



Concur Travel & Conference Manual

Version 1.01
Created on 04/09/19
Last Updated on 04/10/19

Table of Contents

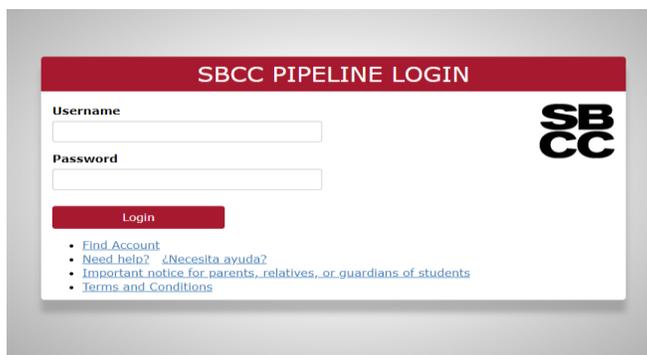
SECTION 1: LOGGING IN TO CONCUR 2
1.1 Login to Concur via Pipeline 2
SECTION 2: CREATING A T&C REQUEST 3
2.1 Creating a New Travel Request 3
2.2 Attaching Supporting Documentation for Travel 4
SECTION 3: ESTIMATED EXPENSES 8
3.1 The Segment Section 8
3.1a Flights 8
3.1b Car Rentals 10
3.1c Hotel Reservations 11
3.1d Railway Tickets 13
3.2 Other Travel Expenses 14
SECTION 4: ALLOCATING BUDGET EXPENSES 17
4.1 Allocating Between Different Funds, Orgs, Programs, and/or Activities 17
SECTION 5: CREATING AN EXPENSE REPORT FROM YOUR TRAVEL REQUEST 19
5.1 Creating an Expense Report 19
5.2 Important Note re: Timely Reimbursement and Expense Reporting 20
5.3 Closing/Inactivating Travel Requests 21
SECTION 6: OTHER RESOURCES 21
6.1 SBCC Fiscal Services/Concur Page 21
6.1A Schedule for Ongoing Live-Training & Support 21
6.1B Concur Manuals 21
6.1C Troubleshooting Guide 22
6.1D Short Videos 22
6.1E Other Concur Resources 22

Concur Travel & Conference Manual

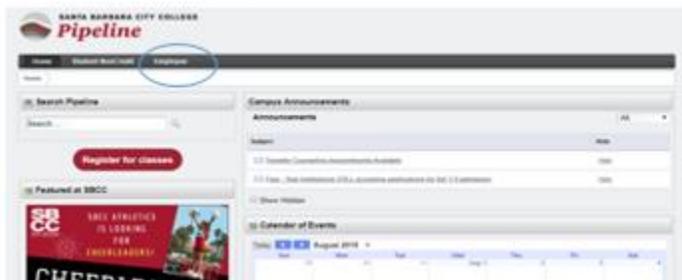
SECTION 1: LOGGING IN TO CONCUR

1.1 Login to Concur via Pipeline

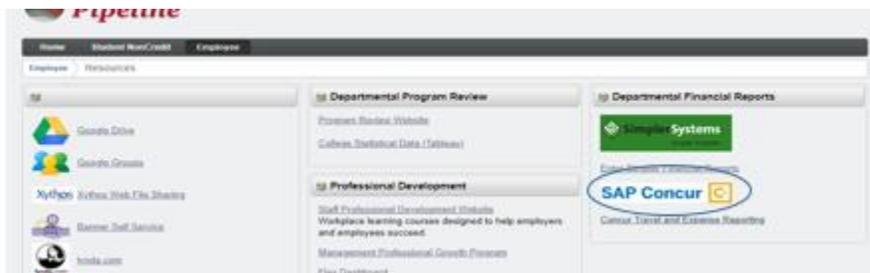
1. Go to: <https://pipeline.sbcc.edu/> in the browser of your choice.
2. Log into your Pipeline account.



3. Choose the **Employee** menu.

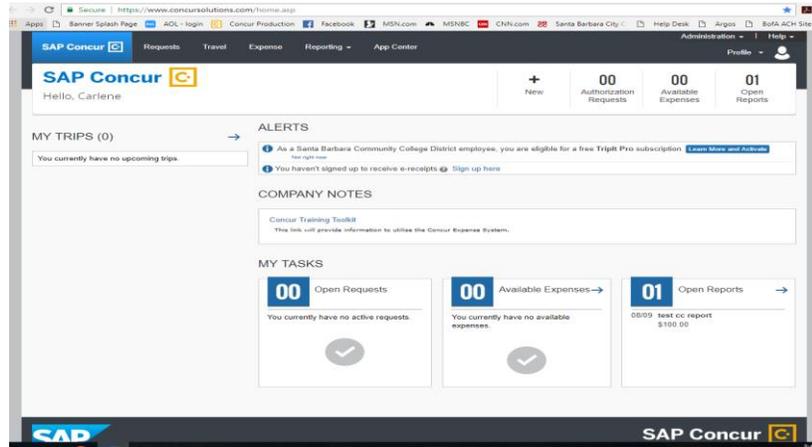


4. Choose **Resources** and the following screen will open. Click **SAP Concur** to open up the app.



Concur Travel & Conference Manual

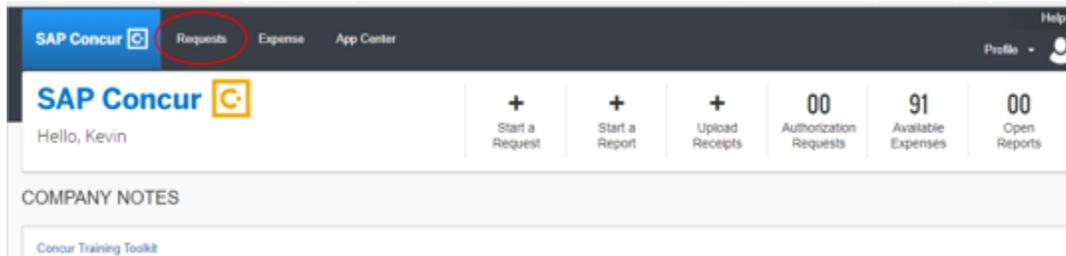
5. Once you are in the app, the screen will look like this:



