

Riverside Community College District

SAP - Concur

User's FAQ's

Updated: October 2022

Riverside City College
Concur FAQ's

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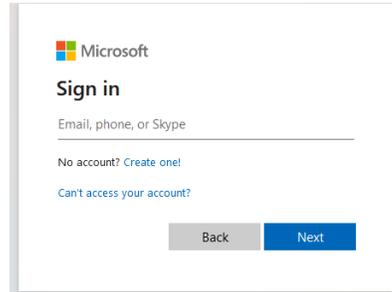
Riverside City College Concur FAQ's

Section1: General (Concur access/APP access)

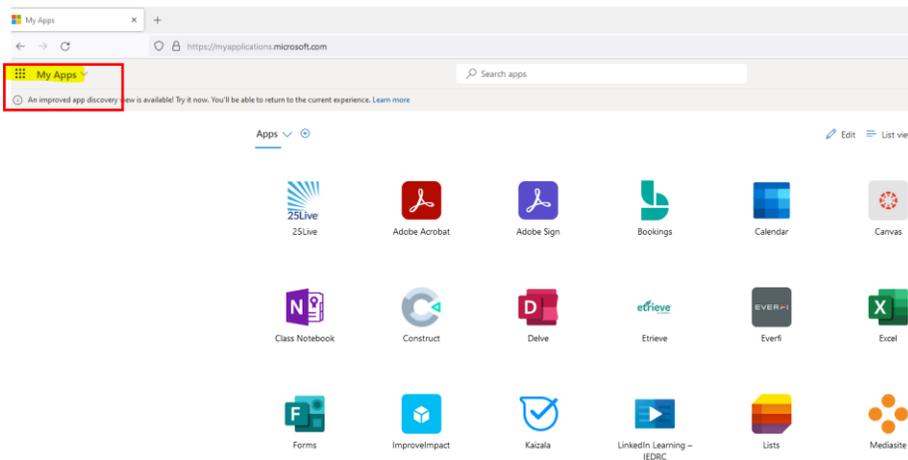
Section 1: General Access to Concur

Q: How do I access Concur?

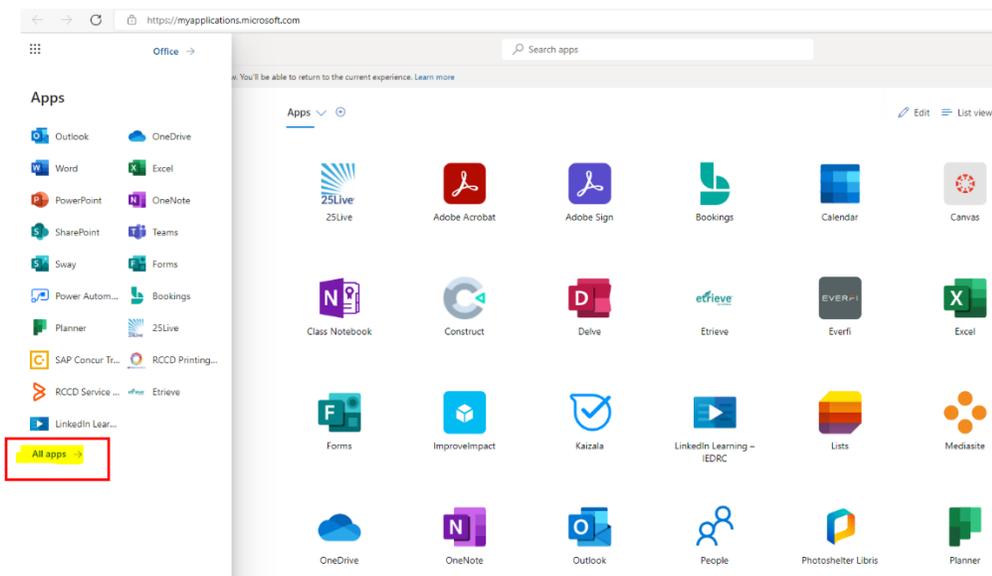
Login into the Microsoft Applications
<https://myapplications.microsoft.com/>



Click on the widget next to the “My Apps”



If you do not see the Concur icon then click on “All apps” to find the Concur icon.



Riverside City College Concur FAQ's

Section1: General (Concur access/APP access)

