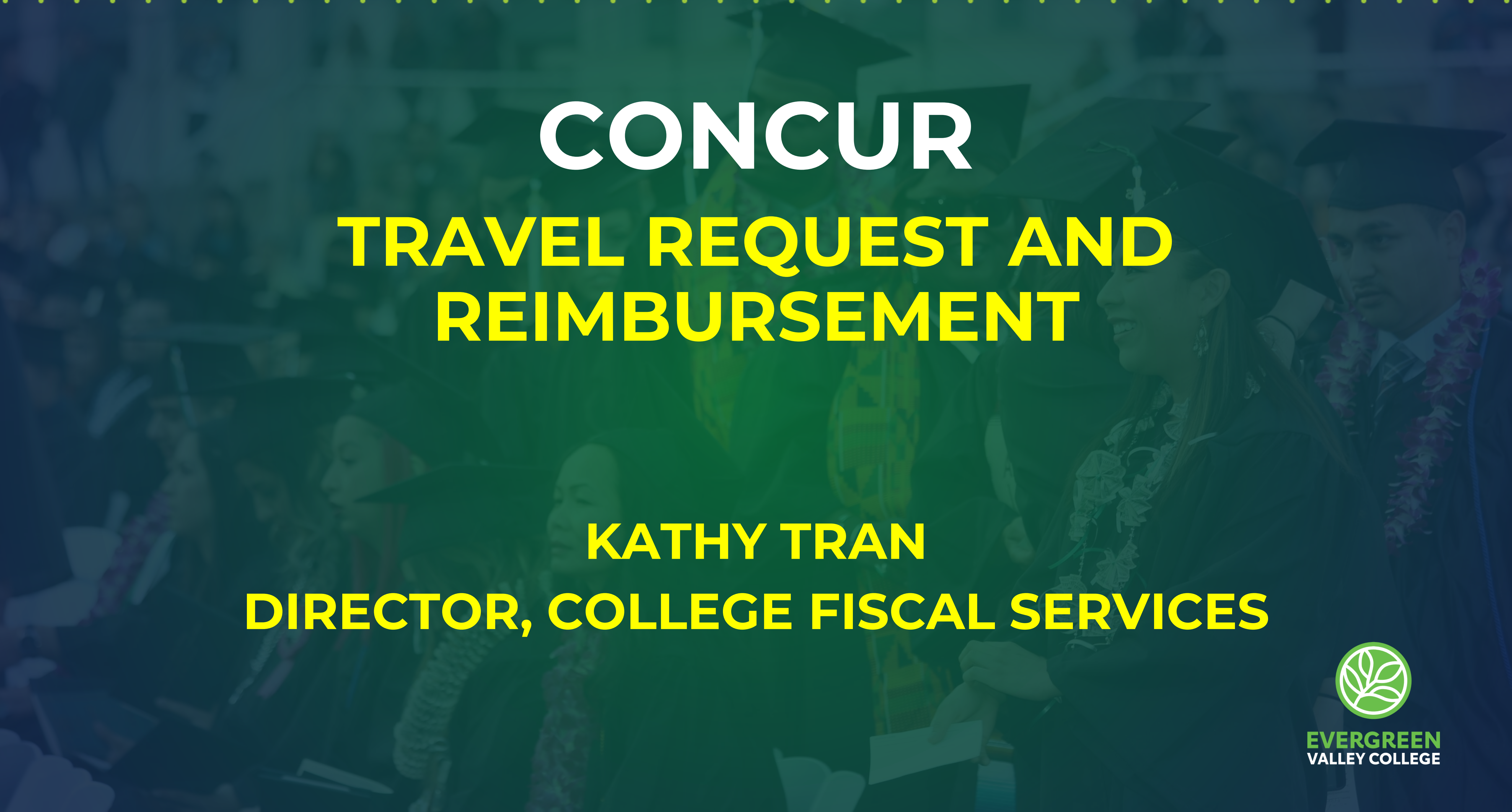

CONCUR

TRAVEL REQUEST AND REIMBURSEMENT

KATHY TRAN

DIRECTOR, COLLEGE FISCAL SERVICES

EVERGREEN
VALLEY COLLEGE

EVERGREEN VALLEY COLLEGE

AGENDA:

- ☑ Professional Development Funding Request
- ☑ How to Submit a Travel “Request” in Concur
- ☑ How to Submit an Travel “Expense” Reimbursement in Concur
- ☑ After Report Submittal
- ☑ Request for Check (RFC)

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PD FUNDING REQUEST

- ☑ Submit funding request through the Professional Development Committee – Link to form can be found on PD Website.
- ☑ Request will be review for approval at the Committee's monthly meeting
- ☑ Once approved, you'll get an email from the PD Chair with the approved letter and GL account

