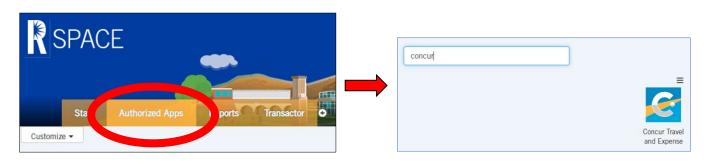
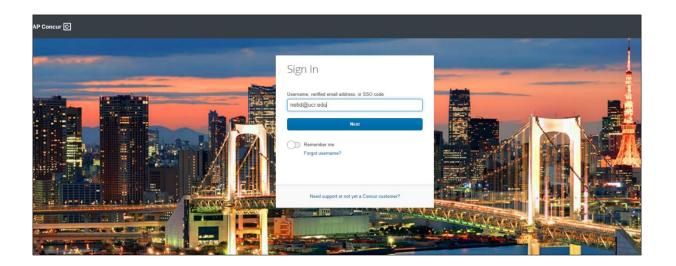
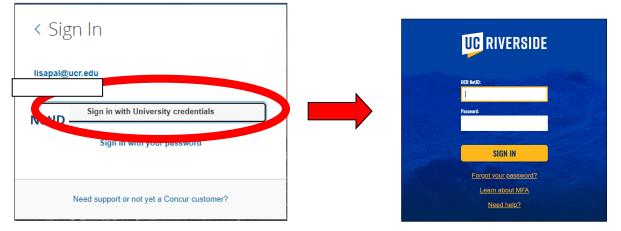
- 1. SIGN IN:
  - a. <u>https://rspace.ucr.edu</u> or <u>https://concur.ucr.edu</u>
    - *i.* Skip to step 4 if you have already accessed the application.
  - b. Use your NetID@ucr.edu email address and password
  - c. Please ensure you are also logged into the campus VPN if accessing the application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



#### 4. CONCUR Homepage:

a. Note: The information and access links viewed on this screenshot may be different for each Traveler.

SAP Concur C Requests Travel	Expense Approvals Reporting •	App Center + New	Required Autho	DO OO prization quests Available Expenses	Profile - O O Open Reports
RIP SEARCH	ALERTS				
* 🕿 🛏	As an employee of University of Californ	ia, Riverside, you	are eligible for a free <b>Triplt</b> F	Pro subscription. Learn More	and Activate Not rig
CONTACT THE DESIGNATED GOVERNMENT AGENCY IN YOUR COUNTRY OF CITIZENSHIP FOR PASSPORTIVISA REQUIREMENTS. TRAVELINTO U.S. MAY REQUIRE ESTA AUTHORIZATION, FOR DETAILS VISIT THE ESTA WEBSITE	• You haven't signed up to receive e-receive	ots. 🕢 Sign up her	8		
Warning- Duplicate air bookings may result in fees from the airlines. Duplicate bookings are defined as reserving multiple seats on the same flight or different flights for the same time frame.	Non-Employee New Vendor Request Link to UCR's Vendor Request System for Concur Training Toolkit	Travel Arrangers t	o request non-employee tra	velers	
Flight Search Round Trip One Way Multi City	SAP Concur provided training materials, n				
From @ Departure city, airport or train station Find an airport   Select multiple airports To @	Welcome to Concur 1 MY TASKS	ravel & E	xpense for the	University of	California, Read more
Arrival city, airport or train station Find an airport   Select multiple airports	<b>00</b> Required Approvals $\rightarrow$	00	Available Expenses ->	Open	Reports -
Search	Great! You currently have no approvals.	You currentl expenses.	y have no available	You currently have n	o open reports.
Show More	Ø				
IY TRIPS (0) →					

5. To Create the required Pre-Trip Request- Click on the " + NEW " button to access the "Start a Request" link

SAP Concur C Requests Travel	Expense Approvals Reporting →	App Center				Help <del>•</del> Profile •
UC RIVERSIDE			<b>00</b> Required Approvals	<b>00</b> Authorization Requests	<b>00</b> Available Expenses	<b>00</b> Open Reports
TRIP SEARCH	ALERTS	Start a Request Start a Report				
	<ul> <li>As an employee of University of Califor</li> <li>now</li> <li>You haven't signed up to receive e-receive</li> </ul>	Upload Receipts	le for a fre	e Triplt Pro subscrip	otion. Learn More an	d Activate Not right