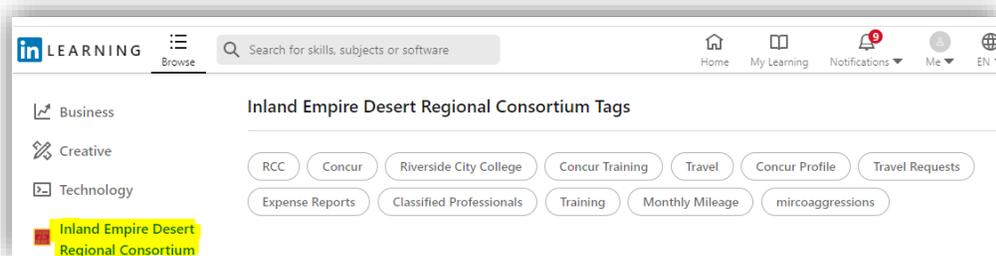
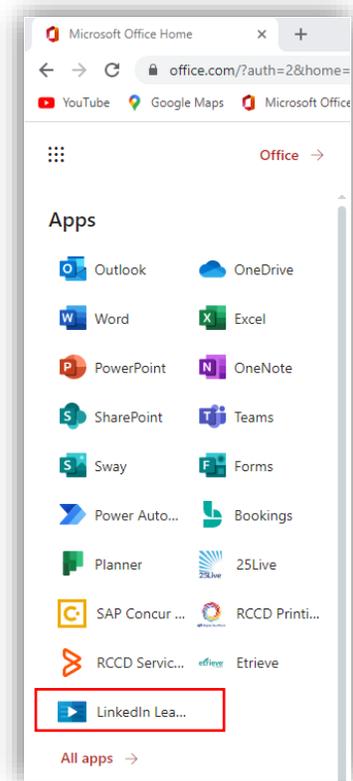
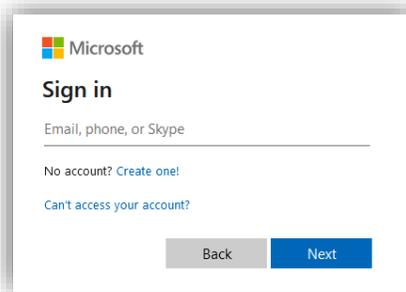
If you encounter technical issues, please contact the Riverside City College Service Desk at (951) 222-8388 or ServiceDesk@rcc.edu between 7:30am – 7:30pm Monday – Friday (excluding Holidays).

Q: Why cannot I sign into the Concur APP?

A: The SSO (Microsoft Single Sign-On) with RCCD doesn't work until the email with Concur is verified. A user under their profile needs to GOTO emails and verify the email. Then the Concur APP will send the email to SSO for authentication.

Q: How do I access Concur videos in LinkedIn?

A: Login into the Microsoft Applications <https://myapplications.microsoft.com/>
Click on the **LinkedIn Learning App**

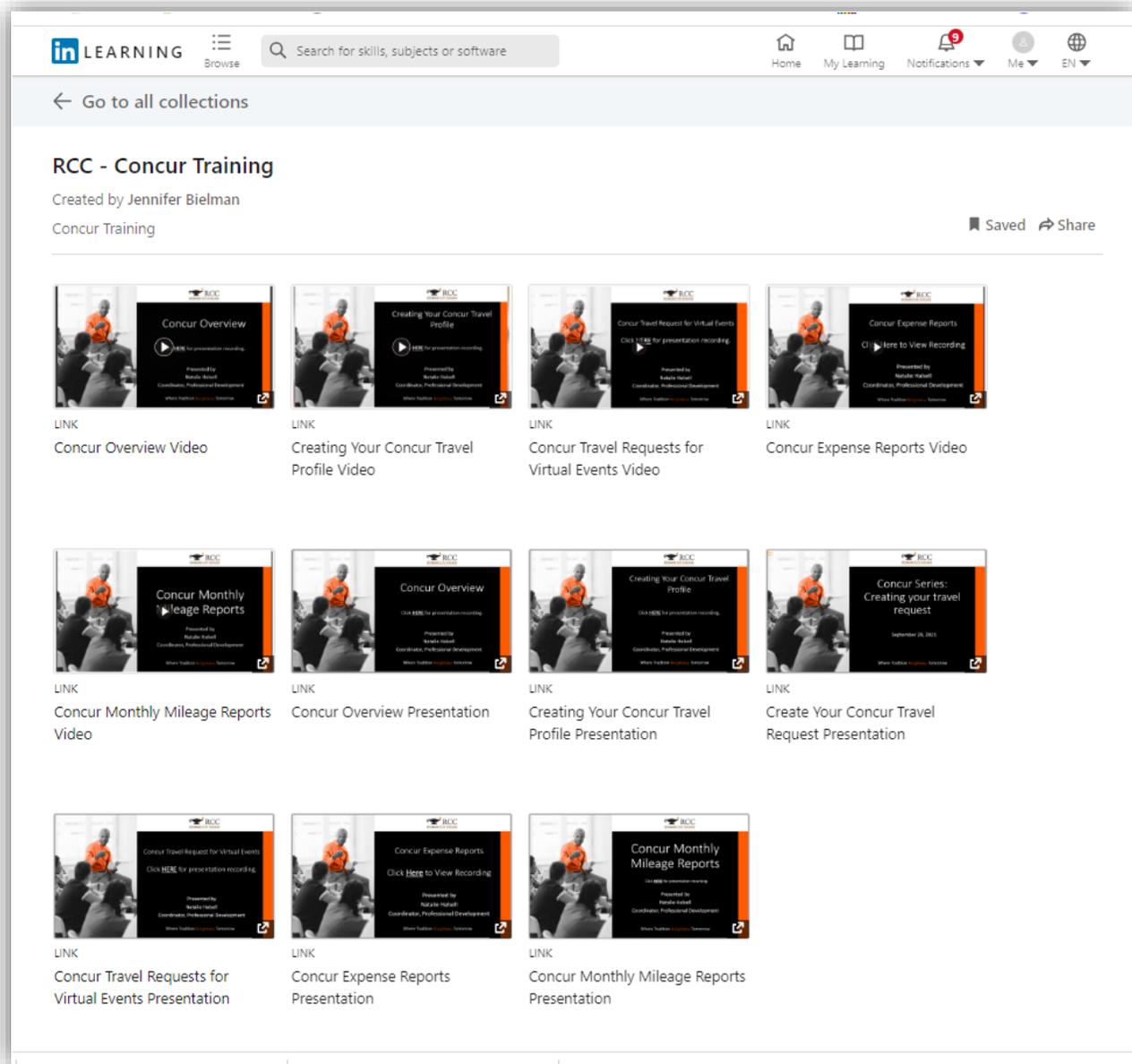
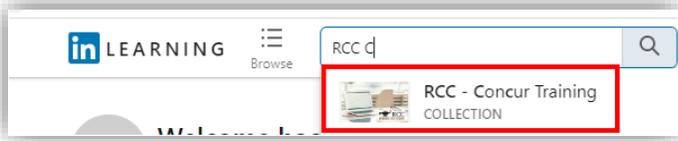


