Concur Process- Faculty/Staff

1. SIGN IN:
   a. https://rspace.ucr.edu or https://concur.ucr.edu
      i. *Skip to step 4 if you have already accessed the application.*
   b. Use your **NetID@ucr.edu** email address and password
   c. Please ensure you are also logged into the campus VPN if accessing the application off-campus.

2. Click on "Authorized Apps" and search for "CONCUR"
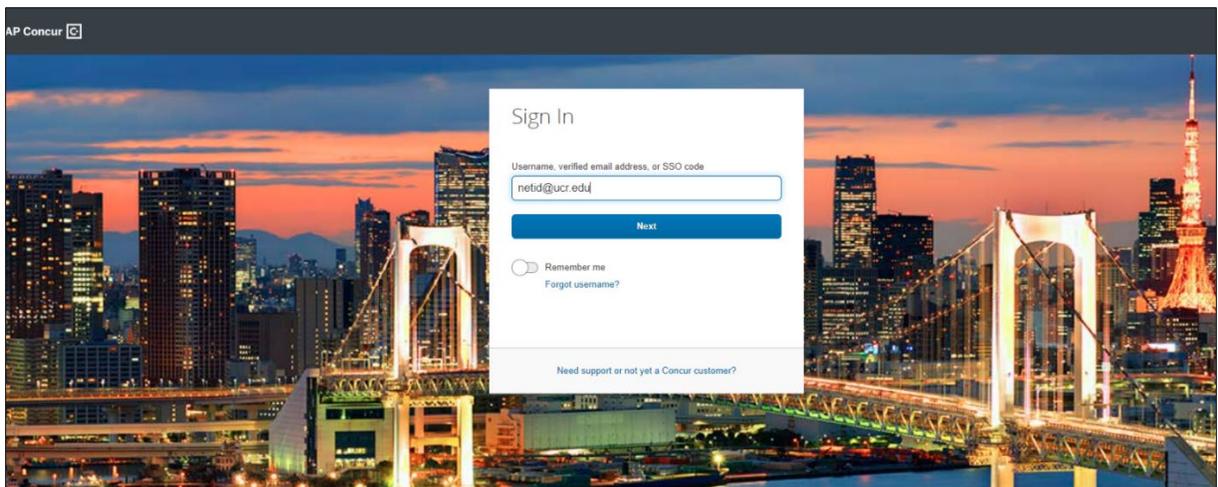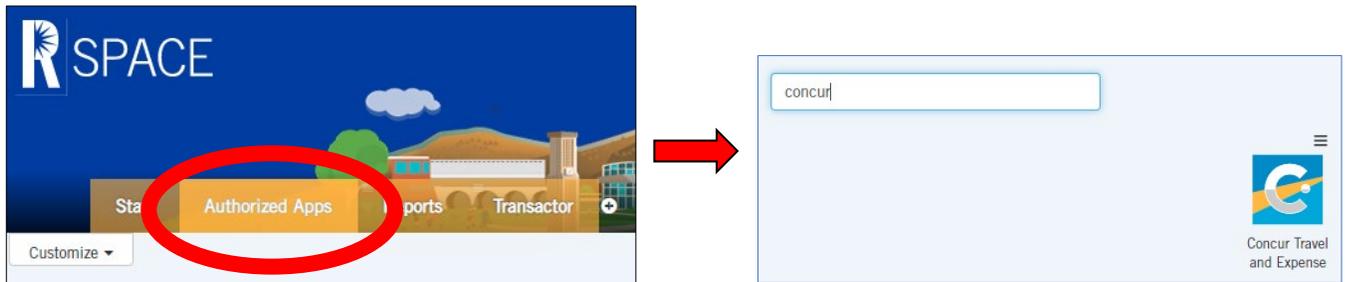
3. Click on "SIGN ON WITH UNIVERSITY CREDENTIALS".
   a. *This will wither redirect you to the UCR CAS login page. If you are already logged into a UCR system, it will use single sign-on and redirect you to the Concur Homepage.*
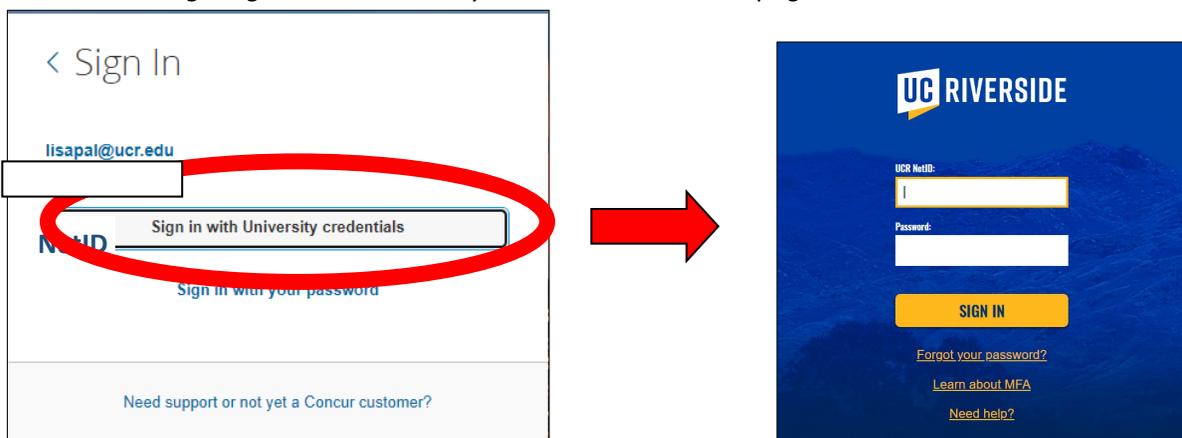
Concur Process- Faculty/Staff

