



# CONCUR TRAINING-FLEX WORKSHOP

## NC CONCUR TEAM:

Fiscal and Technical Analyst, Jonnathan Duenas  
Accounting Services Clerk Sub, Edward Jimenez  
Director, Business Services-Esmeralda Abejar  
Instructional Technology Specialist- Lenny Riley



**[ConcurQuestions@norcocollege.edu](mailto:ConcurQuestions@norcocollege.edu)**

# AGENDA

## TRAVEL REQUESTS

1. HOW TO ACCESS CONCUR
2. UPDATING YOUR TRAVEL PROFILE
3. CREATING/SUBMITTING TRAVEL REQUESTS
  - a) OUT OF STATE TRAVEL  
UPDATED PROCESS
4. BANK OF AMERICA CREDIT CARD  
ISSUANCE PROCESS
5. BOOKING TRAVEL

## EXPENSE REPORTS

6. CREATING AND SUBMITTING  
EXPENSE REPORTS
  - a) MONTHLY MILEAGE REPORT
7. MONTHLY MILEAGE EXPESE  
REPORT
8. NEED HELP WITH CONCUR?

# 1.HOW TO ACCESS CONCUR

Esmeralda Abejar

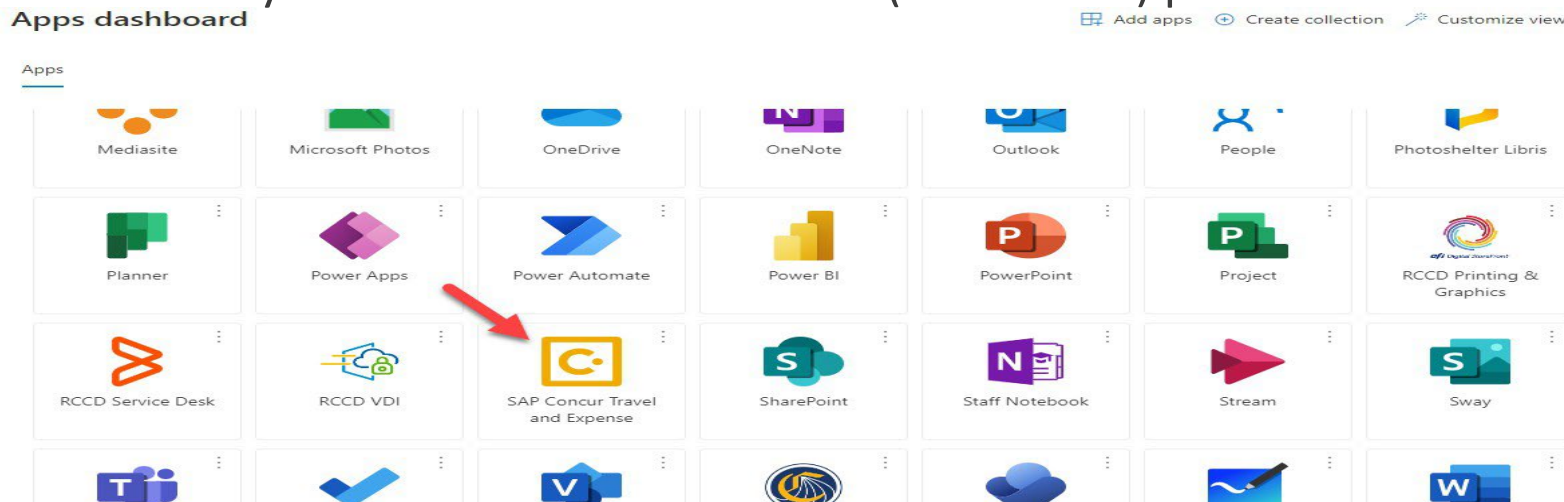


**NORCO**  
COLLEGE

# TRAVEL REQUESTS

## 1. HOW TO ACCESS CONCUR

- MyApps Portal - Single Sign-On (SSO) Portal [myapplications.microsoft.com](https://myapplications.microsoft.com) OR [go.rccd.edu](https://go.rccd.edu)
- College/District Email Address = [FirstName.LastName@norcocollege.edu](mailto:FirstName.LastName@norcocollege.edu) OR [FirstName.Lastname@rccd.edu](mailto:FirstName.Lastname@rccd.edu)
- Password is the same as your Network and Email (Office365) password



# 1.HOW TO ACCESS CONCUR CONT.

## CI AZUMANO TRAVEL - BUSINESS TRAVEL 877-454-8785

The screenshot displays the Concur user interface for the Riverside Community College District (RCCD). The top navigation bar includes the RCCD logo and a user profile icon. A left-hand sidebar lists various menu items: Home, Requests, Travel, Expense, Approvals, Reporting, App Center, and Administration. The main content area is divided into several sections. At the top, a greeting reads "Hello, Esmeralda" with the date "August 17, 2026". Below this are three primary action buttons: "Create Request" (with a purple icon), "Plan a Trip" (with a green icon), and "Create Expense Report" (with a blue icon). The "Flight Search" section is prominently featured, containing tabs for "Round-trip", "One-way", and "Multi-city". It includes input fields for "From" (pre-filled with "SNA - John Wayne Airport"), "To" (with a placeholder "Enter location"), and "Dates" (pre-filled with "08/17/2026 - 08/18/2026"). There is also a "Cabin" dropdown menu set to "Economy" and a checkbox for "Include Accommodation". To the right of the flight search is a "Company Notes" section. It features the "CI AZUMANO BUSINESS TRAVEL" logo, which is noted as "A SENECA NATION COMPANY". The notes include a welcome message, terms of use stating that Concur is for official business use only, and a link to "RCCD Travel Restriction Information". It also provides contact information for CI Azumano Travel, including a phone number (877) 454-8785 and availability hours (24/7/365). Links for "Concur FAQs" and "Concur User Guide" are provided at the bottom of the notes section.

**RCCD** | RIVERSIDE COMMUNITY COLLEGE DISTRICT

Home  
Requests  
Travel  
Expense  
Approvals  
Reporting  
App Center  
Administration

Hello, Esmeralda  
August 17, 2026

**Create Request**  
Start an approval request for travel or expenses.

**Plan a Trip**  
Find and book flights, hotels, and rides for your business trip.

**Create Expense Report**  
Begin an expense report to track business related expenses.

**Flight Search**

Round-trip One-way Multi-city

From \*  
SNA - John Wayne Airport

To \*  
Enter location

Dates \*  
08/17/2026 - 08/18/2026

Cabin  
Economy

☐ Include Accommodation

**Company Notes**

**CI AZUMANO**  
BUSINESS TRAVEL  
A SENECA NATION COMPANY

Welcome to Concur, Managed by CI Azumano Travel

**Terms of Use:** Concur is for official business use only. Booking personal travel on this site is prohibited.

**RCCD Travel Restriction Information**

Effective immediately and through Summer 2021, Riverside Community College District is lifting COVID-19 pandemic restrictions on all travel within the State of California. The necessity of out-of-state travel will need to be evaluated and approved, on a case-by-case basis, by the traveler's respective College President, Vice Chancellor or Chancellor. It is anticipated that ALL COVID-19 pandemic restrictions for RCCD travel will be lifted effective Fall 2021, depending on the status of the pandemic. Additional notification will be provided closer to the beginning of the Fall term.

