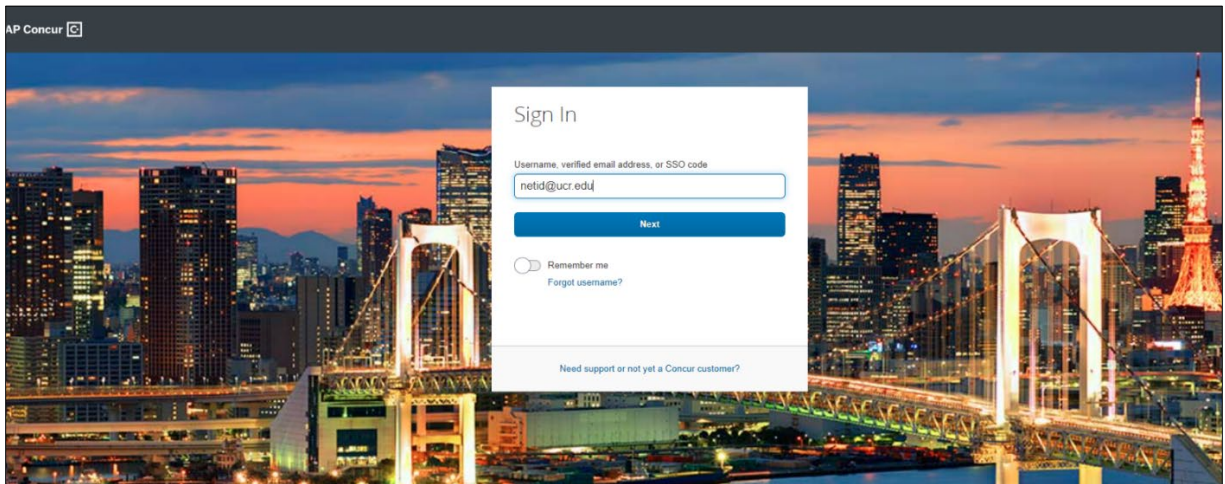


Concur Process- Math Graduate Students

1. SIGN IN:

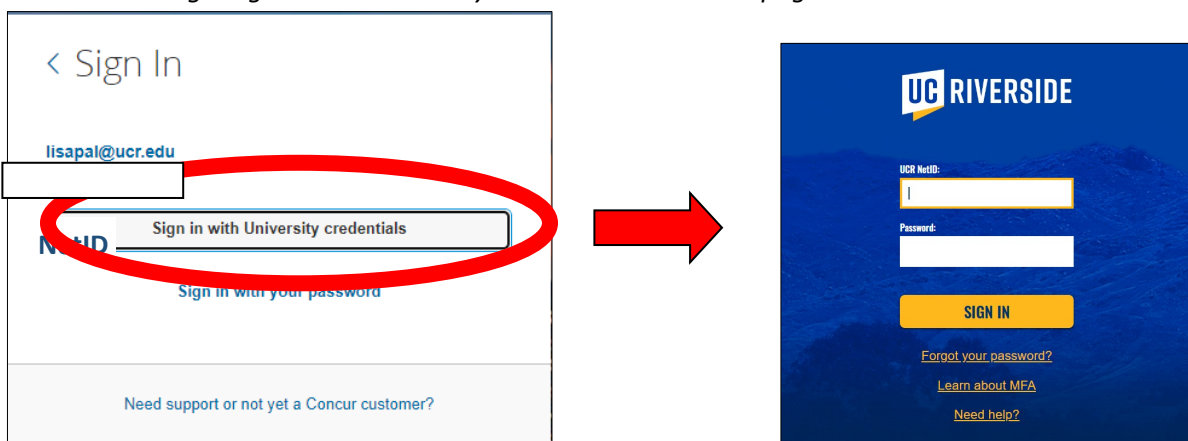
- a. <https://rweb.ucr.edu> or <https://concur.ucr.edu>
 - i. Skip to step 4 if you have already accessed the application.
 - b. Use your NetID@ucr.edu email address and password
 - c. Please ensure you are also logged into the campus VPN if accessing the application off-campus.
-

