

# Professional Development

I (can) Concur!

Basics for Travel and Funding Requests

1

March 17, 2023

# Agenda

1. Overview for **approval of funding** from Professional Development Committee
2. Submit **Request** in Concur
3. Submit **Expense Report** in Concur upon return from conference
4. Any Other **Employee Reimbursement** (Non-Conference related)
5. Assign someone as a **delegate**

# Approval of funding – Key Notes

- ❖ <https://www.evc.edu/support-resources/participatory-governance/professional-development>
- ❖ Committee accepts funding request for virtual or off-campus professional conferences, seminars, or workshops.
- ❖ Estimate the expected cost such as registration, lodging, airfare, mileage etc.
- ❖ Funding for full-time faculty is limited to a maximum of **\$1,200.00** per academic year.
- ❖ Adjunct faculty: **\$600.00** per academic year.
- ❖ Full-time classified staff: **\$1,200.00** per academic year.
- ❖ Part-time classified Staff: **\$600.00** per academic year.

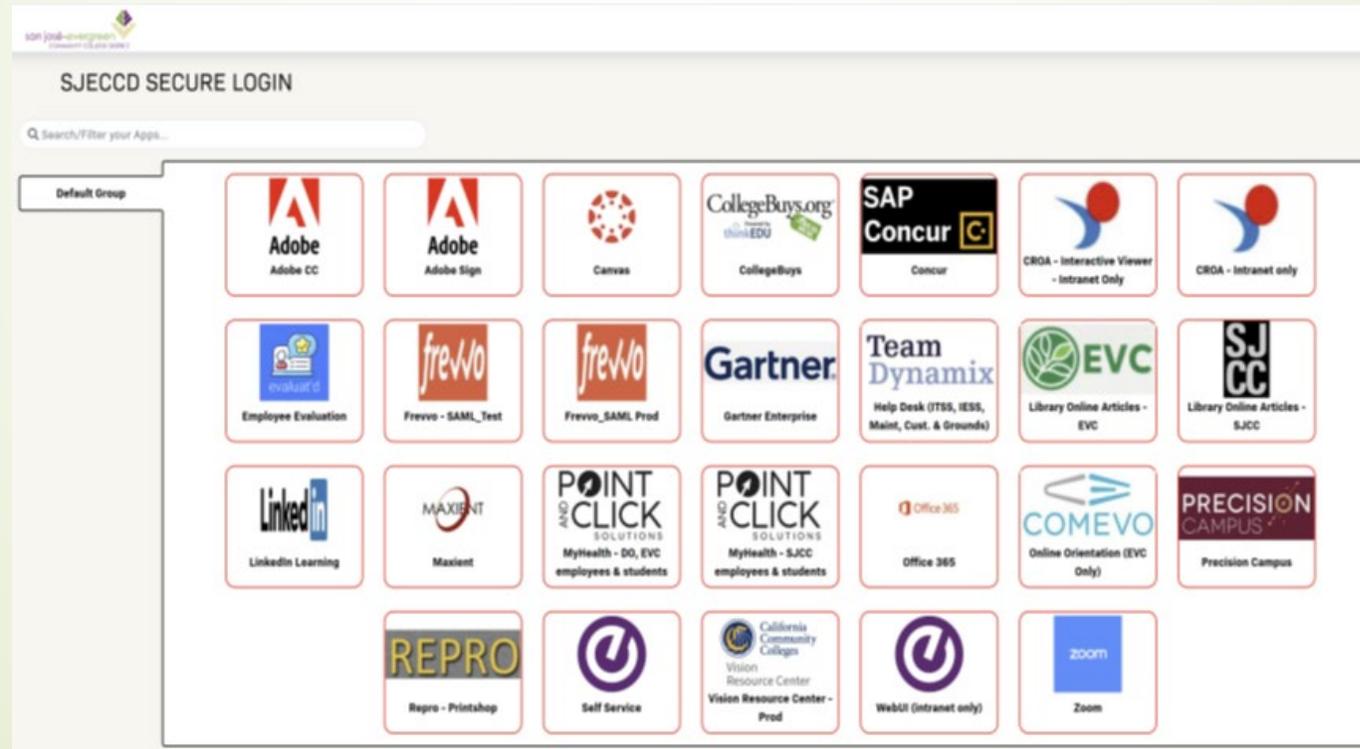
# My Conference Qualifies! What's Next?

- ❖ Submit Request through **Professional Development Funds** form
- ❖ Request is discussed at Professional Development Committee monthly Meeting
- ❖ **You got a letter!** Open it!
- ❖ Submit Request in Concur

# Submit Request in Concur

## (Step by Step Instructions)

1. Login through [sso.sjeccd.edu](https://sso.sjeccd.edu)



# Submit Request in Concur cont.

2. Click **“Requests”** on black menu
  - ❖ If you don't see **“Requests”** contact Business Services
3. Click **“Create New Request”**

The screenshot shows the 'Create New Request' form in SAP Concur. The form includes the following fields:

- Conference/Request Name \*
- Justification of Travel \*
- Trip Type \*
- Start Travel Date \*
- End Travel Date \*
- Main Destination City \*
- Main Destination Country \*
- How will you book your travel? \*
- Will you have Personal Travel? \*
- Personal Dates of Travel \*
- Professional Development Request \*
- Fund \*
- OL Location \*
- Cost Center \*
- Users \*
- Comments To/From Approver/Processors

At the bottom right, there are 'Cancel' and 'Create Request' buttons.

