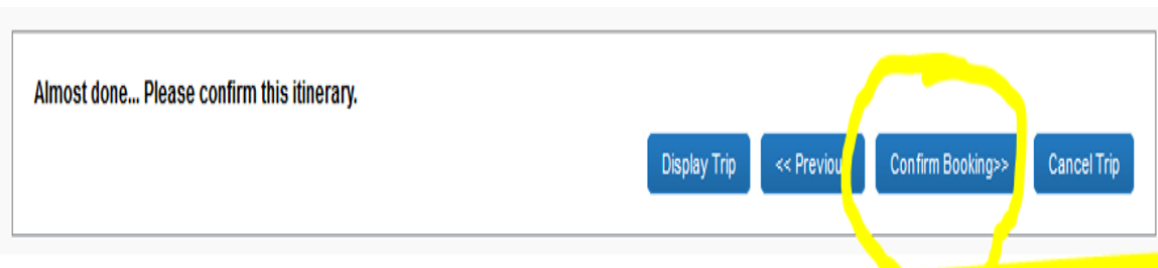
1. Enter your search criteria
2. Select your model option
3. Click “Reserve car and continue”

The RCCD credit card reserves your car. The District holds an agreement with Enterprise Car Rentals. When renting a vehicle, the District will be automatically billed.

To complete the booking process, you must click each blue “next” button that appears at the bottom right hand of the screen.



Once you have reach “Confirm Booking” as an option, click to finalize the booking process.



The following message will appear and an overview of the trip overview displays.

## Finished!

You have successfully booked your trip!

### Trip Record Locator : HJFIBP

This trip complies with your travel policy.

Your itinerary has been saved. CalTravelStore (State of CA RX0F) will service your itinerary.

**Please Note:** Fares are not guaranteed until tickets are issued and are subject to change without notice. Airfare must be ticketed by: 11/21/2019 09:59 pm Pacific

Travel Contact Information  
877-454-8785

## Contacting Purchasing for Payments

Once your travel request has been fully approved, you will receive an automated email notification from [AutoNotifications@concursolutions.com](mailto: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](mailto: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: If you have prepaid the expenses and will be seeking reimbursements, you can skip this step.

Registration - Submit conference registration form or invoice to the purchasing department. Be sure to note the payee name and total amount due 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 (your name, arrival date, confirmation #) leaving the credit card number fields blank.
- b. Email purchasing the hotel's Credit Card Authorization form at [purchasingtravel@rccd.edu](mailto:purchasingtravel@rccd.edu). Purchasing will complete the credit card authorization form and return it to the hotel. The hotel will charge the District credit card upon check out. Tip: A week before your trip contact the hotel to confirm they have the credit card authorization form on file for your trip. Also, be sure to check out at the front desk to ensure the District card is charged and not your personal card. Travelers are still required to provide a credit card upon check-in for incidentals.

## Delete/Cancel/Recalling/Closing Requests

**Delete** - A Request can only be deleted if it has never been submitted.

**Cancel** - A Request can be cancelled 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
  - Expense link will remain visible
  - Request must be Closed/Inactivated in order to prevent expensing
- If Request is cancelled after booking, the Request and the Booking will be cancelled
  - Expense link will remain visible
  - Request must be Closed/Inactivated in order to prevent expensing
- Cancellation of a Request, after it has been fully approved, will release the encumbrance

## **Recall and Resubmit**

You cannot change, cancel, or delete a Request that has been submitted unless you Recall it first. A user may recall a request at any point in the approvals process.

**Cancelling an approved request will result in not being able to book travel or submit an expense report. Use caution when recalling a request.**

Some of the reasons to recall a request are to correct an existing entry or add missing information. If you have questions regarding this process, please contact your local Concur administrator.

## **Close/Inactive**

All requests need to be manually closed/inactivated only if you have already or will not be receiving a reimbursement.

## **Multiple Requests**

If another Request is created due to changes in travel plans mid-stream, you are able to attach the Requests associated with the trip to a single expense report. For assistance with this option, please contact your local Concur administrator.

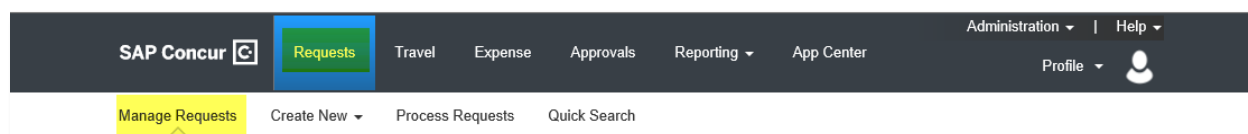
# **Section III:**

## **Creating your Expense Reimbursements**

## Creating your Expense Reimbursement

Once you complete your trip you are ready to prepare your expense reimbursement. Expense reports will route to the Direct Supervisor, then Budget Approvers based on the budget string (School, Goal, Function). **NOTE:** Faculty/Athletics will have to manually add their division Dean as additional approver.

To begin, click on the **Requests** tab, then **Manage Requests**



All travel related Expense Reports must be initiated at the **Requests** tab, by clicking **Expense** link under the **Action** header. This prepopulates the Expense Report Header and will link the request to the Expense Report.

Request Dates	Date Submitted	Total	Approved...	Remaining...	Action
11/12/2019	07/02/2019	\$1,162.11	\$1,162.11	\$1,162.11	<a href="#">Expense</a>
11/13/2019					
10/28/2019	07/30/2019	\$1,324.12	\$1,324.12	\$1,324.12	<a href="#">Expense</a>
10/30/2019					
07/20/2019	04/25/2019	\$1,563.61	\$1,563.61	\$1,563.61	<a href="#">Expense</a>
07/24/2019					
07/20/2019	05/13/2019	\$1,200.00	\$1,200.00	\$143.40	<a href="#">Expense</a>
07/24/2019					

Review information in the Expense Report Header and Click **Next**. The information in the Expense Report Header is copied from the travel request. Travel Requests are not required when seeking only Personal Car Mileage Reimbursements, for travel less that 50 miles in each direction, or Monthly Mileage Reports.