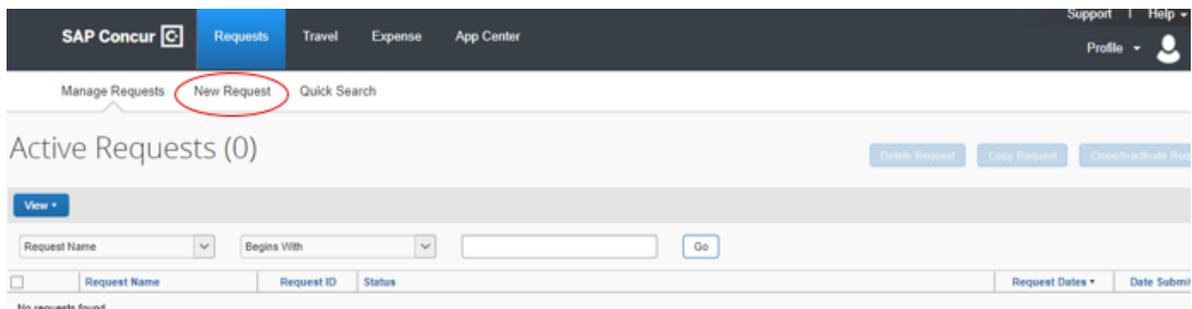
SECTION 2: CREATING A T&C REQUEST

2.1 Creating a New Travel Request.

1. From the Welcome Screen, click on **Requests**.



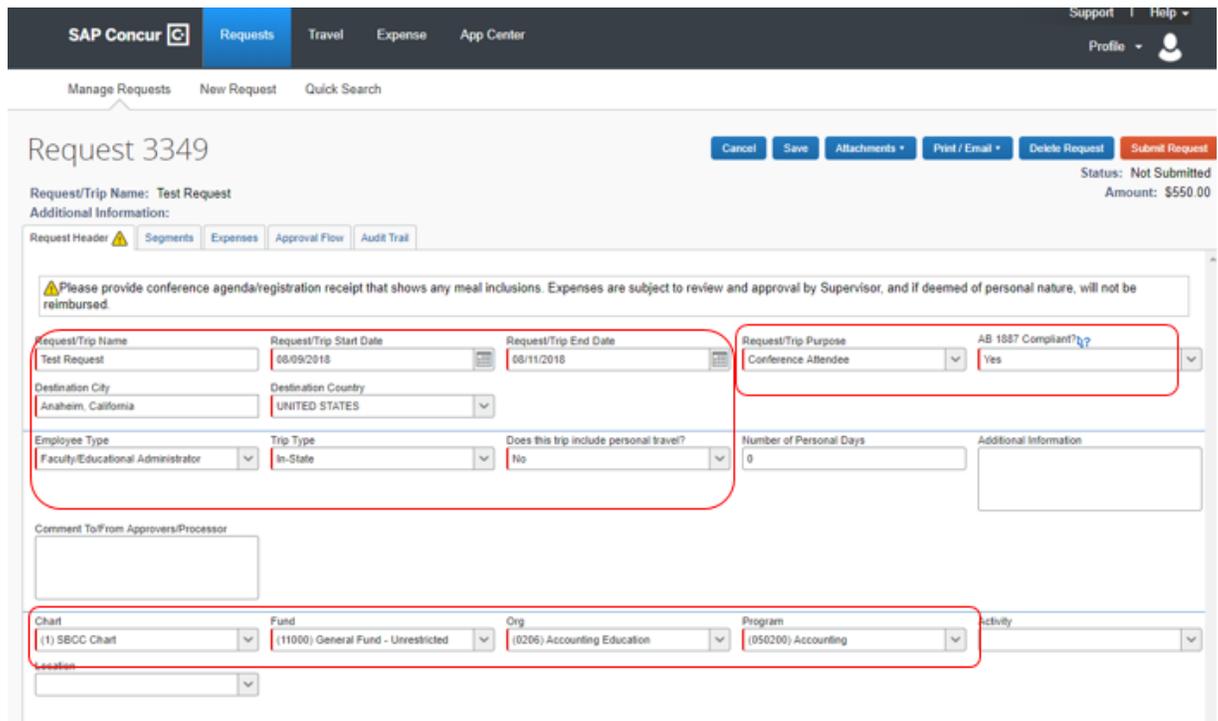
2. Create a new request by clicking on the **New Request** button.



Concur Travel & Conference Manual

- This will take you to the **Request Header** screen. Fill out all pertinent information (red-bordered boxes require information to be added).

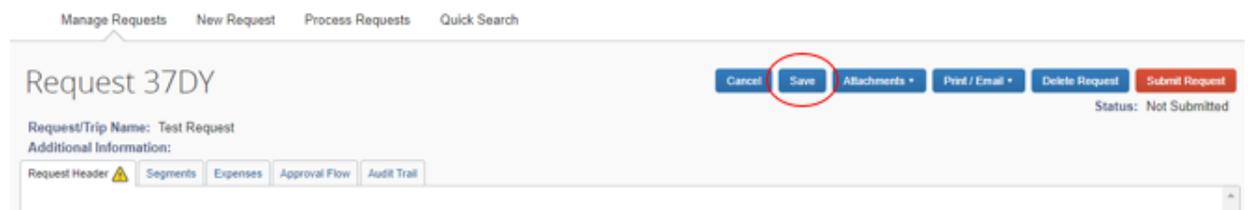
Please Note: The AB 1887 restricts the states we are allowed to travel to. Hover over the blue ? in the AB 1887 field to see more information.



The screenshot shows the SAP Concur 'Request 3349' form. The 'Request Header' section contains several fields, some of which are highlighted with red boxes to indicate they require information to be added:

- Request/Trip Name:** Test Request
- Request/Trip Start Date:** 08/09/2018
- Request/Trip End Date:** 08/11/2018
- Request/Trip Purpose:** Conference Attendee
- AB 1887 Compliant?:** Yes
- Destination City:** Anaheim, California
- Destination Country:** UNITED STATES
- Employee Type:** Faculty/Educational Administrator
- Trip Type:** In-State
- Does this trip include personal travel?:** No
- Number of Personal Days:** 0
- Chart:** (1) SBCC Chart
- Fund:** (11000) General Fund - Unrestricted
- Org:** (0206) Accounting Education
- Program:** (050200) Accounting

- When you are done, click on the **Save** button in the top right section.



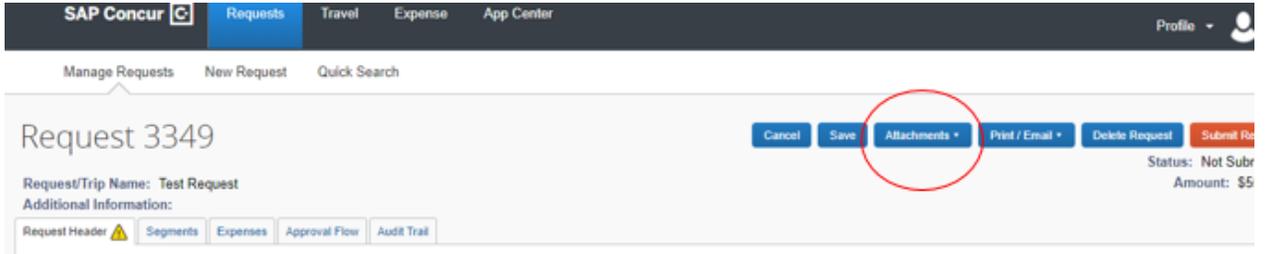
The screenshot shows the SAP Concur 'Request 37DY' form. The 'Save' button in the top right corner is circled in red, indicating it should be clicked when done.

2.2 Attaching Supporting Documentation for Travel

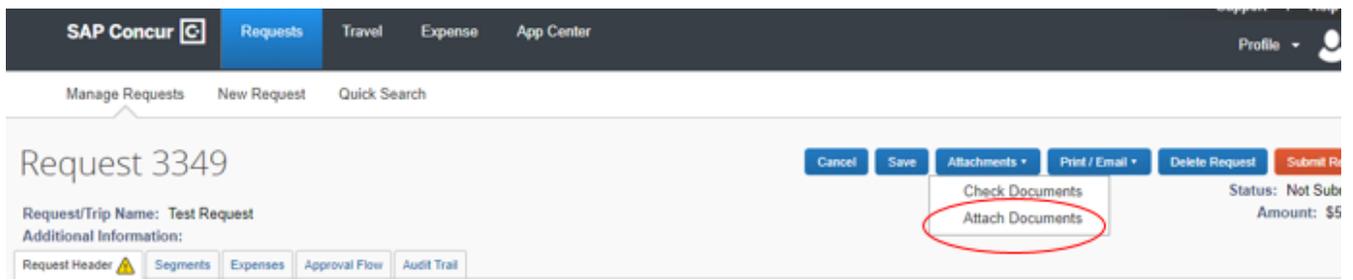
- After you have filled out the **Request Header** information, you will need to attach the conference agenda. Follow the instructions below to do so.

Concur Travel & Conference Manual

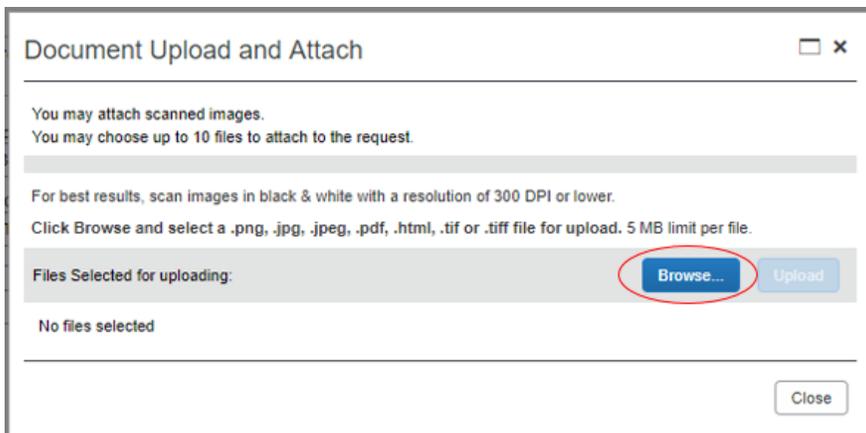
2. Click **Attachments** to get the dropdown menu.



