



SAP Concur

User's Guide

October 2019

Table of Contents

Introduction

Before you begin

Section I: Creating Your Travel Profile

Assigning Delegates

Travel Request Delegate

Budget Office as Delegate

Acting as a Delegate

Section II: Instructions for Travelers

Creating a Travel Request

Estimating Expenses using Cal Travel Store

Book online: Concur Travel

Book with Agent: Cal Travel Store

Book Outside of Concur & Cal Travel Store

Submitting for Approval –

Completing the Booking Process

Section III: Creating your Expense Reimbursement

After the travel

Creating your Expense Reimbursement

Using Concur Mobile App

Section IV: Instructions for Delegates

Section V: Instructions for Approvers

Introduction

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

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

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

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

Before you begin

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

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

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

2. Purchasing will add the User to Concur using the above information.
3. Purchasing submits the request to Information Technology (IT) for the Concur app to be added to requester's Single Sign-On (SSO) Portal (go.rccd.edu)
4. Purchasing notifies the requester to inform the user that they are now setup and ready to access Concur.
5. Upon successful login, the new Concur User can modify their user Profile and add additional user profile information. (See section on "**Creating Your Travel Profile.**")

Section II:

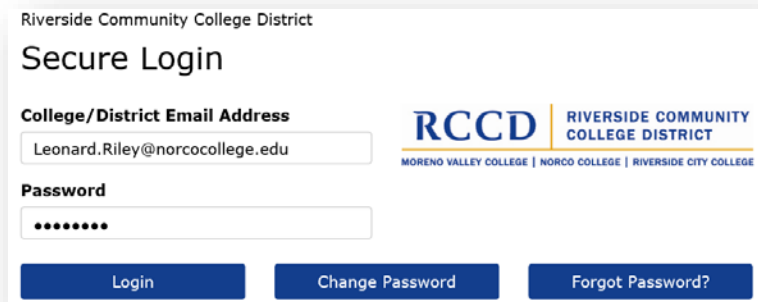
Creating Your Travel Profile

Creating your travel profile

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

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

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



Riverside Community College District
Secure Login

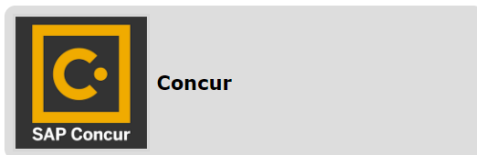
College/District Email Address

Password

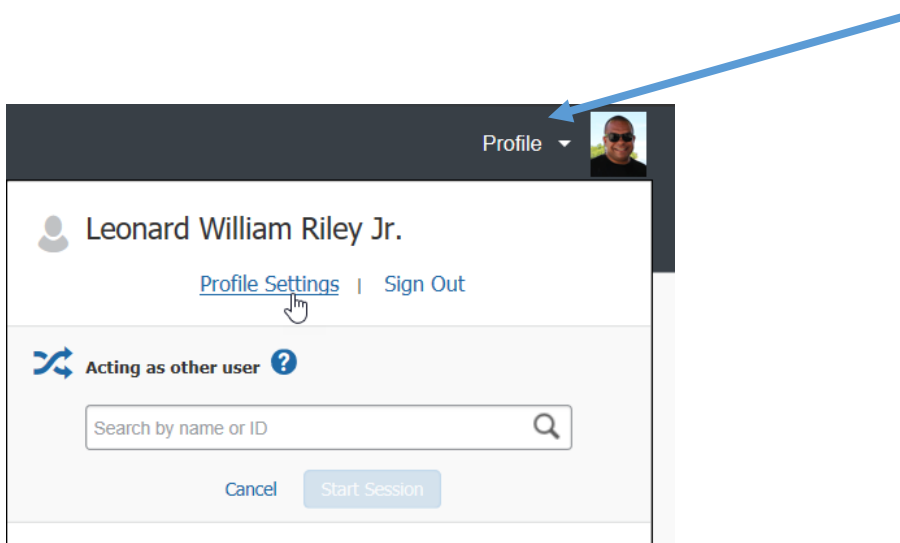
[Login](#) [Change Password](#) [Forgot Password?](#)

RCCD RIVERSIDE COMMUNITY COLLEGE DISTRICT
MORENO VALLEY COLLEGE | NORCO COLLEGE | RIVERSIDE CITY COLLEGE

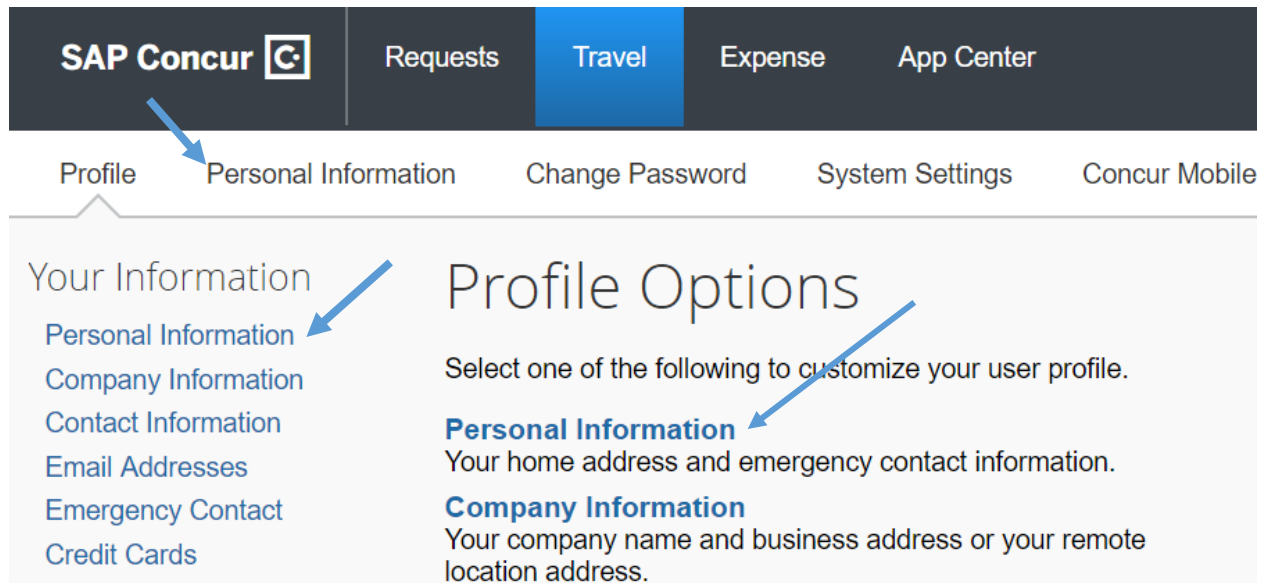
Click on the “Concur” icon. **NOTE: If you do not see the “Concur” icon on your Portal page, contact your local Concur Administrator, Lenny Riley.**