- 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"
  - I. Approver ID should indicate "Melissa Gomez" or "Catherine Munoz"
  - m. FAU- Please enter the desired FAU you wish to charge your travel to.
    - 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

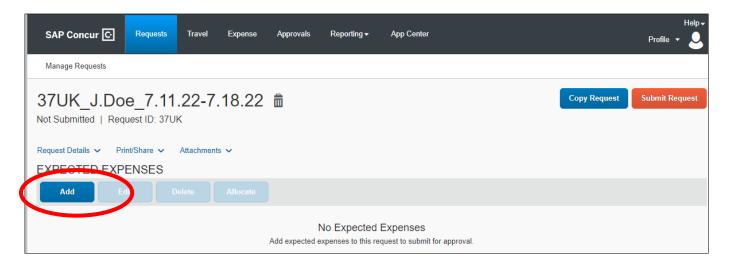
Create New Request	( A )	В
Request Type *	Trip Name *	Traveler Type *  Employee  Business Purpose/Additional Information *  G
Business Travel Start Date *       MM//DD/YYYY     H       Personal Travel Dates     K       Accountability Structure *     C       Y      (D01056) Mathematics	Business Travel End Date *	Will this trip include personal trave?*
Activity *         Y ✓       Search by Code         Cost Center         Y ✓       Search by Code	Fund *	Function V Y v Search by Code
		Case. Create Request

- 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.

	SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting 🗸	App Center		Help+ Profile +
	Manage Requests					RIP NAME '	TITLE TO EDIT	]	
$\langle$	J.Doe_7.11. Not Submitted   Requ							Copy Request	Submit Request
	Request Details 🗸 Pri	nt/Share 🗸 🕠	Attachments 🔊	~					
	EXPECTED EXP	ENSES							
	Add Ed								
						No Expected	Expenses equest to submit for appro	oval.	

J.Doe_7.11.22-7.18.22		
Request Type		Top Name *
*Travel Request		37UK_J.Doe_7.11.22-7.18.22
Trip Type *		Trip Parper*
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:



- **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	

#### **10.** Enter in the required information:

- a. Trip Start Dates
- b. Estimated Amount
- c. Currency (this should be USD)
- d. Comments related to the trip
- e. Click the "Save" button when done

New Expense: 03. G	Ground Transport	tation \$1	00.00		ancel Save
Allocate					
usiness Travel Start Date *			Estimated Amount *	Currency *	
07/11/2022			100.00	US, Dollar	•
omment					
Mileage to/from [insert approved loc	cation]				

- **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.

SAP C	oncur C	Requests	Travel	Expense	Approvals	Reporting <del>-</del>	App Center			Profile 🔻	Help 🗸
Manage	Requests										
	_	00e_7.11 Request ID: 37UI		.18.22	\$230.0	0 💼			Copy Reques	Submit Req	uest
Request De	etails 🗸	Print/Share 🗸	Attachment	s 🗸							
EXPEC	TED E	<b>XPENSES</b>									
Add											
<b>_ /</b>	Alerts ↑↓	Expense type ↑↓					Details <b>↑</b> ↓	Date 🚍	Amount↑↓	Requested ↑↓	
	<b>—</b>	03. Ground Tra	nsportatio	n				07/13/2	2022 \$50.00	\$50.00	
	Ģ	03. Ground Tra	nsportatio	n				07/11/2	2022 \$100.00	\$100.00	
	Ģ	03. Ground Tra	nsportatio	n				07/11/2	2022 \$80.00	\$80.00	
										\$230.00	

- **12.** Click Submit Request when done adding expenses.
- **13.** Review the UCR Travel Request User Confirmation and click the "Accept & Continue" when ready.

*UCR Travel Request User Confirmation	$\left  \times \right $
By clicking on the 'Accept & Submit' button, I certify that: 1. This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official business University of California, Riverside. 2. This request is in compliance with UC Travel policy and other restrictions as applicable (e.g. Award Terms & Conditions, NCAA, etc.).	s for
Business & Finance Bulletin G-28: https://policy.ucop.edu/doc/3420365	
Cancer Ca	iue

**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

15. Your request is now pending review/approval.

SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting <del>-</del>	App Center		Profile 🔻	Help•
Manage Requests									
Manage Red	quests								
REQUEST LIBRA	ARY View	Active Req	uests 🗸						
			SUBMITTED		07/11/2022				
				e_7.11.22-7.					
+			570K_5.00	6_1.11.22-1.	10.22				
Create New F	Request		\$230.00	)					
		$\boldsymbol{\mathcal{C}}$	Pending Revie Munoz, Cather						
L									