### Create a New Expense Report

Report Header

Report/Trip Name 2019 ACBO Fall Conference	Report/Trip Business Start Date 10/28/2019	Report/Trip Business End Date 10/30/2019	Report/Trip Purpose Conference Attendee
Traveler Type Staff	Paid for by an outside entity? No	Does this trip contain personal travel? No	Personal Travel Dates Additional Information Comment
Fund (11) 11 - UNRESTRICTED GE	School (DDB) DDB - BUSINESS OPE	Resource (1000) 1000 - GENERAL FUN	Project Year 0
Goal 6729	Function (0000) 0000 - CAMPUS ADMI		

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
2019 ACBO Fall Conference	37D3	No	\$786.00	\$786.00	\$786.00

Next >> Cancel

The expense report will auto-populate with any expenses that have already been incurred by booking in Concur.

Expense Center

SAP Concur

Requests Travel Expense Approvals

Administration Help

Acting as West, Raymond D

Manage Expenses

CCFC 26th Annual Conference

Delete Report Notify Employee

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

Exceptions

Expense Type	Date	Amount	Exception
Airfare	10/07/2019	\$162.52	Did you use your personal card?
Hotel	11/13/2019	\$0.00	Did you use your personal card?

Expenses

Date	Expense Type	Amount	Requested
11/13/2019	Hotel Sheraton, Sacrame	\$0.00	\$0.00
11/13/2019	Car Rental Enterprise, Sacram	\$0.00	\$0.00
10/07/2019	Airfare Southwest, Ontario,	\$162.52	\$162.52

TOTAL AMOUNT \$162.52 TOTAL REQUESTED \$162.52

Available Expenses

Expense Detail	Expense Type	Source	Date	Amount
Hilton Hotels	Hotel		10/30/2019	\$427.50

The next step is to note how each prepaid expense was paid. This ensures the traveler is not reimbursed for expenses not paid personally.

Expense Nightly Lodging Expenses Receipt Image

Available Receipts

Total Amount: \$481.78 | Itemized: \$481.78 | Remaining: \$0.00

Expense Type: Hotel

Transaction Date: 10/30/2019

Report/Trip Purpose: Conference Attendee

Additional Information:

Vendor: Hilton Hotels

City of Purchase: San Diego, California

Payment Type: College Card (AmEx)

Amount: 481.78 USD

Comment:

Save Add Itemization Attach Receipt Cancel

There are several expense types available to choose from in the drop down menu.

- Out of Pocket – Select this option if the expense was paid out of pocket by the traveler.
- College Card (AmEx) or College Card (BoA) – The Purchasing department has two credit cards to pay travel related expenses. Travelers should contact Purchasing to confirm which card was used. Hotel or conference registration fees are examples of the type of expenses that may have been paid by the District credit card.



- Other Entity – Select this option for expenses paid for by an outside entity.
- RCC Ghost Card (Citi) – Select this option if airfare and/or car rental were booked through Concur.

To add expenses to the expense report, click on “New Expense” at the top of the expense report:



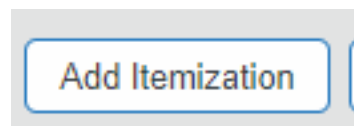
Select the expense type you wish to add from the displayed options. If necessary use “Miscellaneous” in the “Other Travel Expenses” section if you do not see the expense type you are looking for.

### All Expense Types

01. Travel Expenses	...04. Meals	...06. Other Travel Expenses
Airfare	Dinner	Miscellaneous
Hotel	Lunch	Tolls/Road Charges
02. Transportation	05. Fees	08. Other
Car Rental	Conference Registration Fees/Agenda	Non Reimbursable/Personal Expense
Parking	06. Other Travel Expenses	09. Non-Employee (Student, Guest) Expenses
Train	Agency Booking Fees	Non-Employee Airfare
03. Mileage	Airline Fees	Non-Employee Charter Bus
Monthly Mileage Report	Currency Exchange Fees	Non-Employee Lodging
Personal Car Mileage	Ground Transportation	Non-Employee Meals
04. Meals	Group Meals/Entertainment <10 Attendees	Non-Employee Other Travel Expenses
Breakfast	Group Meals/Entertainment 10 + Attendees	

### Adding Hotel Expenses

You will be required to itemized the hotel expenses. Enter the basic expense and click on “Add Itemization”



Expense | **Nightly Lodging Expenses** | Receipt Image | Available Receipts

Total Amount: \$481.78 | Itemized: \$481.78 | Remaining: \$0.00

Expense Type Hotel	Transaction Date 10/30/2019	Report/Trip Purpose Conference Attendee	Additional Information	Vendor Hilton Hotels
City of Purchase San Diego, California	Payment Type College Card (AmEx)	Amount 481.78 USD	Comment	

Save Add Itemization Attach Receipt Cancel

Refer to the hotel folio for room rate and tax information to add to the itemization. Click on “Save Itemization”.