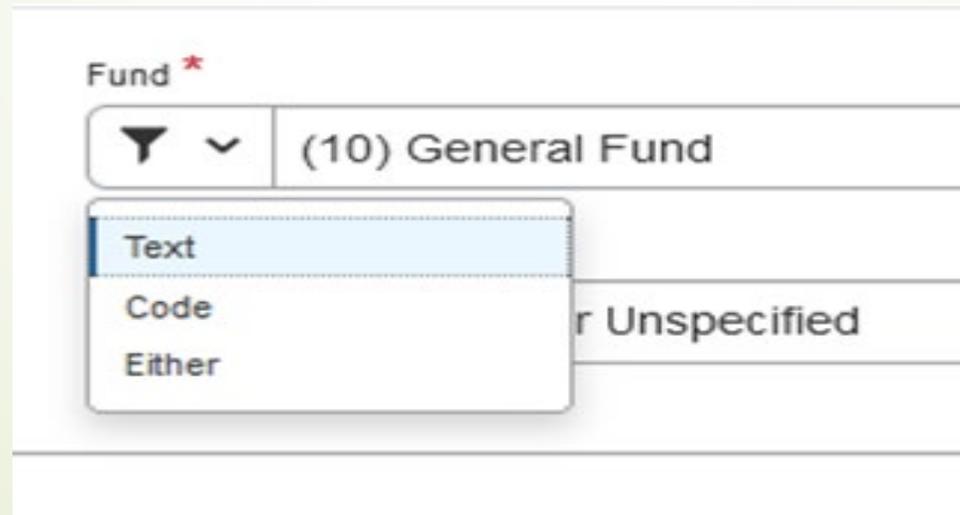
The screenshot shows the 'Manage Requests' page in SAP Concur. The page title is 'Manage Requests' and it includes a 'REQUEST LIBRARY' section with a 'View' dropdown set to 'Active Requests'. A large red box highlights a '+ Create New Request' button. To the right of the box, the text reads: 'THERE ARE NO ACTIVE REQUESTS Click Create New Request to create a new request'. A red arrow points from the 'Create New Request' button in the screenshot to the 'Create New Request' button in the form screenshot above.

# Submit Request in Concur cont.

4. Fill out all required fields in the Header screen
  - ❖ Give a meaningful **name**
  - ❖ **Justification** of Travel
  - ❖ **Trip Type** (In State, International, Non-Travel, Out of State)
  - ❖ Start Travel Date
  - ❖ End Travel Date
    - Note: The date you start and end the travel, not the actual conference dates as per agenda
  - ❖ **Main Destination City and County**
  - ❖ Select the appropriate fields “**How you book your travel?**”
    - Agency-booked (**Do Not Use**)
    - Self-Booked outside of Concur Travel (You can book with or without Concur Travel)
    - No Travel (Online conference)

# Submit Request in Concur cont.

- ❖ Select if you have Personal Travel (Yes/No). If yes, state the dates
- ❖ Check mark “**Professional Development Request**”
  - **Text**: means you have to know the fund name (E.g. General Funds)
  - **Code**: means you need to know the 2 digits of the fund (E.g. 10)
  - **Either**: **Most preferred**



The screenshot shows a form field labeled "Fund" with a red asterisk indicating it is required. The dropdown menu is open, showing three options: "Text", "Code", and "Either". The "Text" option is currently selected and highlighted in blue. The text "(10) General Fund" is visible in the input field, and the text "r Unspecified" is partially visible to the right of the dropdown.

# Submit Request in Concur cont.

5. Your request header has been created, and now **add** all major estimated expense: e.g.
  - a) Registration cost
  - b) Lodging Cost
  - c) Air Fare
- ❖ Click **“Add”** and select **“Expected Expense type”** one at a time.

The screenshot shows the SAP Concur interface for managing a request. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main content area shows the request details for 'ACBO April 2023', which is 'Not Submitted' with a 'Request ID: 34KJ'. There are 'Copy Request' and 'Submit Request' buttons. Below this, there are links for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section has buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. At the bottom, it states 'No Expected Expenses' and 'Add expected expenses to this request to submit for approval.'

The 'Add Expected Expense' dialog box features a search bar labeled 'Search for an expense type'. Below the search bar, there is a list of expense categories with expandable sub-items:

- 01. Travel Expenses
  - Hotel Reservation
- 02. Transportation
  - Air Ticket
  - Car Rental
  - Ground/Public Transportation
  - Railway Ticket
- 03. Mileage
- 04. Meals
  - Breakfast-per diem
  - Dinner-per diem
  - Lunch-per diem
- 09. Other
  - Registration Fee

A red arrow points from the 'Add' button in the screenshot on the left to this dialog box.