**Contact Information for CI Azumano Travel:**  
To reach a travel counselor for questions or assistance regarding a reservation: (877) 454-8785  
Travel counselors are available 24/7/365

**Concur Information and Guides:**  
[Concur FAQs](#)  
[Concur User Guide](#)

## 2.UPDATING YOUR TRAVEL PROFILE

Esmeralda Abejar

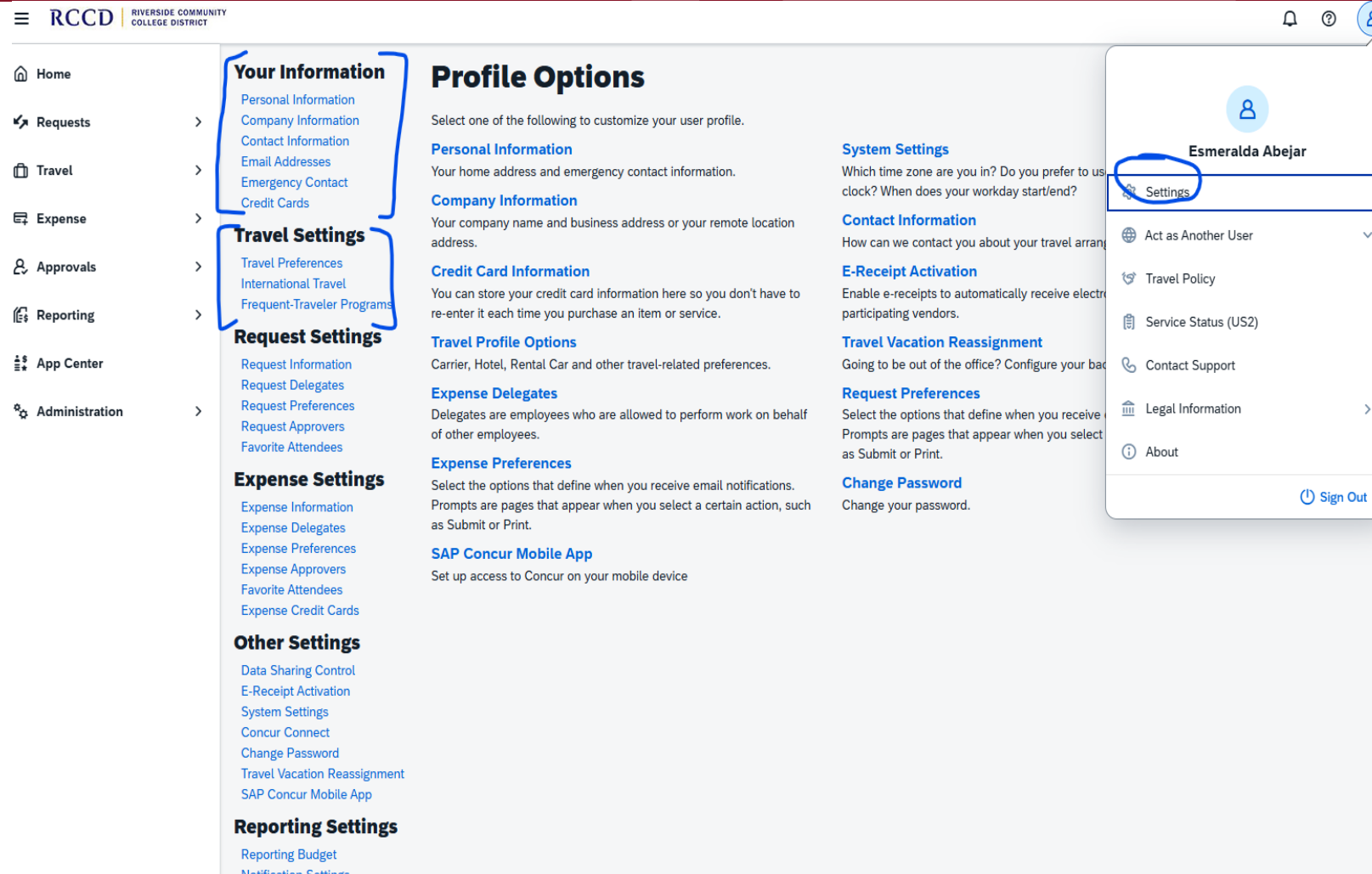


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# 2.UPDATING YOUR TRAVEL PROFILE

Before you enter a travel request:

- Go to settings
- Enter **Your Information**- personal and company information  
[required]
- Enter travel preferences, and frequent-traveler program information.



RCCD | RIVERSIDE COMMUNITY COLLEGE DISTRICT

Home Requests Travel Expense Approvals Reporting App Center Administration

**Your Information**  
Personal Information  
Company Information  
Contact Information  
Email Addresses  
Emergency Contact  
Credit Cards

**Travel Settings**  
Travel Preferences  
International Travel  
Frequent-Traveler Programs

**Request Settings**  
Request Information  
Request Delegates  
Request Preferences  
Request Approvers  
Favorite Attendees

**Expense Settings**  
Expense Information  
Expense Delegates  
Expense Preferences  
Expense Approvers  
Favorite Attendees  
Expense Credit Cards

**Other Settings**  
Data Sharing Control  
E-Receipt Activation  
System Settings  
Concur Connect  
Change Password  
Travel Vacation Reassignment  
SAP Concur Mobile App

**Reporting Settings**  
Reporting Budget  
Notification Settings

**Profile Options**  
Select one of the following to customize your user profile.

**Personal Information**  
Your home address and emergency contact information.

**Company Information**  
Your company name and business address or your remote location address.

**Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.

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

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**SAP Concur Mobile App**  
Set up access to Concur on your mobile device

**System Settings**  
Which time zone are you in? Do you prefer to use a 12-hour clock? When does your workday start/end?

**Contact Information**  
How can we contact you about your travel arrangements?

**E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**  
Going to be out of the office? Configure your backfill.

**Request Preferences**  
Select the options that define when you receive prompts. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Change Password**  
Change your password.

Esmeralda Abejar  
Settings  
Act as Another User  
Travel Policy  
Service Status (US2)  
Contact Support  
Legal Information  
About  
Sign Out

## 2. UPDATING YOUR TRAVEL PROFILE CONT.

- Verify your Personal Information.
- Make certain that the first, middle, and last names shown are identical to those on the photo ID that you will be presenting at the airport.
- Is your driver's license REAL ID compliant? A new form of Identification will be required for air travel within the U.S starting May 7, 2025. Click [here](#) for more information on Real ID.
- Add contact information.
- Verify email address.
- Add Travel Preferences.
- **Do not add credit card information.**

### My Profile - Personal Information

Jump To: Personal Information Choose

To see the Notice on Collection for details on how the Statewide Travel Program collects, uses, and shares personal information you provide through this form, please follow this link: <https://www.dgs.ca.gov/OFAM/Travel>

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 <b>[Required]</b>                      | Preferred Name       | Last Name                           | Suffix               |
|----------------------------------------------|----------------------------------------|----------------------------------------------------|----------------------|-------------------------------------|----------------------|
| <input type="text" value="Ms"/>              | <input type="text" value="Esmeralda"/> | <input type="text"/>                               | <input type="text"/> | <input type="text" value="Abejar"/> | <input type="text"/> |
|                                              |                                        | <input checked="" type="checkbox"/> No Middle Name |                      |                                     |                      |
| Date of Birth (mm/dd/yyyy) <b>[Required]</b> |                                        | Gender <b>[Required]</b>                           |                      |                                     |                      |
| <input type="text" value="**/**/****"/>      |                                        | <input type="text" value="Female (F)"/>            |                      |                                     |                      |