Note- RCC Concur videos are under Inland Empire Desert Regional Consortium

Riverside City College Concur FAQ's

Section1: General (Concur access/APP access)

To Save the collection search RCC- Concur Training > search RCC Concur Collection > click on the RCC- Concur Training COLLECTION hyperlink

A screenshot of the LinkedIn Learning 'RCC - Concur Training' collection page. The page header includes the LinkedIn Learning logo, a search bar with the text 'Search for skills, subjects or software', and navigation icons for Home, My Learning, Notifications (with a red '9' badge), Me, and EN. Below the header is a 'Go to all collections' link. The main content area is titled 'RCC - Concur Training' and lists 'Created by Jennifer Bielman' and 'Concur Training'. There are 'Saved' and 'Share' icons. The page displays a grid of 12 items, each with a thumbnail image and a title. The items are: 1. Concur Overview Video (LINK), 2. Creating Your Concur Travel Profile Video (LINK), 3. Concur Travel Requests for Virtual Events Video (LINK), 4. Concur Expense Reports Video (LINK), 5. Concur Monthly Mileage Reports Video (LINK), 6. Concur Overview Presentation (LINK), 7. Creating Your Concur Travel Profile Presentation (LINK), 8. Create Your Concur Travel Request Presentation (LINK), 9. Concur Travel Requests for Virtual Events Presentation (LINK), 10. Concur Expense Reports Presentation (LINK), 11. Concur Monthly Mileage Reports Presentation (LINK).

Click on the video you are interested in viewing.

Section 2: Travel Request

Section 2: Travel Request Questions

Q: Concur vs IERR vs Galaxy. How do I know if it goes into Concur?

A: ALL travel related events such as conferences/workshops which require payment should be entered into Concur. You do NOT need a Galaxy requisition for travel-related expenses.

Q: Do I need a travel request even if there is no cost?

A: If you are physically attending a workshop or conference, you must complete a travel request even if there is no cost associated. A travel request is also your authorization to travel on behalf of the District and ensures the District is aware of your travel in the event you are injured. Once the request has been fully approved and the travel has ended, close it.

Q: Do I need a travel request even if all expenses are covered by a third party?

A: Yes, a travel request must be completed with a zero amount and list that is paid by outside agency. This is for management and risk tracking of travel.

Q: What documents do I need to attach to my request?

A: Conference registration fee, Airfare estimate, Hotel estimate, Meals estimate, Car rental estimate, Parking estimate, Uber/Lyft estimate, and Mileage estimate.

Q: Can I use Concur for student travel?

A: Yes, Concur can be used for student travel. There is a “non-employee travel expense” type available to use to denote student-related travel expenses. Contact your Concur trainer for support in generating your travel request.

Riverside City College
Concur FAQ's

Section 2: Travel Request

Q: Can I book airfare for students?

A: Yes, if you have students who will need airline tickets, include their names on the Travel Request in the Comments section, attach a list of students on the request and.

The screenshot shows the SAP Concur interface for a travel request. The title is "Non-Employee Airfare \$2,500.00". The date is 03/16/2022. The "Allocate" button is visible. The "Request/Trip Start Date" is 03/16/2022 and the "Request/Trip End Date" is 03/19/2022. The "Paid for by an outside entity?" field is set to "No". The "Description" is "Student Airfare". The "Transaction Amount" is 2,500.00 and the "Currency" is "US, Dollar". The "Approved Amount" is 2,500.00. There is a "Comment" field at the bottom.

Q: What documents do I need to upload for student travel?

A: The same as for a traveler request, with the exception of including a list of students and a schedule of game events (for Athletics).

Q: Can we use Concur for group travel?

A: Yes, if the ONLY expense is registration and each individual will not be reimbursed for travel expenses such as meals or mileage.

Q: My Concur Request is being routed to the wrong approver; how do I change or update the approver?

A: Contact local campus support individuals.

RCC: Contact Liz Tatum so she can connect with HR to update their records.

Norco: Email to: ConcurQuestions@norccollege.edu

MVC: Contact Laurie Crouse

District: Email to: purchasingtravel@rccd.edu

Q: Travel is approved but there has been an addition to the travel (add-on). Can I modify my request?