# Submit Request in Concur cont.

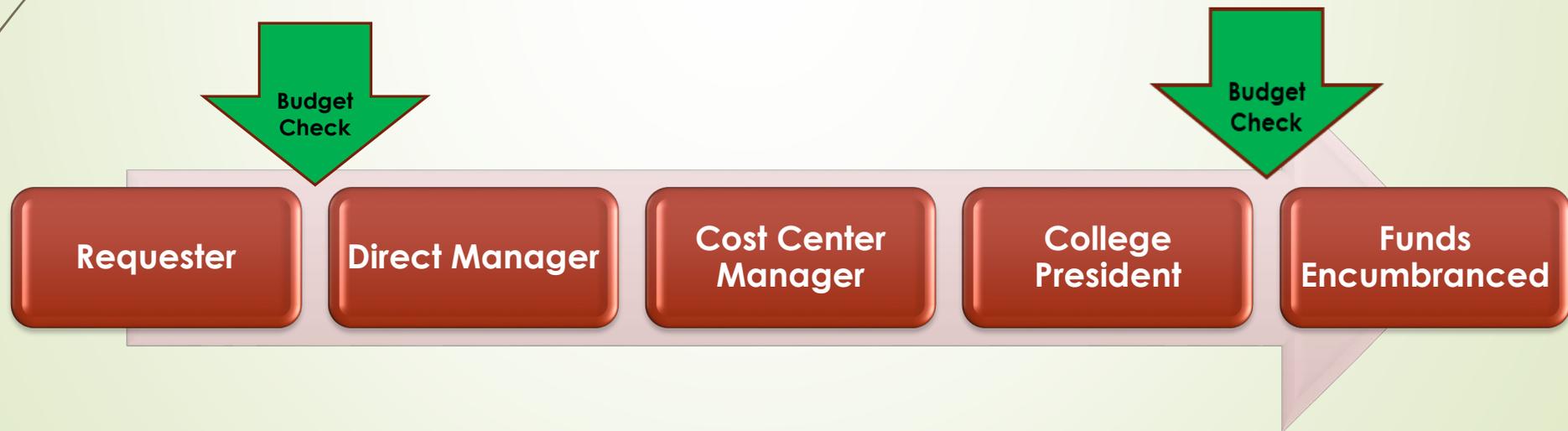
6. Click “**Attachment**” to attach needed documents:
  - a) Professional Development **Funding Approval Letter**
  - b) PDF of **Conference details** (flyer, conference agenda, etc.)
7. To **edit/delete/allocate**: check mark the line & complete as needed.

The screenshot displays the SAP Concur interface for a request. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main content area shows the request details for 'ACBO April 2023 \$1,200.00' with a status of 'Not Submitted' and 'Request ID: 34KJ'. Below this, there are buttons for 'Copy Request' and 'Submit Request'. The 'EXPECTED EXPENSES' section includes a table with columns for Alerts, Expense type, Details, Date, Amount, and Requested. The table lists three items: Registration Fee, Hotel Reservation, and Air Ticket, all with a date of 05/21/2023 and a total amount of \$1,200.00.

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Registration Fee		05/21/2023	\$300.00	\$300.00
<input type="checkbox"/>	Hotel Reservation	Reno, Nevada	05/21/2023	\$700.00	\$700.00
<input type="checkbox"/>	Air Ticket	San Jose (SJC) - Reno (RNO) : Round Trip	05/21/2023	\$200.00	\$200.00
				<b>\$1,200.00</b>	

# Submit Request in Concur cont.

8. Click "**Submit Request**" after validating.
  - ❖ The request goes to the next approver "**Direct Manager**" as per workflow.
9. Concur will notify you as soon as the request gets **approved**.
10. You are ready to **book your trip**.