3. In the dropdown list, choose **Attach Documents**.

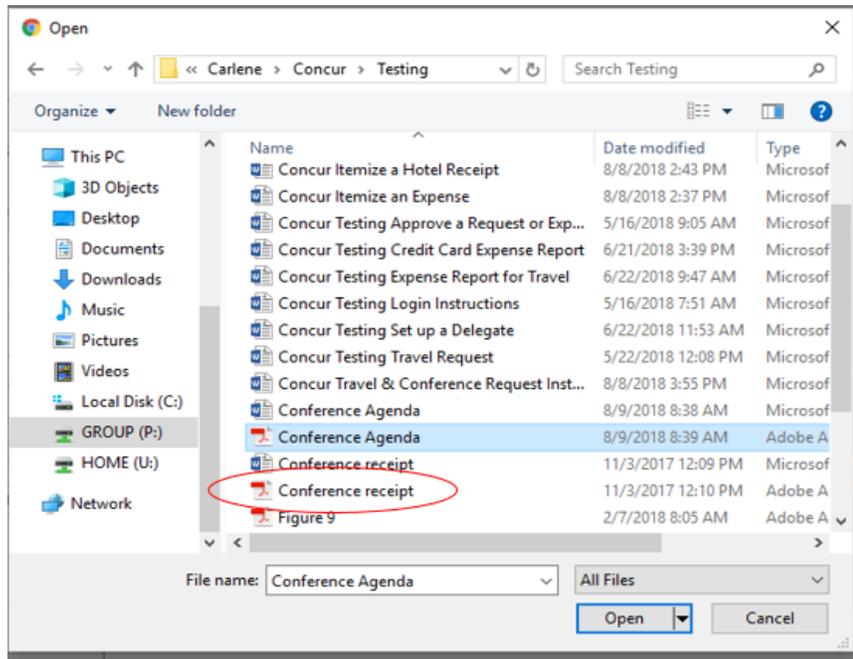


4. This will open up new options. Click on **Browse** to choose/upload a document from your computer files.

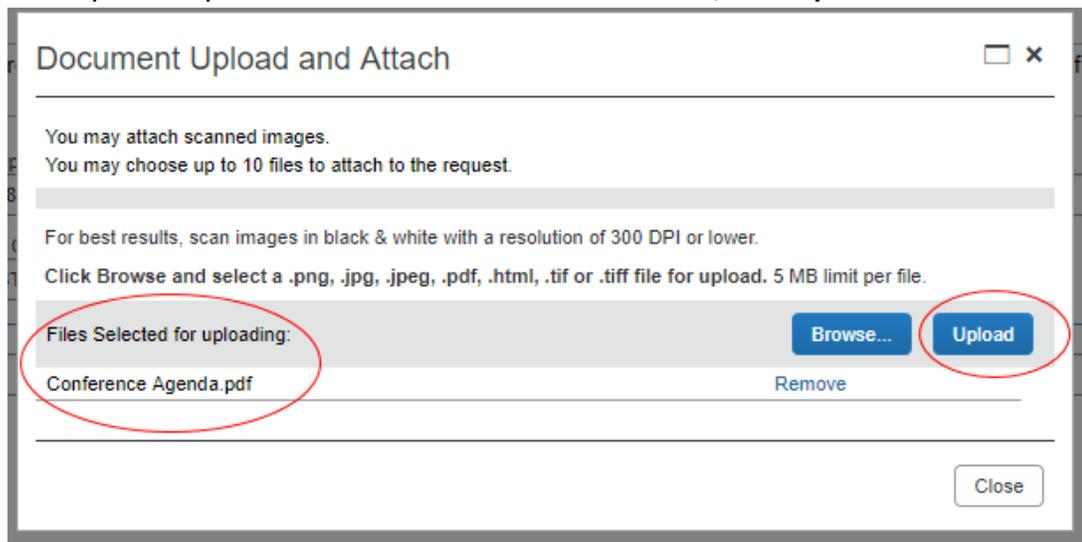


5. Locate your file and click Open.

Concur Travel & Conference Manual

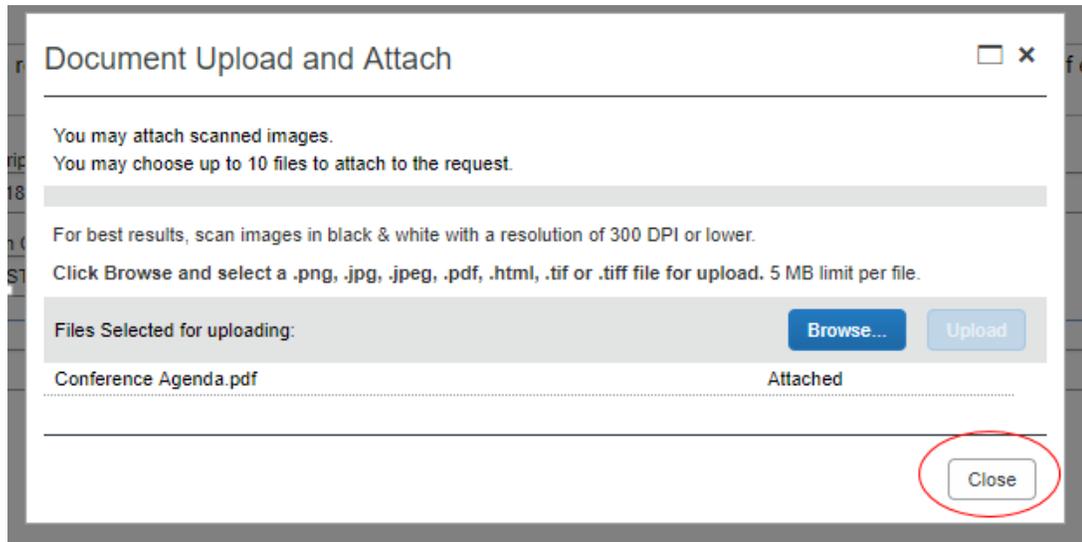


6. Once you verify that the correct file has been selected, click **Upload**.

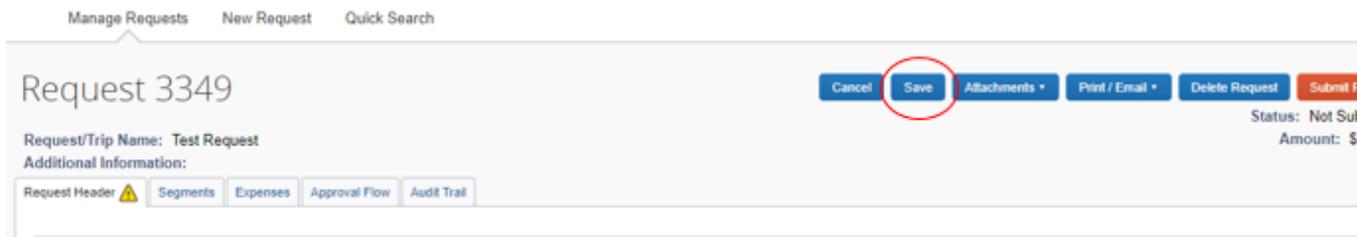


7. Then click **Close**.

Concur Travel & Conference Manual



8. After the Upload box closes, click **Save**.



9. **Special Note:** We have received reports that some Concur users have received the following alert even after attaching a conference agenda. This appears to be a glitch in the software. If you receive this note after attaching the Conference Agenda, please disregard.