2. Click on “Authorized Apps” and search for “CONCUR”



3. Click on “SIGN ON WITH UNIVERSITY CREDENTIALS”.

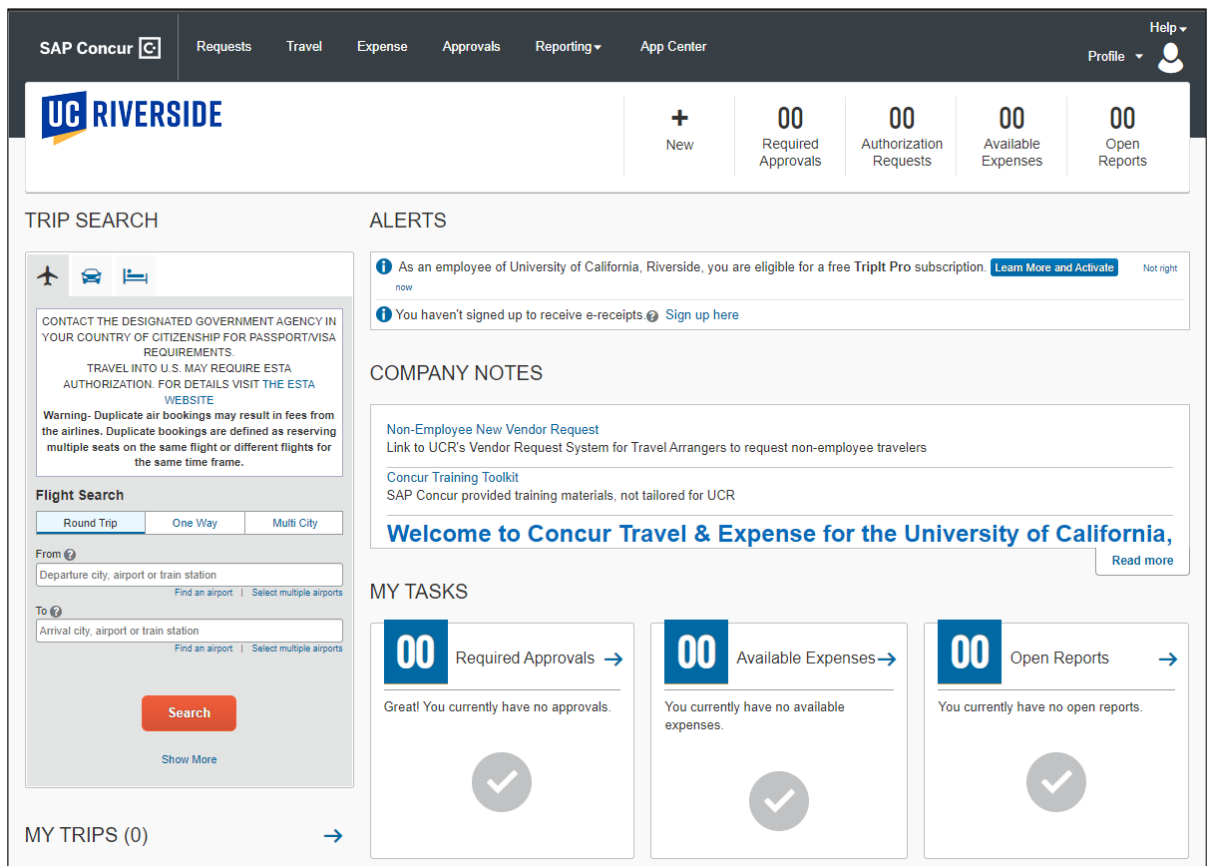
- a. This will redirect you to the UCR CAS login page. If you are already logged into a UCR system, it will use single sign-on and redirect you to the Concur Homepage.