# 3.CREATING/SUBMITTING YOUR TRAVEL REQUEST (TR)

## OUT-OF-STATE TRAVEL

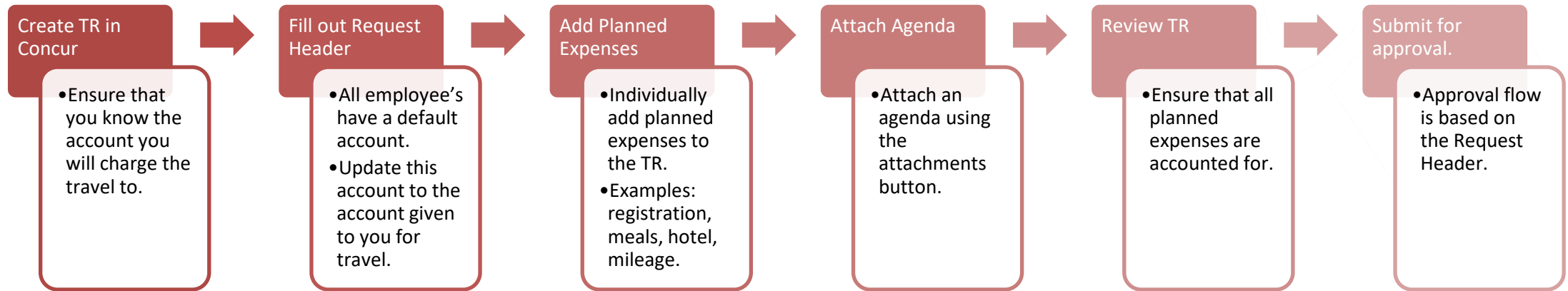
### STUDENT TRAVEL

Jonnathan Dueñas



**NORCO**  
COLLEGE

# Creating a TR Process



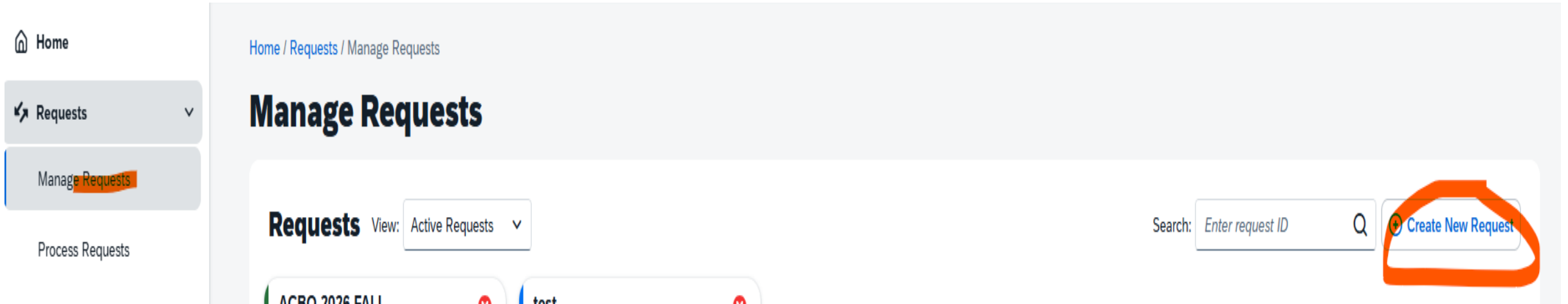
# 3. CREATING/SUBMITTING TRAVEL REQUESTS

## Guiding questions to help with estimates:

1. Funding:
  - a. Who is funding the TR?
  - b. Is this a field trip or does it include student travel?
  - c. Is this TR for out-of-state travel?
2. Registration, Hotel, & Meals:
  - a. How much is the conference registration?
  - b. Are meals included in the conference registration cost? If not, make sure to include it.
  - c. How much is the hotel reservation?
3. Transportation:
  - a. Are you flying or driving? (Please note: District will pay the lowest transportation cost).
  - b. What about rental car, or Uber/Lift services?
  - c. Will parking and/or toll roads cost be incurred?
4. Mileage:
  - a. Mileage reimbursement, please use built in mileage calculator.
    - i. Do not use the BofA credit card for gas purchases
  - b. Gas purchases are allowed for field trips only when driving college vans or rentals. (Include gas cost in your estimated expenses)

# TO CREATE A NEW TRAVEL REQUEST

From the Manage Request tab, click on Requests > Create New Request.



## 3. CREATING/SUBMITTING TRAVEL REQUESTS

# REQUEST HEADER

- If the entire conference name does not fit in the Request/Trip Name field, make sure to use the Additional Information or Comment fields, to add the complete conference title.
- Business Trip Start date to End Date, ***Include all travel days not just the date of the conference.***
- Fill out all required field.

Create New Request

Required field \*

Request/Trip Name \*

Business Trip End Date \*

MM/DD/YYYY

Departure City \*

John Wayne (Airport - SNA), Santa Ana, California

Destination Country

How will you book your travel? \*

Request/Trip Purpose \*

Destination City \*

Business Trip Start Date \*

MM/DD/YYYY

Paid for by an outside entity? \*

Out of State and beyond 500 miles? \* ?

Traveler Type \*

Staff

Does this trip contain personal travel? \*

Personal Dates of Travel

Additional Information

0/500

## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# REQUEST HEADER

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

(11) 11 - UNRESTRICTED GENERAL FUND

▼

×

(EDB) BUSINESS OPERATIONS - NORCO

▼

×

(1000) 1000 - GENERAL FUND

▼

×

Project Year \*

0

▼

×

Goal \*

2

(6729) BUSINESS OPERATIONS - NORCO

▼

×

Function \*

3

(0000) CAMPUS ADMINISTRATIVE SERVICES

▼

×

Group

NC

Comment

0/500

✓

✦

 Request Assistant is On 

?

Select the services to estimate: \*

☐ ✈ Flight

☐ 🚗 Car Rental

☐ 🏨 Hotel

☐ 🍴 Meal

Cancel

✦ Generate Estimate

The request assistant can be used to generate a travel estimate, or it can be turned off.

## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# HOW WILL YOU BOOK YOUR TRAVEL?

| How will you book your travel?            | ADD Expected Expenses and/or Travel Plans                                                                                                                                                                                                                                            |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01. Book Online –Concur Travel            | (Via Travel Store CI Azumano Travel) <ul style="list-style-type: none"><li>• Air Ticket</li><li>• Hotel Reservation</li><li>• Car Rental</li></ul>                                                                                                                                   |
| 02. Book with Agent –Cal Travel           | (Via Travel Store) <ul style="list-style-type: none"><li>• Group Travel -Air tickets, Hotel Reservation and Car Rental. (Student travel)</li><li>• Multiple Stops and other complicated variations</li><li>• Personal travel dates</li></ul>                                         |
| 03. Book Outside of Concur and Cal Travel | All travel arrangements Outside of Concur:<br>(i.e. conferences where group rates have been previously arranged) <ul style="list-style-type: none"><li>• Airfare (Not Booked In Concur)</li><li>• Hotel (Not Booked in Concur)</li><li>• Car Rental (Not Booked in Concur)</li></ul> |

## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# ADD EXPECTED EXPENSES AND/OR TRAVEL PLANS

When Adding expected Expenses, refer to the TR request header, **how will you book your travel field and match your selection.**

**For option 01.** Book online –Concur travel and  
**For option 02.** Book with Agent –Cal Travel.

Choose the highlighted options:  
(Air Ticket, Hotel Reservation and Car Rental).