Expense | **Nightly Lodging Expenses** | Receipt Image | Available Receipts

Total Amount: \$481.78 | Itemized: \$481.78 | Remaining: \$0.00

Check-in Date 10/28/2019	Check-out Date 10/30/2019	Number of Nights 2
-----------------------------	------------------------------	-----------------------

**Recurring Charges (each night)**

Room Rate	Room Tax
Other Room Tax 1	Other Room Tax 2

☐ Room rate and taxes will be shown as separate expenses

**Additional Charges (each night)**

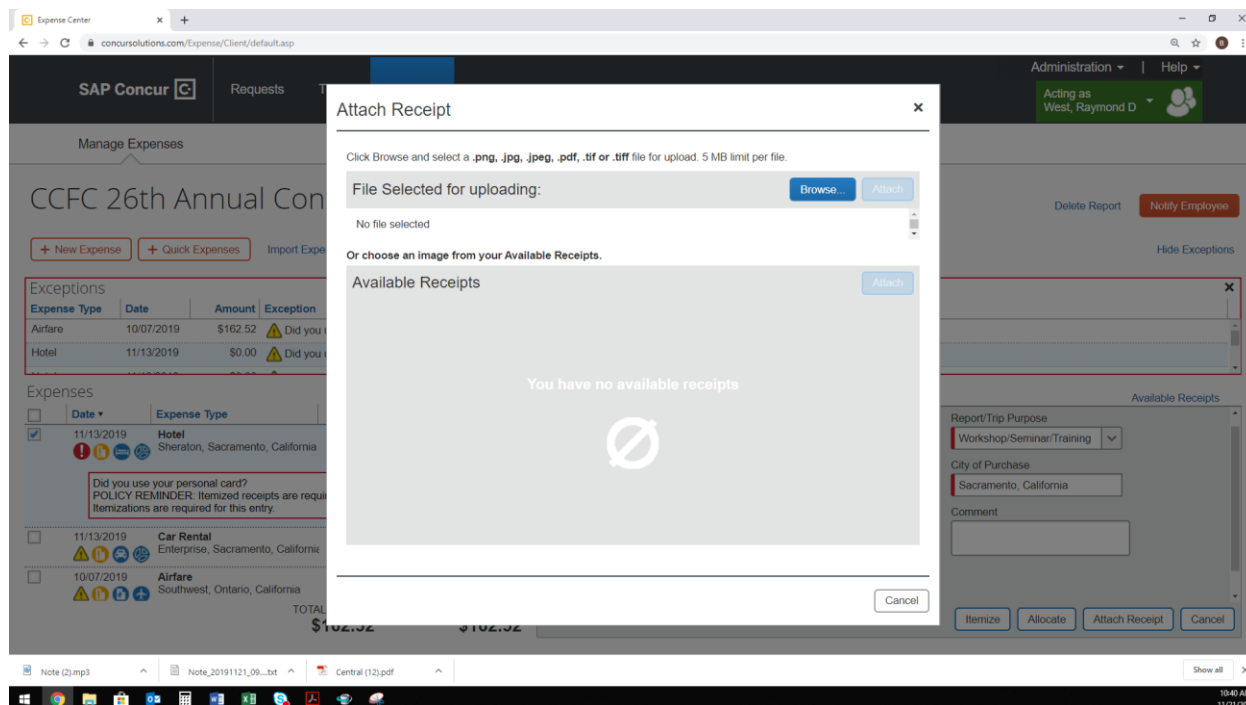
Expense Type Choose an expense type	Amount
Expense Type Choose an expense type	Amount

Save Itemizations Cancel

Next, click “attach receipt” to attach the hotel folio to the expense entry.

Attach Receipt

Next browse to select the file to upload and click “attach”.



## Adding Airfare Expenses

If the option to activate e-receipts was selected in the profile settings, some expenses may display an option to attach an e-receipt to an expense. In the example below, the e-receipt is available for airfare. To add the e-receipt, click on the tab and select from the available receipts displayed.

A screenshot of the SAP Concur "E-Receipt" form. The form is titled "Expense" and "E-Receipt". It contains several input fields and dropdown menus. The "Expense Type" is set to "Airfare". The "Transaction Date" is "10/07/2019". The "Report/Trip Purpose" is "Workshop/Seminar/Training". The "Additional Information" field is empty. The "Ticket Number" is "5262128645141". The "Vendor" is "Southwest Airlines". The "City of Purchase" is "Ontario, California". The "Payment Type" is "RCC Ghost Card (Citi)". The "Amount" is "162.52" with a currency dropdown set to "USD". The "Request" field shows "11/11/2019, \$162.52 - CCFC". At the bottom, there are buttons for "Save", "Itemize", "Allocate", "Attach Receipt", and "Cancel". On the right side, there is a tab labeled "Available Receipts" which is currently active, showing a list of receipts.

## Adding Mileage Expense

### 03. Mileage

#### Monthly Mileage Report

#### Personal Car Mileage

When adding mileage to the expense report, select “personal car mileage”. Instructions for creating a monthly mileage report are on page 54.

To add personal car mileage, complete the transaction date, and purpose of the trip. Next, click on the “mileage calculator” link:

The screenshot shows the 'New Expense' form. A blue arrow points from the text 'click on the “mileage calculator” link:' to the 'Mileage Calculator' link, which is accompanied by a small map icon. The form includes fields for Expense Type (set to 'Personal Car Mileage'), Transaction Date (03/04/2020), Purpose of the Trip (conference attendee), Paid for by an outside entity? (No), From Location, To Location, Payment Type (Out of Pocket), Distance (0), Amount (0.00), USD, Comment, and Request (03/04/2020, \$109.62 - 4CSD /). At the bottom right are buttons for Save, Allocate, Attach Receipt, and Cancel.

Enter the start and end fields and click on “Deduct Personal Commute”.

The screenshot shows the 'Mileage Calculator' interface. On the left, there are waypoints: 4800 Magnolia Avenue, Riverside, CA 92506 (A), 555 W Foothill Blvd, Claremont, CA 917 (B), and 4800 Magnolia Avenue, Riverside, CA 92506 (C). The map shows a route from A to B to C. Below the waypoints, the 'Deducted Commute Distance' section shows 'Home' at 3720 Ramona Dr, Riverside, CA 92506 and 'Office' at 4800 Magnolia Ave, Riverside, CA 92506, with a distance of 0.2 MI. The 'Directions' section shows the route from A to B to C. At the bottom left, the 'Deduct Commute' checkbox is checked. The bottom right shows 'TOTAL PERSONAL 0.2 MI' and 'TOTAL BUSINESS 59.3 MI'. A blue box highlights the 'Deduct Commute' checkbox and the 'TOTAL PERSONAL' field. At the bottom right are buttons for 'Add Mileage to Expense' and 'Cancel'.



