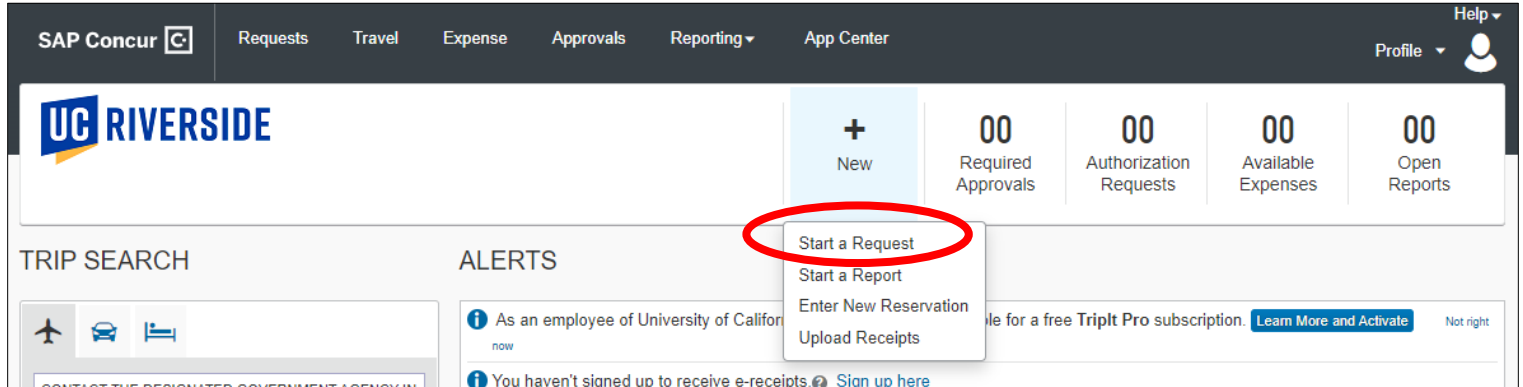
4. CONCUR Homepage:

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

Concur Process- Math Graduate Students



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



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

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- 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 use ONLY the following for the FAU field for the pre-trip. Please indicate the funding source that you have been approved to use in the Comments section and attach the pre-approval. You must select the pop-up listing to match the field as you type the information.
 - i. Activity: A01100 Mathematics
 - ii. Fund: 68310 Sale of Equipment
 - iii. Function: 40 Instruction & Research
 - iv. Cost Center: FJGS Graduate Student
- n. Click **"Create Request"** when done

The screenshot shows the 'Create New Request' form with the following fields and callouts:

- A:** Trip Name (J.Doe_7.11.22-7.18.22)
- B:** Traveler Type (Employee)
- C:** Request Type (*Travel Request)
- D:** Trip Name (J.Doe_7.11.22-7.18.22)
- E:** Business Purpose/Additional Information
- F:** Trip Type (None Selected)
- G:** Will this trip include personal travel? (None Selected)
- H:** Business Travel Start Date (MM/DD/YYYY)
- I:** Business Travel End Date (MM/DD/YYYY)
- J:** Main Destination City
- K:** Accountability Structure ((D01056) Mathematics)
- L:** Approver ID ((1009785) Melissa Gomez)
- M:** Payment Option (EFT)

The red box highlights the Activity, Fund, and Function dropdown menus. The blue box highlights the 'Create Request' button.

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.

The screenshot shows the 'Manage Requests' page with the following elements:

- Request Title:** J.Doe_7.11.22-7.18.22 (highlighted with a red circle and arrow pointing to 'CLICK TRIP NAME TITLE TO EDIT')
- Status:** Not Submitted | Request ID: 37UK
- Buttons:** Copy Request, Submit Request
- EXPECTED EXPENSES:** Add, Edit, Delete, Allocate
- Message:** No Expected Expenses. Add expected expenses to this request to submit for approval.

Concur Process- Math Graduate Students

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

Request Type: *Travel Request
Trip Name *: 37UK_J.Doe_7.11.22-7.18.22
Trip Type *: 1. In-State
Trip Purpose *: 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 Manage Requests

37UK_J.Doe_7.11.22-7.18.22
Not Submitted | Request ID: 37UK

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

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

Concur Process- Math Graduate Students

e. Click the “Save” button when done

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.*

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	03. Ground Transportation		07/13/2022	\$50.00	\$50.00
<input type="checkbox"/>	03. Ground Transportation		07/11/2022	\$100.00	\$100.00
<input type="checkbox"/>	03. Ground Transportation		07/11/2022	\$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** ✕

By clicking on the 'Accept & Submit' button, I certify that:

- This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official business for University of California, Riverside.
- This request is in compliance with UC Travel policy and other restrictions as applicable (e.g. Award Terms & Conditions, NCAA, etc.).

