- 1. SIGN IN:
 - a. <u>https://rweb.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 Concu	r 🖸 Requests	Travel	Expense	Approvals	Reporting -	App Center				He Profile 🔻
UC RIV	ERSIDE					+ New	00 Required Approvals	00 Authorization Requests	OO Available Expenses	OD Open Reports
RIP SEAR	СН		ALER	TS						
★ 🕿 I	<u> </u>		As a now	an employee of	University of Califor	nia, Riverside, you	are eligible for a fre	e Triplt Pro subscri	ption. Leam More a	nd Activate Not rig
CONTACT THE D	ESIGNATED GOVERNMEN	IT AGENCY IN	1 You I	haven't signed i	up to receive e-rece	ipts.@ Sign up her	re			
VOUR COUNTRY OF CITIZENSHIP FOR PASSPORT/VISA REQUIREMENTS. TRAVELINTO U.S. MAY REQUIRE ESTA AUTHORIZATION. FOR DETAILS VISIT THE ESTA WEBSITE Warning- Duplicate air bookings may result in fees from			COMPANY NOTES							
	licate bookings are define on the same flight or differ the same time frame.				/endor Request Request System fo	r Travel Arrangers	to request non-emp	loyee travelers		
Flight Search				ir Training Toolk Concur provided	it training materials, r	not tailored for UCF	2			
Round Trip	One Way	Multi City						or the Univ	ersity of	California
From ? Departure city, air; Fo ?	oort or train station Find an airport Se	lect multiple airports	ΜΥ ΤΑ	ASKS						Read mor
Arrival city, airport	or train station Find an airport Se	lect multiple airports	0	Require	d Approvals →	00	Available Expe	nses →	DD Open F	Reports -
	Search		Great	You currently h	ave no approvals.	You current expenses.	ly have no available	e You	u currently have no	open reports.
	Show More									
IY TRIPS ((0)	\rightarrow								

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

SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting -	App Center					Help 🗸 Profile 👻 💄
	IDE					+ New	Re	00 equired provals	00 Authorization Requests	DO Available Expenses	00 Open Reports
TRIP SEARCH			ALER	TS	C	Start a Request Start a Report	ン				
★ 🕿 🛏			As a now	n employee of l	Jniversity of Califor	Enter New Reserverse		le for a fre	e Triplt Pro subscri	ption. Learn More an	d Activate Not right
CONTACT THE DESIGNATE		AGENCY IN	1 You H	haven't signed u	p to receive e-recei	pts.@ Sign up her	е				

- 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 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

Create New Request	(A)	к
Request Type *	Trip Name* D J.Doe_7.11.22-7.18.23 D Trip Purpose* None Selected	Traveler Type * Employee Business Purpose/Additional Information * G
Business Travel Start Date *	Business Travel End Date *	Will this trip include personal travel?*
MM/DD/YYYY H III	MM/DD/YYYY I Main Destination City * I Image: Second City * Image: Second City * Image: Second City *	None Selected
T v (D01056) Mathematics	▼ ~ (10009785) Melissa Gomez	M
Activity * ▼	Fund * ▼ ✓ Search by Code Project ▼ ✓ Search by Code	Function Search by Code
		la
		Can Creats 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 CLICK TRIP NAME TITLE TO EDIT]
\langle	J.Doe_7.11.22-7.18.22	Copy Request Submit Request
	Request Details V Print/Share V Attachments V	
	EXPECTED EXPENSES	
	Add Edit Delete Allocate	
	No Expected Expenses Add expected expenses to this request to submit for approval.	

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 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:

SAP Concur ⓒ	Requests	Travel	Expense	Approvals	Reporting -	App Center			Help+ Profile + 💄
Manage Requests									
37UK_J.Dc Not Submitted Rec	quest ID: 37U			â				Copy Request	Submit Request
EXPECTED EXP									
Add	d D								
					No Expected expenses to this re-	Expenses quest to submit for approv	al.		

- **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 Expen	se: 03. Grou	nd Transport	ation \$100.()0		ancel Save
07/11/2022						
Allocate						
Business Travel Start Date	*		Estimat	ed Amount *	Currency *	
07/11/2022			100.0	0	US, Dollar	
Comment						
Mileage to/from [inse	ert approved location]					
			13			

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.

SAF	Concur C	Requests Travel	Expense	Approvals	Reporting -	App Center			Help+ Profile + 💄		
Mana	age Requests										
Not St	37UK_J.Doe_7.11.22-7.18.22 \$230.00										
EXPI	EXPECTED EXPENSES										
	Add										
	Alerts ↑↓	Expense type ↑↓				Details ↑↓	Date 🚍	Amount↑↓	Requested <mark>↑</mark> ↓		
	Ģ	03. Ground Transportatio	'n				07/13/2022	\$50.00	\$50.00		
	,	03. Ground Transportatio	'n				07/11/2022	\$100.00	\$100.00		
	Ģ	03. Ground Transportatio	'n				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: 1. This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official busines 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	
Canc Accept & Conti	nue

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	✓ App Center	Help+ Profile + 💄
Manage Requests				
Manage Request	S			
REQUEST LIBRARY View	✓ <u>Active Requests</u> ✓			
	SUBMITTED	07/11/2022		
+		oe_7.11.22-7.18.22		
Create New Request	\$230.0	0		
	Pending Rev Munoz, Cath			