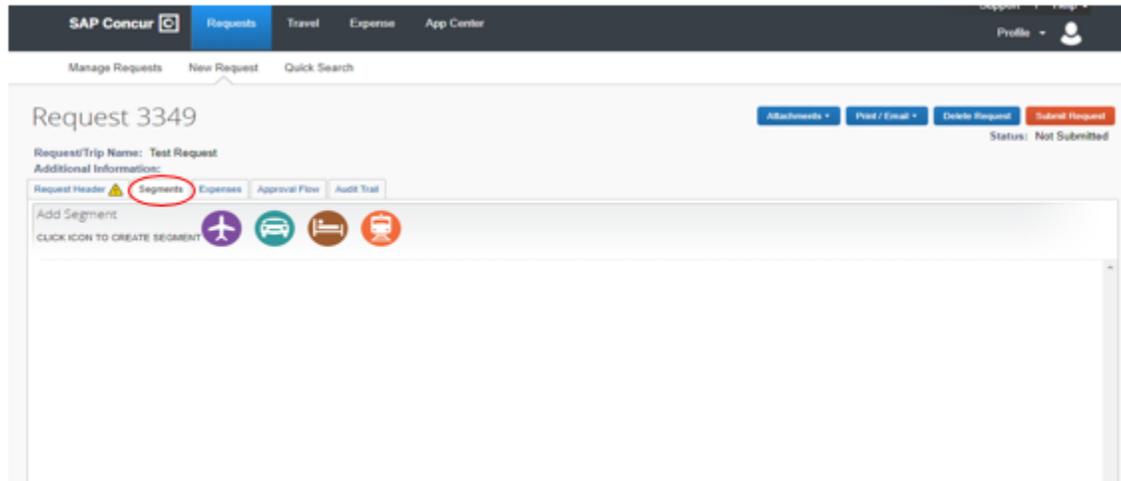
Expense Type	Date	Amount	Exception
N/A			⚠ Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Concur Travel & Conference Manual

SECTION 3: ESTIMATING EXPENSES

3.1 The Segment Section

1. After creating a New Request, click on the **Segments** tab. In this section, you will add your individual Airfare, Car Rental, Hotel Reservation, and/or Train information. If none of these are applicable, please skip to [Section 3.2 Other Travel Expenses](#).



3.1a Flights

1. If you are flying, click on the **Airfare icon**.



2. Then select **Round Trip** or **One Way** and fill in all required fields (marked with red borders).

Concur Travel & Conference Manual

SAP Concur | Requests | Travel | Expense | App Center | Profile

Manage Requests | New Request | Quick Search

Request 3349

Request/Trip Name: Test Request
Additional Information:
Request Header | Segments | Expenses | Approval Flow | Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Air Ticket | Round Trip | One Way | Amount: [] USD

Outbound

From: []
To: []
Date: 08/09/2018 | Depart at: []
Comment: []

Class of Service: []

Return

Date: 08/11/2018 | Depart at: []
Comment: []

Class of Service: []

3. Then click **Save**.

Request Header | Segments | Expenses | Approval Flow | Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Outbound

From: Santa Barbara (Airport - SBA), Santa Barbara, California
To: John Wayne (Airport - SNA), Santa Ana, California
Date: 08/09/2018 | Depart at: 07:00 am
Comment: []

Class of Service: EconomyStandard

Return

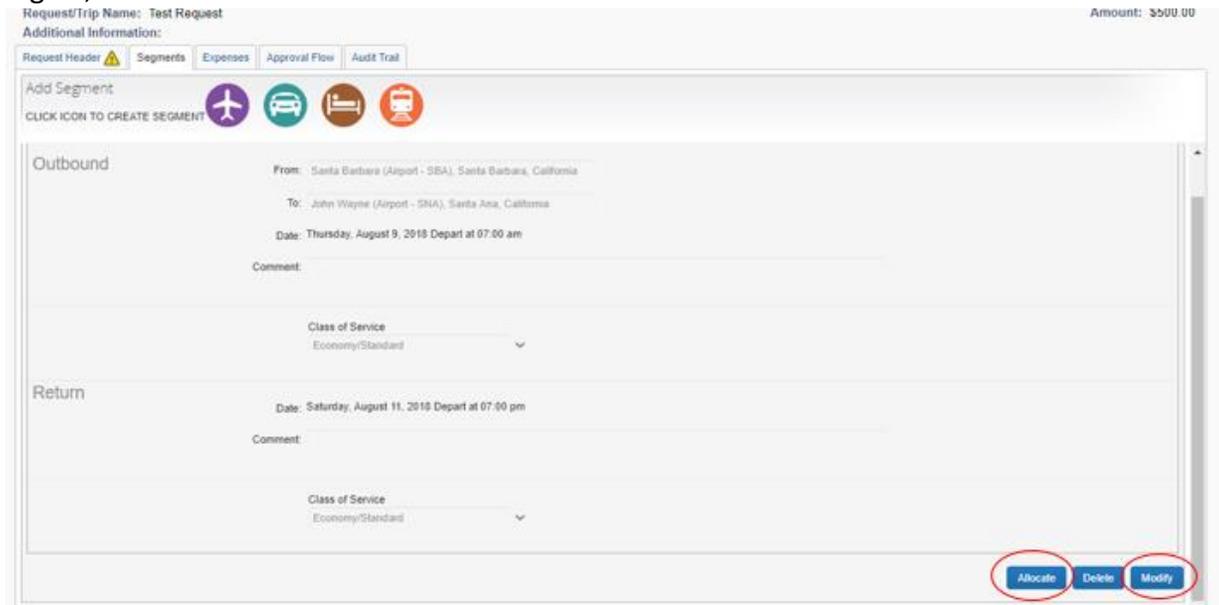
Date: 08/11/2018 | Depart at: 07:00 pm
Comment: []

Class of Service: EconomyStandard

Save | Cancel

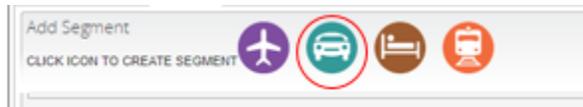
Concur Travel & Conference Manual

- Your screen will then look like the one below. Click **Modify** if you need to make a change or **Allocate** if another Fund or Org is paying for the flight. Add additional flights, if needed.



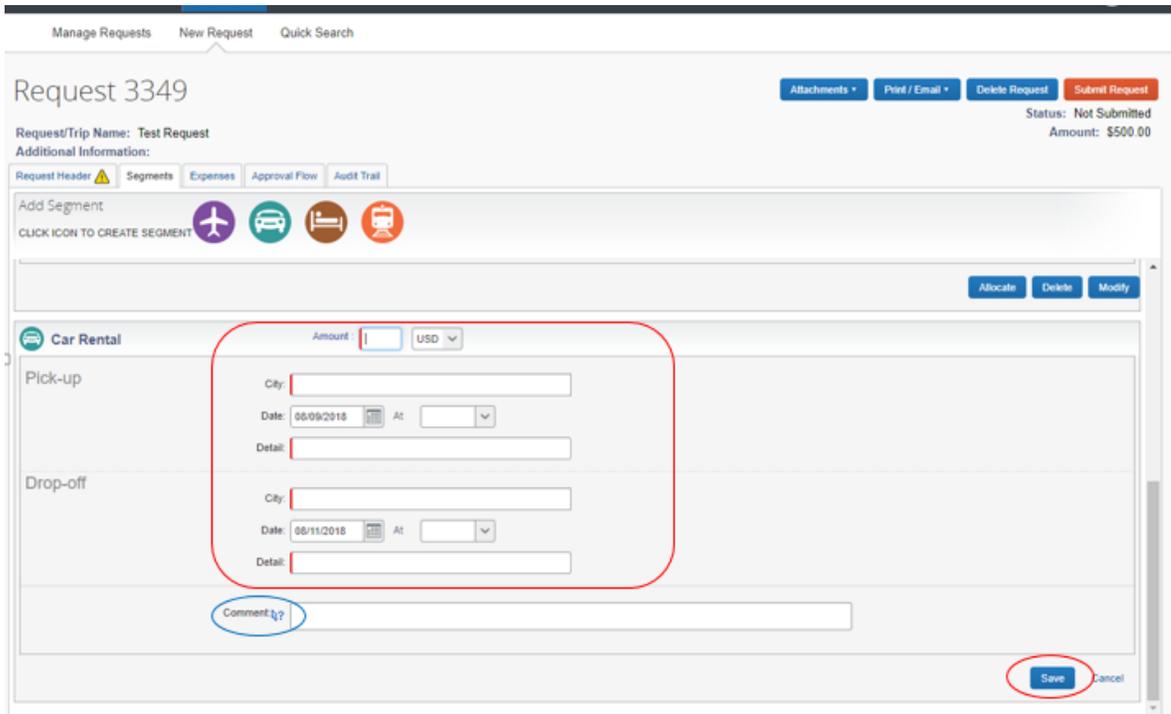
3.1b Car Rentals

- If you are renting a car, click on the **Car Rental** icon.



- Your screen will look like the one below. Fill in **required fields highlighted in red** (the blue ? in the **Comment** area will show SBCC's Enterprise account number). Then click **Save**.