Business & Finance Bulletin G-28: <https://policy.ucop.edu/doc/3420365>

Cancel **Accept & Continue**

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

Concur Process- Math Graduate Students

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 App Center

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

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

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

AutoNotification@concuroluti Gomez, Melissa

To Lisa Diaz

SAP Concur

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 ID J. Doe Diaz

Request ID 37UK

Request Name 37UK_J.Doe_7.11.22-7.18.22

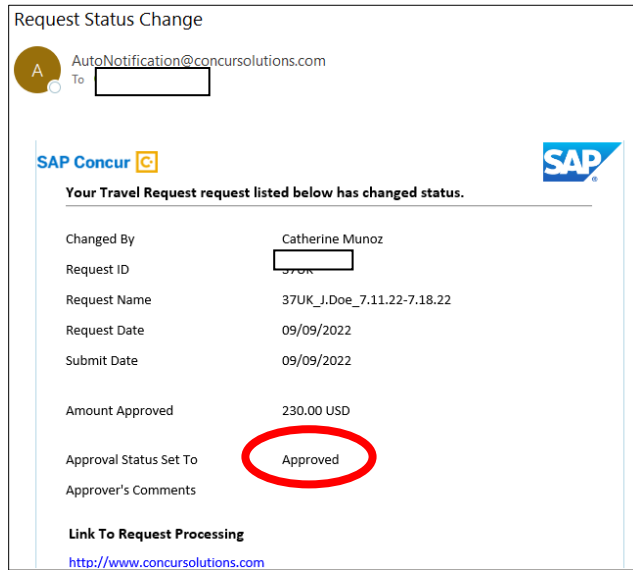
Request Purpose [INSERT APPLICABLE TRIP INFORMATION HERE]