A: If your travel request is not yet fully approved, you can recall the request, modify it, and then resubmit it for approval. If it is already fully approved, you will need to create an “add-on” to your original travel request.

Q: Can I use more than one budget string on my travel request?

A: Yes, follow the steps to “allocate budget” found in the Concur manual.

Riverside City College
Concur FAQ's

Section 2: Travel Request

Q: Can I use the RCCD Foundation Accounts for Concur travel?

A: No, RCCD does not have Foundation charge-back working with Concur. You need to process a check request with the Foundation team.

Q: If I underestimated the cost of my request, how can I add more money to my Concur travel request?

A: If your travel request is not yet fully approved, you can recall the request, modify it, and then resubmit it for approval. If it is already fully approved, you will need to create an "add-on" to your original travel request. After the add-on is approved, the traveler will need to contact PurchasingTravel@rccd.edu to request the additional funds be added to your AmexGo card.

Q: Due to the price changes, my travel request has been underestimated. What is the maximum amount I can go over without processing an add-on?

A: Your travel request can go over 10% or \$200 dollars whichever is more.

Q: What is the process for notifying the President of my travel out of state?

A: In addition to submitting your Concur Travel Request, the president's executive assistant sends a RIV-ALL on a monthly basis requesting travelers to submit the appropriate information for pre-approval (see example below).

From: RIV-ALL <RIV-ALL@LISTS.RCC.EDU> on behalf of "Gonsier, Heidi" <Heidi.Gonsier@RCC.EDU>
Reply-To: "Gonsier, Heidi" <Heidi.Gonsier@rcc.edu>
Date: Monday, August 1, 2022 at 2:47 PM
To: riv-all <riv-all@lists.rcc.edu>
Subject: [RIV-ALL] Out of state travel - August board report

Good afternoon. The deadline for out-of-state travel requests is **August 4, 2022**. Please note, travel must be scheduled **after August 16, 2022** to be included in the August board report.

Please provide the following information **before** entering requests in Concur. I will share with Dr. Vurdien for his pre-approval. Thank you.

1. faculty name(s)
2. city and state of conference
3. dates of travel
4. title of conference
5. estimated cost
6. funding source (i.e. general fund etc.)

Heidi Gonsier
Executive Assistant to the President
951-222-8804 | heidi.gonsier@rcc.edu



Section 3: AMEX Go

Section 3: AMEX GO Card Questions

Q: How do I get my AMEX GO card?

A: Once your travel request has been approved, you will email purchasingtravel@rccd.edu asking for an AMEX GO card. In the email, provide the following:

- travel request number
- your name
- your cell phone number (needed to install AMEX Go app)
- your college / worksite location (all charged paid by college)
- TYPE – new card or reload existing card

See page 50 in the Concur Manuel for instructions.

Q: How long does it take for me to receive my AMEX GO card?

A: It takes about 7-10 days for your AMEX GO card to be available for pick up at your Cashier's office. The Cashier's office will notify you via email when your card is available for pick up.

Q: How long does it take for my funds to appear on my AMEX GO card?

A: It takes about 2-3 days for the funds to appear on the AMEX GO card once requested.

Q: Is the AMEX GO good for a one-time use?

A: No, once the AMEX GO card has been issued to you then it is yours to keep and use for future travel.

Q: I cancelled my travel and no longer need the AMEX GO. What do I do with the AMEX Go card?

A: You can keep the card for future travel. If you will no longer will travel for RCCD, destroy the AMEX GO card and notify purchasingtravel@rccd.edu to deactivate your account in the AMEX Go system.

Q: Can I use my AMEX GO card to buy gas?

A: Yes, you may purchase gas using the AMEX GO card under the following conditions:

- You are renting a vehicle or using a college vehicle.
- You have included the gas expense in your original travel request as an "other travel request".

Q: Can I use my AMEX GO card to buy gas for my personal car?

A: No, if you drive your personal vehicle for business purposes, then you will get mileage reimbursement. Mileage will need to be included as an Expected Expense in your original travel request

Q: I am using "Book with Concur" to create my travel request. Can I still use the AMEX GO Card for my other expenses?

A: Yes! No matter what booking type you choose, you can always request the AMEX GO card.

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Section 3: AMEX Go

Q: Is there a way to set up the credit card to where I would get the credit for the money spent put on my account so I can use it for the future? For instance, at Chick-fil-A, I usually get a good amount of points that can be used for free on my next purchase if I spend \$500.

A: AMEX GO does not have a reward/credit system. These are district public funds and cannot be used on personal rewards.

Section 4: Delegate (admin support, out of office)

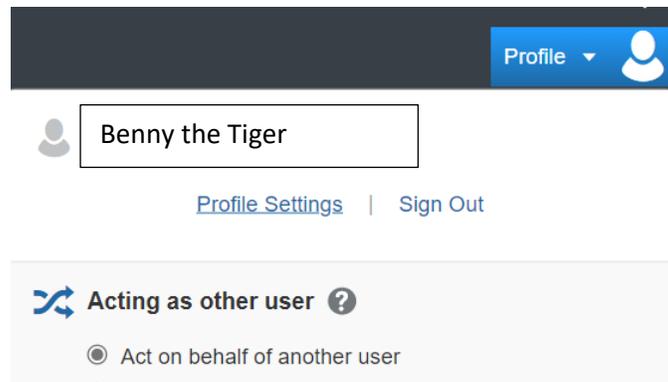
Section 4: Delegate Questions

Q: When should I make someone my delegate?