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

AutoNotification@concu	rsoluti Gomez, Melissa	
To 🔮 Lisa Diaz		
P Concur 🖸	SAL	
	pending approval by Catherine Munoz. You are	
•	ise that approver has designated you as a delegate.	
receiving this email becau	ise that approver has designated you as a delegate.	
	ise that approver has designated you as a delegate.	
Request F J. Doe	Diaz	
Request F J. Doe	Diaz	
Request F J. DOC Request ID	Diaz 37UK	
Request F J. DOC Request ID Request Name	Diaz 37UK 37UK_J.Doe_7.11.22-7.18.22	
Request F J. DOE Request ID Request Name Request Purpose	Diaz 37UK 37UK_J.Doe_7.11.22-7.18.22 [INSERT APPLICABLE TRIP INFORMATION HERE]	

Anto <u>Notification@concur</u>	solutions.com	
SAP Concur C Your Travel Request reque	st listed below has changed status.	SAP
Changed By	Catherine Munoz	
Request ID	570K	
Request Name	37UK_J.Doe_7.11.22-7.18.22	
Request Date	09/09/2022	
Submit Date	09/09/2022	
Amount Approved	230.00 USD	
Approval Status Set To	Approved	
Approver's Comments		
Link To Request Processing	-	

**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.

SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting <del>-</del>	App Center		Profile	Help 🗸
Manage Requests									
Manage Re	quests								
REQUEST LIBRA	ARY View	Active Req	uests 🗸						
			APPROVED		07/11/2022				
+				e_7.11.22-7.					
Create New I	Request		\$230.00	)					
			Approved						

**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.

SAP Con	cur 💽 Requests	Travel	Expense	Approvals	Reporting 🗸	App Center			Help Profile 👻 🕗
Manage Re	quests								
_	_ <b>J.Doe_7.11.</b> Request ID: 37UK	22-7.	18.22	\$230.0	0		More Actio		reate Expense Report
Request Detai	ils 🗸 Print/Share 🗸 🖌	Attachments	× •						
EXPECT	ED EXPENSES								
Alerts †↓	Expense type ↑↓					Details ↑↓	Date \Xi	Amount ↑↓	Requested <b>↑</b> ↓
œ	03. Ground Transport	ation					07/13/2022	\$50.00	\$50.00
Ģ	03. Ground Transport	ation					07/11/2022	<b>\$1</b> 00.00	\$100.00
	03. Ground Transport	ation					07/11/2022	\$80.00	\$80.00
<b>—</b>	oo. oroana manopora								

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

REQUEST Approved \$40.00								
Add Expense								
		A	dd expenses to	No Expenses this report to submit	ursement.			

**20.** Select the appropriate expense type from the dropdown menu.

0	+	
Available Expenses	Create New Expense	
Search for an expen	se type	
<ul> <li>Recently Used</li> </ul>		4
Parking		
Meals & Incident	als - Domestic	
Taxi/Shuttle/Car	service	
Personal Car/Bu	siness Use - Mileage	
<ul> <li>01. Airfare</li> </ul>		
Airfare		

- **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.

Details It	emizations				Hide Receipt 🖺
Allocate		×	Required field		
Expense Type "					
Airfare			~		
Transaction Date *		Purpose *			
MM/DD/YYYY		Business Meeting/Event	~		
Trip Type *		Flight Departure Date *			
1. In-State	~	MM/DD/YYYY			
		Flight Return Date *			
		MM/DD/YYYY		Upload Receipt Image	
Traveler Type *		Class of Service * 🕜			
Employee	~	None Selected	~		
Airline Vendor *		Destination City *			
Search for Vendor	~	• •			
Payment Type *					
Incurred by Traveler	~				
Amount *		Currency *			
		US, Dollar	~		
Reference Number 🕜					
			le		
Save Expense Save an	nd Add Another C	ancel			