Total Posted Amount 230.00 USD

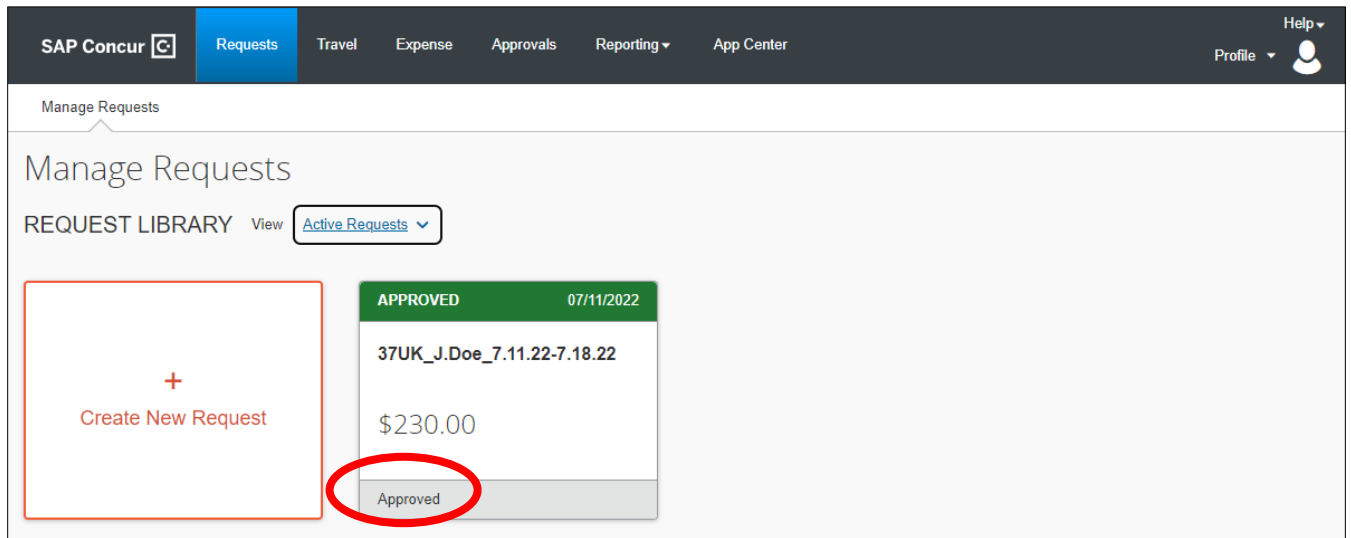
Link To Request Processing

<http://www.concurolutions.com>

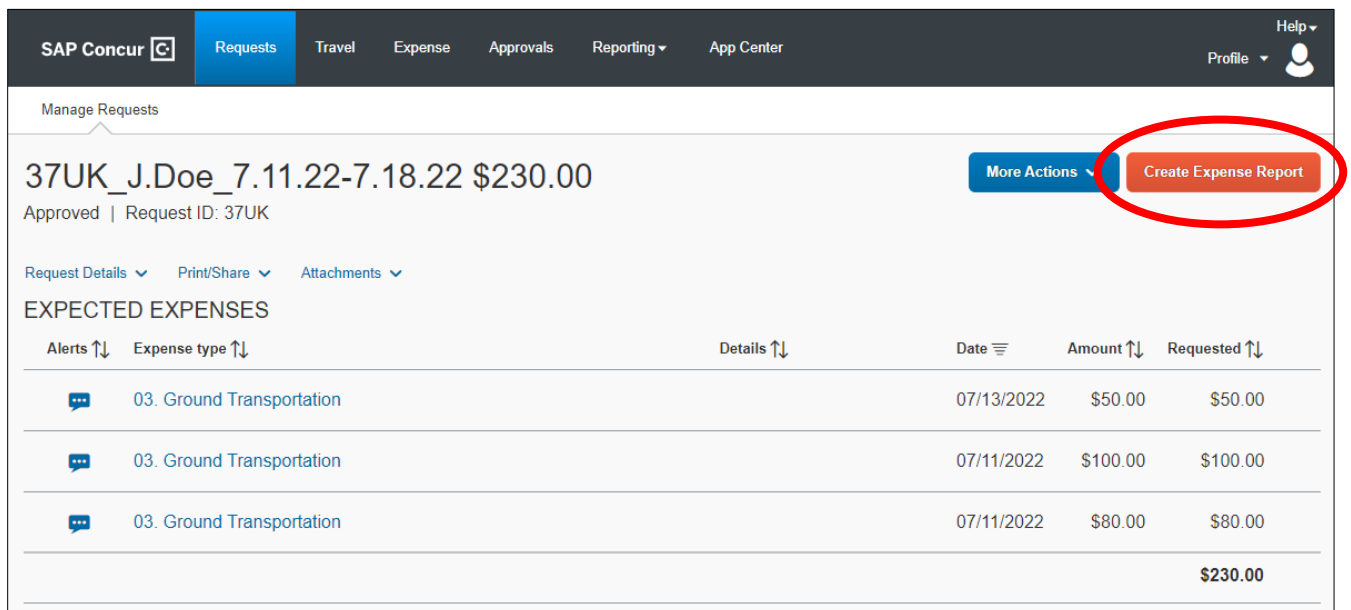
Concur Process- Math Graduate Students



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.

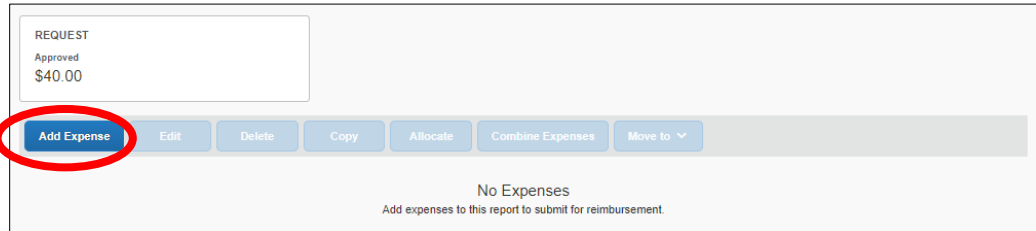


18. Click on the approved requests to view the expected expense information.
 a. You are now also able to "Create Expense Report" for the reimbursement process of this trip.