4. CONCUR Homepage:
   a. Note: The information and access links viewed on this screenshot may be different for each Traveler.
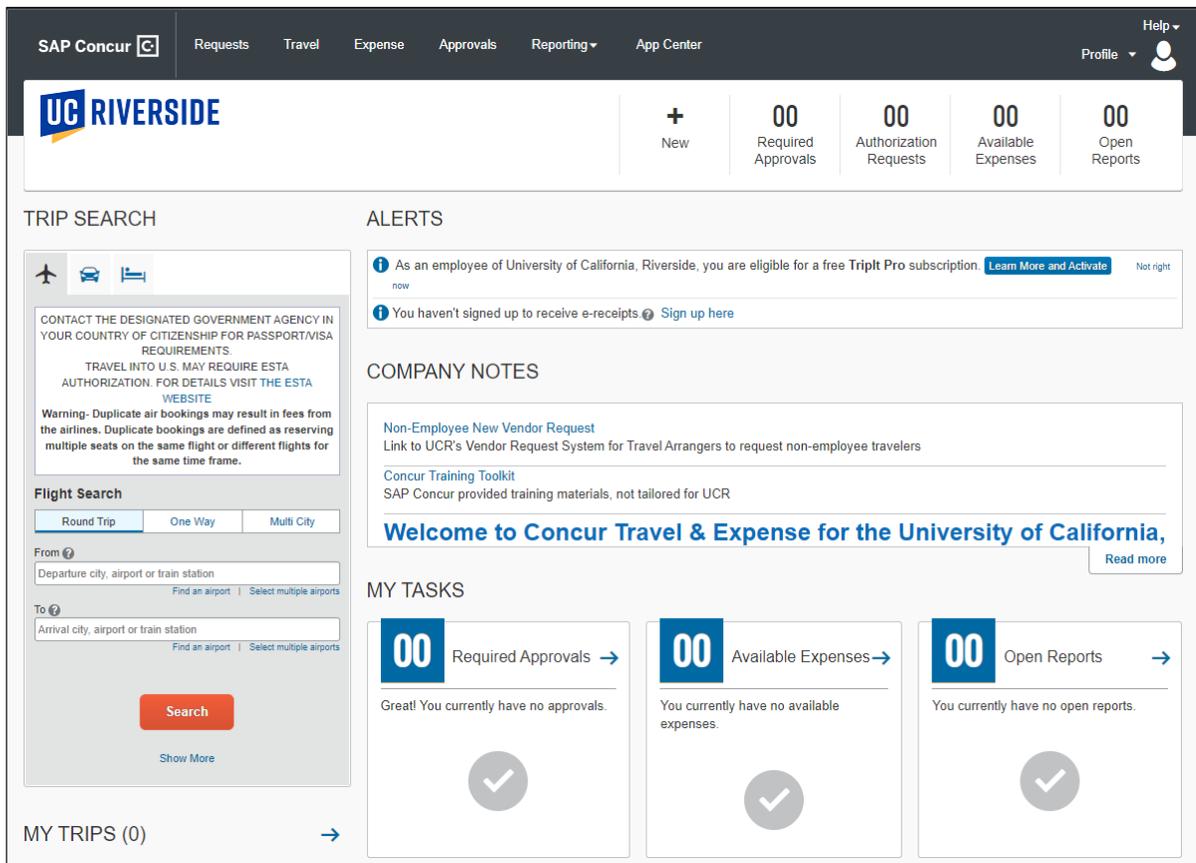
5. To Create the required Pre-Trip Request- Click on the " **+ NEW** " button to access the "Start a Request" link
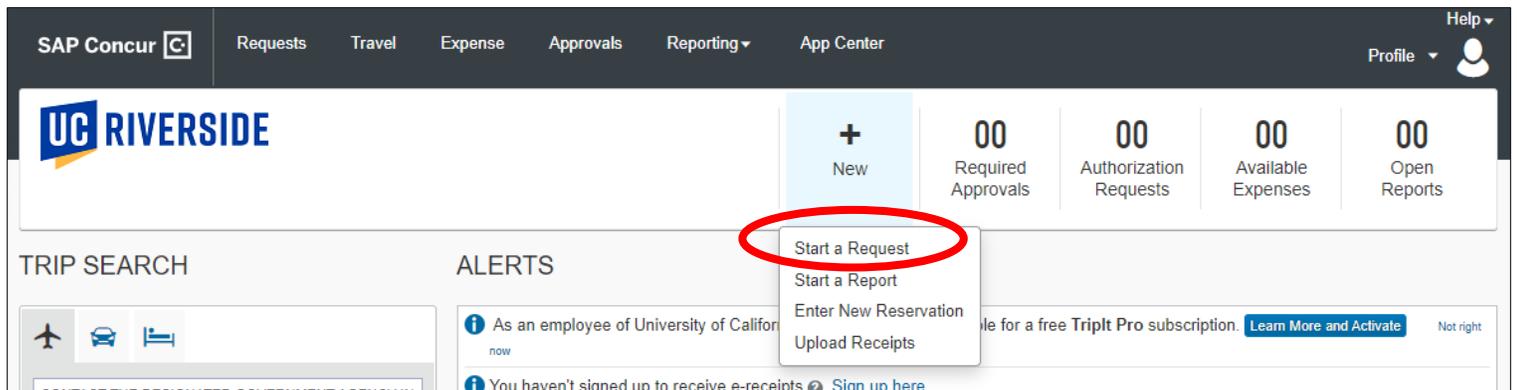
Concur Process- Faculty/Staff