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



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



Begin by clicking **Personal Information**.

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

NOTE: If you find there are any errors in this field, please contact your local Concur administrator, Lenny Riley, at 951-372-7075, or Leonard.Riley@norccollege.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.



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 [Required]	Nickname	Last Name	Suffix
▼	LEONARD	WILLIAM	Lenny	RILEY JR	▼

☐ No Middle Name

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

Company Information

Employee ID

2705996

Manager

SAMUEL LEE

Org. Unit/Division Employee Position/Title



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

Company Name

Riverside Community Coll

Assigned Location

Norco CA (Norco, CA)

Street

2001 Third Street

Please choose a company location.

United States of America - CA

Corona CA (Corona, CA)

Jurupa Valley (Jurupa Valley, CA)

Moreno Valley (Moreno Valley, CA)

Norco CA (Norco, CA)

Ambs Drive (Riverside, CA)

Bundy Avenue (Riverside, CA)

Davis Avenue (Riverside, CA)

Magnolia Avenue (Riverside, CA)

Main Location (Riverside, CA)

Market St (Riverside, CA)

; assigned location

City

Norco

Postal Code

92860

Country/R

United S

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.

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

Home Address

Go to top

Street

City

State/Province/Region

Postal Code

Country

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

Contact Information

Go to top

Work Phone^[Required**]

Work Extension

Work Fax

2nd Work Phone/Remote Office


Home Phone^[Required**]

Pager

Other Phone

Concur Mobile Devices

Register and manage your mobile devices here.



Add a new device »

****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**.

Register and manage your mobile devices here.

Device Name

Device Type
 Unknown ▼

Mobile Phone Number
 United State ▼

☒ Primary Mobile Phone


☐ I agree to receive recurring risk, safety and other business-related autodialed text messages to this number from my Providing Entity of the Risk Messaging Service


?
 • 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.
 • If you opt-out, you may continue to receive emergency texts from your Providing Entity.

OK Cancel

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

Concur Mobile Devices
 Register and manage your mobile devices here.



Personal Cell Phone
 +1 951-555-5555
 Primary Mobile Phone
 Use for Safety and Business Text Message Alerts
[Edit Device »](#)

Concur for Mobile


Download Concur Mobile on your mobile device by clicking on the link below:

Concur for Mobile

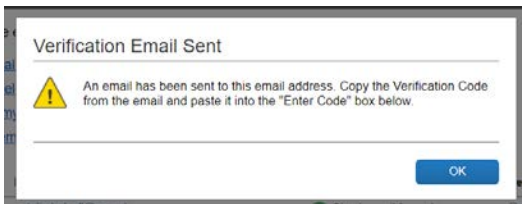


**You must specify either a home phone or a work phone.

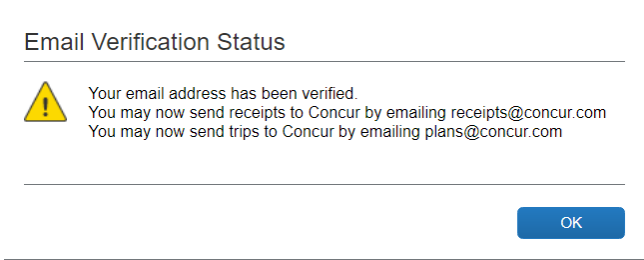
Next, you will need to verify your email address. First, check to see that the pre-populated email address is correct. Then, click on the **Verify** link.

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



Email Address	Verification Status	Verify	Contact?	Actions
Email 1 natalie.halsell@rcc.edu	Check email for code	Resend Cancel	Yes	
Enter Code UTYLT5Q5HF9L51G13TYI		OK		



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

Emergency ContactGo to top

Name

Relationship

Street

☒ Address same as employee

City

State/Province/Region

Postal Code

Country

Phone

Alternate Phone

United States of America

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

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

Air Travel Preferences

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

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
Add a Program




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.

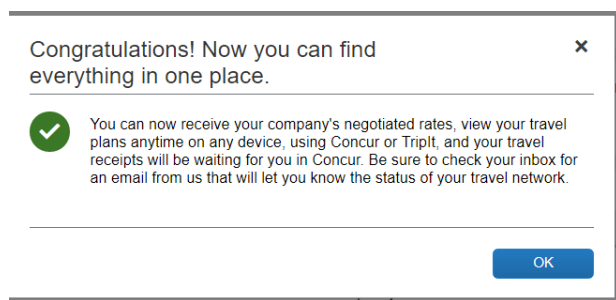
Add Travel Programs

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

The page allows you to enter up to 5 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	  	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		<input type="text" value="Select a carrier"/>	<input type="text"/>	<input checked="" type="checkbox"/>
2	  	Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
		<input type="text" value="Select a carrier"/>	<input type="text"/>	<input checked="" type="checkbox"/>

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.