Concur Travel & Conference Manual



Request 3349

Request/Trip Name: Test Request
Status: Not Submitted
Amount: \$500.00

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Car Rental
Amount: USD

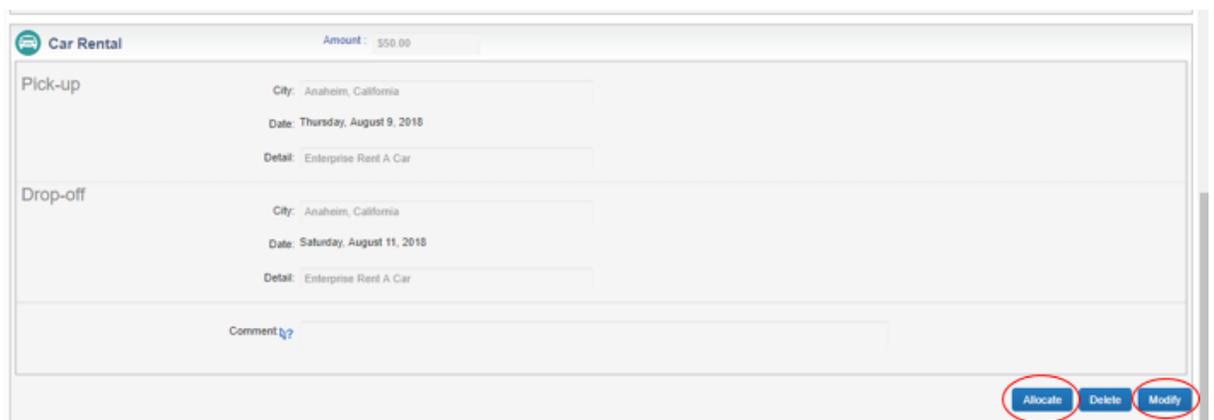
Pick-up
City:
Date: 08/09/2018 At
Detail:

Drop-off
City:
Date: 08/11/2018 At
Detail:

Comment

Allocate Delete Modify Save Cancel

- You will then go to the next screen. Click **Modify** if you need to make a change or **Allocate** if another Fund or Org is paying for the flight. Add additional car rentals if needed.



Car Rental
Amount: \$50.00

Pick-up
City: Anaheim, California
Date: Thursday, August 9, 2018
Detail: Enterprise Rent A Car

Drop-off
City: Anaheim, California
Date: Saturday, August 11, 2018
Detail: Enterprise Rent A Car

Comment

Allocate Delete Modify

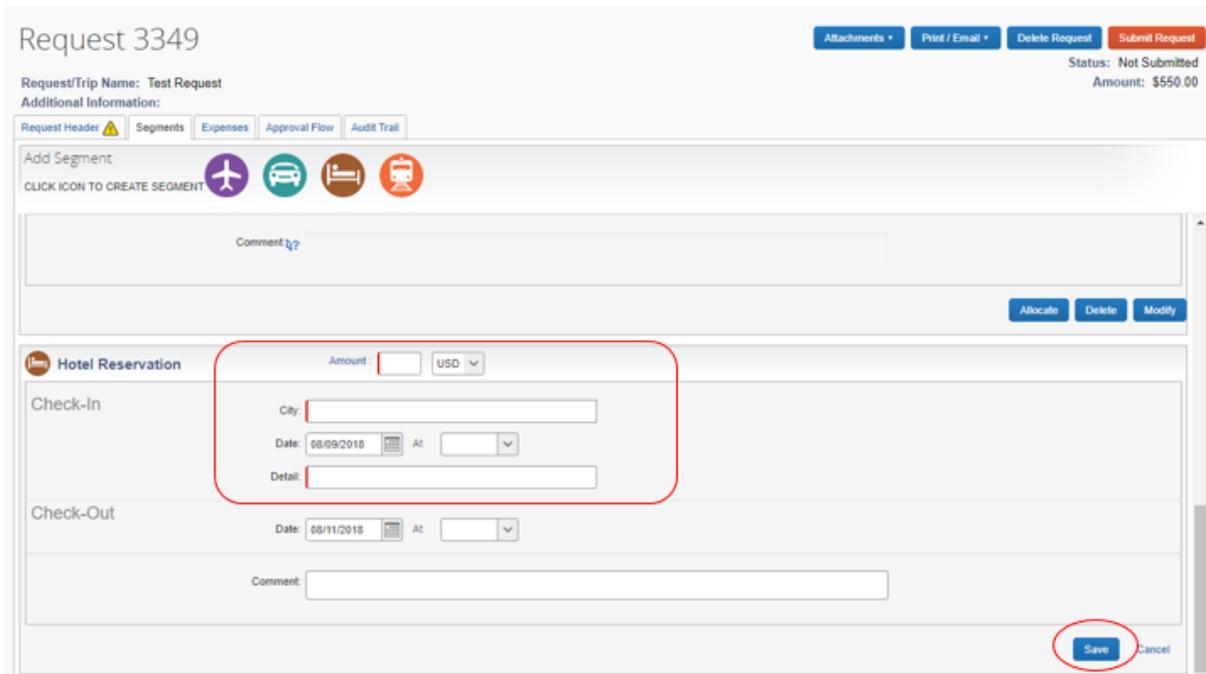
3.1c Hotel Reservations

- If you are staying in a hotel, click on the **Hotel Reservation** icon.

Concur Travel & Conference Manual



5. Your screen will now look like the one below. Fill in all required information in the **red-bordered boxes**. Then click **Save**.



Request 3349

Request/Trip Name: Test Request
 Additional Information:
 Status: Not Submitted
 Amount: \$550.00

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
 CLICK ICON TO CREATE SEGMENT

Comment:

Allocate Delete Modify

Hotel Reservation Amount: USD

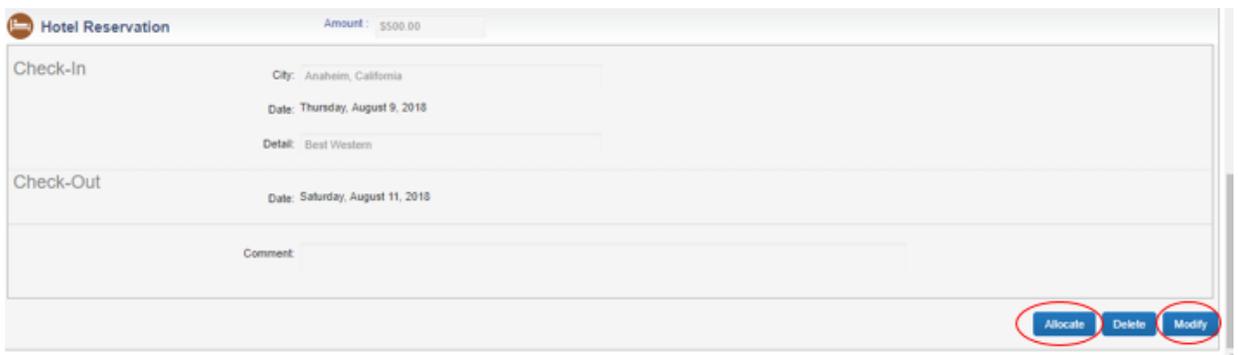
Check-In
 City:
 Date: 08/09/2018 At:
 Detail:

Check-Out
 Date: 08/11/2018 At:

Comment:

Save Cancel

6. You will then go to the next screen. Click **Modify** if you need to make a change or **Allocate** if another Fund or Org is paying for the flight. Add additional hotel rentals if needed.