6. Enter in applicable trip information. Note: Fields marked with * are required before you can proceed
   a. Trip Name Format: **FirstNameInitial.FullLastName_Trip Dates** (ex: "J.Doe_7.11.22-7.18.22")
   b. Traveler Type: "Employee"
   c. Trip Type should be indicated
   d. Trip Purpose should be indicated
   e. Business Purpose/Additional Information should be applicable to the trip
   f. Enter in Start and End Dates for the trip
   g. Please indicate if any personal travel was included in the trip.
   h. Indicate dates of personal travel.
   i. Enter in the Destination City as applicable
   j. Appropriate Payment Options are either: "Check" or "EFT"
   k. **Accountability Structure** should be "D01056-Mathematics"
   l. **Approver ID** should indicate "Melissa Gomez" or "Catherine Munoz"
   m. **FAU**- Please enter the desired FAU you wish to charge your travel to.
      i. If you wish to use multiple sources, please add the primary FAU (Activity, Fund, Function and Cost Center only) and note the additional funds in the comments section.
      ii. If you do not know your current balances or FAUs, you may access via PIWRS or contact the finance team to obtain your FAUs.
   n. Click "**Create Request**" when done

7. The Pre-Trip Request will now have an automatically generated a "**REQUEST ID**" associated with it.
   a. *Please click on the Trip Name to add the Request ID in front of your name.*
      i. *I.E. REQUEST ID_ J.Doe_7.11.22-7.18.22*
   b. Click the Save button at the bottom once updated.

Concur Process- Faculty/Staff

Edit Request Header

J.Doe_7.11.22-7.18.22   Request ID: 37UK

Request Type	Trip Name *
*Travel Request	37UK_J.Doe_7.11.22-7.18.22

Trip Type *	Trip Purpose *
1. In-State	Fieldwork

8. Back to the main Request page:
- a. Click on the "Add" button to enter in the expected expenses for this trip:

SAP Concur | Requests | Travel | Expense | Approvals | Reporting ▾ | App Center

Help ▾
Profile ▾

Manage Requests

37UK_J.Doe_7.11.22-7.18.22 🗑

Not Submitted | Request ID: 37UK

Copy Request   Submit Request

Request Details ▾   Print/Share ▾   Attachments ▾

EXPECTED EXPENSES

Add   Edit   Delete   Allocate

No Expected Expenses
Add expected expenses to this request to submit for approval.