A: If you are an administrator and would like to have your assistant act on your behalf to create your travel request, book your travel, and create and submit your expense reports, consider making someone your delegate.

Q: I was made a delegate for someone else. How do I act as their delegate?

A: Login to Concur. At the top, right-hand portion of your screen, click the down area near the word “profile”, then enter the name of the individual you will be acting as and select from the list. This will open up that individual’s profile for you to work under.



Q: I am a delegate trying to book my manager’s travel and I can't see the book link.

A: Your manager will need to update what you are able to access as their delegate.

Q: What is the difference between a “Delegate” and “Travel Arranger”?

A: Delegates create or approve Travel Requests and expense reports for travelers. Travel Arrangers handle travel arrangements for travelers.

Q: Can the “Delegate” and “Travel Arranger” be the same person?

A: Yes. Be sure to setup the person as both a “Travel Arranger” (in the traveler profile) and as a “Delegate” (in the Concur Request/Expense profile).

Q: I am a delegate and need to submit a Missing Receipt Affidavit. Why am I unable to locate the form and submit on the traveler’s behalf?

A: By design, the SAP Concur system only allows the end user to fill out the legal declaration form. Just like with any legal declaration, only the person that is claiming something can create the form. Proxies, delegates, or anyone acting as the user, will not be able to use or create this declaration.

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Section 5: Associated Students (AS)

Section 5: Associated Students (AS)

Q: How do I book a Concur travel using my ASRCC Budget Trust Accounts?

A: The process is the same however, there are **three items to update**:

1. Travelers must update the request header budget string to 11-AZK-1000-0-6960-0501:

Additional Information	Fund	1	School
	(11) UNRESTRICTED GENERAL FUND		(AZK) ASRCCD CHARGEBACK
	Resource	2	Project Year
	(1000) 1000 - GENERAL FUND		0
Goal	Function	3	Group
6960	0501		RCC

2. Add a Comment referencing the AS Budget or Trust Account charging the travel to:

Request Comment
Tatum, Elizabeth 08/26/2022
Per Jim McCarron paying this travel out of Trust account number 94551 Mens Track Trust.
Refer to AZK / 11 / 1000/ 6960/ 0501 Notes: AZK with goal/function 6960/0501

3. Add the approval workflows – for ASRCC Budget accounts add the approvals based on the requisition procedure; for Trust accounts refer to the approvals listed on the Trust cards.

Q: How do I know who to add to the approval workflow for ASRCC Trust Accounts?

A: Refer to your current ASRCC Trust Card or contact Liz Tatum for a copy of the Trust Account.

Q: The approval listed on the Trust Cards are not updated, do I need to update the Trust Card prior to initiating my Concur Request?

A: Yes, please update the Trust Card and send to Liz Tatum. Once received then you can proceed with the Concur Request.

Q: Can we use multiple ASRCC budget accounts?

A: Yes, list the budget accounts in the comments sections.

Q: Can I use the general budget and an ASRCC account?

A: It is not recommended to intermingle the general budget with an ASRCC account. They are different workflows and it will be difficult to reconcile.

Riverside City College
Concur FAQ's

Section 5: Associated Students (AS)

Q: Are the ASRCC Trust Account approvals different than the ASRCC Budget approvals?

A: Yes, refer to the Trust Card for approvals for ASRCC Trust Accounts. According to ASRCC AP 5420, the ASRCC Budget approvals workflow is noted on the ASRCC website under the ASRCC Finance Code document.

Q: Do I need to fill out the ASRCC Field Trip Packet?

A: Yes the ASRCC process has not changed.

Q: If I am going on a field trip or college trip less than 500 miles – do I need submit a Concur Request?

A: Yes Concur will be required for all travel, including local field trips. You can find more information in the ASRCC Field Trip Packet.

Section 6: Approval Process

Section 6: Approval Process Questions

Q: My travel request/mileage report/expense report is routing to the wrong person for approval.

A: Email ServiceDesk@rcc.edu and include information about the error message you are receiving and the necessary correction.

Q: I'm going on vacation; can someone approve on my behalf?

A: Yes! You can make someone your temporary delegate to approve on your behalf.

Q: How long does the approval process take?

A: The process varies but on average approvals are completed between 2 – 3 days.

Q: How do I know if my travel request or expense report is approved?

A: Log into Concur, at the top of your screen click on requests. All of your open travel requests will display along with their approval status.

Section 7: Booking

Section 7: Booking Questions

Q: When can I book my travel?

A: Once your travel request is fully approved, a link to “Book Travel” will appear. Follow the link to book your travel segment.

Q: How do I decide if I should book in Concur?

A: Before entering the travel request, explore the rates available to you through the Travel Store for your airfare or hotel. Are these rates better than what you can obtain going outside of Concur?