Hotel Reservation Amount: \$500.00

Check-In
 City: Anaheim, California
 Date: Thursday, August 9, 2018
 Detail: Best Western

Check-Out
 Date: Saturday, August 11, 2018

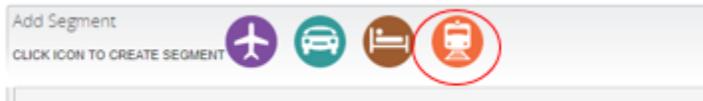
Comment:

Allocate Delete Modify

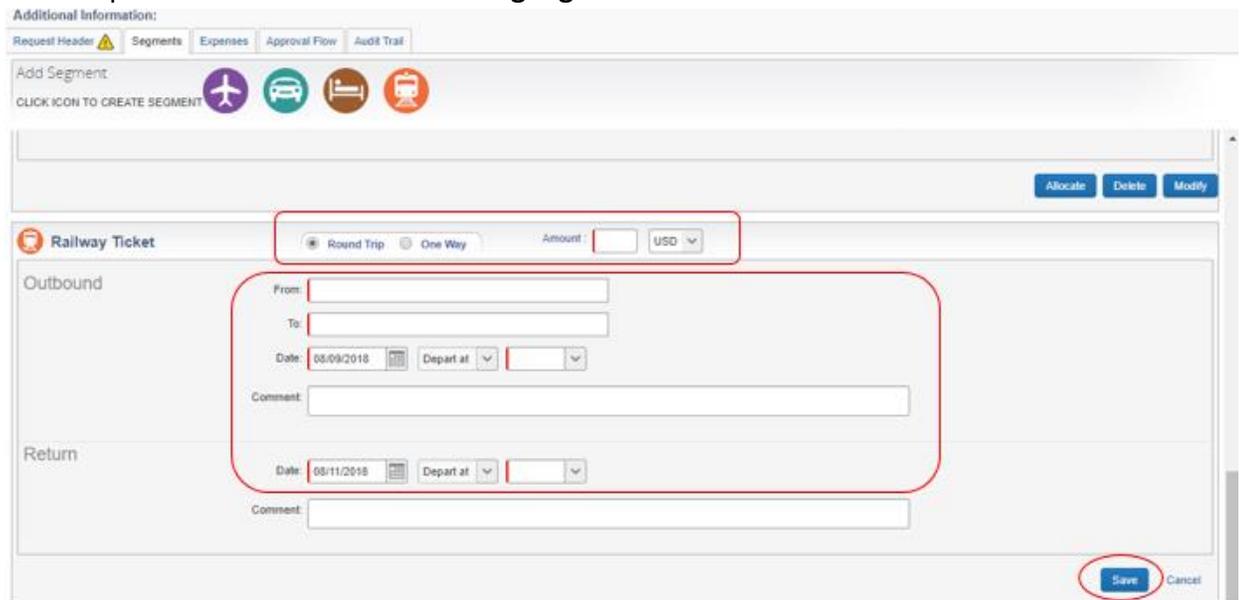
Concur Travel & Conference Manual

3.1d Railway Tickets

1. If you plan on using the train, click the **Railway Ticket** icon.



2. Your screen will now look like the one below. Choose Round Trip or One Way, then fill in all required information in the **red highlighted boxes**. Then click **Save**.



Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Railway Ticket

Round Trip One Way Amount USD

Outbound

From: [Red Box]
To: [Red Box]
Date: 08/09/2018 Depart at: [Red Box]
Comment: [Red Box]

Return

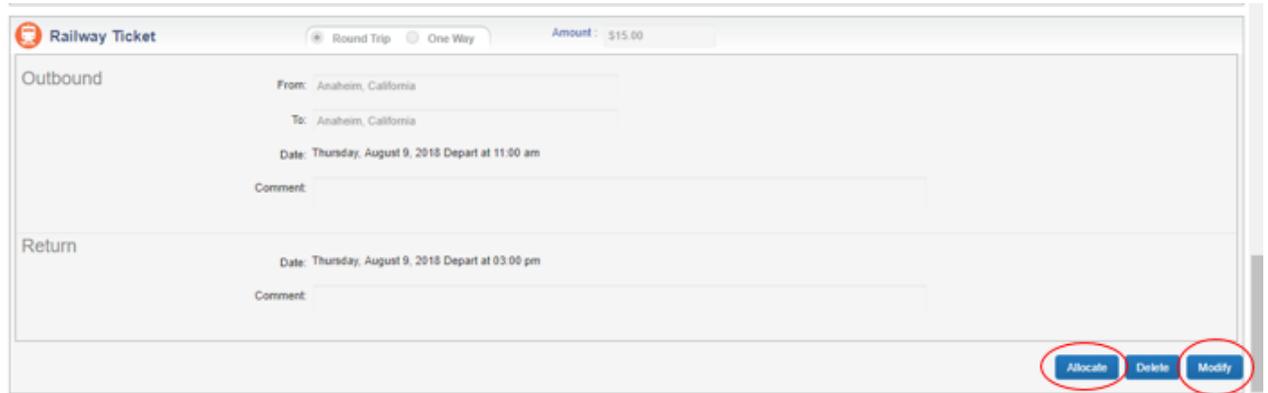
Date: 08/11/2018 Depart at: [Red Box]
Comment: [Red Box]

Allocate Delete Modify

Save Cancel

3. You will then go to the next screen. Click **Modify** if you need to make a change or **Allocate** if another Fund or Org is paying for the flight. Add additional railway tickets if needed.

Concur Travel & Conference Manual



3.2 Other Travel Expenses

1. Click on the **Expenses** Tab.



2. The left side of the screen will reflect expenses that you already created from the segment tab and do not need to be added again.

You can now add any non-segment expenses that are needed for your trip by clicking on the appropriate category from the right side of the screen.

Concur Travel & Conference Manual

Manage Requests New Request Quick Search

Request 3349

Request/Trip Name: Test Request
 Status: Not Submitted
 Amount: \$1,065.00

Attachments Print / Email Delete Request **Submit Request**

Additional Information:
 Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense **Allocate**

Date	Expense Type	Amount	Requested
08/09/2018	Airfare	\$500.00	\$500.00
08/09/2018	Car Rental	\$50.00	\$50.00
08/09/2018	Hotel	\$500.00	\$500.00
08/09/2018	Train	\$15.00	\$15.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

Hotel Group

02. Transportation

Car Rental Fuel

Charter Bus/Transfers

Other Ground Transportation

Parking

Taxi

03. Individual Meals

Breakfast

Dinner

Lunch

03. Mileage

06. Other

Seminar Registration/Fees

3. As an example, click **Dinner**.

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

Hotel Group

02. Transportation

Car Rental Fuel

Charter Bus/Transfers

Other Ground Transportation

Parking

Taxi

03. Individual Meals

Breakfast

Dinner

Lunch

03. Mileage

06. Other

Seminar Registration/Fees

4. Fill in required fields. Click [Allocate](#) if needed, then/or click **Save**.

Concur Travel & Conference Manual

Request 3349 Attachments • Print / Email • Delete Request • **Submit Request**

Request/Trip Name: Test Request Status: Not Submitted
Amount: \$1,065.00

Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

New Expense Delete

Date	Expense Type	Amount	Requested
08/09/2018	Airfare	\$500.00	\$500.00
08/09/2018	Car Rental	\$50.00	\$50.00
08/09/2018	Hotel	\$500.00	\$500.00
08/09/2018	Train	\$15.00	\$15.00

Expense Type: Dinner Transaction Date:

Description: Transaction Amount: 0.00 USD

Comment:

TOTAL AMOUNT	TOTAL REQUESTED
\$1,065.00	\$1,065.00

Save Allocate Cancel

- Your screen will look like below. Enter any additional expenses your trip requires and then click **Submit Request**.

Concur Travel & Conference Manual

Request 3349

Request/Trip Name: Test Request
Status: Not Submitted
Amount: \$1,101.00

Date	Expense Type	Amount	Requested	
<input type="checkbox"/>	08/09/2018	Airfare	\$500.00	\$500.00
<input type="checkbox"/>	08/09/2018	Car Rental	\$50.00	\$50.00
<input type="checkbox"/>	08/09/2018	Hotel	\$500.00	\$500.00
<input type="checkbox"/>	08/09/2018	Train	\$15.00	\$15.00
<input type="checkbox"/>	08/09/2018	Dinner	\$36.00	\$36.00

TOTAL AMOUNT: \$1,101.00 | TOTAL REQUESTED: \$1,101.00

SECTION 4: ALLOCATING BUDGET EXPENSES

4.1 Allocating Between Different Funds, Orgs, Programs, and/or Activities.

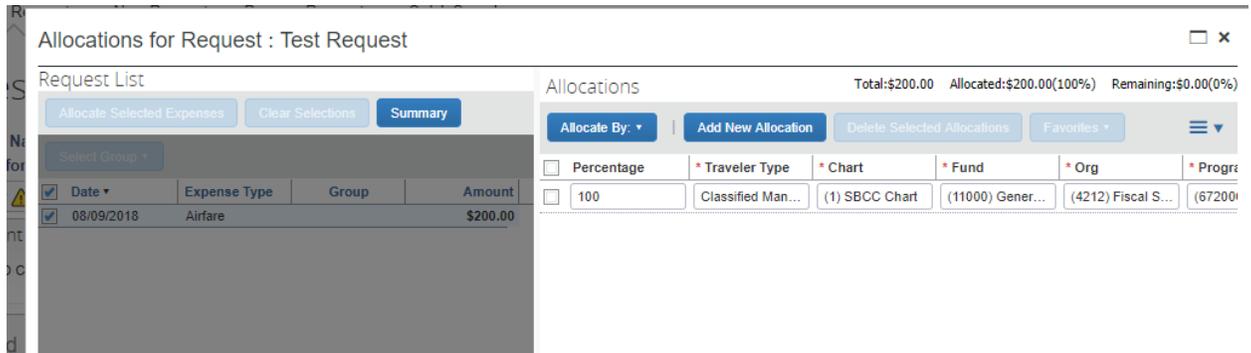
1. After clicking on the **Allocate** button, you will see the following screen. Click on the appropriate checkbox(es) and then click on **Allocate Selected Expenses**.