9. Select the expense category and enter the required information.
- a. Mileage or Ride Sharing is being reported, click on "Ground Transportation"

Add Expected Expense   ✕

Search for an expense type

01. Airfare

02. Lodging

03. Ground Transportation

04. Individual Meals

05. Business Meetings

06. Social Activities and Entertainment

07. Conference/Training Registration

08. Other Expenses

Concur Process- Faculty/Staff

10. Enter in the required information:

    a.   Trip Start Dates   d.   Comments related to the trip

    b.   Estimated Amount   e.   Click the "Save" button when done

    c.   Currency (this should be USD)

11. Add in any additional Expected Expenses for the full trip date time frame.

    a.   At the pre-trip stage, items need not be itemized as you will need to enter itemizations in the expense report that will be created from this pre-trip request.

12. Click Submit Request when done adding expenses.

13. Review the UCR Travel Request User Confirmation and click the "Accept & Continue" when ready.

14. You will receive a new screen indicating if you want to add another approver. You may skip this and click the submit button

Edit Approval Flow ✕

+ Add Step

Financial Approver

Gomez, Melissa

+ Add Step

Cancel   **Submit**

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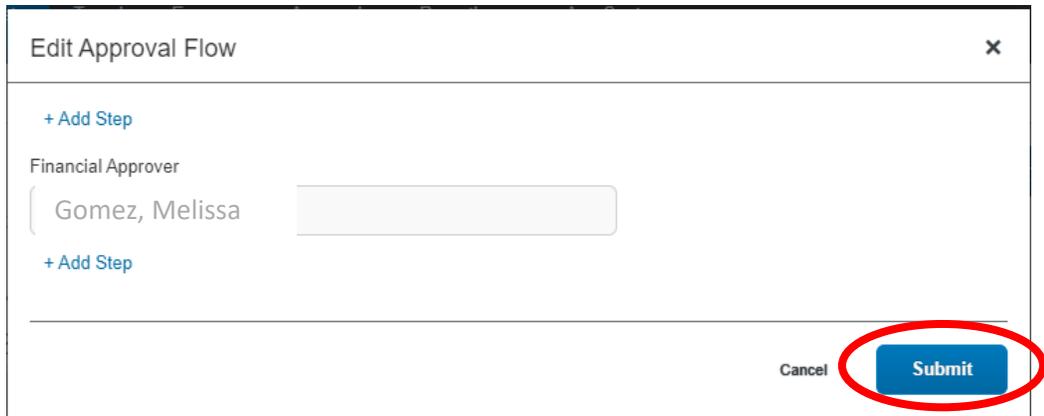
15. **Your request is now pending review/approval.**

SAP Concur [C] | Requests | Travel | Expense | Approvals | Reporting ▾ | App Center   Help ▾   Profile ▾ 👤

Manage Requests

Manage Requests

REQUEST LIBRARY   View [Active Requests ▾]

+
Create New Request

SUBMITTED   07/11/2022

37UK_J.Doe_7.11.22-7.18.22

$230.00

Pending Review
Munoz, Catherine

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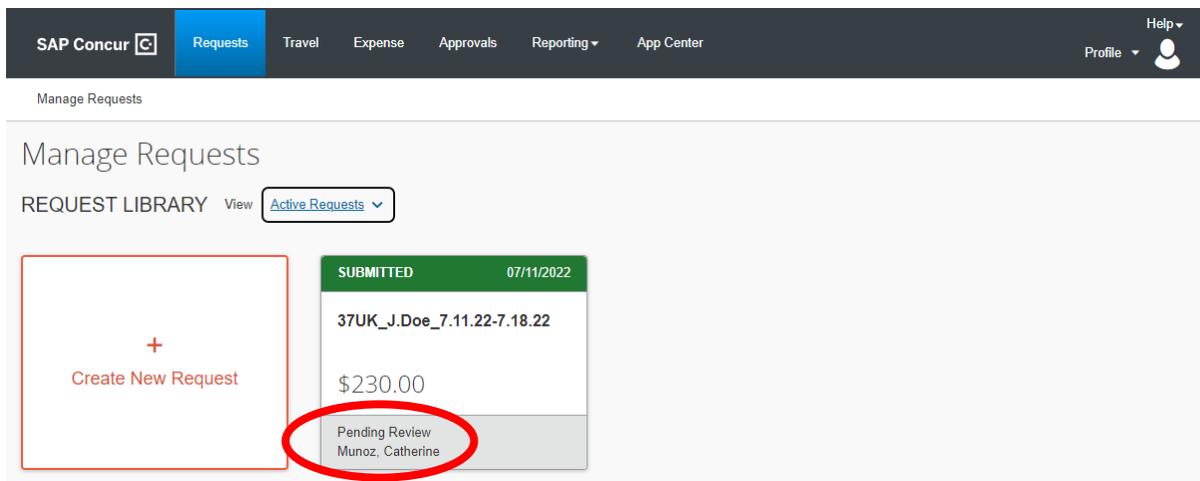
16. You will receive email notifications from AutoNotification@concursolutions.com on the status of your pre-trip.