**For option 03. Book Outside of Concur** and Cal Travel.  
Choose the options labeled **(Not Booked in Concur)**.

## Add expected expenses and/or travel plans

*Search by expense type, category, description* 

### 01. Travel Expenses

**Air Ticket**

Airfare (Not Booked In Concur)

Hotel (Not Booked in Concur)

**Hotel Reservation**

### 02. Transportation

**Car Rental**

Car Rental (Not Booked in Concur)

Car Rental Fuel

Ground Transportation (Uber, Taxi, Bus)

Parking

Train

### 03. Mileage

### 04. Meals

# 4.CREATING/SUBMITTING TRAVEL REQUESTS

# TRAVEL TAB

**Travel Arranger View**

Flight Search

Round-trip One-way Multi-city

From \*  
SNA - John Wayne Airport

To \*  
Enter location

Dates \*  
08/17/2026 - 08/18/2026

Cabin  
Economy

☐ Include Accommodation

Search Flights

Upcoming Travelers Company Notes I'm Assisting

**CI AZUMANO**  
BUSINESS TRAVEL  
A SENECA NATION COMPANY

Welcome to

**Terms of Use:** Concur is for official business travel only. It is not to be used for personal travel. Effective immediately and through restrictions on all travel within the S approved, on a case-by-case basis. It is anticipated that ALL COVID-19 restrictions will be lifted by the status of the pandemic. At this time, we are not accepting any travel requests for non-essential travel.

**Contact Information for CI Azumano:**  
To reach a travel counselor for questions, please contact the travel counselors. Travel counselors are available 24/7/365.

**Concur Information and Guides:**  
[Concur FAQs](#)  
[Concur User Guide](#)  
If you are still having issues navigating the system, please contact the travel counselors.

**Helpful Information for Travelers:**

- To apply an unused ticket credit, automatically applied behind the scenes.

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

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

## 3. CREATING/SUBMITTING TRAVEL REQUESTS

# ATTACHMENTS AND BUDGET

Please attach the agenda and adjust allocated budget (if necessary) before submitting.

Manage Requests

Home / Requests / Manage Requests / Bronco Roundup

Alerts: 2

REQUEST

Error: Please contact PurchasingTravel@rccd.edu and request Vendor ID Setup. [View](#)

Warning: NOTICE: AFTER receiving your approved TR email notification; Email the Traveler's Name, Cell Phone Number, Approved TR#, and Worksite Location to PurchasingTravel@rccd.edu [View](#)

Bronco Roundup

Not Submitted | Request ID: 4DFV

Request Details Print/Share Attachments

Attach Documents

Submit Request Copy Request Edit Approval Flow Delete Request

EXPECTED EXPENSES

Add Documents

Add Edit Delete Allocate

No Expected Expenses

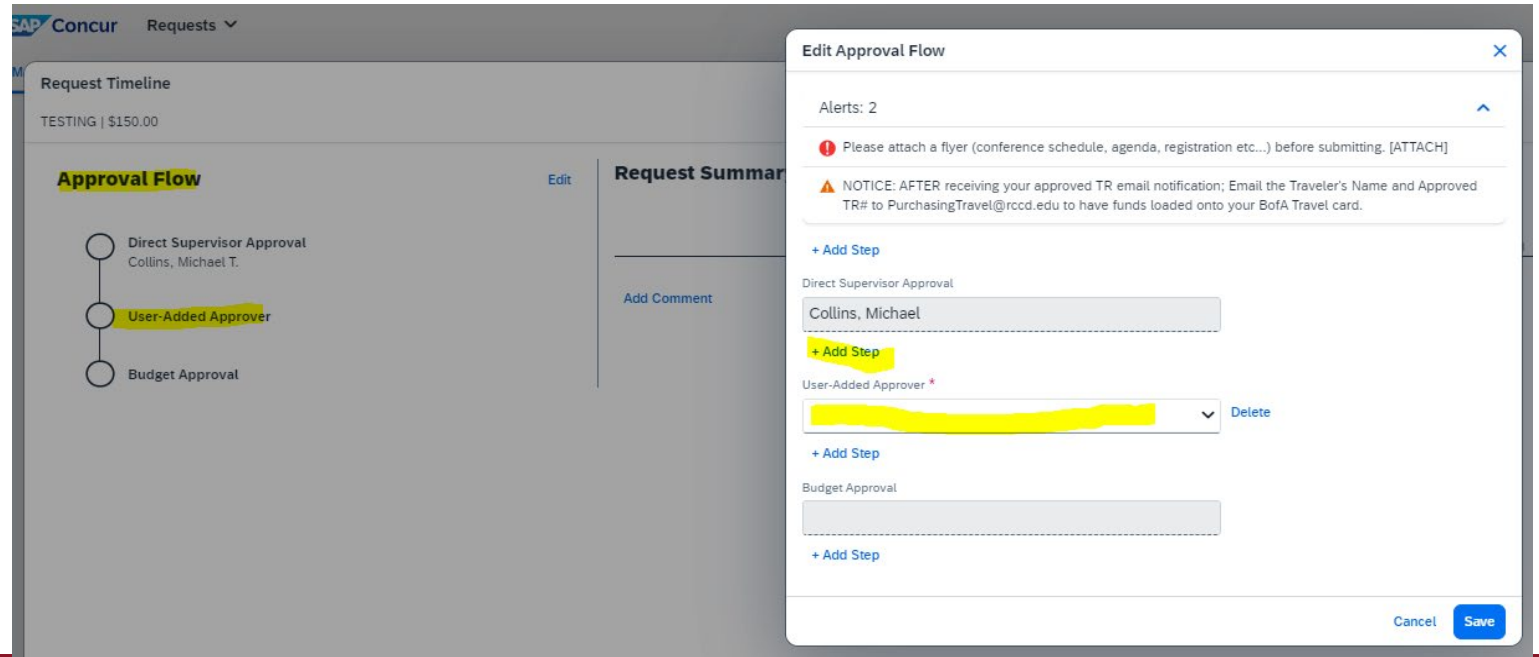
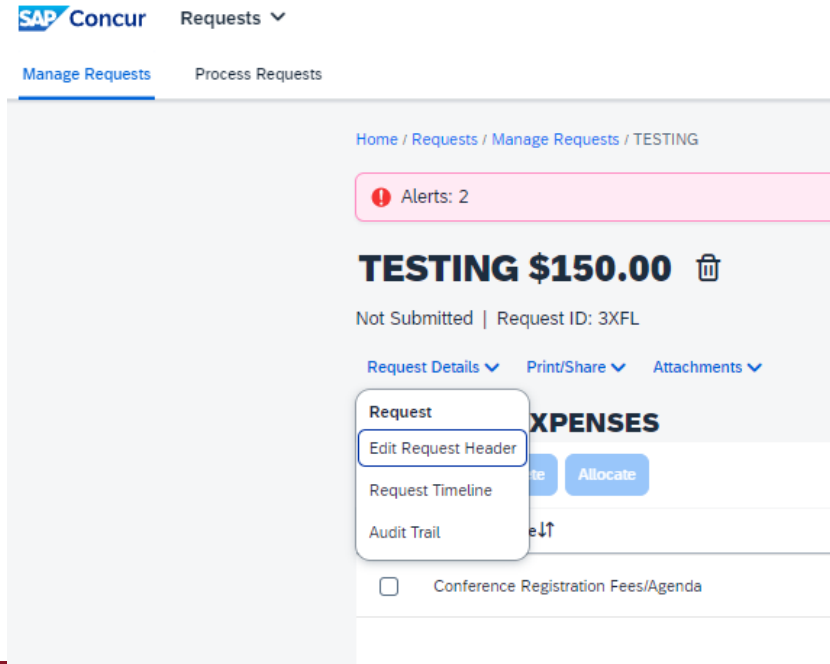
Add expected expenses and/or travel plans to this request to submit for approval.

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

- Change budget string and percentages using the Allocate Blue Button for (Individual Expense).
- To update the budget for the whole TR go to Request Header.