Allocations for Request : Test Request

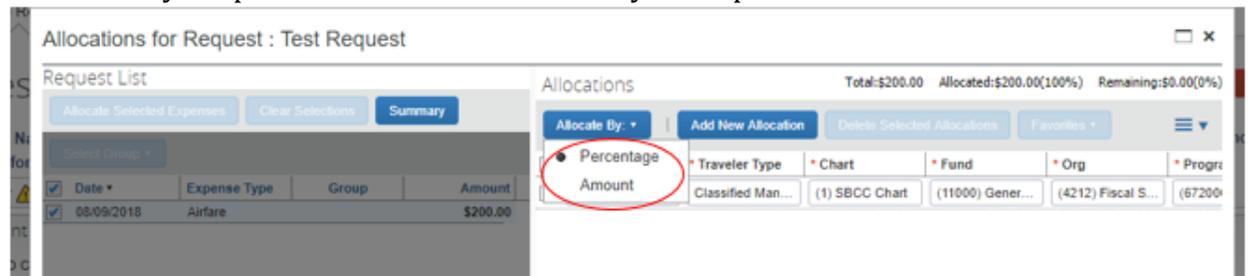
Date	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	08/09/2018	Airfare	\$200.00

2. The Allocation screen will open up.

Concur Travel & Conference Manual

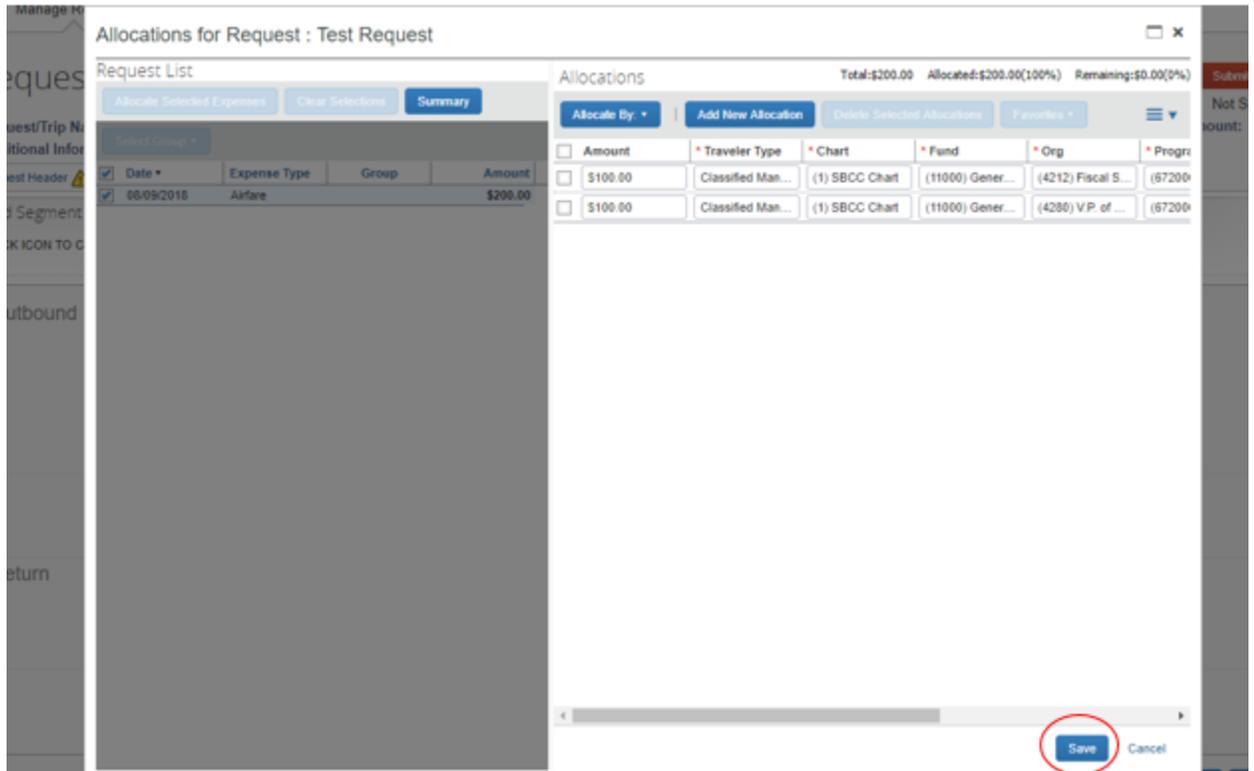


3. Click on the **Allocate By** button to get a dropdown list. Pick either **Percentage** or **Amount** as your preferred method to allocate your expenses.



4. Complete each separate line for each Fund/Org/Program combination where your expense needs to be charged (new lines will be created accordingly as you allocate the amounts). Click on **Save** when you are done allocating.