Travel Request Pending Approval By: Catherine Munoz, 37UK_J.Doe_7.11.22-7.18.22

A   AutoNotification@concursoluti   Gomez, Melissa
     To ● Lisa Diaz

SAP Concur [C]   SAP

There is a **Travel Request pending approval by Catherine Munoz. You are receiving this email because that approver has designated you as a delegate.**

Request F J. Doe	Diaz
Request ID	37UK
Request Name	37UK_J.Doe_7.11.22-7.18.22
Request Purpose	[INSERT APPLICABLE TRIP INFORMATION HERE]
Total Posted Amount	230.00 USD

Link To Request Processing

http://www.concursolutions.com

Concur Process- Faculty/Staff

17. Once approved, you will then be able to click the link directly in the email notification to access Concur. Click on "Authorization Requests" to access all pending or approved requests.
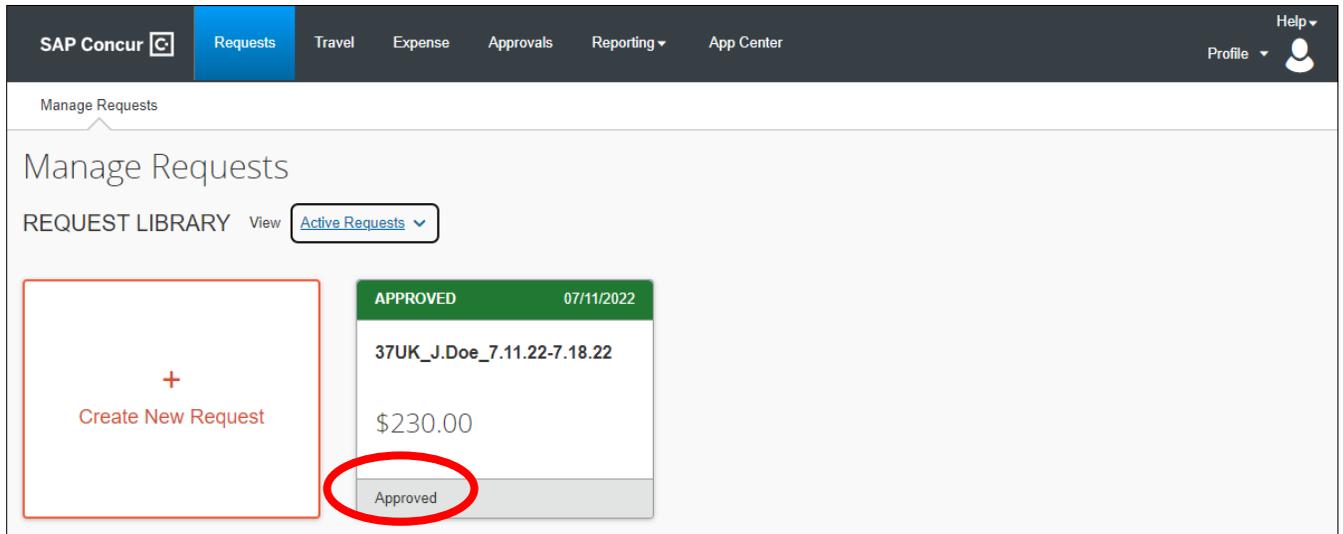
18. Click on the approved requests to view the expected expense information.
   a. You are now also able to "Create Expense Report" for the reimbursement process.
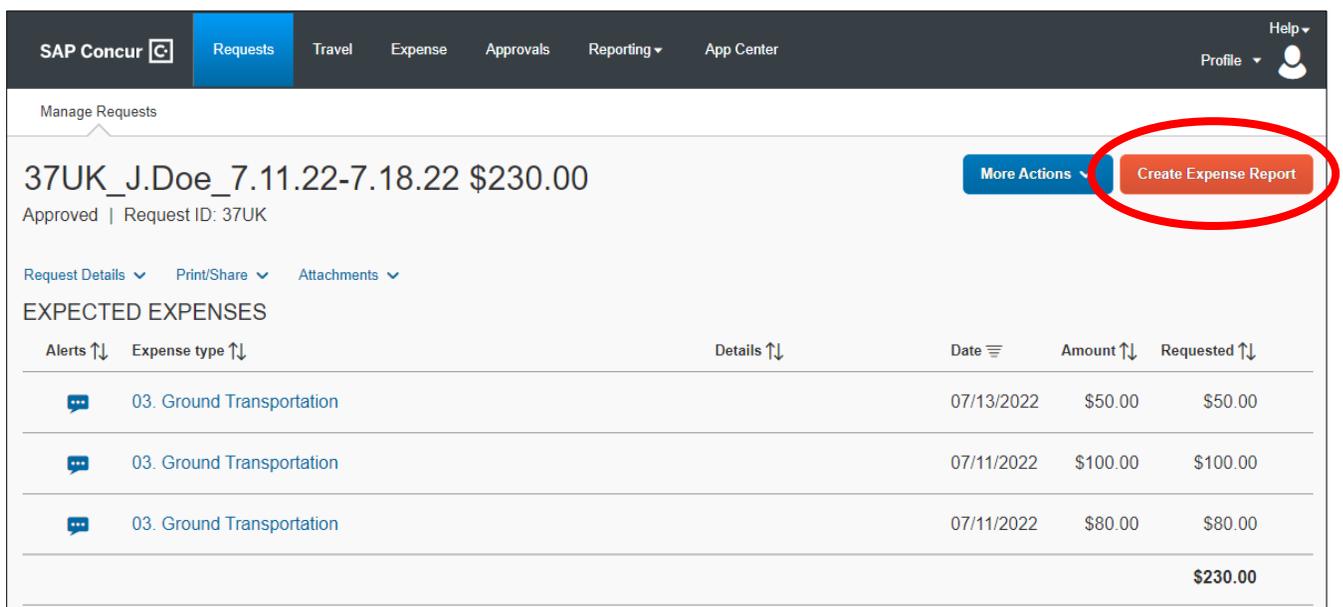
Concur Process- Faculty/Staff