Next, click on “Add Mileage to Expense” and then “Save” to complete the personal car mileage entry.

### Adding Other Expenses

Continue to add additional expenses until all expenses and receipts have been added to the expense report.

### Finalizing Expense Report

Once all expenses have been entered, the total cost of the trip will be displayed under “Total Amount” and “Total Approved”. NOTE: Total approved is not the amount to be reimbursed to the traveler.

Expenses <span style="float: right;"><a href="#">View</a> &lt;&lt;</span>				
	Date ▾	Expense Type	Amount	Approved
>	10/30/2019   	Hotel Hilton Hotels, San Diego, California	\$389.94	\$389.94
	10/29/2019   	Breakfast Aroma Hilton Resort, San Diego, Ca	\$6.14	\$6.14
	10/29/2019  	Lunch Starbucks, San Diego, California	\$14.35	\$14.35
	10/28/2019  	Breakfast Aroma Hilron Resprt, San Diego, Ca	\$3.90	\$3.90
>	10/28/2019    	Hotel Hilton Hotels, San Diego, California	\$194.97	\$194.97
	10/27/2019  	Personal Car Mileage	\$117.74	\$117.74
	09/05/2019  	Conference Registration Fees/Ag 2019 ACBO Conference, San Diego	\$450.00	\$450.00
			<b>TOTAL AMOUNT</b> <b>\$1,177.04</b>	<b>TOTAL APPROVED</b> <b>\$1,177.04</b>

The reimbursement must not exceed the original estimated travel request by more than 10% or \$200 per RCCD Board Policy. To verify the expense reimbursement has not exceeded this amount, view the approved amount displayed on the right hand side of the expense report under “Approved Amount”.

Summary			
Report Summary			
Report Totals			
		Amount Due Company	Amount Due Employee
		\$0.00	\$142.13
Requests (1)			
>	Request Name	Request ID	Amount Approved
>	2019 ACBO Fall Conference	37DE	\$896.00
			Amount Remaining
			\$896.00

You will also be able to see the amount actually due back to the employee.

## Receipts

Itemized receipts are required for each expense entered. There are several methods to add the receipts to an expense report:

### Receipt Store

Digital receipts can be emailed concur and will be available to be selected/attached to expense entry as required. User (and/or Delegate) has to validate email address in Profile Settings.

### Upload

Receipt images can be uploaded from your desktop (please note image size must be less than 5BM).

### E-Receipts

Electronic receipts will be automatically generated for participating vendors (typically airlines, hotels, car rental vendors). User has to opt in through Profile Settings.

### Missing Receipts Affidavit

Missing Receipts Affidavit is an electronic attestation by user that the expenses incurred were within policy and business related.

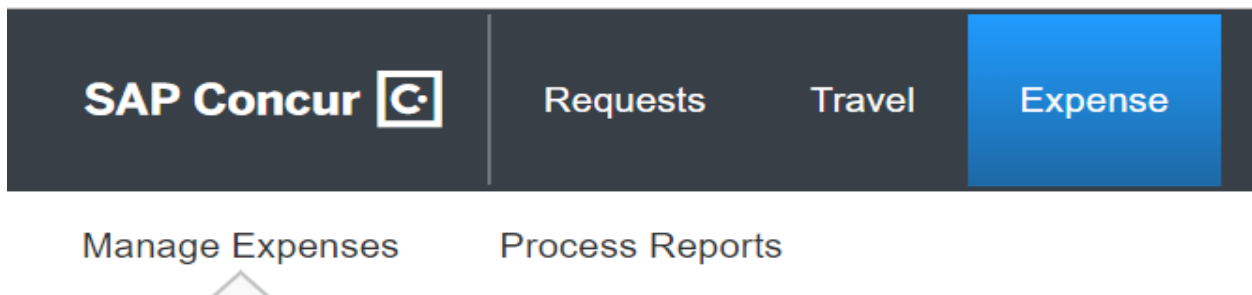
## Creating your Monthly Mileage Report

Monthly Mileage Reports may be submitted for mileage reimbursement requests for local travel (<50 miles each trip) without a Travel Request on a monthly basis

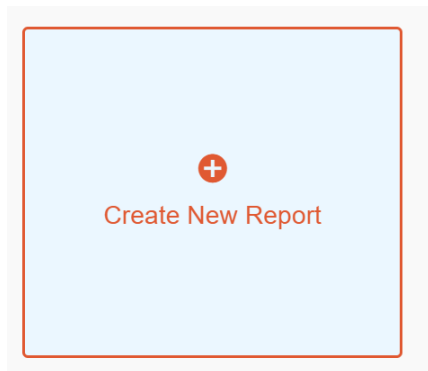
- Create one expense report for all mileage incurred during the month
- Enter a line entry for each day for Mileage (using Mileage Calculator)
- Enter Parking or Tolls related to the trips
- Attach receipts for Parking and/or Tolls

Note\*\*Do Not select “Personal Car Mileage” as this Expense Type is specifically for mileage connected to a Travel Request.

To create a monthly mileage report, click on the “Expense” tab on the ribbon on the top of your screen.



Click on “Create a new report”.



Complete all sections with a red bar (denotes a required field). For assistance in obtaining the appropriate budget string to charge, please contact your department.