Southwest Ticket Credits

+ Add Ticket Credit

Add Ticket Credit

Southwest Record Locator:

Valid Until:

Ticket Amount:

Ticket Currency:

Cancel

Add Ticket Credit

TSA Secure Flight Information

TSA requires entry of gender and date of birth. You can also enter a Redress Number or your TSA PreCheck Known Traveler Number if you have one. Click on the Quick Help icon for additional information about these options.

TSA Secure Flight

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

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

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](#)

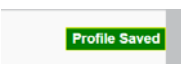
Travel Assistants

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

Credit Card Information

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

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



Click the **Travel** link at the top of the toolbar to return to the homepage.

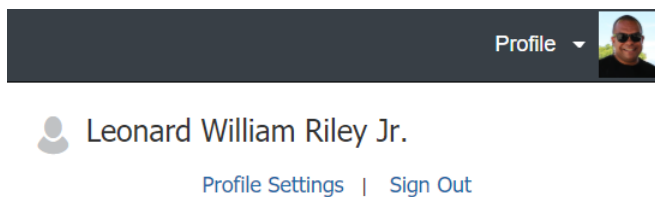
If you have questions about completing the Concur Profile, please contact your local Concur administrator or the DGS Statewide Travel Program at 916-376-3974, or by email at statewidetravelprogram@dgs.ca.gov.

Assigning Delegates

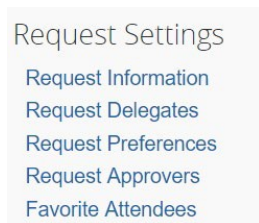
A delegate is an individual you assign to act on your behalf for both the travel request process as well as the expense reimbursement process. Delegate settings are shared between the travel and reimbursement.

Travel Request Delegates

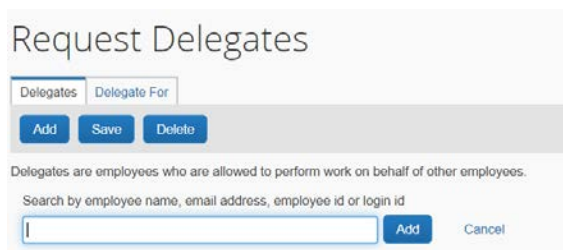
To assign someone to be your travel request delegate, click **Profile** and select **Profile Settings**:



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



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



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

Delegates

Delegate For

Add

Save

Delete

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

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Hodawanus, Tricia Tricia.Hodawanus@norccollege.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.

Acting as a Delegate

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

To work as a delegate...

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

Acting as other user ?

Collins, Michael T

Welbon, Collin C
noemail@rccd.edu (Email)
User ID:
Logon ID: @rccd.edu

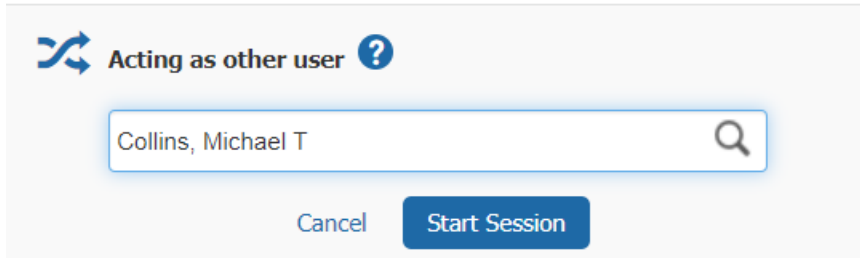
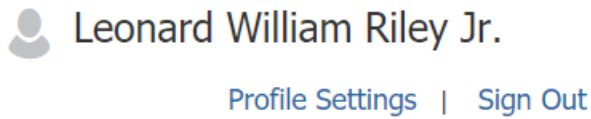
Molko, Colleen V
Colleen.Molko@norccollege.edu (Email)
User ID:
Logon ID: @rccd.edu

Norgard, Colleen M
Colleen.Norgard@norccollege.edu (Email)
User ID:
Logon ID: @rccd.edu

Collins, Michael T
Michael.Collins@norccollege.edu (Email)
User ID:
Logon ID: @rccd.edu

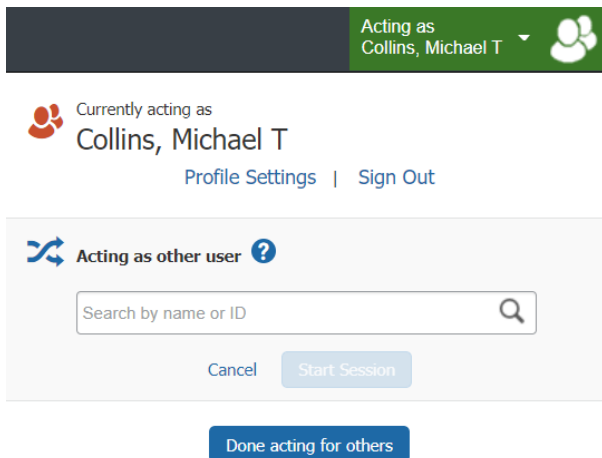
more

4. Click **Start Session**



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

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



5. To select a different user, follow the same steps but select a different name

6. To return to your own tasks, click **Acting as**, and then click **Done acting for others**

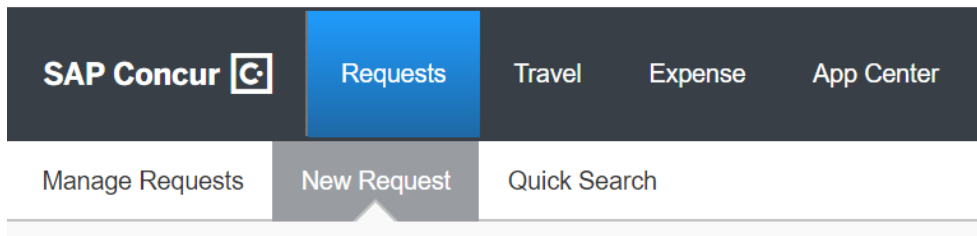
Section II:

Instructions for Traveler

Creating a Travel Request

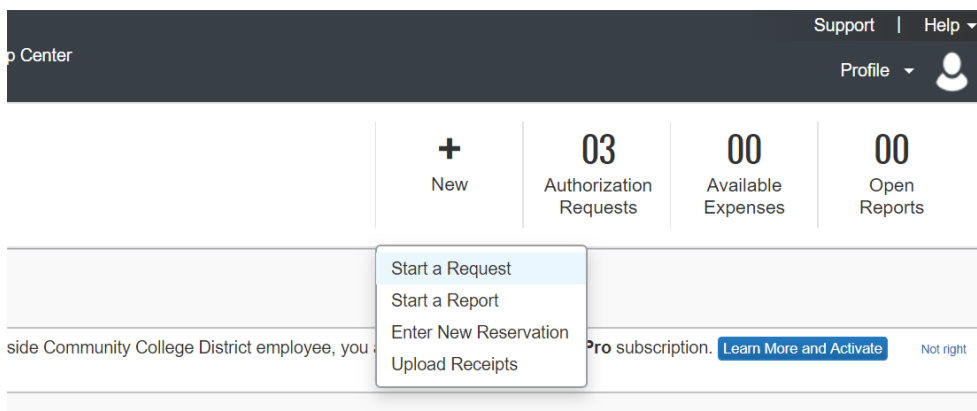
To create a new Travel Request:

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



OR

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



A blank request will appear:

Request

Request/Trip Name: Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name: How will you book your travel? Request/Trip Start Date: Request/Trip End Date: Request/Trip Purpose: Paid for by an outside entity? Out of State and beyond 500 miles? ☐

Destination City: Destination Country:

Traveler Type: Does this trip contain personal travel? Personal Dates of Travel: Additional Information: Comment:

Fund: School: Resource: Project Year:

Goal: Function: Group: RDC:

Cash Advance: Cash Advance Amount: USD: Cash Advance Comment:

Completing Request Header Information

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

Request/Trip Name

How will you book your travel? **(Required field)**

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

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

01. Book Online - Concur Travel - Select this option if you will be using the booking feature within Concur to book any portion (airfare, hotel, car rental) of your travel after the travel request has been fully approved.

02. Book with Agent - Cal Travel Store – Select this option if you will be contacting the Cal Travel Store Agency for assistance in booking your travel. This option is recommended if your travel will include multiple stops, group travel, or other complicated variations.

03. Book Outside of Concur and Cal Travel Store – Select this option if you will be making all of your travel arrangements outside of Concur segments (purchased airfare, reserved hotel and car rental, registered for conference). You will be able to add details about the expenses you've incurred or reservations you made in the Expense segment.

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

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

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

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

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

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

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

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

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

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

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

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

Estimating Expenses Using Cal Travel Store

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

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



Estimating Air Travel Expenses

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

Complete the fields and click **Search**.

A screenshot of the SAP Concur Travel Store search interface. The interface has a top navigation bar with 'Travel', 'Arrangers', 'Trip Library', and 'Templates'. Below this is a search section with icons for flight, car, hotel, and train. A message box asks if the user's driver's license is REAL ID compliant. Below that is a 'Mixed Flight/Train Search' section with tabs for 'Round Trip', 'One Way', and 'Multi City'. The 'From' field is populated with 'ONT - Ontario Airport - Los Angeles, CA'. The 'To' field is empty. The 'Depart' field is set to '09:00 am' and the 'Return' field is set to '03:00 pm'. There are also fields for 'depart' and 'return' times with dropdown menus for time zones. A checkbox at the bottom is labeled 'Pick-up/Drop-off car at airport'.

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

Depart - Fri, Oct 4

Depart 06:00 A - 12:00 P

Arrive 07:25 A - 10:26 P

Return - Mon, Oct 7

Depart 12:00 P - 06:00 P

Arrive 01:26 P - 07:20 A

Price

Price \$131.60 - \$7,323.42

Display Settings

☐ Hide Non-refundable Fares
 ☐ Hide Propeller Planes
 ☐ Depart/Return Same Airport Only

2 stops

2 results

2 stops

2 results

—

—

—

Shop by Fares

Shop by Schedule

Flight Number Search

Q

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

Frequent Flyer Programs [Add a Program](#)

For Southwest

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.

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

METHOD OF PAYMENT

This purchase will be charged to your company directly.



This is a Non-Refundable Ticket

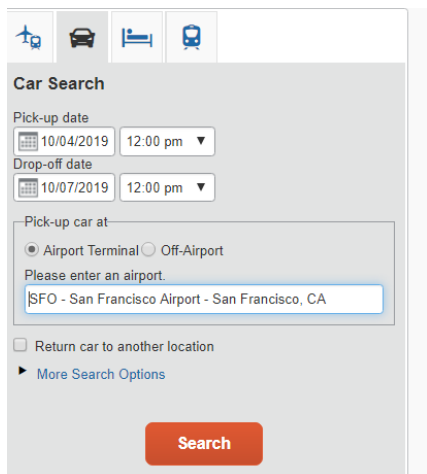
Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure 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](#)

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.

NOTE: It is important to note that RCCD holds an agreement with Enterprise Car Rentals.

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

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
Enterprise	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](#)

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

Book Online: Concur Travel Steps

Completing the Segments Section

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

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

Airfare

The screenshot shows the 'Add Segment' form in the Concur Travel system. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs, there's a section for 'Add Segment' with a prompt 'CLICK ICON TO CREATE SEGMENT' and four icons: Airplane (selected), Hotel, Car, and Train. The 'Air Ticket' section is active, showing options for 'Round Trip', 'One Way', and 'Multi-Segment'. The 'Amount' field is set to 'USD'. The form is divided into 'Outbound' and 'Return' sections. Each section has fields for 'From', 'To', 'Date', 'Depart at', and a 'Comment' field.