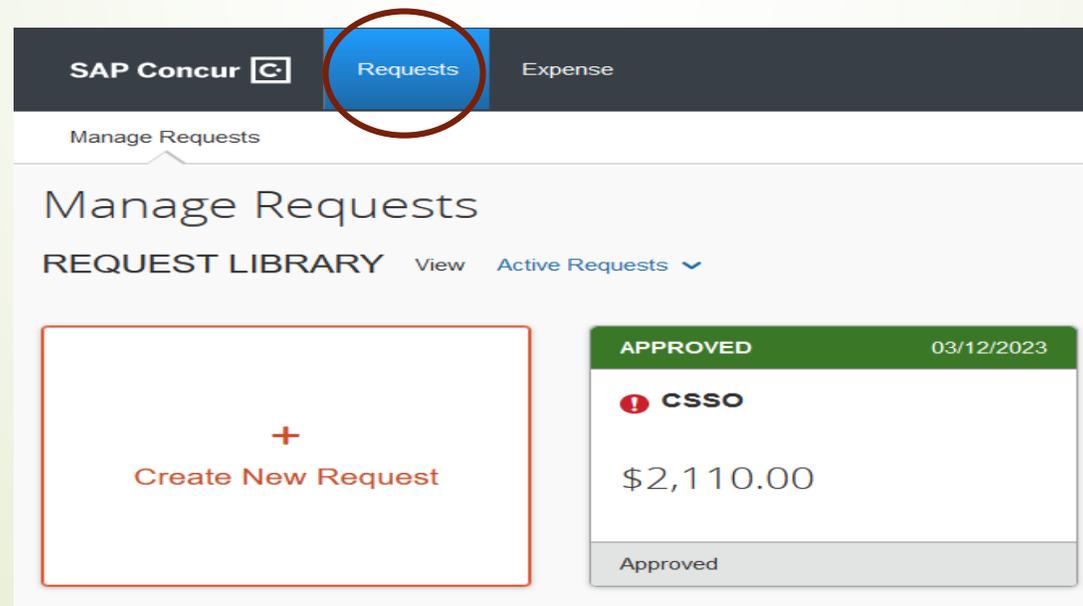


# Submit Expense Report in Concur

(After return from Conference)

Goal is to show the entire cost of that conference/trip, irrespective how it was paid.

1. On the black menu bar, click **“Requests”**
  - ❖ Double click your approved request



The screenshot shows the SAP Concur interface for managing requests. At the top, there is a dark blue navigation bar with the SAP Concur logo on the left, a blue button labeled "Requests" circled in red, and the word "Expense" on the right. Below the navigation bar, the page title "Manage Requests" is displayed. Underneath, there is a "REQUEST LIBRARY" section with a "View" button and a dropdown menu set to "Active Requests". The main content area features a large white box with a red border containing a red plus sign and the text "Create New Request". To the right of this box is a card for an approved request. The card has a green header with "APPROVED" and the date "03/12/2023". Below the header, there is a red exclamation mark icon followed by "CSSO" and the amount "\$2,110.00". At the bottom of the card, the word "Approved" is written in a grey bar.

# Submit Expense Report in Concur cont.

2. Click on "Create Expense Report"

Alerts: 1

**CSSO \$2,110.00** More Actions **Create Expense Report**

Approved | Request ID: 34GT

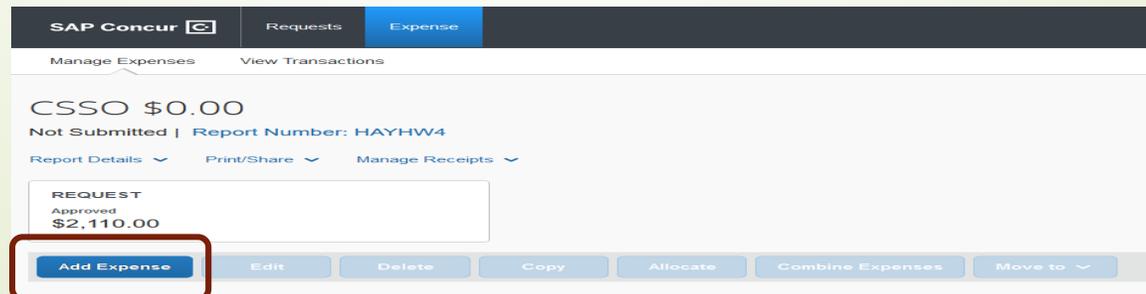
[Request Details](#) [Print/Share](#) [Attachments](#)

**EXPECTED EXPENSES**

Alerts	Expense type	Details	Date	Amount	Requested
	Hotel Reservation	Los Angeles, California	03/12/2023	\$900.00	\$900.00
	Air Ticket	Oakland (OAK) - Los Angeles (LAX) : Round Trip	03/12/2023	\$400.00	\$400.00
	Breakfast-per diem		03/12/2023	\$75.00	\$75.00
	Lunch-per diem		03/12/2023	\$80.00	\$80.00
	Dinner-per diem		03/12/2023	\$140.00	\$140.00
	Registration Fee		03/12/2023	\$515.00	\$515.00
					<b>\$2,110.00</b>

# Submit Expense Report in Concur cont.

3. Click “**Add Expense**”. Be sure not to exceed PD approved amount.
  - ❖ you going to add all **actual expenses** such as registration, air fare, lodging, mileage, per diems one at a time.
  - ❖ Ensure to attached itemized invoice/receipt with proof of payment (last 4 digit of credit card #)
  - ❖ Payment types are either:
    - Out of Pocket – (Reimbursed to Employee)
    - Prepaid by P-Card
    - Paid with District Check (RFC)
  - ❖ Upload receipt and save expense.



The screenshot shows the SAP Concur interface for managing expenses. The top navigation bar includes 'SAP Concur', 'Requests', and 'Expense'. Below the navigation, there are tabs for 'Manage Expenses' and 'View Transactions'. The main content area displays 'CSSO \$0.00' and 'Not Submitted | Report Number: HAYHW4'. There are three dropdown menus: 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'REQUEST' box shows 'Approved \$2,110.00'. At the bottom, there is a row of buttons: 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. A red arrow points to the 'Add Expense' button.