For example, is the conference rate for the hotel less expensive than what you found in Concur? Are the flight departure and arrival times what you need? If you feel you will benefit from using the Travel Store for air, hotel, and/or car rental, then you should select “Book in Concur”. If you do not wish to use the Travel Store for any of your travel fares, then you should select “Book outside of Concur”.

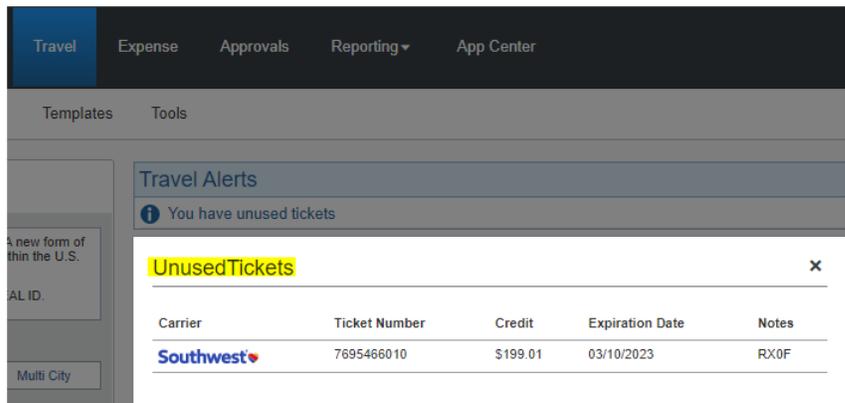
Q: Do I have to use the on-line booking tool in Concur for all travel arrangements?

A: No. It is highly recommended however, the on-line booking tool in Concur is optional. However, the Concur booking tool includes state-contracted discounts for airfare, lodging, and rental cars, as well as the inventory of travel arrangements available through public websites like Expedia or Travelocity.

Q: I have encountered an emergency and can no longer attend the conference. What do I do with my airfare? Can I transfer my airfare to a colleague?

A: Contact the Cal Travel Store immediately, if you booked your airfare through the Cal Travel Store and let them know you will not be able to use the airfare ticket. Typically, the airfare ticket is non-refundable and non-transferable therefore the airfare ticket assigned to you will be available for future use.

Information on Unused Tickets can be found on your Concur Travel site:



The screenshot shows the Concur Travel Alerts interface. At the top, there are navigation tabs: Travel, Expense, Approvals, Reporting, and App Center. Below these are sub-tabs for Templates and Tools. A notification banner reads "Travel Alerts" and "You have unused tickets". Below the banner, a table titled "Unused Tickets" displays the following information:

Carrier	Ticket Number	Credit	Expiration Date	Notes
Southwest	7695466010	\$199.01	03/10/2023	RX0F

Section 8: Payment

Section 8: Payment Questions

Q: How do my conference vendors get paid?

A: Once your travel request is fully approved, you will need to email purchasingtravel@rccd.edu to request an AMEX GO card. This is a pre-loaded credit card you will use to pay all of your conference/trip expenses.

Q: What if the vendor does not accept AMEX GO as a form of payment?

A: The District has other credit cards available to issue payments. Email purchasingtravel@rccd.edu and let them know the vendor does not accept AMEX GO for payment.

Q: What if the vendor does not accept credit card payments at all?

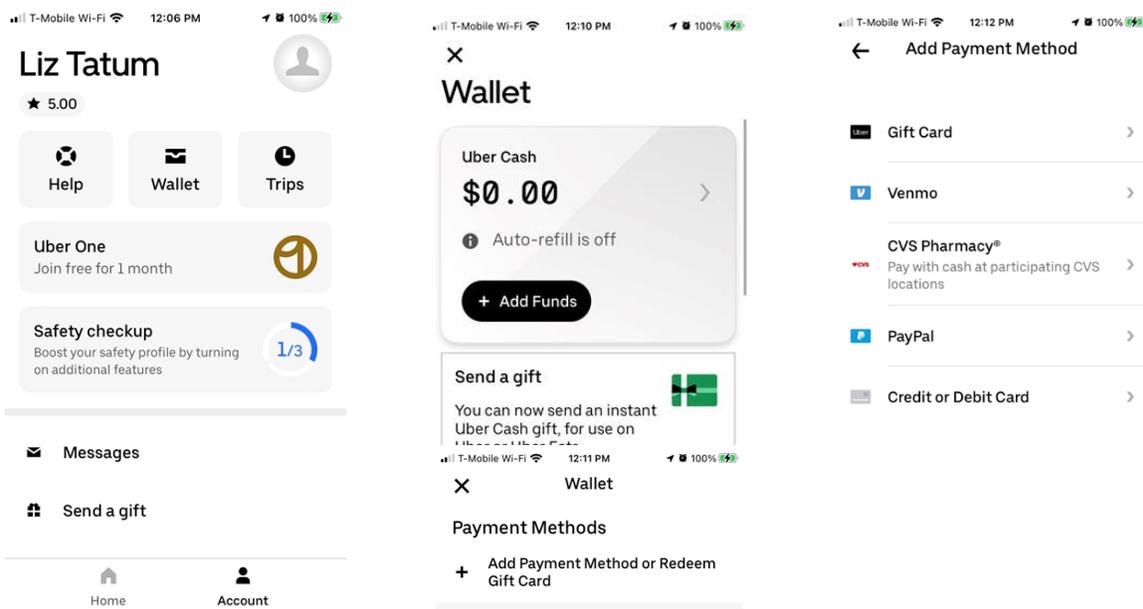
A: A paper check can be requested to pay this vendor. To do so, you will need to email purchasingtravel@rccd.edu a completed a "Travel Check Request" form. Let them know the vendor does not accept credit card payments and you are requesting a check for payment.