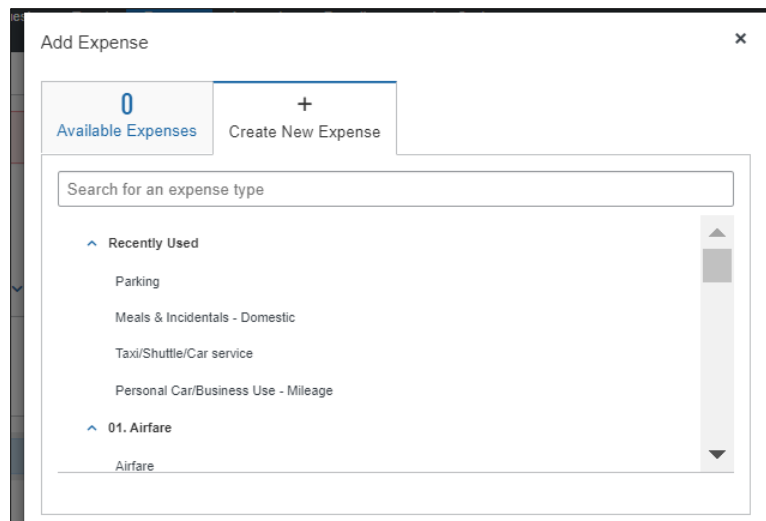


Concur Process- Math Graduate Students

19. Add itemized expenses for the trip by clicking “Add Expense”.

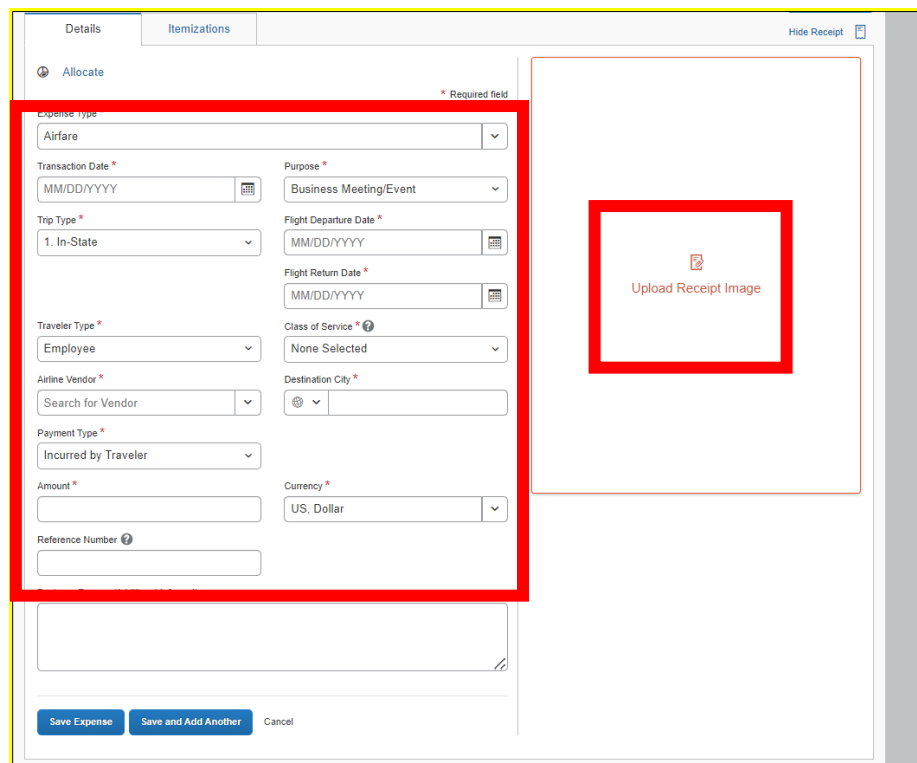


20. Select the appropriate expense type from the dropdown menu.



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.



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

Concur Process- Math Graduate Students

Details Itemizations Hide Receipt

Allocate * Required field

Expense Type * Airfare

Transaction Date * MM/DD/YYYY

Trip Type * 1. In-State

Traveler Type * Employee

Payment Type * Incurred by Traveler

Amount * US Dollar

Reference Number

Business Purpose/Additional Information

Purpose * Business Meeting/Event

Flight Departure Date * MM/DD/YYYY

Flight Return Date * MM/DD/YYYY

Class of Service * None Selected

Destination City *

Upload Receipt Image

Save Expense Save and Add Another

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

Travel Expense Approvals Reporting App Center Help Profile

Copy Report Submit Report

az: Test1 - returning to withdraw. View Report Timeline

Image Receipts Travel Allowance

Delete Copy Allocate Combine Expenses Move to

Expense Type	Expense Type	Vendor Details	Date	Requested
Incurred 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.