# Submit Expense Report in Concur cont.

## Key Notes for all reimbursement:

- ❖ Total mileage can be claimed 300 miles one way, and 600 miles round trip. No receipt is required.
  - If the travel is completed between Monday to Friday, round trip mileage can be calculated from EVC to the designated destination.
  - If the travel is done on weekend, round trip mileage can be calculated from your home to the designated destination.
- ❖ Keep gratuity 20% maximum of the service.
- ❖ To claim Per diem, provide agenda only, no receipt is required



# Other Employee Reimbursement

Any college related expenses that is paid by an employee such as:

- ❖ Purchase of minor office supplies (54300)
- ❖ Ground/Public Transportation “Parking” (55200)
- ❖ Mileage (55230)
- ❖ Postage (55810)
- ❖ Memberships (55220)
- ❖ Food and Beverage (**Need approved Food Purchase Request form signed by President**) (54301)

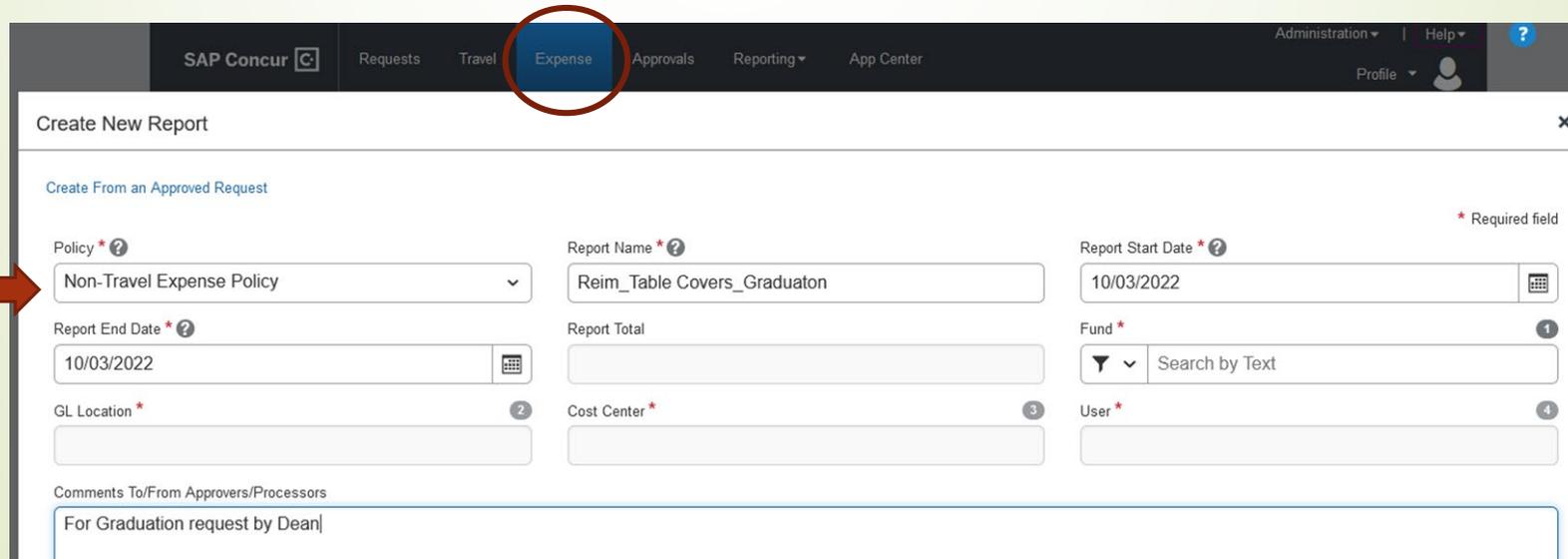
- Make sure the budgets are available on the account

# Other Employee Reimbursement cont.

## (Step by Step Instructions)

The steps are:

1. Go to “**Expense**” on the black menu bar
2. Click “**Create New Report**”
3. Select “**Non Travel Policy**”
4. Fill all the field and click “**Create Report**”



SAP Concur

Requests Travel **Expense** Approvals Reporting App Center Administration Help

Create New Report

Create From an Approved Request

\* Required field

Policy \* ? Non-Travel Expense Policy

Report Name \* ? Reim\_Table Covers\_Graduaton

Report Start Date \* ? 10/03/2022

Report End Date \* ? 10/03/2022

Report Total

Fund \* 1 Search by Text

GL Location \* 2

Cost Center \* 3

User \* 4

Comments To/From Approvers/Processors

For Graduation request by Dean

# Other Employee Reimbursement cont.

5. Click “**Add Expense**”
6. Select the appropriate expense type.
  - ❖ Note: Ensure to have a **itemized receipt**.
  - ❖ If you cannot provide receipt, provide signed “**Affidavit of Missing Receipt**” form is available at: <https://www.sjeccd.edu/district-services/fiscal-services/accounting-toolbox>

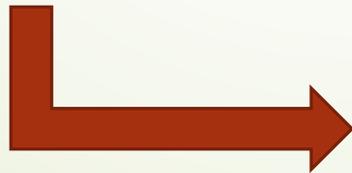
Reim Table Covers\_Graduation \$55.00 Copy Report Submit Report