- Report/Trip Name n- enter the month the report is for.
- Start Date – select the first day of the month
- End Date – select the last day of the month
- Complete all fields
- Click “Next”

## Create a New Expense Report

### Report Header

Report/Trip Name December Mileage	Report/Trip Business Start Date 12/01/2019	Report/Trip Business End Date 12/31/2019	Report/Trip Purpose Meeting	
Traveler Type	Paid for by an outside entity?	Does this trip contain personal travel?	Personal Travel Dates	Additional Information
Comment				
Fund	School	Resource	Project Year	Goal
Function				
<a href="#">Next &gt;&gt;</a>				

To add your trip information, be sure to select the “Monthly Mileage Report” as the expense type NOT Personal Car Mileage/

New Expense

Expense Type

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

Recently Used Expense Types

Monthly Mileage Report

Personal Car Mileage

All Expense Types

**01. Travel Expenses**  
Airfare  
Hotel  
**02. Transportation**  
Car Rental

**...06. Other Travel Expenses**  
Airline Fees  
Currency Exchange Fees  
Ground Transportation  
Group Meals/Entertainment <10 Attendees

Enter the transaction date and purpose of the trip. Click on “Mileage Calculator” and enter the start and end locations. Click “Calculate Route” to view the results.



**Mileage Calculator**

☐ Avoid Tolls ☐ Avoid Highways

**Waypoints**

- A 3720 Ramona Dr, Riverside, CA 92506, x
- B 5885 Haven Ave, Rancho Cucamonga, x

**Calculate Route**

☐ Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	0.0 MI

Map data ©2019 Terms of Use Report a map error

**Add Mileage to Expense** Cancel

Click on “Make Round Trip” for round trip travel calculation.

## Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

**Waypoints**

- A 3720 Ramona Dr, Riverside, CA 92506, x
- B 5885 Haven Ave, Rancho Cucamonga, x
- C

**30.4 MI**

☐ Personal

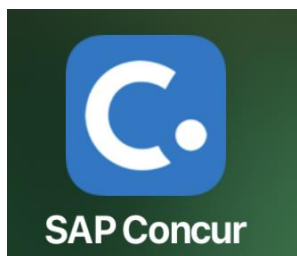
**Calculate Route** **Make Round Trip**

Next, click on “Deduct Personal Mileage”. Click “Add Mileage to Expense” to add this calculation to your report.

**Add Mileage to Expense**

Click “Save” and repeat the steps for each day of mileage you want added to the monthly report. Remember to add parking as a separate expense and attach your receipt if applicable. Once done preparing your report, click “Submit Report”.

## 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.

### Access Available Via SSO

- Download Mobile App from App Store (or get a link by clicking 'Get Started')
- Login to RCCD SSO on your mobile device
- Login to Concur using Company Code **2UP2B2**

### Using Mobile App

- Create image receipts and attach to your profile
- Manage Trips and Expense Reports on the go
- Prepare, Submit, Approve Expense Reports

### 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.

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.  
Click Forgot Concur Mobile PIN in the left hand menu to reset your existing Concur Mobile PIN.

Concur Username: hurongi@rccd.edu

A smartphone displaying the Concur Mobile app interface. The screen shows a header with the Concur logo and a list of menu items: Trips, Expenses, Expense Reports, and Approvals. The background of the app shows a cityscape.

# **Section IV:**

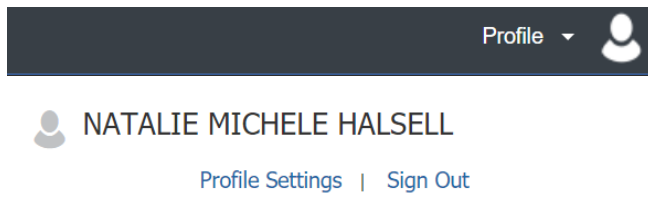
## **Instructions for Delegates**

## Assigning Delegates

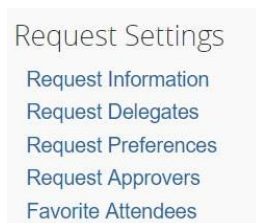
A delegate is an individual you assign to act on your behalf for both the travel request process as well as the expense reimbursement process. Please be sure to discuss the role with the individual you would like to assign as your delegate prior to doing so.

### Travel Request Delegates

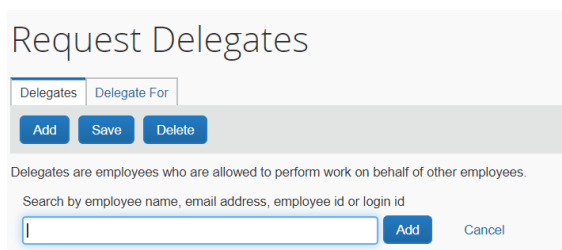
To assign someone to be your travel request delegate, click on the “Profile” icon and select “Profile Settings”:



On the left hand side of your screen under the Request Settings, click on “Request Delegates”:



Click on “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:

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	TATUM, ELIZABETH Liz.Tatum@rcc.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

## Expense Delegates

To assign someone to act as your Delegate for creating expense reports, click on “Expense Delegates” on the left-hand side of your screen. Next, click on the blue “Add” button and search for the individual you would like to assign:

## Expense Delegates

Delegates

Delegate For

Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add

Cancel

Once selected, be sure to check mark all of the actions you want to allow them to take on your behalf.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Tatum, Elizabeth Liz.Tatum@rcc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click “Save” to save these changes.