Cancel Accept & Continue

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

Concur Process- Math Graduate Students

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

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

Report Submitted

Test1 | \$138.13

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.

Report Pending Approval By Catherine Munoz, Test1

AutoNotification@concursolutions.com
To: Melissa Gomez

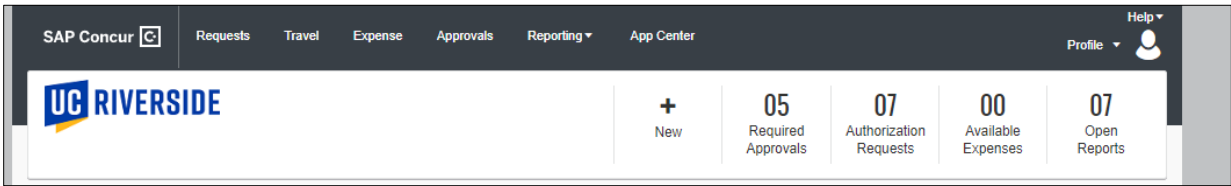
There is an expense report pending approval by Catherine Munoz. You are receiving this email because that approver has designated you as a delegate.

Report From	Melissa Gomez
Report Name	Test1
Report Purpose	Test1
Requested Amount	138.13 USD

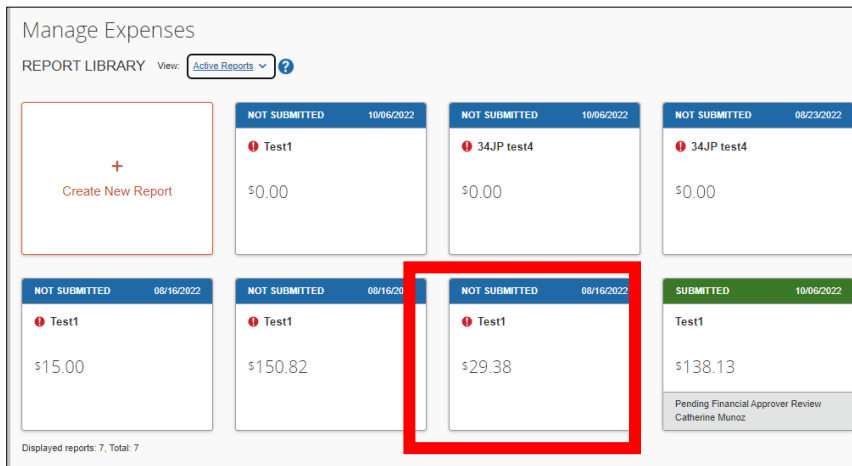
28. If for some reason, any corrections must be made by the traveler, the trip may be recalled by the traveler by clicking on "Expense"



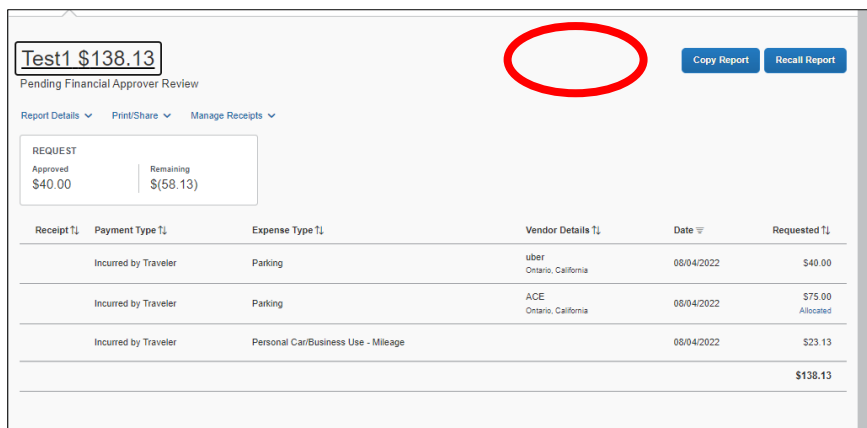
Concur Process- Math Graduate Students



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.