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

				Hide Receipt	_
Allocate Expense Type *		*	Required field		
Airfare			~		
Transaction Date *		Purpose *			
MM/DD/YYYY		Business Meeting/Event	~		
Trip Type *		Flight Departure Date *			
1. In-State	~	MM/DD/YYYY		_	
		Flight Return Date *		R	
		MM/DD/YYYY		Upload Receipt Image	
Traveler Type *		Class of Service * 🕢			
Employee	~	None Selected	×		
Airline Vendor *		Destination City *			
Search for Vendor	~	• •			
Payment Type *					
Incurred by Traveler	Ý				
Amount *		Currency *			
		US, Dollar	~		
Reference Number 🚱					
Business Purpose/Addition	nal Information				
			le		
Save Expense S	ave and Add Another	Ca			

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

Travel Expense	se Approvals	Reporting •	App Center			Help <del>•</del> Profile •
						~
					Copy eport	Submit Report
az: Test1 - return	ing to withdraw. V	'iew Report Ti	meline			
nage Receipts 🗸	Travel Allowance 🗸					
nt Type †↓	Expense Type	¢↓		Vendor Details ↑↓	Date 😇	Requested ↑↓
d by Traveler	Parking			uber Ontario, California	08/04/2022	\$250.00
				ACE		\$75.00

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

*UCR User Electronic Agreement-Travel Expenses (Expense Report)
I certify this Expense Voucher is a true statement. The amounts claimed for reimbursement: 1) are actual expenses incurred by me while on official University business for the dates indicated, 2) exclude personal travel expenditures, 3) do not include alcohol, 4) have not been reimbursed from any other source, and 5) adhere to UC Business & Finance bulletin G-28.
Cance Accept & Continue

**25.** A report summary will pop up as shown below, review and click "Submit Report".

Report Totals		×
Company Payments \$138.13 Employee		
Employee Payments \$0.00 Company		
Amount Total: \$138.13	Due Employee: \$138.13	Owed Company: \$0.00
Requested Amount: \$138.13	Total Paid By Company: \$138.13	Total Owed By Employee: \$0.00
		Cance: Submit Report

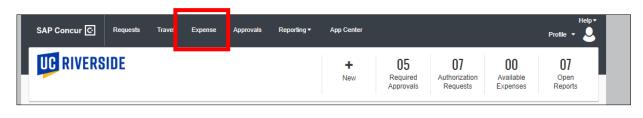
26. A confirmation window will appear, simply click "Close"

Report Status	×
✓Report Submitted Test1 \$138.13	
10511 \$130.13	
	Ciose

**27.** Email notifications from <u>AutoNotification@concursolutions.com</u> 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.

eport chang approv	al By Catherine Munoz, Test1
AutoNotification@co	ncursolutions.com
	nessage is displayed, click here to view it in a web browser. 1elp protect your privacy, Outlook prevented automatic download of some pictures in this message
ŧ	
Report Pendir	ng Approval By Catherine Munoz, Test1
There is an evenence r	and anyting approval by Cathoring Muser
	eport pending approval by Catherine Munoz. email because that approver has designated
You are receiving this	
You are receiving this you as a delegate.	email because that approver has designated
You are receiving this you as a delegate.	email because that approver has designated Melissa Gomez

**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.

Manage Expenses REPORT LIBRARY View: Active R	eports v ?					
	NOT SUBMITTED	10/06/2022	NOT SUBMITTED	10/06/2022	NOT SUBMITTED	08/23/2022
+	() Test1		34JP test4		34JP test4	
Create New Report	\$0.00		\$0.00		\$0.00	
NOT SUBMITTED 08/16/2022	NOT SUBMITTED	08/16/20	NOT SUBMITTED	08/16/2022	SUBMITTED	10/06/2022
() Test1	Test1		Itest1		Test1	
\$15.00	\$150.82		\$29.38	- 1	\$138.13	
					Pending Financial Appro Catherine Munoz	over Review
Displayed reports: 7, Total: 7						

#### 30. Click "Recall Report"

nding Financial Appro	over Review				
port Details V Print/S	hare 🗸 Manage	Receipts V			
REQUEST					
Approved	Remaining				
\$40.00	\$(58.13)				
Receipt†↓ Payment T	'ype †↓	Expense Type ↑↓	Vendor Details 1↓	Date 😇	Requested ↑↓
Incurred by	Traveler	Parking	uber Ontario, California	08/04/2022	\$40.00
Incurred by Traveler		Parking	ACE	08/04/2022	\$75.00
		Ракиц	Ontario, California	00/04/2022	Allocated
Incurred by Traveler		Personal Car/Business Use - Mileage		08/04/2022	\$23.13
					\$138.13

**31.** Confirm intent to recall by clicking "Yes". This will return the report to the traveler for edits.