19. Add itemized expenses for the trip by clicking "Add Expense".

20. Select the appropriate expense type from the dropdown menu.
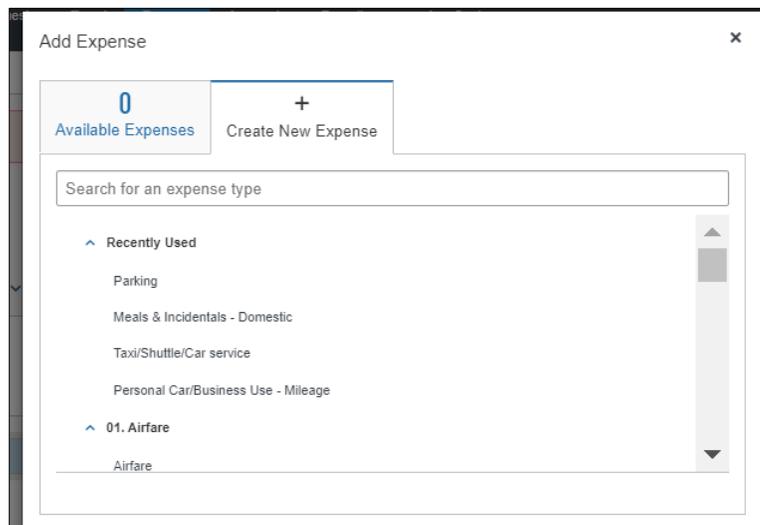
21. Enter required information denoted with "*" and upload associated receipts by clicking "Upload Receipt Image".
- a.   See example below for fields to complete for airfare details and receipt upload.
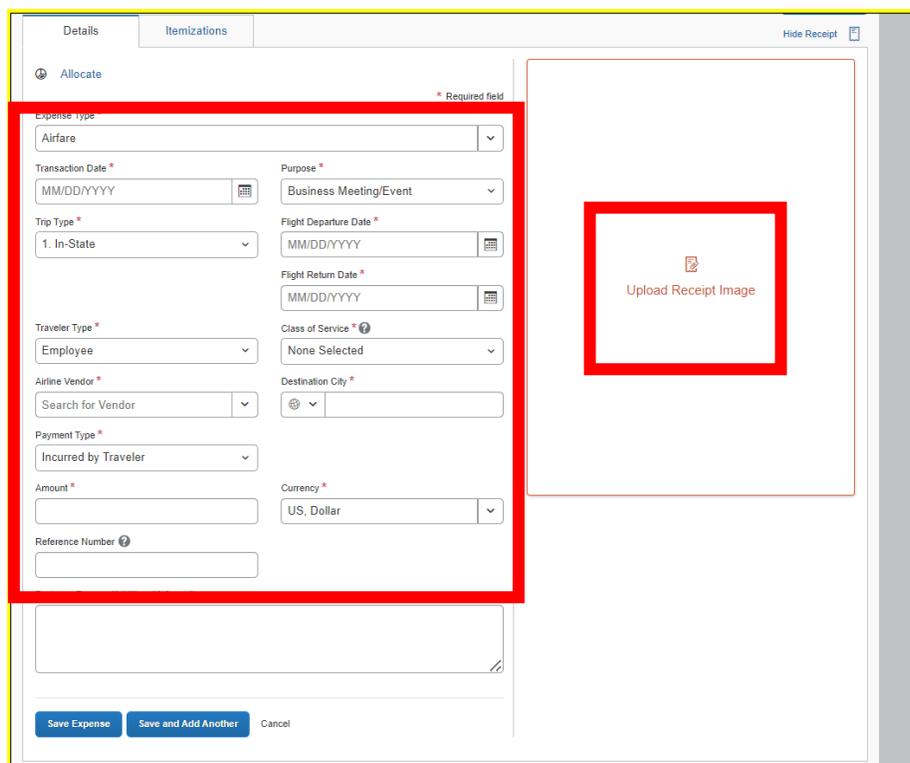
Concur Process- Faculty/Staff