## Add Approver if not found:

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



# CREATING/SUBMITTING TRAVEL REQUESTS

# REVIEW ALERTS

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

[Home](#) / [Requests](#) / [Manage Requests](#) / TESTING

Alerts: 2

REQUEST

 Please attach a flyer (conference schedule, agenda, registration etc...) before submitting. [ATTACH] [View](#)

 NOTICE: AFTER receiving your approved TR email notification; Email the Traveler's Name and Approved TR# to [PurchasingTravel@rccd.edu](mailto:PurchasingTravel@rccd.edu) to have funds loaded onto your BofA Travel card. [View](#)

**TESTING \$150.00** 

[More Actions](#) [Submit Request](#)

Not Submitted | Request ID: 3XFL

**Red Exclamation ! Sign means hard stop.** Concur will not let you submit request until all red exclamation signs are corrected.

## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# PRINT SHARE REPORTS

Print Share > RCCD Request Printed Report with Flow/Trail

RCCD Request Printed Report with Flow /Trail

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

Printed on 09/01/2022 8:03 PM

**Approval Flow**

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

**Audit Trail**

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

Close Print Save as PDF Email

Reports can be printed, saved and emailed.

## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# Out of State Travel Procedure

Effective immediately, an additional step to the process has been added: the College President must now obtain pre-approval from the Chancellor with justification for the travel cost before the request can be placed on the Board agenda. This step requires additional lead time, so we are adjusting the internal submission deadline accordingly.

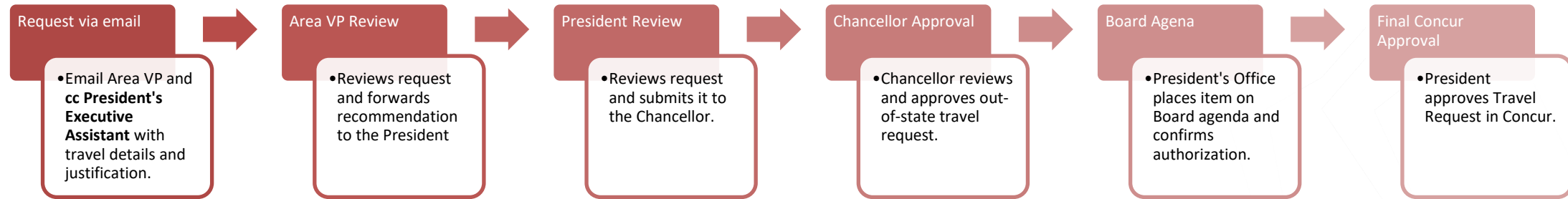
To ensure sufficient time for review and approval, all out-of-state travel requests must be submitted **at least 5 business days prior to the Tuesday deadline for the upcoming Board meeting to allow time for review and Chancellor's approval.**



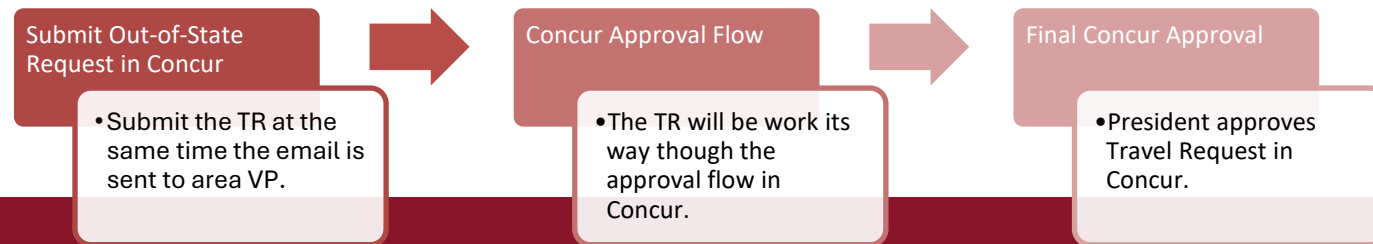
## 3.CREATING/SUBMITTING TRAVEL REQUESTS

# Out of State Travel: Process

## Email Approval Process:



## Concur Travel Request Process:



# OUT OF STATE TRAVEL EMAIL TEMPLATE:

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

**Mr./Ms. NAME, TITLE, DEPARTMENT.**

To travel to **CITY, STATE.**

From **MONTH, DAY, YEAR** through **MONTH, DAY, YEAR,**

To attend the **NAME OF EVENT.**

Estimated cost: **TOTAL AMOUNT SUBMITTED IN CONCUR.**

**Funding Source: GENERAL FUND/GRANT NAME.**

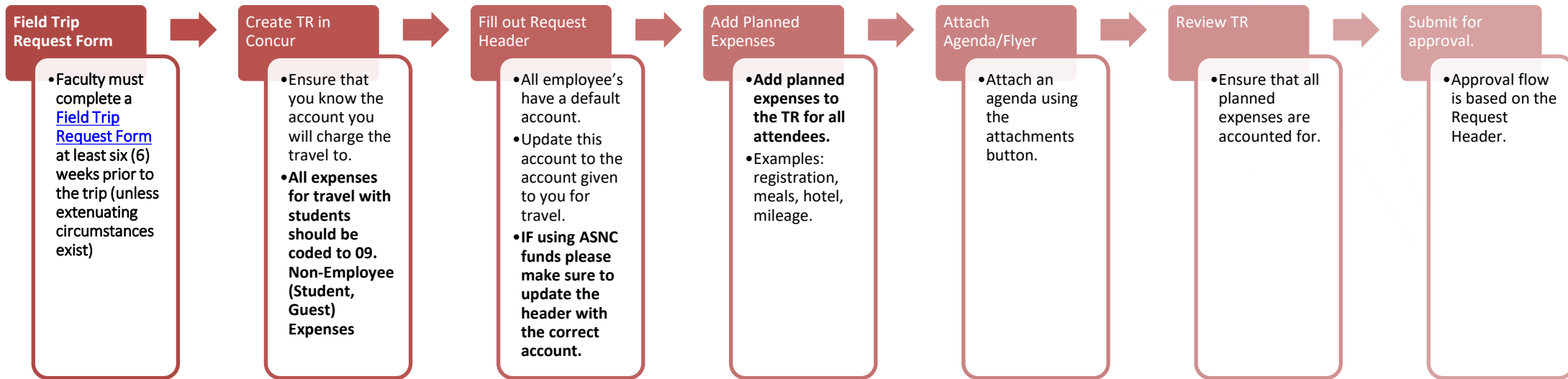
Please direct questions to Denise Terrazas at [Denise.Terrazas@norcocollege.edu](mailto:Denise.Terrazas@norcocollege.edu))

# STUDENT TRAVEL



- The process of creating a travel request that involves students and/or is funded through Associated Students or Trust Account funds is similar to creating a regular travel request.
- Field trips or excursions are trips conducted in connection with courses of instruction or instructional-related social, educational, cultural, athletic, or musical activities for students to and from places in California, or any other state, the District of Columbia, or a foreign country.
- All travel should be processed through Concur.

# Creating a TR Process for Student Travel



# 09. Non-Employee Expenses

SAP Concur

Requests

Manage Requests

REQUEST

Error: Please contact PurchasingTravel@rccd.edu and request Vendor ID Setup.