The new segment fields appear below the original segment fields.

Hotel

The screenshot shows the 'Add Segment' form in the Concur Travel system, specifically for a 'Hotel Reservation'. The 'Request/Trip Name' and 'Additional Information' fields are visible at the top. The 'Add Segment' section shows the 'Hotel' icon selected. The 'Hotel Reservation' section is active, showing fields for 'Check-In' (City, Date, At, Detail) and 'Check-Out' (Date, At). There is also a 'Comment' field at the bottom.

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**, and follow these same steps to complete any remaining segments that apply to the request.

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 (aka first tab), you will skip the Segments tab and enter travel expenses directly here using the steps below.

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

Request 3773

Request/Trip Name:
Additional Information:

Request Header  Segments Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#) <<

<input type="checkbox"/> Date	Expense Type	Amount	Requested
-------------------------------	--------------	--------	-----------

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

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.

01. Travel Expenses	02. Transportation	03. Mileage	06. Other Travel Expenses
Airfare	Car Rental	04. Meals	
Hotel	Parking	05. Fees	
	Train	Registration Fees	

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.

Expense Type <input type="text" value="Airfare"/>	Request/Trip Start Date 11/02/2019	Request/Trip End Date 11/06/2019	Paid for by an outside entity? <input type="text" value="No"/>
Description <input type="text"/>	Transaction Amount 0.00 <input type="text" value="USD"/>	Comment <input type="text"/>	

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 11/02/2019	Request/Trip End Date 11/06/2019	Paid for by an outside entity? No
Description <input type="text"/>	Transaction Amount 0.00 USD	Comment <input type="text"/>	

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 <input type="text"/>	Transaction Amount 0.00 USD	Comment <input type="text"/>	

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

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

Expense Type 03. Mileage	Request/Trip Start Date 11/02/2019	Request/Trip End Date 11/06/2019	Paid for by an outside entity? No
Description <input type="text"/>	Distance <input type="text"/>	Mileage 0.58	Amount 0.00 USD
Comment <input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Allocate"/> <input type="button" value="Cancel"/>			

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

Expense Type 04. Meals	Request/Trip Start Date 11/02/2019	Request/Trip End Date 11/06/2019	Paid for by an outside entity? No
Description <input type="text"/>	Transaction Amount 0.00 USD	Comment <input type="text"/>	

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

Expense Type: Registration Fees

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:

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:

Request Header		Segments	Expenses	Approval Flow	Audit Trail
<div>+ New Expense</div>		<div>Delete</div>			«
<input type="checkbox"/>	Date	Expense Type	Amount	Requested	
<input type="checkbox"/>	11/02/2019	04. Meals	\$200.00	\$200.00	
<input checked="" type="checkbox"/>	11/02/2019	Registration Fees	\$450.00	\$450.00	
<div><div></div><div>NOTICE: Please email Conference Registration payment processing instructions to purchasingtravel@rccd.edu</div></div>					

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

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

Expense Type: 06. Other Travel Expenses

Transaction Date: 11/02/2019

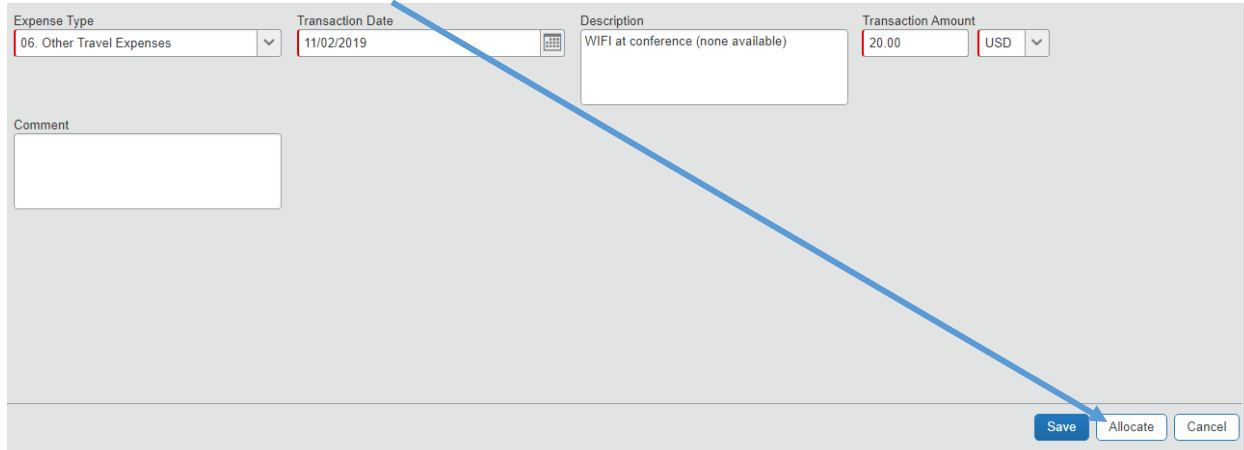
Description: WIFI at conference (none available)

Transaction Amount: 20.00 USD

Comment:

Allocating Budget

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



The image shows a form for entering an expense. At the bottom right, there are three buttons: 'Save', 'Allocate', and 'Cancel'. A blue arrow points from the 'Allocate' button back to the 'Transaction Date' field at the top left of the form.

Expense Type: 06. Other Travel Expenses
Transaction Date: 11/02/2019
Description: WIFI at conference (none available)
Transaction Amount: 20.00 USD

Comment: [Empty text box]

Buttons: Save, Allocate, Cancel

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

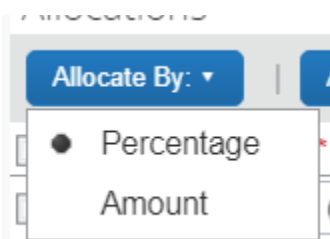
Select the checkboxes to the left of each expense you would like to allocate. You may select one, all, or some of the expenses.