22. Click "Save" if done with adding expenses or "Save and Add Another" to continue adding expenses.

23. Once all expenses and receipts have been entered/uploaded, click on "Submit Report ".

24. Review the UCR Travel Expenses User Confirmation and click "Accept & Continue".

25. A report summary will pop up as shown below, review and click "Submit Report".
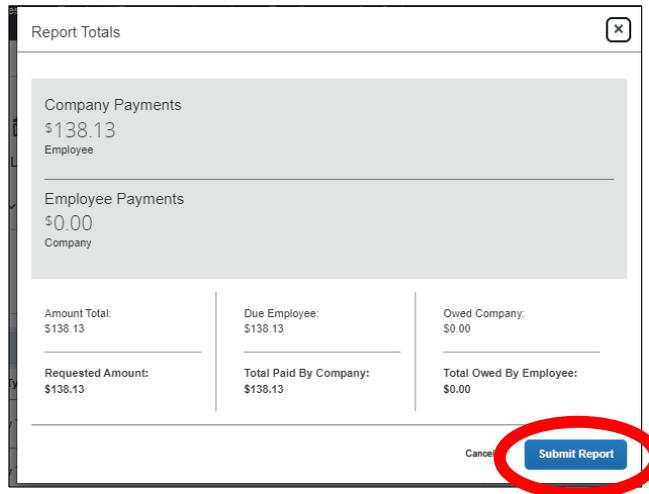
26. A confirmation window will appear, simply click "Close"
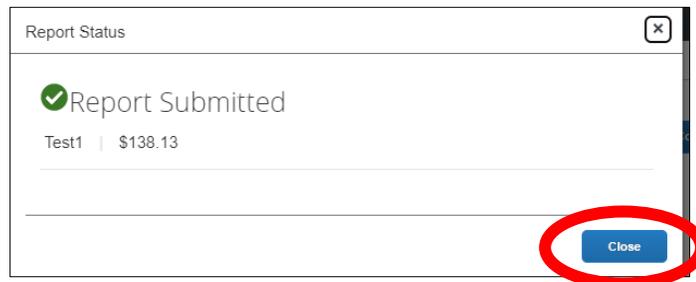
27. Email notifications from AutoNotification@concursolutions.com will generate upon submission and when there is a status change of the expense report similar to that of the pre-trip. See sample below.
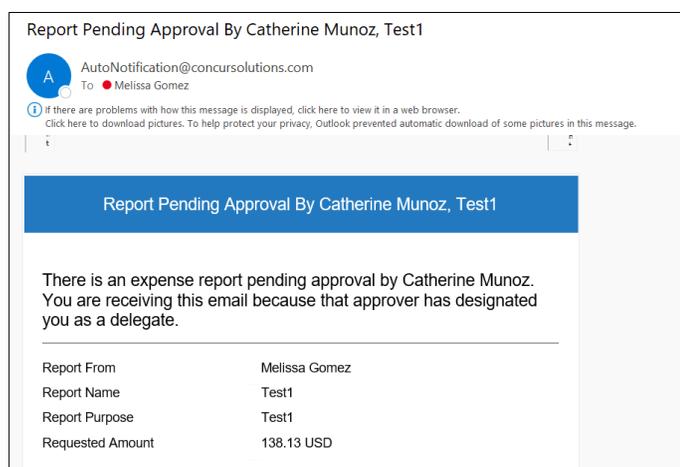
Concur Process- Faculty/Staff