Warning: NOTICE: AFTER receiving your approved TR email notification; Email th

Bronco Roundup

Not Submitted | Request ID: 4DFV

Request Details

Print/Share

Attachments

EXPECTED EXPENSES

Add expected expenses and/or travel plans

Search by expense type, category, description

Collapse All Sections

Ground Transportation (Uber, Taxi, Bus)

Parking

Train

03. Mileage

04. Meals

05. Fees

Conference Registration Fees/Agenda

06. Other Travel Expenses

09. Non-Employee (Student, Guest) Expenses

Non-Employee Airfare

Non-Employee Charter Bus

Non-Employee Lodging

Non-Employee Meals

Non-Employee Other Travel Expenses

No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

Submit Request

Copy Request

Edit Approval Flow

Delete Request

Add

Edit

Delete

Allocate

# Student Travel Note: Sign-in sheet is required for student travel.

Please make sure that a **sign-in sheet** is created and filled out with the following information:

1. Student name
2. Student ID number
3. Student signature



## 4.BANK OF AMERICA ISSUANCE PROCESS

Esmeralda Abejar



# 4.BANK OF AMERICA CREDIT CARD ISSUANCE PROCESS

**Note to first time travelers: Purchasing will not issue a credit card without a fully approved Travel Request.**

1. Traveler will fill out [Travel Credit Card acknowledgement form](#) (If BofA credit card has not been previously issued).
2. Purchasing will order credit card when form is received. BofA card will arrive within 5-7 business days.
3. Purchasing will send credit card to Cashier's office for traveler to pick up. (Picture ID is required).
4. Traveler emails [purchasingtravel@rccd.edu](mailto:purchasingtravel@rccd.edu) to request funds to be loaded to BofA card when Travel Request is fully approved.
5. Proceed to book flight, hotel and pay conference registration when credit card is loaded with funds.
6. Traveler or delegate can book in Concur (No BofA Card needed)  
If option 1. Book Online with Concur was selected.  
You will need to provide you BofA card when checking in at the hotel.
7. Traveler or delegate can book hotel, car rental and pay conference registration (BofA credit card needed).  
If option 3. Book outside of Concur was selected.

# ACKNOWLEDGEMENT FORM

## Acknowledgement Form

As part of our web-based, integrated travel and expense management solution (Concur), Riverside Community College District will be issuing you a Bank of America Visa credit card specifically designated for travel-related expenses.

**By signing this form, you understand and agree that:**

**1. Authorized Use:**

- The traveler will be expected to use the Travel Credit Card in accordance with the Riverside Community College District's Board Policy and Administrative Procedures, including [BP/AP 5900](#)
- The Riverside Community College District Travel Credit Card is for approved travel expenses only. Personal use of the card is strictly prohibited.

**2. Expense Reporting:**

- You are required to retain itemized receipts and supporting documentation for each transaction made using the loaded card. These documents must be submitted promptly for expense reporting and reimbursement purposes. Failure to provide supporting documentation may constitute an unallowed activity and require personal reimbursement.

**3. Card Security:**

- You will be responsible for the safe keeping of the Travel Card issued to you and, if lost or stolen, will report its loss/theft immediately to Purchasing Department at [PurchasingTravel@rccd.edu](mailto:PurchasingTravel@rccd.edu)

**4. Card Termination:**

- The travel credit card remains the property of Riverside Community College District and must be returned upon termination of employment or upon request.

**5. Unallowed transactions:**

- The traveler will be personally liable for unallowed activity and will be required to reimburse Riverside Community College District. Unauthorized transactions are non-travel purchases, personal expenditures or unallowed items per Board policy.

**Your personal credit will not be affected by any use of the Travel Card.**

I hereby acknowledge that I have read, understood, and agreed to the terms and conditions outlined in this acknowledgment agreement. I also confirm that I will comply with all applicable policies and procedures related to the use of the travel card.

Print Cardholder/Employee Name: \_\_\_\_\_

Cardholder/Employee Signature and Date: \_\_\_\_\_

RETURN COMPLETED FORM TO [PurchasingTravel@rccd.edu](mailto:PurchasingTravel@rccd.edu)

Version 09/14/23

- When emailing the form to purchasing, please send your cell phone number, and the Approved TR #.
- You will then receive the following email.

# 4. BANK OF AMERICA CREDIT CARD ISSUANCE PROCESS

## Purchasing email

After the BofA credit card has been ordered, traveler will receive the following **email** from Purchasing Travel.

Your Bank of America Visa Travel Card has been ordered.

Your physical card will arrive at your work location in 5-7 business days.

Be prepared to show valid photo ID when signing for receipt of your card.

College Employees - After 7 Business Days, check with your campus Cashier's Office.

District Office Employees – You will receive an email when your card is ready to be picked up at the District's Lobby Reception desk.

Once you have your card in hand, follow the attached instructions and activate your account by visiting: [www.bankofamerica.com/globalcardaccess](http://www.bankofamerica.com/globalcardaccess)

You will need to utilize your cell phone number as the one-time Verification ID.

For example: (951) 123-4567 would be entered in as 9511234567

The billing address, when requested by merchants, is listed below.

\* Please Note: You may be asked for the billing zip code for some transactions.

3801 Market Street

Riverside, CA 92501

\*The amount loaded on your card may include an additional amount to cover any transaction/processing fees or additional charges that may occur. Please check card balance for availability of funds.

Please be sure to continue to email [PurchasingTravel@rccd.edu](mailto:PurchasingTravel@rccd.edu) once you have a TR that is fully approved in Concur to request the funds be loaded.

Thank you,

Purchasing Travel Team

## 5.BOOKING TRAVEL

Jonnathan Dueñas



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

Click [Book Travel](#) and follow the travel store booking process

**2024 Vineyard Symposium \$2,050.00**

Pending on-line Booking | Request ID: 3VJK

More Actions ▼

Book Travel

**Note: This only applies if option 1. Book Online- Concur Travel was selected in your travel request.**

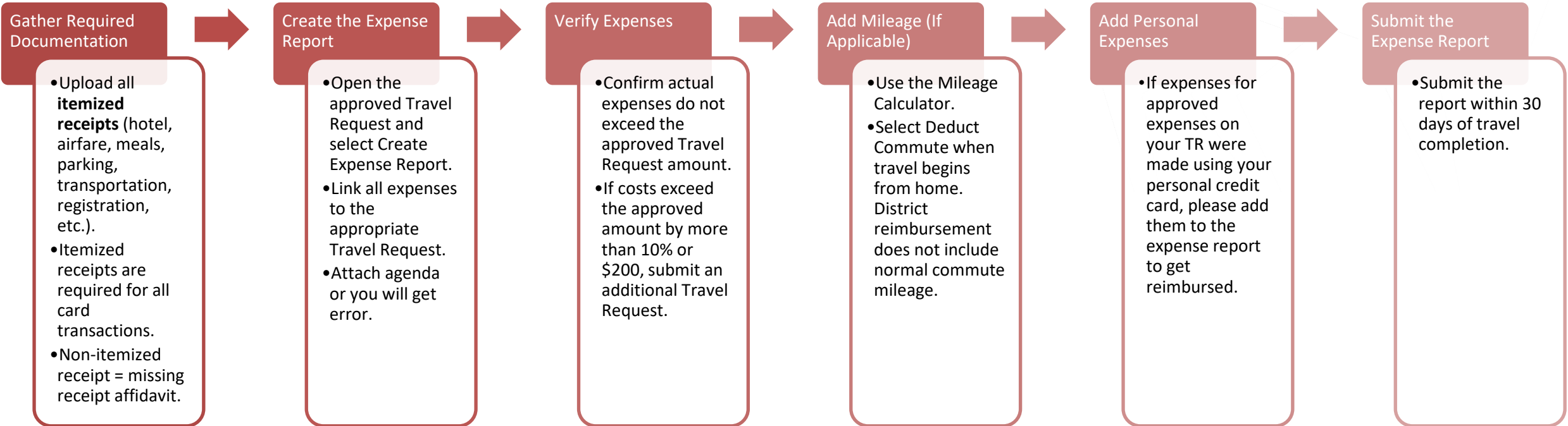
## 5. BOOKING TRAVEL

# 6. CREATING AND SUBMITTING EXPENSE REPORTS

Jonnathan Dueñas



# 4. Creating and Submitting Expense Report



# Download the SAP Concur App

## Your Information

[Personal Information](#)  
[Company Information](#)  
[Contact Information](#)  
[Email Addresses](#)  
[Emergency Contact](#)  
[Credit Cards](#)

## Travel Settings

[Travel Preferences](#)  
[International Travel](#)  
[Frequent-Traveler Programs](#)

## Request Settings

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

## Expense Settings

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

## Profile Options

Select one of the following to customize your user profile.