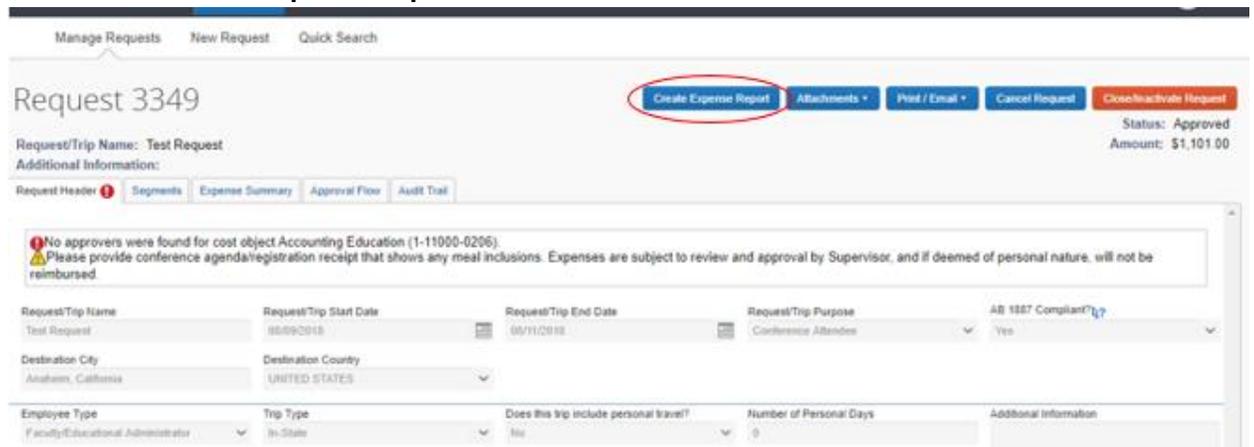
Concur Travel & Conference Manual



SECTION 5: CREATING AN EXPENSE REPORT FROM YOUR TRAVEL REQUEST

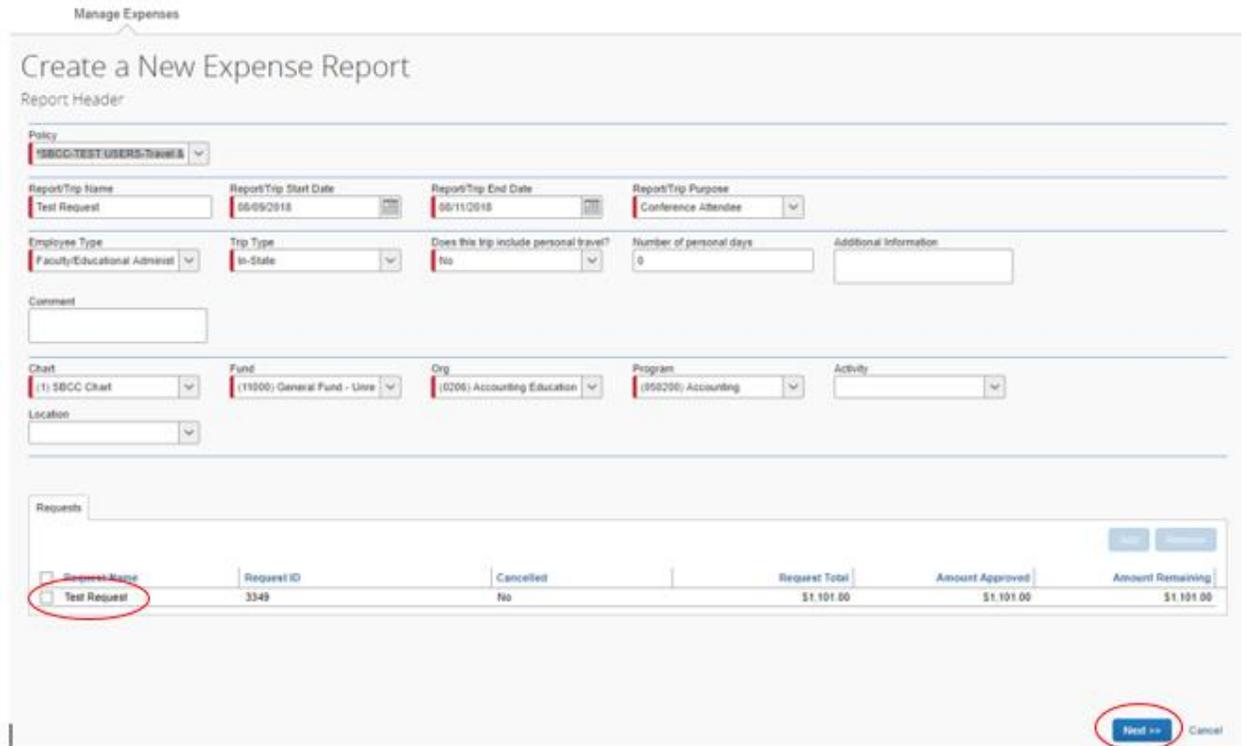
5.1 Creating an Expense Report.

1. Click on the **Create Expense Report** button.



Concur Travel & Conference Manual

2. Mark the **checkbox** of the appropriate **Request**. Then click on **Next**.



Manage Expenses

Create a New Expense Report

Report Header

Policy: SBCC-TEST USERS-Travel &

Report/Trip Name: Test Request | Report/Trip Start Date: 05-09-2018 | Report/Trip End Date: 05-11-2018 | Report/Trip Purpose: Conference Attendee

Employee Type: Faculty/Educational Admstr | Trip Type: In-State | Does this trip include personal travel?: No | Number of personal days: 0

Comment:

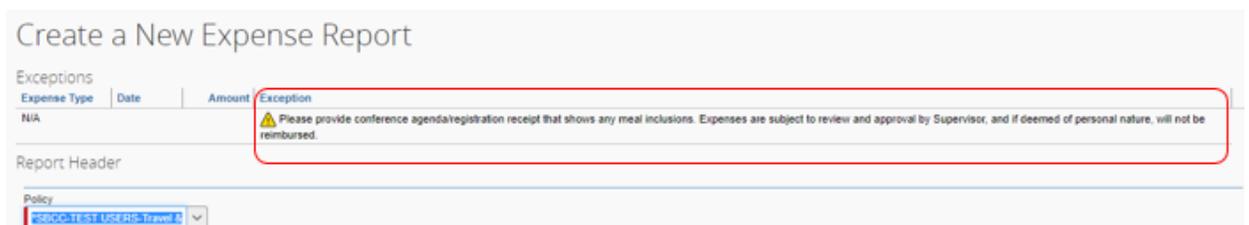
Chart: (1) SBCC Chart | Fund: (1100) General Fund - Unre | Org: (0205) Accounting Education | Program: (950200) Accounting | Activity:

Location:

Request	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input checked="" type="checkbox"/>	Test Request	3349	No	\$1,101.00	\$1,101.00	\$1,101.00

Next >> Cancel

3. If the following **Exception** comes up, just click **Next** again.



Create a New Expense Report

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Report Header

Policy: SBCC-TEST USERS-Travel &

4. This will now generate a Report in the **Expense Module** of Concur. From here, please follow the Concur Expense directions, which are listed in the [Concur Expense Manual](#).

5.2 Important Note re: Timely Reimbursement and Expense Reporting

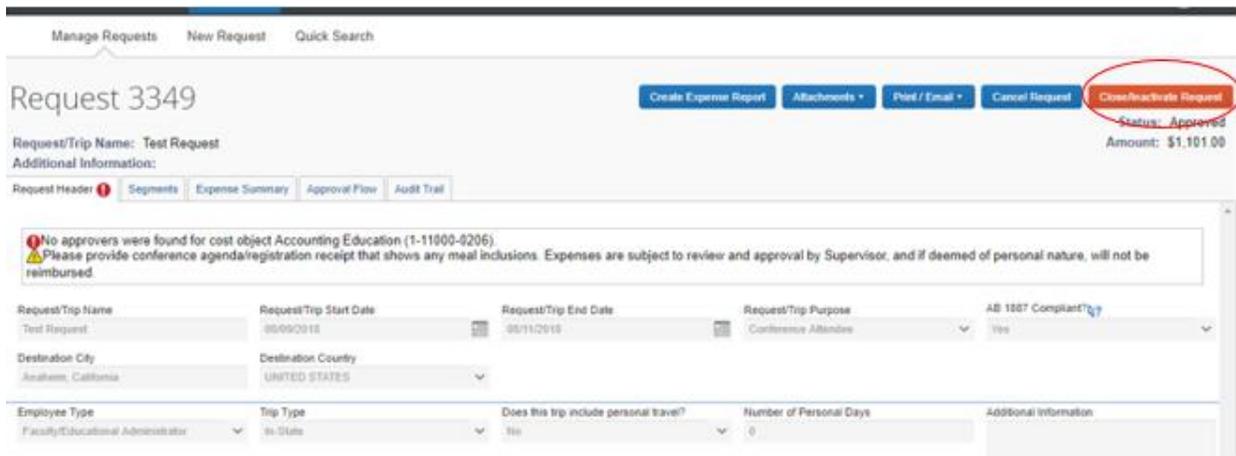
Please Note: You can continue creating Expense Reports from this Travel Request as long as the Request remains open. This is a common practice when flights or lodging is paid for in advance or in time periods that are outside of the conference dates. This also allows out-of-pocket

Concur Travel & Conference Manual

expenses to be reimbursed prior to the Conference taking place. Please process Expense Reports as needed for compliance or hardship purposes.

5.3 Closing/Inactivating Travel Requests

Once you have reported all your expenses from your Travel Request, please Close/Inactivate your Travel Request. This can be done by opening your Travel Request in the **Requests** section of Concur, and clicking on the orange **Close/Inactivate Request** button.



SECTION 6: OTHER RESOURCES

6.1 SBCC Fiscal Services/Concur Page

The Fiscal Services Department has created a webpage with Concur Resources (<http://www.sbccc.edu/fiscalservices/concur.pcf.php>), which contains the following:

6.1A Schedule for Ongoing Live-Training & Support

Training Workshops will be conducted on a monthly basis. Office Hours for Concur Support will be held on a weekly basis through the end of 2019.

Please check this page for updated schedules, which will be updated on at least a monthly basis.

6.1B Concur Manuals

Fiscal Services has created customized manuals for the following Concur Modules:

1. District Credit Card Reporting/Personal Reimbursement Requests
2. Travel & Conference

Concur Travel & Conference Manual

6.1C Troubleshooting Guide

The troubleshooting guide serves as a quick-reference resource with solutions to the most common issues/error messages we have seen in SAP Concur. This guide will be updated on an ongoing basis.

6.1D Short Videos

As of April 2019, the Fiscal Services plans to add training videos as an additional resource. Videos are expected to be posted before the Fall 2019 terms begins.

6.1E Other Concur Resources

References and links to other general Concur resources.