## Acting as a Delegate

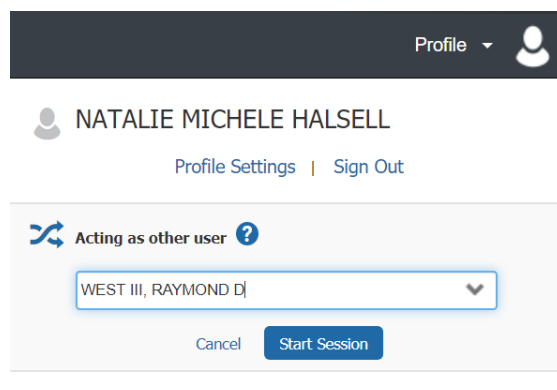
To begin acting as someone’s delegate, first you must login to Concur using your own login credentials. If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

**NOTE:** Please do not assign someone as your delegate without first discussing with them.

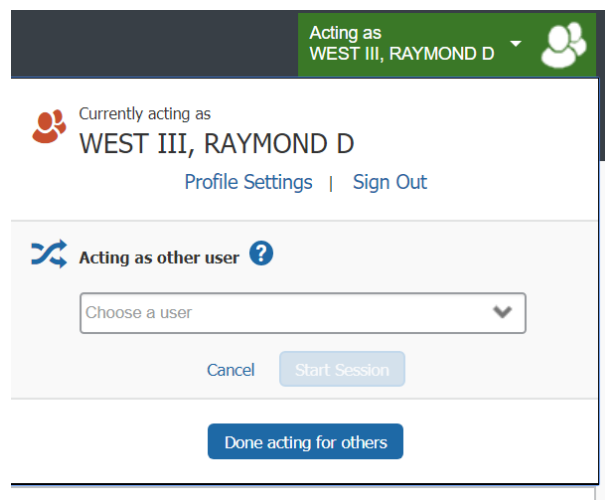
To work as a delegate:

1. Click on the Profile icon in the upper right-hand corner of the screen.
2. Click on > **Act on behalf of another user**.
3. Select the appropriate user's name.
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”**.

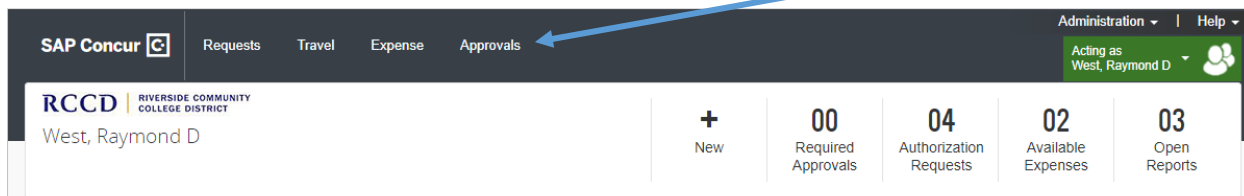
**NOTE:** The role of the delegate and the tasks you are asked to perform can vary from person-to-person dependent upon. For example, some administrators may wish their delegates to complete the travel request and/or expense reports on their behalf. A delegate may be asked to review incoming requests pending an administrator's approval. Those duties and your role as a delegate will need to be defined.

# **Section V:**

## **Instructions for Reviewers/Approvers**

The following steps apply to both individuals reviewing travel requests and expense reports as well as those approving travel requests and expense reports. Approvals are required for both travel requests and expense reimbursements. To begin, approvers will need to login to the single sign-on portal using your email address and password at go.rccd.edu.

Click on the Concur icon to launch Concur. To view pending approvals, click on the **Approvals** tab on the home page ribbon.



The approvals dashboard will appear. Click on either the **Request** tab or the **Expense Reports** tab to view items pending approval.



## Approving a Travel Request

All employees traveling on behalf of the District are required to complete a travel request prior to travel in compliance with Board Policy/Administrative Policy 6900.

To view pending travel requests in Concur, click on the “Requests” tab and select the travel request you wish to review.

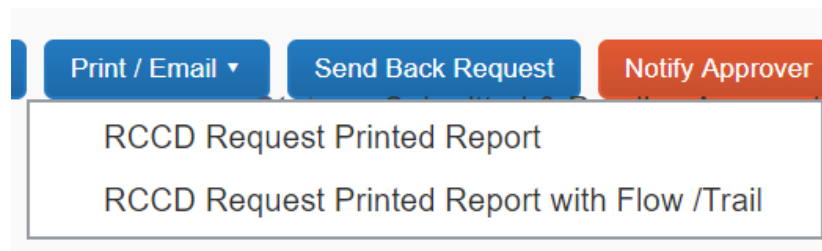
Requests		
Request Type	Request Name	Request ID
Travel	Test Travel for Training	3AFV



Review the following items:

- Dates of travel (personal dates of travel included?)
- Destination (out-of-state travel requires Board approval)
- Funding Source/Budget String (is this the appropriate funding source for the trip?)
- Required Documents have been attached

To view this information, click on the Print/Email icon. Next, select “RCCD Request Printed Report with Flow/Trail” from the drop-down menu.



A new window opens with a summary report that includes the traveler’s name, Request/Trip name, a summary of the total estimated expenses, the budget string to be charged, and the approver workflow.

---

### Travel Request

Request ID : **3AFV**  
Minimum Departure Date : **01/24/2020**  
Approval Status : **Submitted & Pending Approval**

---

---

Request/Trip Na : **Test Travel for Training**  
Request/Trip Start Date : **01/24/2020**  
Request/Trip End Date : **01/31/2020**  
\*Request/Trip Purpose : **Conference Attendee**  
\*How will you book your travel? : **01. Book online - Concur Travel**  
\*Paid for by an outside entity? : **No**  
\*Traveler Type : **Staff**  
\*Trip Type : **Employee**  
\*Does this trip contain personal travel? : **No**  
\*Fund : **11 - UNRESTRICTED GENERAL FUND (11)**  
\*School : **DDB - BUSINESS OPERATIONS - RIVERSIDE (DDB)**  
\*Resource : **1000 - GENERAL FUND (1000)**  
\*Project Year : **0**  
\*Goal : **6729**  
\*Function : **0000 - CAMPUS ADMINISTRATIVE SERVICES (0000)**  
\*Out of State? : **No**  
Main Destination City : **San Francisco (US)**  
Main Destination Country : **UNITED STATES (US)**