### Personal Information

Your home address and emergency contact information.

### Company Information

Your company name and business address or your remote location address.

### Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

### Expense Delegates

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

### Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### SAP Concur Mobile App

Set up access to Concur on your mobile device

[Concur Profile settings](#)>[Profile options](#)>[Concur Mobile Registration](#)

[Settings](#) / SAP Concur Mobile App

## SAP Concur Mobile App

### Mobile Sign-in Policies

- i** Your organization has set the following policies:
- You may sign into the mobile app using SSO or your username and password
  - You may set up biometrics on your mobile device to make signing into the mobile app easier

### Sign in With QR Code

To automatically sign into the app, click the button below and use the camera on your mobile device to sign in to the Concur Mobile app.

[Mobile App Sign-in](#)

[Download SAP Concur App](#)> start taking pictures of your receipts.

## Download the app

Use your mobile device to scan the QR code below for your mobile device type.



# 6.CREATING/SUBMITTING EXPENSE REPORTS

# ADD EXPENSES

SAP Concur

Expense ▾

?

EA

Manage Expenses

Card Transactions

Process Reports

Home / Expense / Manage Expenses / ACBO 2024 Spring Conference

✖ Alerts: 1

▼

ACBO 2024 Spring Conference \$675.00

Delete Report

Copy Report

Submit Report

Not Submitted | [Report Number: U58FIY](#)

REQUEST

Approved

\$2,242.67

Report Details ▾

Print/Share ▾

Manage Receipts ▾

[View Available Receipts](#)

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to ▾

| <input type="checkbox"/> | Alerts↓↑ | Receipt↑ | Payment Type↑ | Expense Type↑ | Vendor Details↓↑ | Date↓ | Requested↓↑ |
|--------------------------|----------|----------|---------------|---------------|------------------|-------|-------------|
|--------------------------|----------|----------|---------------|---------------|------------------|-------|-------------|

Click on Add Expense, you will see three options:

- Scan Receipt
- Manually Create Expense
- Select from Available Expenses

## 6. CREATING/SUBMITTING EXPENSE REPORTS

## Payment Type

- Bank of America Travel Card- becomes the default payment type when card is used.
- CalTravel Ghost Card. Selected when booking was done through the travel store.
- Other Entity- Used when A/P sends check payment.
- Out of Pocket.

The image shows two screenshots of an expense management system. The top screenshot displays a table of expenses with columns for Alerts, Receipts, Payment Type, and Expense Type. A yellow circle highlights the 'Payment Type' column, which shows 'BofA Travel Card' for a specific entry. The bottom screenshot shows the 'New Expense' form, which is divided into 'Details' and 'Itemizations' tabs. The 'Details' tab is active, showing fields for Expense Type (Parking), Transaction Date (04/23/2024), City of Purchase (Sacramento, California), Amount, and Comment. The 'Payment Type' dropdown menu is open, showing options: CalTravel Ghost Card, Other Entity, and Out of Pocket.

|                          | Alerts↑ | Receipt↑ | Payment Type↑    | Expense Type↑                       |
|--------------------------|---------|----------|------------------|-------------------------------------|
| <input type="checkbox"/> |         |          | BofA Travel Card | Conference Registration Fees/Agenda |

### New Expense

**Details** | Itemizations

**Allocate**

Expense Type \* \* Required field  
Parking X v

Transaction Date \*  
04/23/2024 📅

Report/Trip Purpose \*  
Conference Attendee v

Additional Information

Enter Vendor Name

City of Purchase  
Sacramento, California X v

Payment Type \* ?  
Out of Pocket v

CalTravel Ghost Card  
Other Entity  
Out of Pocket

Amount \*

Comment

Save Expense | Save and Add Another | Cancel

# 6. CREATING/SUBMITTING EXPENSE REPORTS

## REQUEST

Approved

\$2,242.67

Report Details ▾

Print/Share ▾

Manage Receipts ▾

Add Expense

Edit

Delete

Manage Attachments

View Receipts in New Window

Missing Receipt Declaration

Expenses

Move to ▾



Alerts↓↑

Receipt↓↑

P

Expense Type↓↑



BofA Travel Card

Conference Registration Fees/Agenda

- All receipts must be itemized.
- Fill out Missing Receipt Declaration (If a receipt is lost).
- Missing Receipt Declaration is submitted and **signed only by Traveler**. Delegates don't have access to it.

## 6. CREATING/SUBMITTING EXPENSE REPORTS

## Adding Personal Car Mileage Expense

Personal car mileage is reimbursed for miles driven above and beyond your normal daily commute to your work location.

When adding mileage to the expense report, select “personal car mileage.”

1. Click on “add expense.”
2. Select the “Personal Car Mileage” expense type.
3. Add the transaction date and note the purpose of the trip.
4. Now STOP! Do not manually add the “From” and “To” locations. Instead, click on the [Mileage Calculator link](#) to open the dialogue box.

### Mileage Calculator

5. Under “Waypoints,” your home address should already appear in the “A” field if you completed your travel profile.

If you do not see your home address populated, add it here. **Please note: Point A should be the place where you started the trip.**

6. Add the destination address and click “Calculate Route”.

Note: If you traveled round trip on this day, click “Make Round Trip”.

7. Click “Deduct Commute” to deduct your normal daily commute.

8. Click “Add Mileage to Expense.” The mileage reimbursement amount will automatically be calculated using the annual standard IRS mileage reimbursement rate.

9. Click “Save” to complete the personal car mileage entry.

## 6. CREATING/SUBMITTING EXPENSE REPORTS

## Add slide from A-team presentation

### **Use Mileage calculator**

#### **Selecting a Route**

- o When using mileage calculator, it is appropriate to select the route that matches the one the traveler actually took. Not necessary to select the shortest distance route

#### **On Net Zero Mileage**

- o Even if a traveler does not expect to be reimbursed, they are advised to include the entry on their expense reports. For liability purposes, need to document when an employee uses their personal car for business.

**NOTE: NOTE – if not deducting commute on a normal workday (M-F) then add a note to line to explain why.**

**The IRS rule is that employees are reimbursed for expenses (i.e. mileage) in excess of normal commute.**

# 6.CREATING/SUBMITTING EXPENSE REPORTS

## **The following are examples of common mileage scenarios you may encounter and how to report them best.**

Scenario 1 - Traveler drives from home to the event and returns home the same day.

Recommendation: One entry, deduct round trip commute.

Scenario 2 - Traveler drives from home to the event and returns a different day.

Recommendation: One entry per day, deduct commute each day.

Scenario 3 - Traveler drives from campus/location to the event and returns to campus/location the same day.

Recommendation: One entry, do not deduct commute.

Scenario 4 - Traveler leaves from campus/location and returns the same day but drives home.

Recommendation: Two entries, do not deduct commute for the first leg, deduct commute for the second leg.

Scenario 5 - Traveler drives from home to the conference location on a regular working day but returns home on a non-working day.

Recommendation: Two entries, deduct commute for first day/leg, do not deduct commute for the second day/leg as this is a non-working day and traveler would not normally have a commute.

Scenario 6 - Traveler is driven to and from the airport/conference location and dropped off.