Not Submitted

Report Details Print/Share Manage Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Alerts Comments Receipt Payment Type Expense Type Vendor Details Date Requested



Add Expense ×

0 Available Expenses + Create New Expense

Search for an expense type

- Food and Food Serv Non Instructional
- 06. Office Expenses
  - Office Supplies
  - Postage/Shipping
  - Printing/Photocopying/Stationery
  - Software - Instructional
  - Software - Non Instructional

# Other Employee Reimbursement cont.

7. Add Mileage expense line
  - ❖ Click “**Add**”
  - ❖ Select “**Local Car Mileage**”
8. Enter: Following
  - ❖ **Transaction date** (Date of travel)
  - ❖ Select Trip Type: **In state**
  - ❖ Click: **Mileage Calculator**

The screenshot shows the SAP Concur 'New Expense' form. The 'Expense Type' is set to 'Local Car Mileage'. The 'Transaction Date' is 10/03/2022, and the 'Trip Type' is 'In State'. The 'From Location' is '3095 Yerba Buena Road' and the 'To Location' is '3251 S White, san jose'. The 'Payment Type' is 'Out of Pocket'. The 'Comment' field contains 'To buy table covers for Graduation'. The 'Distance' is 0, the 'Amount' is 0.00, and the 'Currency' is 'US, Dollar'. The 'Reimbursement Rates' are 'USD 0.625 per mile'. The form includes buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'.

SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Expenses | View Transactions | Process Reports

### New Expense

Cancel | Save Expense | Show Receipt

Details | Itemizations

Mileage Calculator | Allocate

Expense Type\* | Transaction Date\* | Trip Type\*  
Local Car Mileage | 10/03/2022 | In State

From Location\* | To Location\* | Payment Type  
3095 Yerba Buena Road | 3251 S White, san jose | Out of Pocket

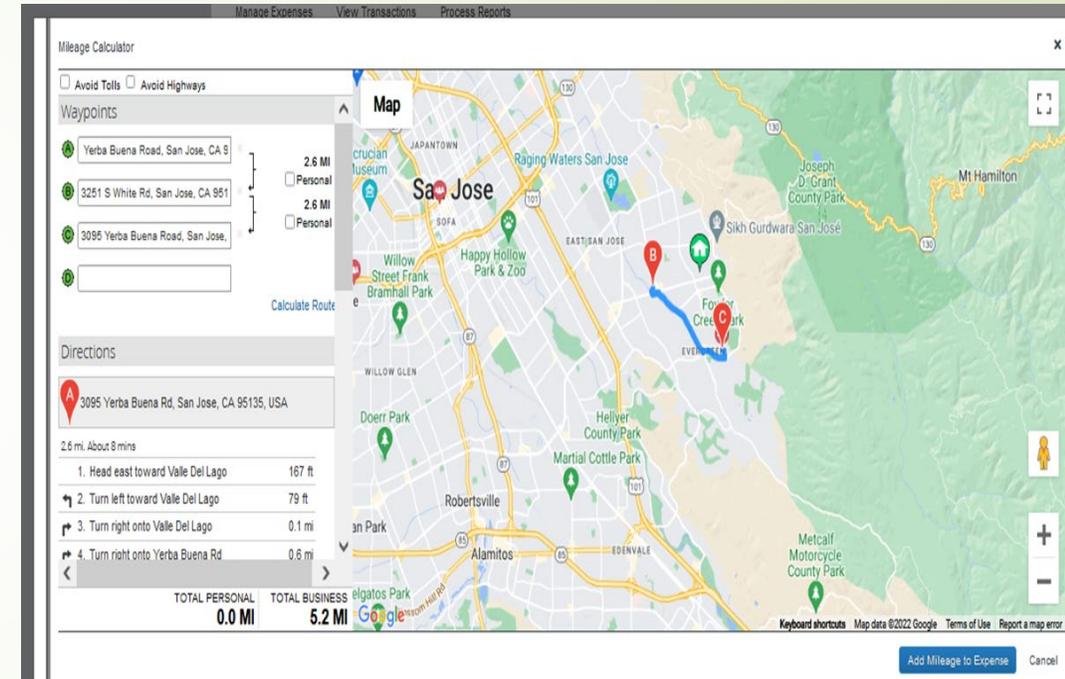
Comment  
To buy table covers for Graduation

Distance\* | Amount | Currency | Reimbursement Rates  
0 | 0.00 | US, Dollar | USD 0.625 per mile