---

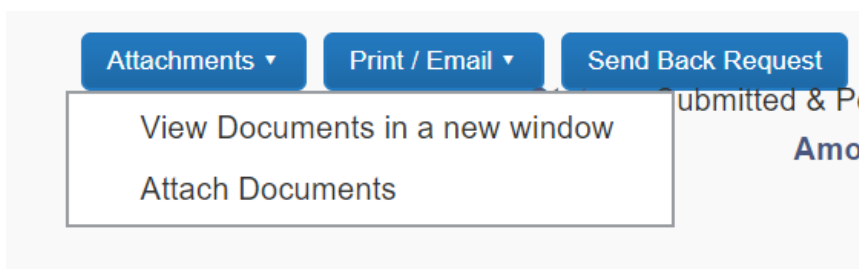
Expenses				
Request/Trip Start Date	Expense Type	Entry Description	Amount	Amount
01/24/2020	Airfare		\$147.98	\$147.98
	<b>Allocations :</b>	100.00% (\$147.98) DDB 6729 0000 11 1000 0		
01/24/2020	Hotel		\$1,085.00	\$1,085.00
	<b>Allocations :</b>	100.00% (\$1,085.00) DDB 6729 0000 11 1000 0		

## Verify Attached Documents

The items noted below are the required documents to be attached to a travel request in Concur:

- Conference agenda or flyer
- Conference registration confirmation or invoice
- Documentation demonstrating how estimate of expenses were reached
  - Conference registration fee
  - Airfare estimate
  - Hotel estimate
  - Car rental estimate
  - Parking estimate
  - Uber/Lyft estimate
  - Mileage estimate (Google Map, MapQuest)

To view the attached document, click on “**Attachments**”, and select “View documents in a new window”:



A new window will open with all of the attached documents appearing as one PDF document. Approver should scroll through to verify each expense type has a corresponding piece of backup attached.


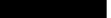

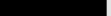
NOTE: Only the traveler or their delegate can make changes to the travel request and resubmit for approval. If changes are needed, click “send back to user” and add comments regarding requested changes.

Once your review of the travel request has been completed, click “Approve”. The travel request will move to the next approver.

## Approving an Expense Report

To review an expense report, click on the expense report you would like to review.

Expense Reports

	Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
	2019 ACBO Fall Conference 2019 Association of Chief Business Officers Fall Conference		11/06/2019	\$30.40	\$30.40
	2019 ACBO Fall Conference		11/06/2019	\$157.78	\$997.72

Concur will display the total actual cost of the trip on the left and the original estimated cost of the travel request on the right. If the total actual cost of the trip exceeds 10% or \$200 of the original estimate, a revised travel request is required in accordance with AP 6900.

2019 ACBO Fall Conference

[Send Back to User](#)
[Notify Approver](#)

[Summary](#)
[Details](#)
[Receipts](#)
[Print / Email](#)
[Hide Exceptions](#)

Exceptions

Expense Type	Date	Amount	Exception
Breakfast	10/28/2019	\$3.90	POLICY REMINDER: Itemized receipts are require for Hotel and Meals.
Breakfast	10/29/2019	\$6.14	POLICY REMINDER: Itemized receipts are require for Hotel and Meals.

Expenses

Date	Expense Type	Amount	Approved
10/30/2019	Hotel Hilton Hotels, San Diego, California	\$389.94	\$389.94
10/29/2019	Breakfast Aroma at Hilton, San Diego, Californi	\$6.14	\$6.14
10/28/2019	Breakfast Aroma at Hilton, San Diego, Californi	\$3.90	\$3.90

Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$157.78

Requests (1)

Request Name	Request ID	Amount Approved	Amount Remaining
2019 ACBO Fall Conference	37CY	\$1,132.00	\$188.26

TOTAL AMOUNT

\$997.72

TOTAL APPROVED

\$997.72

To view the total amount due to the employee and the budget string to be charged, go to Print/Email and Click on RCCD – Detailed Report with Summary Data.

2019 ACBO Fall Conference [REDACTED]

Summary Details ▾ Receipts ▾ Print / Email ▾

Exceptions


Expense Type	Date	Amount
Breakfast	10/28/2019	\$3.90
Breakfast	10/29/2019	\$6.14

RCCD- Detailed Report with Summary Data

RCCD- Detailed Report

RCCD- Detailed Mileage Report

Hotel and Meals.

 POLICY REMINDER: Itemized receipts are required for Hotel and Meals.

A pop-up window will appear with a summary of the expense report.

**Expense Report**  
**Report/Trip Name : 2019 ACBO Fall Conference**  
**Authorization Request**  
**Request ID : 37CY**

Scroll through the summary to review the following:

- Confirm the budget string is correct for each expense type
- Expenses noted as “out of pocket” under payment types are amounts due back to the employee
- Expenses noted with College Card (AmEx or BoA) in the expense report are expenses which have been pre-paid with the District credit card. Airfare and car rental expenses are paid for by the Ghost card contained within the Concur system
- Concur will automatically deduct any cash advances issued

**Breakfast**

Transaction Date	*Report/Trip Purpose	Expense Type	Account Code 1	Additional Information	Vendor	City of Purchase	Payment Type	Amount
10/29/2019	Conference Attendee (Conference Attendee)	Breakfast	5220		Aroma at Hilton	San Diego	Out of Pocket	\$6.14
<b>Allocations :</b>		100.00% (\$6.14) DDB-6729-0000-11-1000-0						
10/28/2019	Conference Attendee (Conference Attendee)	Breakfast	5220		Aroma at Hilton	San Diego	Out of Pocket	\$3.90
<b>Allocations :</b>		100.00% (\$3.90) DDB-6729-0000-11-1000-0						