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

AutoNotification@concur To OLisa Diaz	soluti Gomez, Melissa
P Concur C There is a Travel Request p	pending approval by Catherine Munoz. You are
	se that approver has designated you as a delegate.
Request F J. Doe	Diaz
Request F J. DOE Request ID	Diaz 37UK
nequest	
Request ID	37UK
Request ID Request Name	37UK 37UK_J.Doe_7.11.22-7.18.22

quest Status Change	
AutoNotification@concurs	solutions.com
SAP Concur 🖸	SA
Your Travel Request reque	st listed below has changed status.
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	ε
http://www.concursolutions.	.com

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 -	App Center		Profile 🔻	Help -
Manage Requests									
Manage Re	quests								
REQUEST LIBRA	ARY View	<u>Active Requ</u>	<u>uests</u> 🗸						
			APPROVED		07/11/2022				
+				e_7.11.22-7.					
Create New	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 of this trip.

SAP Con	cur 💽 Requests	Travel	Expense	Approvals	Reporting -	App Center			Hel Profile 👻
Manage Re	quests								
	J.Doe_7.11 Request ID: 37UK	.22 - 7.	.18.22	\$230.0	0		More Action		reate Expense Repor
Request Detail		Attachments	s 🗸						
	ED EXPENSES Expense type ↑↓					Details ↑J	Date =	Amount↑↓	Requested ↑J
	Expense type 14					Detuns 14	Dute -	Amount IV	Requested 14
9	03. Ground Transpor	tation					07/13/2022	\$50.00	\$50.00
;;;	03. Ground Transpor	tation					07/11/2022	\$100.00	\$100.00
_	03. Ground Transpor	tation					07/11/2022	\$80.00	\$80.00
—									

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

REQUEST Approved \$40.00					
Add Expense Edit Delete					
No Expenses Add expenses to this report to submit for reimbursement.					

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

0	+	
vailable Expenses	Create New Expense	
Search for an expen	se type	
 Recently Used 		
Parking		
Meals & Incident	als - Domestic	
Taxi/Shuttle/Car	service	
Personal Car/Bu	siness Use - Mileage	
 01. Airfare 		
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 Iten	izations				Hide Receipt
Allocate			* Required field		
Expense type					
Airfare			<pre></pre>		
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 🚱					
			11		
Save Expense Save and A	dd Another	Cancel			

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

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 *		8
		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 🚱				
Business Purpose/Additional	Information			
			/	

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

Travel	Expense Approvals	Reporting •	App Center			Help • Profile •
						~
					Copy .eport	Submit Report
az: Test1 - r	eturning to withdraw.	View Report Ti	meline			
inage Receipt	s 🗸 Travel Allowance 🤊	~				
Delete						
ent 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 (Exp	bense Report)
I certify this Expense Voucher is a true statement. The amounts claimed for rr incurred by me while on official University business for the dates indicated, 2) not include alcohol, 4) have not been reimbursed from any other source, and G-28.) exclude personal travel expenditures, 3) do
	Cance Accept & Continue
	Accept a 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
		Cancel Submit Report

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

×
Close

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 Pending Approv	al By Catherine Munoz, Test1
AutoNotification@co	ncursolutions.com
To 🔸 Melissa Gomez	
	nessage is displayed, click here to view it in a web browser. Nelp protect your privacy. Outlook prevented automatic download of some pictures in this message.
Click here to download pictures. To h	reip protect your privacy, Outlook prevented automatic download of some pictures in this message.
	•
Report Pendir	ng Approval By Catherine Munoz, Test1
There is an expense re	eport pending approval by Catherine Munoz.
There is an expense re You are receiving this	
There is an expense r You are receiving this you as a delegate.	eport pending approval by Catherine Munoz.
There is an expense re	eport pending approval by Catherine Munoz. email because that approver has designated
There is an expense r You are receiving this you as a delegate.	eport pending approval by Catherine Munoz. email because that approver has designated Mellssa 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"



SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting -	App Center				Help • Profile •
	IDE					+ New	05 Required Approvals	07 Authorization Requests	DO Available Expenses	07 Open Reports

29. Click on the desired report that shows Submitted that needs correction.

EPORT LIBRAR	RY View: Active	Reports V					
		NOT SUBMITTED	10/06/2022	NOT SUBMITTED	10/06/2022	NOT SUBMITTED	08/23/20
+		() 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	10/06/2
() Test1		() Test1		() Test1		Test1	
\$15.00		\$150.82		\$29.38		\$138.13	
						Pending Financial Appr Catherine Munoz	over Review

30. Click "Recall Report"

nding Financial Approver Review				
port Details 🗸 🛛 Print/Share 🗸 Mana	ge Receipts 🗸			
REQUEST				
Approved Remaining				
\$40.00 \$(58.13)				
Receipt ↑↓ Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date =	Requested ↑↓
Incurred by Traveler	Parking	uber Ontario, California	08/04/2022	\$40.00
Incurred by Traveler	Parking	ACE	08/04/2022	\$75.00
		Ontario, California		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.