28. If for some reason, any corrections must be made by the traveler, the trip may be recalled by the traveler by clicking on "Expense"
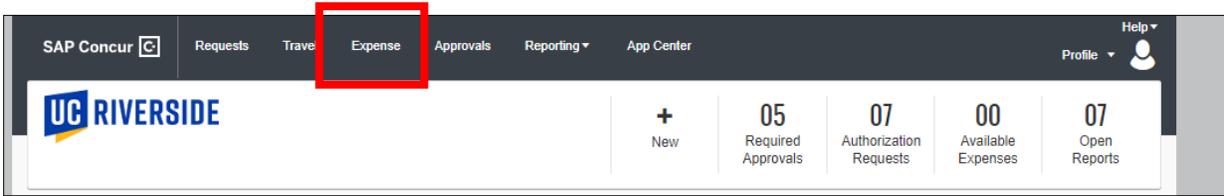
29. Click on the desired report that shows Submitted that needs correction.
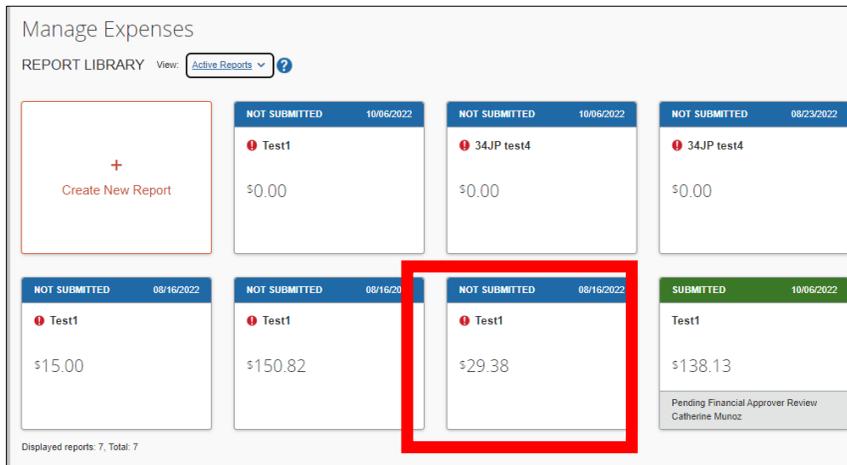
30. Click "Recall Report"
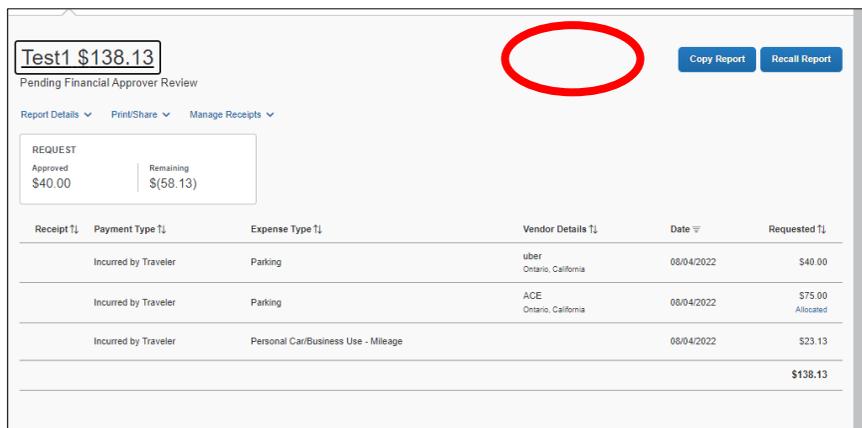
31. Confirm intent to recall by clicking "Yes". This will return the report to the traveler for edits.