**Conference Registration Fees/Agenda**

Transaction Date	*Report/Trip Purpose	Expense Type	Account Code 1	Additional Information	Vendor	City of Purchase	Payment Type	Amount
09/05/2019	Conference Attendee (Conference Attendee)	Conference Registration Fees/Agenda	5220			Riverside	College Card (AmEx)	\$450.00
<b>Allocations :</b>		100.00% (\$450.00) DDB-6729-0000-11-1000-0						

To view the total amount due to the employee, scroll down to the bottom of the summary page. This amount is noted under “Amount Due User”:

<b>Report Total :</b>	<b>\$997.72</b>
<b>Personal Expenses :</b>	<b>\$0.00</b>
<b>Total Amount Claimed :</b>	<b>\$997.72</b>
<b>Amount Approved :</b>	<b>\$997.72</b>
<b>Company Disbursements</b>	
<b>Amount Due User :</b>	<b>\$157.78</b>
<b>Amount Due College Card :</b>	<b>\$0.00</b>
<b>Total Paid By Company :</b>	<b>\$997.72</b>

The summary report can either be closed or saved as a PDF if necessary.

## Verifying Receipts

To verify itemized receipts are attached to the expense report, click on “Receipts” and select “View Receipts in new window”.

# 2019 ACBO Fall Conference

[Disalvio, Sherrie]

[Summary](#)
[Details ▾](#)
[Receipts ▾](#)
[Print / Email ▾](#)

Exceptions	
Expense Type	Date
Breakfast	10/28/2019
Breakfast	10/29/2019

Receipts Required

View Receipts in new window

View Receipts in current window

Attach Receipt Images

Itemized receipts are required for Hotel and Meals.

Itemized receipts are required for Hotel and Meals.

A pop-up window will open with all available receipts.


- Each expense type should have an itemized receipt attached with the exception of mileage
- Review mileage calculation is in compliance with board policy
- Verify a copy of the conference agenda is attached

Note: Approvers have the ability to attach missing receipts to any expense type but cannot make any other type of change to the expense report. Only the traveler or their delegate can make changes to the request or expense report and resubmit for approval. If changes are needed, click “send back to user” and add comments regarding requested changes.

Once the expense report has been reviewed, click “**Approve Report**”. Once approved, the request automatically forwards to Accounts Payable for reimbursement processing.

## Approving Mileage Reports

The process for reviewing monthly mileage reimbursements is similar to regular expense reports. Click on the Approvals tab at the top of your screen and select the “Expense” tab to view pending expense reports.

Mileage for August 2019				<a href="#">Copy Report</a>	
<a href="#">Summary</a> <a href="#">Details ▾</a> <a href="#">Receipts ▾</a> <a href="#">Print / Email ▾</a>				 <a href="#">Show Exceptions</a>	
Expenses				View ▾ <<	
Date ▾	Expense Type	Amount	Approved	Summary	
08/27/2019	Monthly Mileage Report	\$2.90	\$2.90	Report Summary	
08/23/2019	Monthly Mileage Report	\$12.76	\$12.76	Report Totals	
08/19/2019	Monthly Mileage Report	\$4.64	\$4.64		
		TOTAL AMOUNT	TOTAL APPROVED		
		\$20.30	\$20.30		
				Amount Due Company	Amount Due Employee
				\$0.00	\$20.30

Click on an individual item to view details for each mileage entry. Travelers are required to use the embedded mileage calculator which will auto populate the trip mileage. The standard IRS mileage rate will be used to calculate the reimbursement rate and automatically updates each year.

Expense

Available Receipts

View Reimbursement Rates

Expense Type

Monthly Mileage Report

Transaction Date

08/23/2019

Purpose of the Trip

Stokoe Visit

From Location

4800 Magnolia Ave, Riverside, CA 92506, USA

To Location

4501 Amb's Dr, Riverside, CA 92505, USA

Payment Type

Out of Pocket

Distance : Amount

22 : 12.76

USD

Approved Amount

12.76

Mileage Calculator

Attach Receipt

View of the mileage calculator.

Mileage Calculator

Waypoints

4800 Magnolia Ave, Riverside, CA 92506, USA

4501 Amb's Dr, Riverside, CA 92505, USA

4800 Magnolia Ave, Riverside, CA 92506, USA

11.0 MI

Personal

10.9 MI

Personal

Directions

A 4800 Magnolia Ave, Riverside, CA 92506, USA

11.0 mi. About 20 mins

Deduct Commute

TOTAL PERSONAL

0.0 MI

TOTAL BUSINESS

21.9 MI

Map

Google

Map data ©2019

Terms of Use

Report a map error

Close



Once reviewed, click "Approve".





# Appendix








## Appendix: Icon Legend




### Exception Messages

-  A yellow Warning Message typically guide user or approvers regarding policy or actions recommended and do not prevent submission of a report
-  Stop Submit Exceptions will not allow the report to be submitted for approval until the issue is resolved

Icon	Name	Description
	Exception	Indicates an exception must be resolved before submission.
	Question	Indicates a question that does not prevent submission.
	Information	Indicates an exception that does not prevent submission.
	Alert	Indicates an exception that does not prevent submission.

Icon	Name	Description
	Attendees	Indicates that an expense entry has associated attendees.
	Comments	Indicated that the expense or report contains a comment.
	Trip Data	Indicates trip information from an itinerary.

	OCR Receipt	Indicates that an expense entry has an Optical Character Recognition (OCR) receipt (for example, Expenselt).
	Receipt Image Required	Indicates that an imaged receipt is required for this expense.

	Missing Receipt Affidavit	Indicates that a missing receipt affidavit has been attached to the expense.
	E-Receipt Available	Indicates that an e-receipt is available in Available Expenses.
	Receipt Attached	Like other expense report entries, this entry has a receipt image attached to it.