Request List			
<div>Allocate Selected Expenses Clear Selections Summary</div> <div>Select Group ▾</div>			
<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.

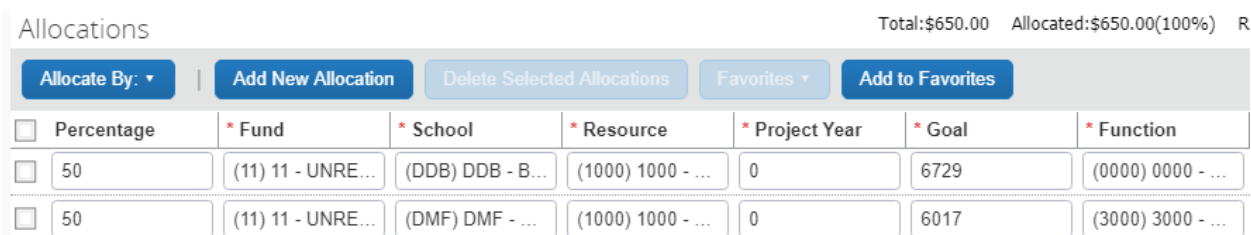
Allocations								Total:\$650.00	Allocated:\$650.00(100%)	Remaining:\$0.00(0%)
<div>Allocate By: ▾ Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites</div>										
<input type="checkbox"/> Percentage	* Fund	* School	* Resource	* Project Year	* Goal	* Function	Code			
<input type="checkbox"/> 100	(11) 11 - UNRE...	(DDB) DDB - B...	(1000) 1000 - ...	0	6729	(0000) 0000 - ...	(11) 11 - UNRE...			

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



A screenshot of a web interface showing a dropdown menu labeled 'Allocate By:'. The menu is open, displaying two options: 'Percentage' (selected with a radio button) and 'Amount'.

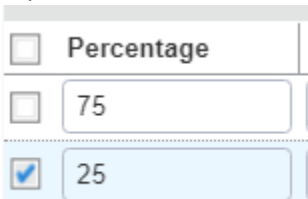
Click on the “Add New Allocation” button then enter the second budget string you would like to charge.



A screenshot of the 'Allocations' section in a web application. At the top right, it shows 'Total:\$650.00 Allocated:\$650.00(100%) R'. Below this is a toolbar with buttons: 'Allocate By: ▾', 'Add New Allocation', 'Delete Selected Allocations', 'Favorites ▾', and 'Add to Favorites'. The main area is a table with the following columns: ☐ Percentage, * Fund, * School, * Resource, * Project Year, * Goal, and * Function. There are two rows of data, each with a checkbox in the first column.

<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 - ...

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



A screenshot of the 'Percentage' field in the table. The first row's percentage is 75, and the second row's percentage is 25, which is highlighted with a blue border and a checkmark in the checkbox column.

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

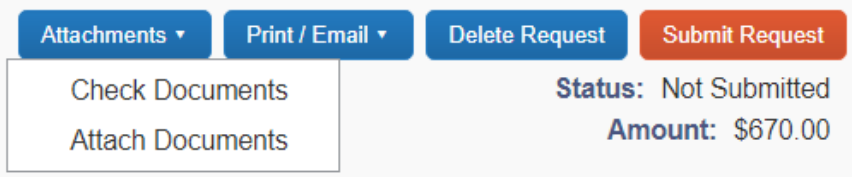
Remember to Save the allocations. If you are done entering expenses and allocating budget, you are ready to upload the required documents.

Uploading Required Documents

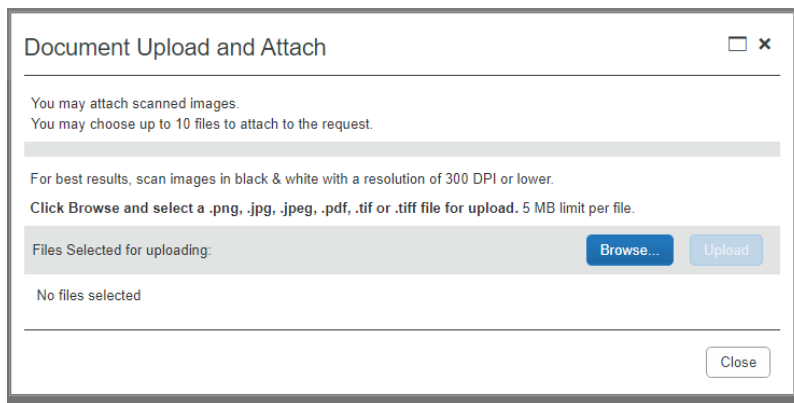
Before submitting the request for approval, there are required documents that need to be uploaded. The request will not move forward without these documents.

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

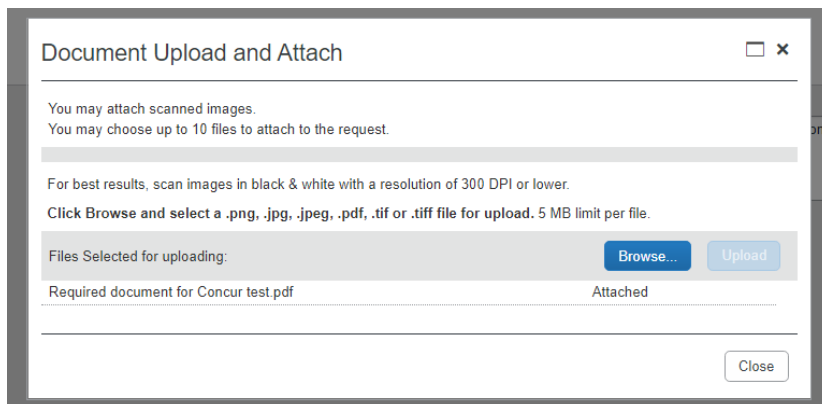
To upload required documents, click on the **Attachments** button and select **Attach Documents**:



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



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



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

Attachments ▾

Print / Email

Check Documents

Attach Documents

Book with Agent: Cal Travel Store

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

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

Book Outside of Concur and Cal Travel Store

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

Submitting for Approval

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

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

Request Header

Segments

Expenses ⚠

Approval Flow

Audit Trail

Budget Approval:

+

×

(this step may be skipped)

User-Added Approver:

+

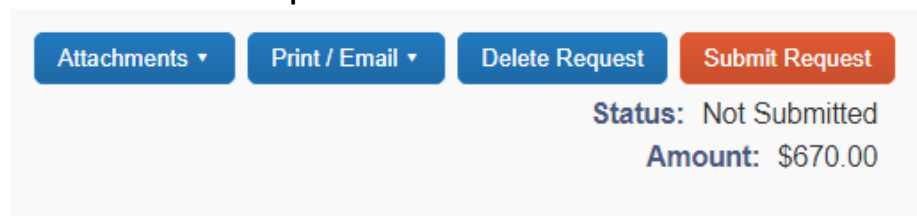
+

×

Search Approvers By

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.

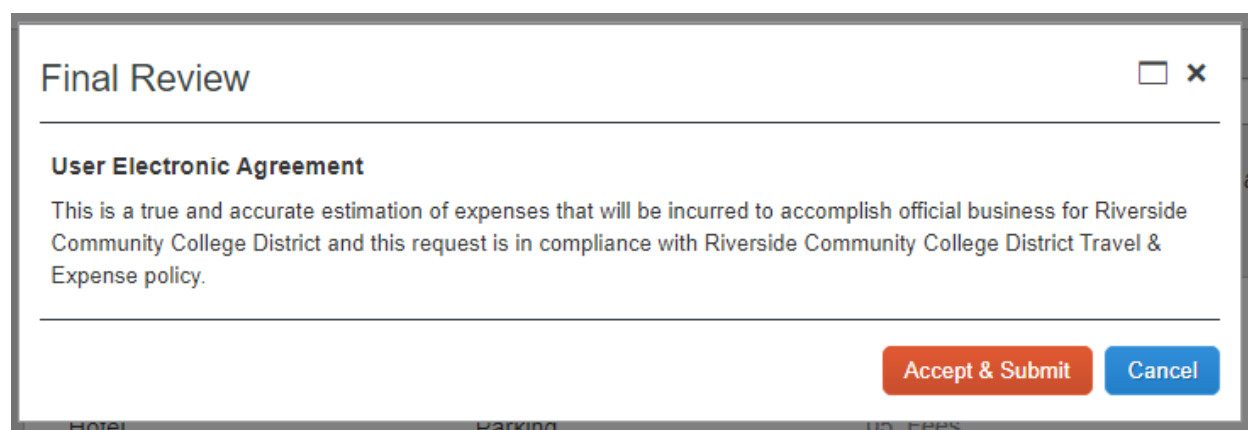
Click on the **Submit Request** button.



Attachments ▾ Print / Email ▾ Delete Request Submit Request

Status: Not Submitted
Amount: \$670.00

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

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



Active Requests (1)

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

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

Contacting Purchasing for Payments

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

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

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

Hotel – This is a two-step process.

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

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

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

Completing the Booking Process

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

Login to Concur.

Click on the *“Manage Request”* link on the banner.

Click on *“book now”* button.

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

Section III:

Creating your Expense Reimbursement

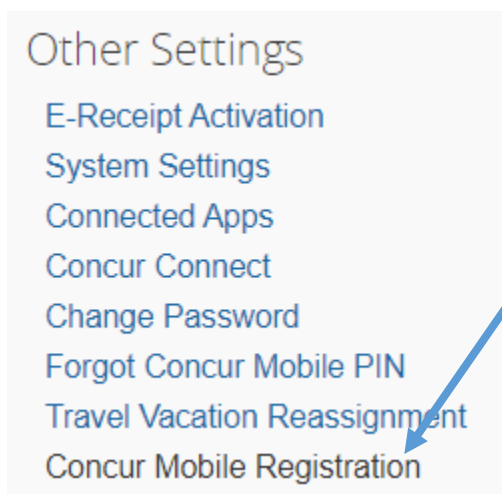
Creating your Expense Reimbursement

Using Concur Mobile App

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



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



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

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

Concur Mobile

Manage your expenses and business travel on your mobile device.

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

natalie.halsell@rcc.edu

Get Started

Or, review your sign-in details:

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

Company Code: 2UP2B2

Alternatively, you can use your Concur username and a Concur Mobile PIN.

Enter a new Concur Mobile PIN in the fields below to setup a new one.

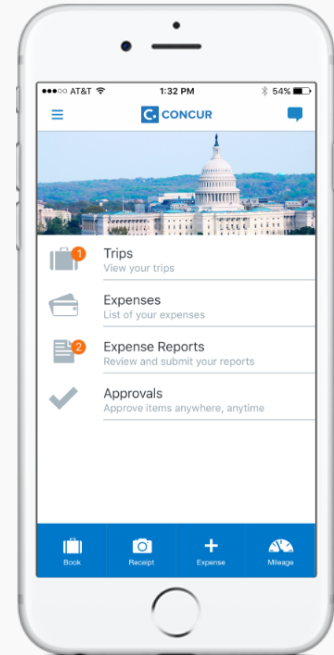
Concur Username: Natalie.Halsell@rcc.edu

Create PIN:

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

Retype PIN:

Set Concur Mobile PIN



Section IV:

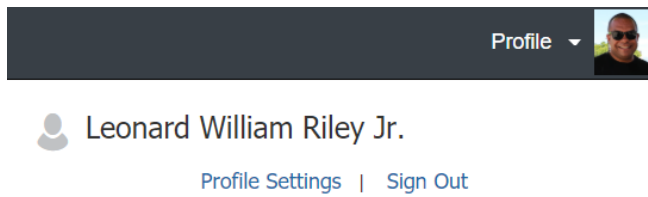
Instructions for Delegates

Assigning Delegates

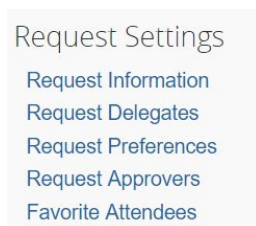
A delegate is an individual you assign to act on your behalf for both the travel request process as well as the expense reimbursement process. Delegate settings are shared between the travel and reimbursement.