Q: When should I request a Cash Advance?

A: The AMEX GO card is now available and a cash advance should only be requested after consultation with the purchasing department. In some cases, a vendor might only accept cash. If this is the case, consult with purchasing to identify a recommended course of action.

Q: How do I pay for my UBER using the AMEX GO card?

A: Login into your UBER app and click on your **Wallet**. Scroll down and under **Payment Methods** add the AMEX GO credit card information.



Section 9: Expense Report

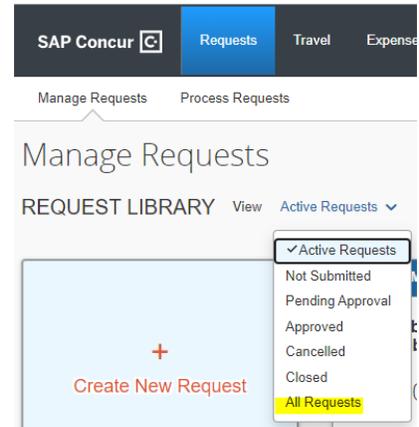
Section 9: Expense Report Questions

Q: Do I need to create an expense report even if I am not expecting a reimbursement?

A: Yes, you need to create an expense report for every travel request you submit. The expense report is needed to “close the loop” and finalize the trip.

Q: I have attended my travel and collected all the receipts – hotel folio, meals, airfare, parking, etc. but I cannot find my Concur Request on my Concur site. How can I find my requests so I can proceed in submitting my expense report?

A: Under your Manage Requests you will view all of your **“Active Requests”** and click the drop-down arrow and click on **“All Requests”**.



Q: My expense report was approved, what now?

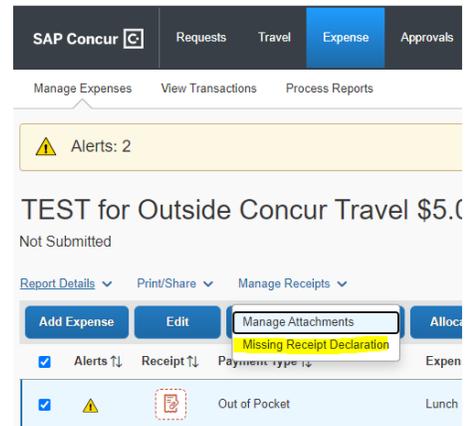
A: Accounts payable will process your expense report and will reimburse you for any out-of-pocket travel expenses you may have paid.

Q: How will I receive my reimbursement?

A: A check will be sent to your home mailing address.

Q: What do I do if I am missing a receipt?

A: You will need to submit a Missing Receipt Affidavit via Concur. Check the box on which you are missing the receipt for and under Manage Receipts click **“Missing Receipt Declaration”**:



Q: My total expenses exceed the travel request approved by more than 10% and I cannot submit the expense report. What do I do?

A: You will need to create an “add-on” to your travel request. Please contact your Concur trainer for guidance.

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Section 9: Expense Report

Q: Where do you see the AMEX Go card charges?

A: You will see your card charges in your Concur queue. You can click on "Available Expenses" to view your charges.

AVAILABLE EXPENSES View: All Expenses ▾

Q: How do I report personal expenses such as alcohol?

A: On the expense report, enter **two-line** items. There should be one line for the original amount indicated on the receipt (including the alcohol) and another line for the payback amount identified as "**Out of Pocket**" on the Payment Type. The payback amount must be entered as a **negative** number. Payments for reimbursement/deposits are made at the Cashiers Office and receipts must be attached to Concur expense reports.

When reimbursing/depositing the personal expense at the Cashier's Office, be sure to provide a budget account reference, such as 11-DXX-1000-0-1501-0000-5220, and a Concur Request ID: 3ABC Conference XYZ on the cashier's miscellaneous receipt. If paying with a check, please write the check payable to RCCD.

Example:

RP Group Conference \$805.48 Copy Report

Sent for Payment

Report Details ▾ Print/Share ▾ Manage Receipts ▾

REQUEST	Approved	Remaining
	\$992.14	\$218.14

First line = \$44.59 (incl alcohol charge on the itemized receipt)

Second line = \$-9.00 the payback to the district for the alcohol charge.

Alerts	Comments	Receipt	Payment Type	Expense Type	Vendor Details	Date	Approved
			AmEx Go Card	Dinner	SHERATON GRDN GRV-ANAHEIM Garden Grove, California	04/14/2022	\$44.59
			Out of Pocket	Dinner	Sheraton Garden Grove, California	04/12/2022	\$-9.00
			Out of Pocket	Personal Car Mileage		04/12/2022	\$23.40
			AmEx Go Card	Conference Registration Fees/Agenda	RP GROUP Riverside, California	03/30/2022	\$500.00
			AmEx Go Card	Hotel	Sheraton Riverside, California	03/30/2022	\$246.49 Itemized
							\$805.48

Q: Are receipt photos accepted as a backup document.