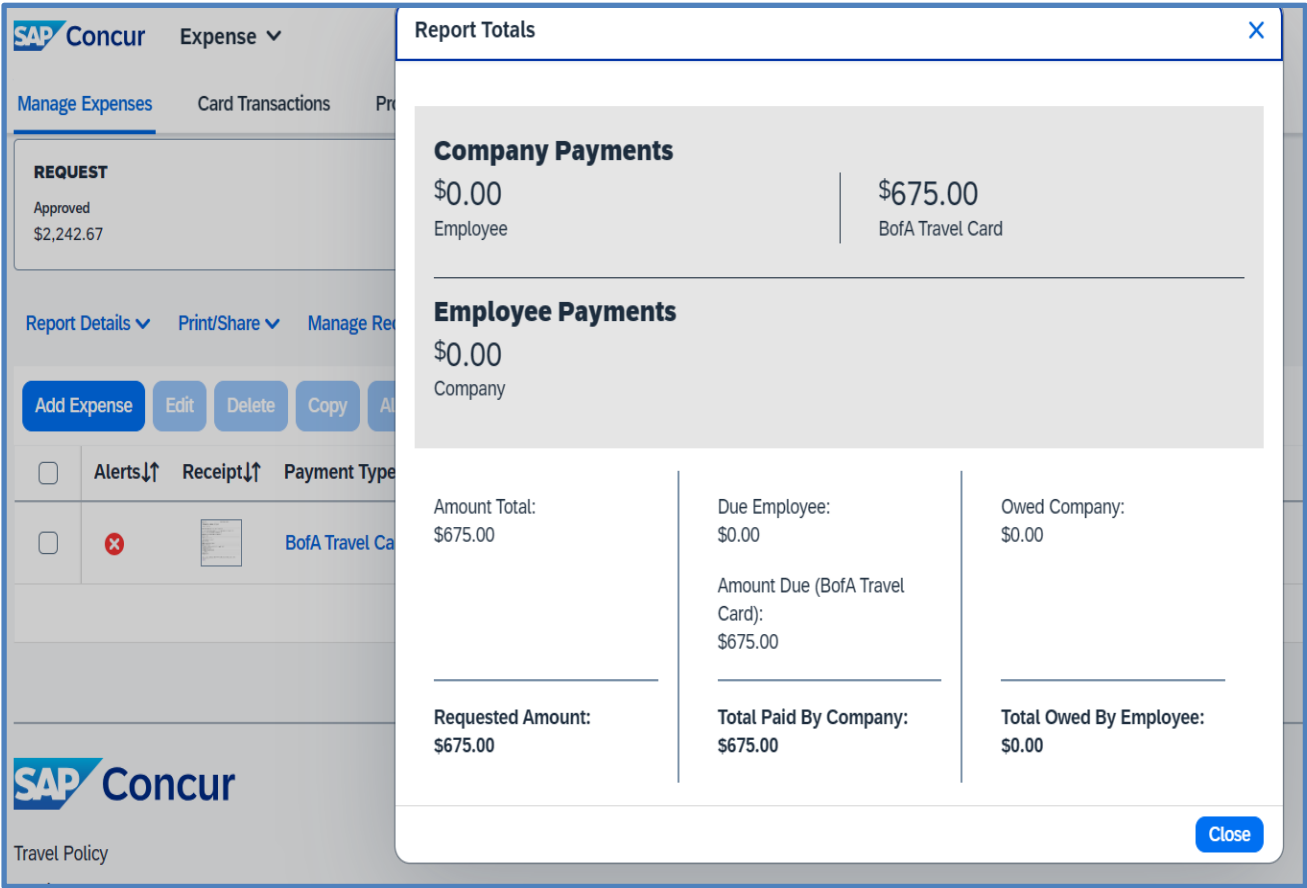
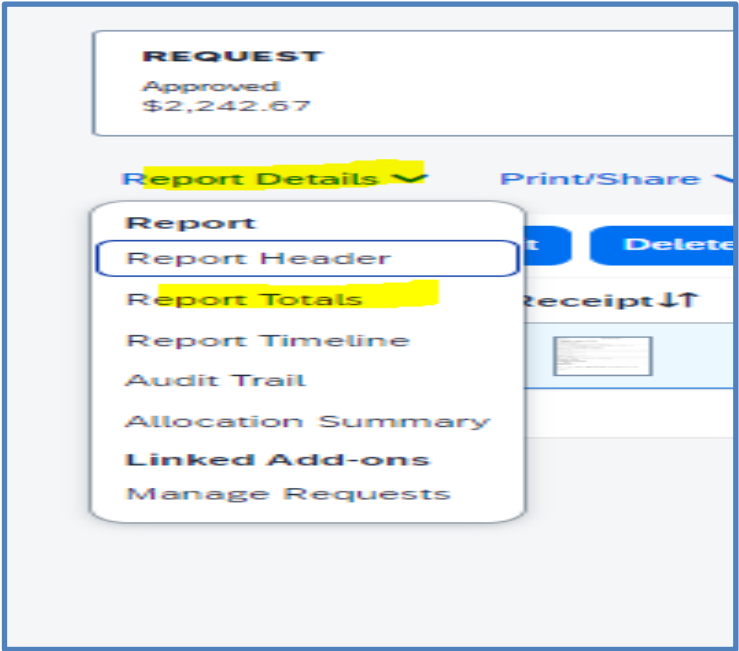
Recommendation: Two entries for each leg, deduct commute for both entries. Traveler would have driven their vehicle to the work location and is therefore still eligible to receive mileage reimbursement On Carpooling

Scenario 7 - Traveler's meet at a location and carpool to the event.

Recommendations:

1. Each traveler submits mileage to and from meet location, deducting normal commute.
2. Individual driving to the final location receives reimbursement from home, to meet up location, and then final destination, deducting normal commute.

Before submitting expense report check the report totals.



# 6.CREATING/SUBMITTING EXPENSE REPORTS

## 7. MONTHLY MILEAGE REPORT

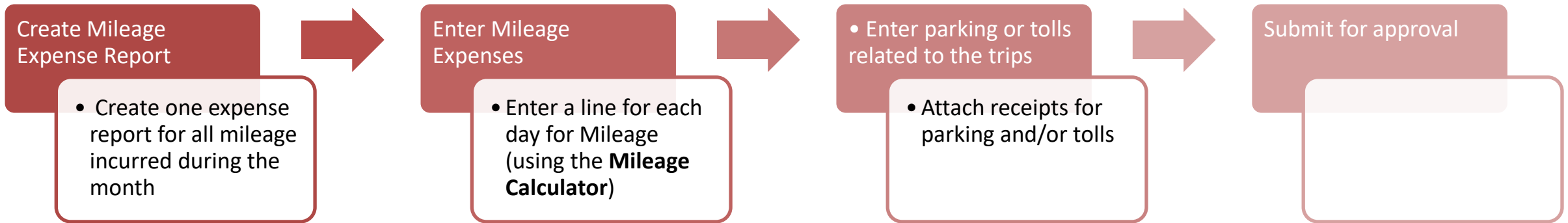
Esmeralda Abejar



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# Monthly Mileage Expense

Monthly Mileage Reports may be submitted for mileage reimbursement requests for local travel (<50 miles one way) without a Travel Request every month.



To create a monthly mileage report:

1. Click on the “Expense” tab on the ribbon at the top of your screen.
2. Click on “Create a new report”.
3. Complete all sections. For assistance in obtaining the appropriate budget string to charge, please contact your department.
  - Report/Trip Name - 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 “Create Report”

4. Select the “Monthly Mileage Report” expense type.
5. Follow the same steps as presented in the “Personal Car Mileage” slide.
6. Repeat these steps for each day you want to report mileage driven, then click “Save and Add Another.”
7. Once you have finished adding all of the dates, select “Save Expense”
8. Once done preparing your report, click “Submit Report”

## a).MONTHLY MILEAGE REPORT

# 7.NEED HELP WITH CONCUR?

Please email the Norco College Concur Team  
[ConcurQuestions@norcollege.edu](mailto:ConcurQuestions@norcollege.edu)

You can also visit

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

for training materials.



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