Travel Request Delegates

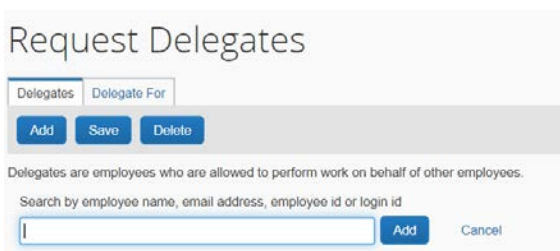
To assign someone to be your travel request delegate, click **Profile** and select **Profile Settings**:



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



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



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

Delegates

Delegate For

Add

Save

Delete

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

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Hodawanus, Tricia Tricia.Hodawanus@norccollege.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

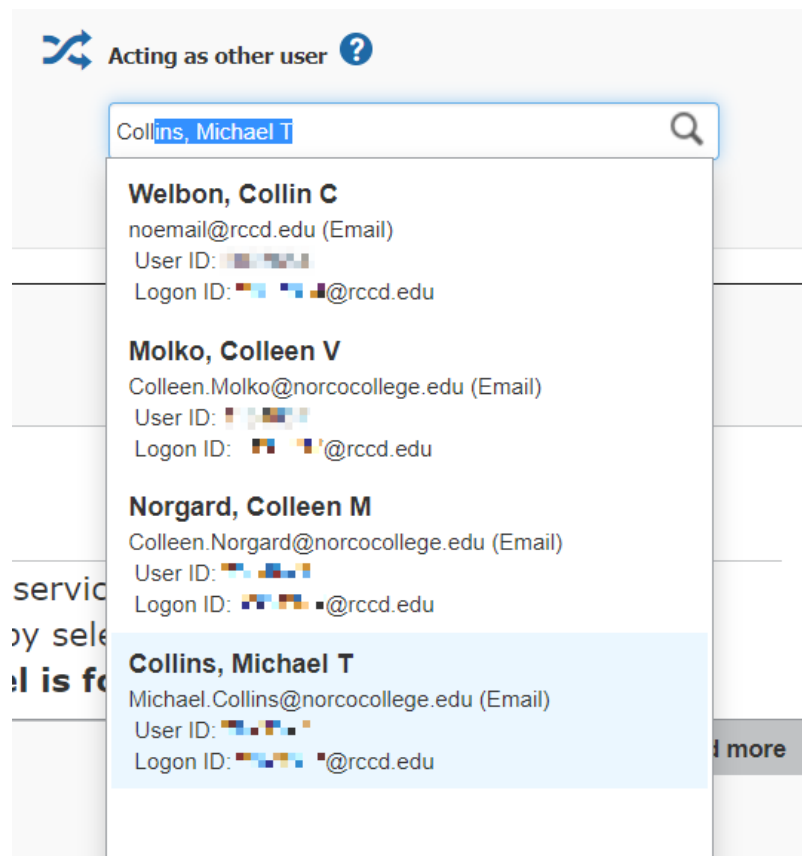
Click **Save** to save your changes. This individual will now be able to perform the functions you have identified on your behalf.

Acting as a Delegate

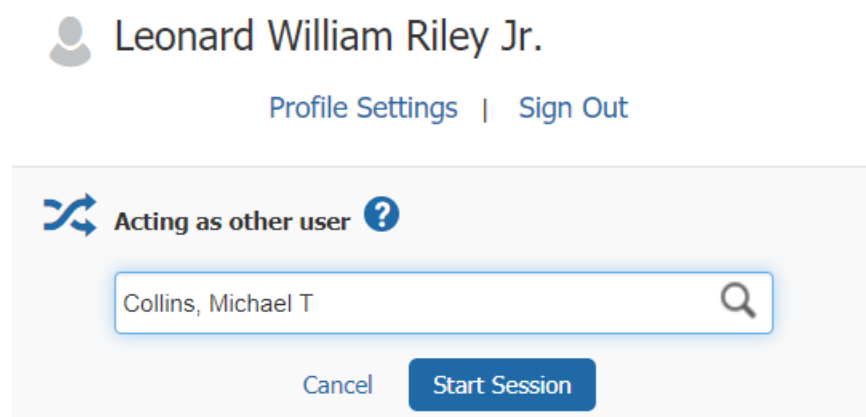
To begin acting as someone's delegate, first you must login to Concur using your own login credentials. If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

To work as a delegate...

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

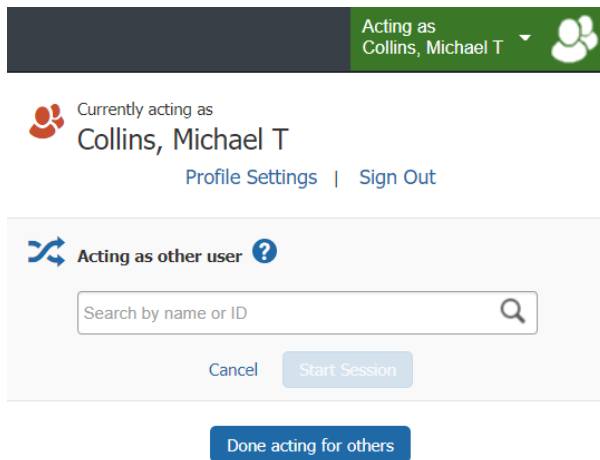


4. Click **Start Session**



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

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



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

Section V:

Instructions for Approvers