Save Expense | Save and Add Another | Cancel

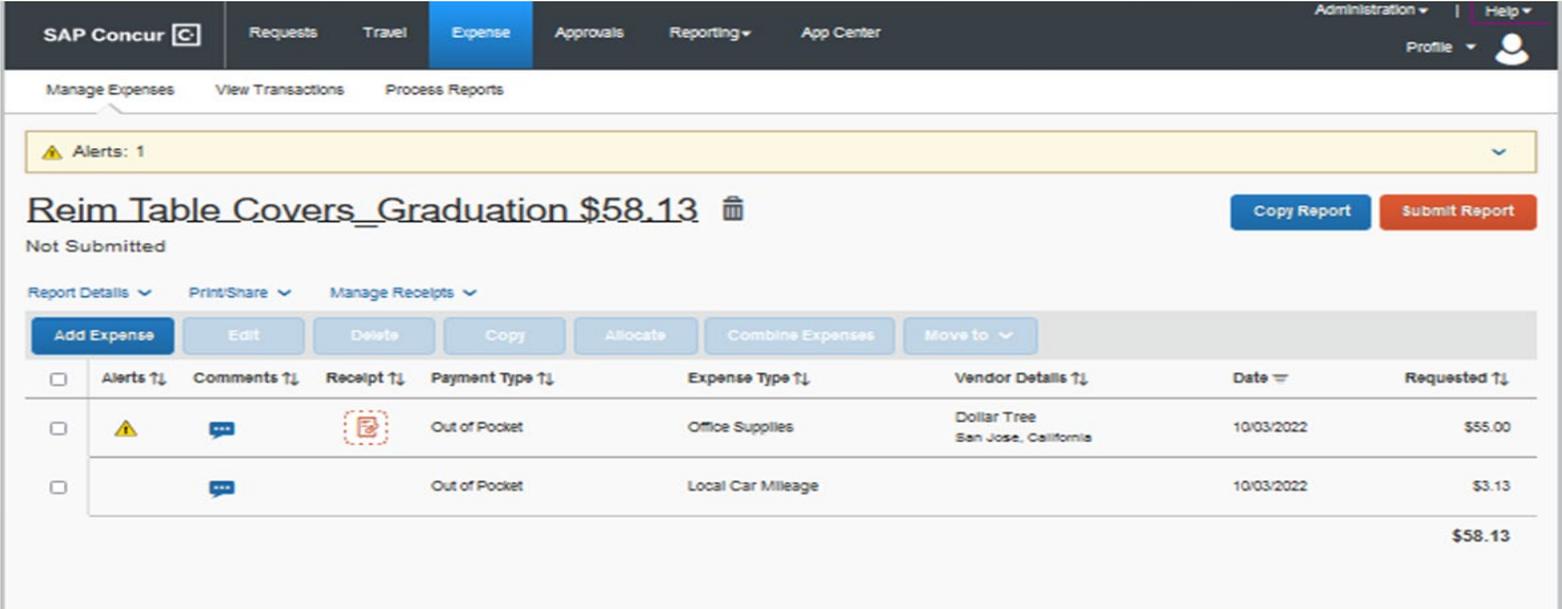
# Other Employee Reimbursement cont.

- ❖ Enter: **“To”** and **“From”** address
- ❖ Select **“Round trip”**
- ❖ Click **“Add Mileage to Expense”**
- ❖ Add **“comments”** (Purpose of the trip)
- ❖ Click **“Save Expense”**
- ❖ *Note: a map will be automatically saved to your request.*



# Other Employee Reimbursement cont.

9. Review and Click **“Submit Report”**
10. An email will be send to the next approver



The screenshot displays the SAP Concur Expense report interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (active), 'Approvals', 'Reporting', and 'App Center'. The user's profile and help options are visible in the top right. Below the navigation, there are tabs for 'Manage Expenses', 'View Transactions', and 'Process Reports'. An alert banner indicates 'Alerts: 1'. The main report title is 'Reim Table Covers\_Graduation \$58.13', with a 'Copy Report' button and a red 'Submit Report' button. The status is 'Not Submitted'. Below the title, there are options for 'Report Details', 'Print/Share', and 'Manage Receipts'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main table lists expenses with columns for Alerts, Comments, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested amount.

<input type="checkbox"/>	Alerts ↑↓	Comments ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>	⚠	💬	📄	Out of Pocket	Office Supplies	Dollar Tree San Jose, California	10/03/2022	\$55.00
<input type="checkbox"/>		💬		Out of Pocket	Local Car Mileage		10/03/2022	\$3.13
								<b>\$58.13</b>

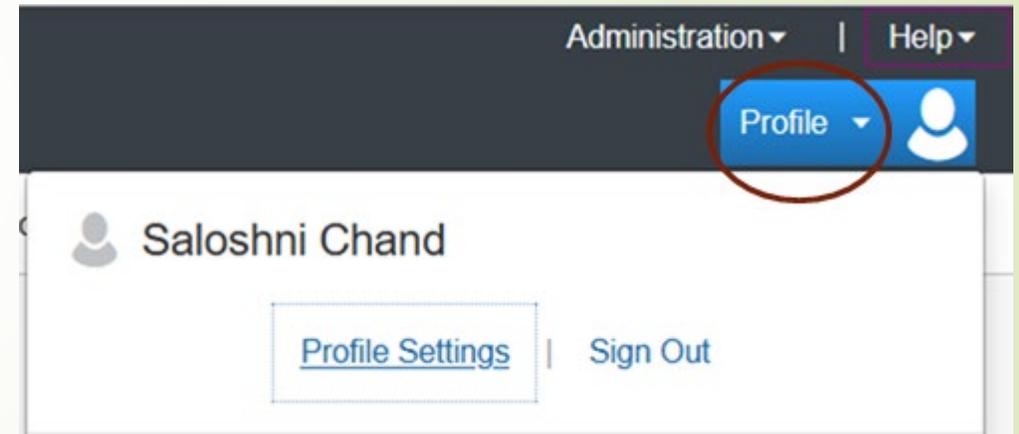
# Assign Someone as a Delegate

(Step by Step Instructions)

A **delegate** is a user who has been granted permission to act on behalf of another user to perform tasks such as preparing and reviewing the expense reports.