A: Yes, receipt photos are accepted as a backup document for Expense Reports as long as they are legible.

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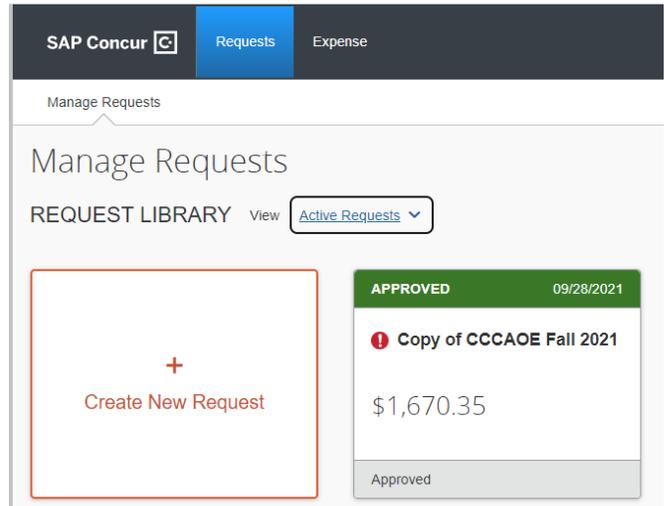
Section 9: Expense Report

Q: Do I need to upload a copy of a mapping service website (e.g., Mapquest) to Expense Reports for mileage reimbursements?

A: Concur has a built-in Mileage Calculator (Google Maps) which calculates the mileage based on addresses entered. Click on the "Mileage Calculator" icon and compute the mileage.

Q: I have submitted my expense report and I have no other receipts to submit; why is showing on my Manage Request view?

A: If there is a remaining balance then it will continue to appear your Manage Requests platform. If all expense reports are completed. Then CLOSE the report but no future expense reports can be processed. Note - RCCD cannot reverse a CLOSED travel request.



Request Total ↑↓	Approved ↑↓	Remaining ↑↓
\$1,670.35	\$1,670.35	\$257.37

Section 10: Error Messages

Section 10: Error Messages

Q: Why am I receiving the “contact purchasingtravel@rccd.edu to request a vendor ID” error message?

A: This means you have never received a reimbursement check from the District and need to have a vendor ID number created and added to your profile. Email purchasingtravel@rccd.edu and request for them to create a vendor ID for you in Concur. They will update your profile and notify you when this has been accomplished. Then, go into your travel request and make some small changes (such as adding a period in a comment field) and save the request. This will clear the error message allowing you to submit your travel request.

Riverside City College
Concur FAQ's

Section 11: SAP/Concur RCCD Contract List

Section 11: SAP/Concur RCCD Contact Listing

Location	Contact	Email Address	Phone Numbers
District Offices	Melinda Chavez	puchasingtravel@rccd.edu	(951) 222 - 8042
	Melissa Griffith		(951) 222- 8645
	Amanda Vasquez		(951) 222 - 8227
Moreno Valley	Laurie Crouse	Laurie.Crouse@mvc.edu	(951) 571 - 6342
Norco	Esmeralda Abejar	Esmeralda.Abejar@norcolleage.edu	(951) 372 - 7075
	Norco Support	ConcurQuestions@norcolleage.edu	
Riverside City	Liz Tatum	Liz.Tatum@rcc.edu	(951) 222 - 8012

Section 12: Message Icons

Section 12: Icons

Icon	Name	Description
	Exception	Indicates that a request exception must be resolved before submission.
	Warning	Indicates that the request has an exception that does not prevent submission.

 This Warning icon is a reminder to the traveler to take some type of action. These symbols will remain and not clear.

Examples of the Warning messages appear below:

- NOTICE: Please email Purchasingtravel@rccd.edu to request a new AMEX GO card or to request funds added to your AMEX GO card. Please include Traveler's name, Cell phone number, & approved travel request.
- Please attach a flyer (conference schedule, agenda, registration etc...) before submitting.
- The request header is missing the required fields.
- NOTICE: Please have your completed vendor forms and forward to purchasing
- The Trip Date that was entered is in the past. Please verify your date before submitting the Request.
- Please contact PurchasingTravel@rccd.edu and request Vendor ID Setup.
- Please select a city in the 'city' list, or enter the place of your choice in 'Detail'.
- POLICY REMINDER: Staff are required to submit requests for In State Travel 10 days prior to travel
- NOTICE: After booking is completed in Concur, please contact the Hotel and request a Credit Card Authorization (CCA) Form – If they require one. Complete their form using your AMEX GO card information and forward the CCA form back to the hotel.
- NOTICE: If your Conference vendor does not accept American Express as a form of payment, please email Conference Registration payment processing instructions to Purchasingtravel@rccd.edu.

Section 12: Message Icons



The **red** Exception alerts the traveler of an error that must be resolved in order to complete the travel request and/or expense report.