## Steps:

1. Click "**Profile**" on Concur homepage
2. Click "**Profile Settings**"



# Assign Someone as a Delegate cont.

## 3. Click “Expense Delegates”

### Profile Options

Select one of the following to customize your user profile.

#### Personal Information

Your home address and emergency contact information.

#### Company Information

Your company name and business address or your remote location address.

#### Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

#### E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

#### Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

#### Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

#### Change Password

Change your password.

#### System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

#### Contact Information

How can we contact you about your travel arrangements?

#### Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

#### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

#### Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

#### Expense Preferences

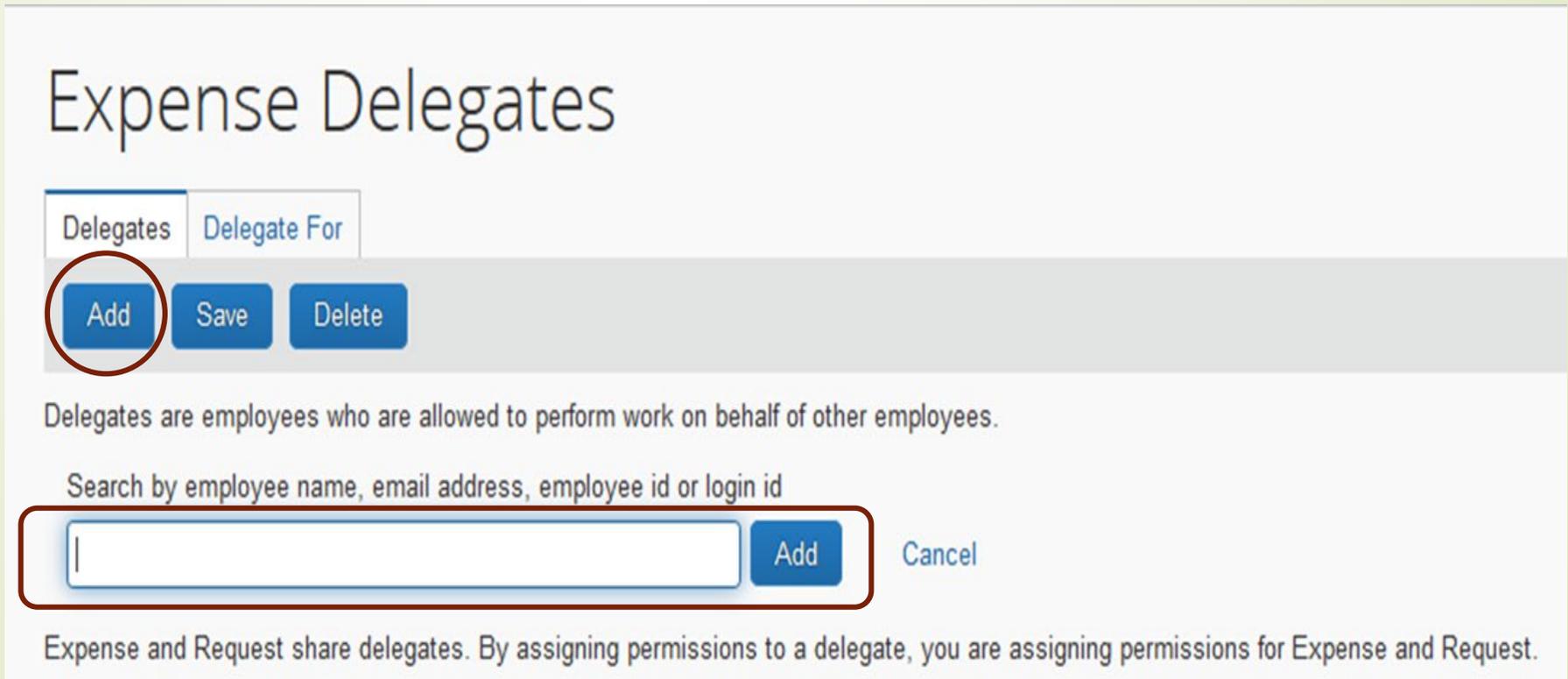
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

#### Concur Mobile Registration

Set up access to Concur on your mobile device

# Assign Someone as a Delegate cont.

4. Click “**Add**” on the delegates tab
5. Search by name or email address



Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

# Assign Someone as a Delegate cont.

6. Check mark the appropriate boxes only
7. Click "**Save**"

## Expense Delegates

Delegates **Delegate For**

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Cuen, Colleen Colleen.Cuen@evc.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