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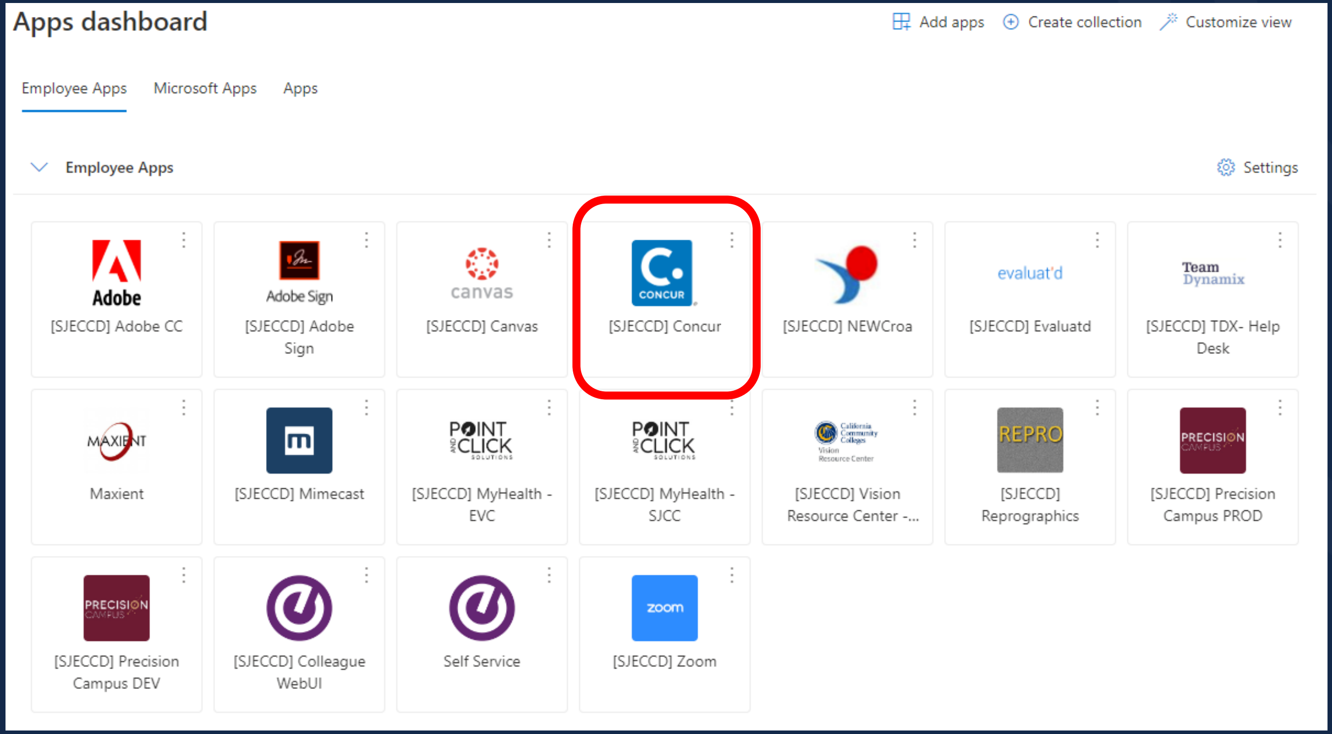
SUBMIT CONCUR: TRAVEL REQUEST

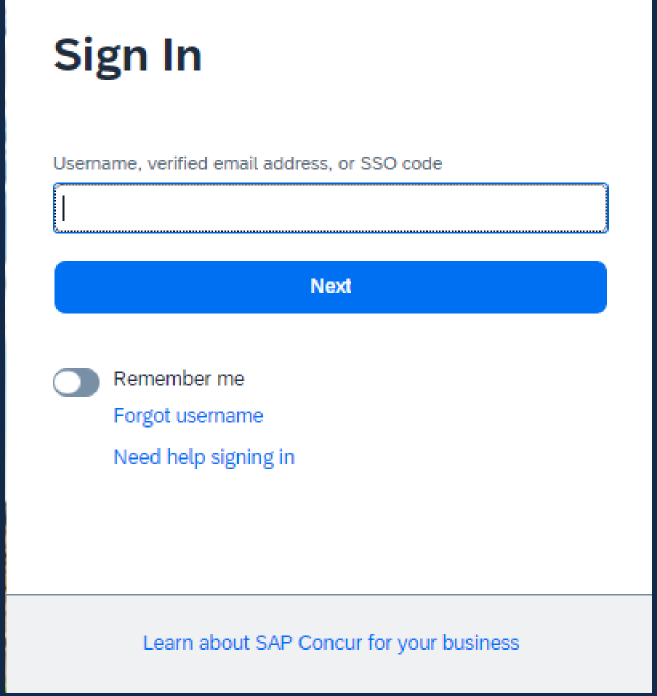
1) Login through https://myapps.microsoft.com/ and select “Concur”


Apps dashboard
Add apps
Create collection
Customize view
Employee Apps
Microsoft Apps
Apps
Employee Apps
Settings
Adobe
[SJECCD] Adobe CC
Adobe Sign
[SJECCD] Adobe Sign
canvas
[SJECCD] Canvas
CONCUR
[SJECCD] Concur
[SJECCD] NEWCroa
evaluat'd
[SJECCD] Evaluatd
Team Dynamix
[SJECCD] TDX- Help Desk
MAXIENT
Maxient
[SJECCD] Mimecast
POINT CLICK
[SJECCD] MyHealth - EVC
POINT CLICK
[SJECCD] MyHealth - SJCC
[SJECCD] Vision Resource Center -...
REPRO
[SJECCD] Reprographics
PRECISION CAMPUS
[SJECCD] Precision Campus PROD
PRECISION CAMPUS
[SJECCD] Precision Campus DEV
[SJECCD] Colleague WebUI
Self Service
zoom
[SJECCD] Zoom

EVERGREEN VALLEY COLLEGE

SUBMIT CONCUR: TRAVEL REQUEST

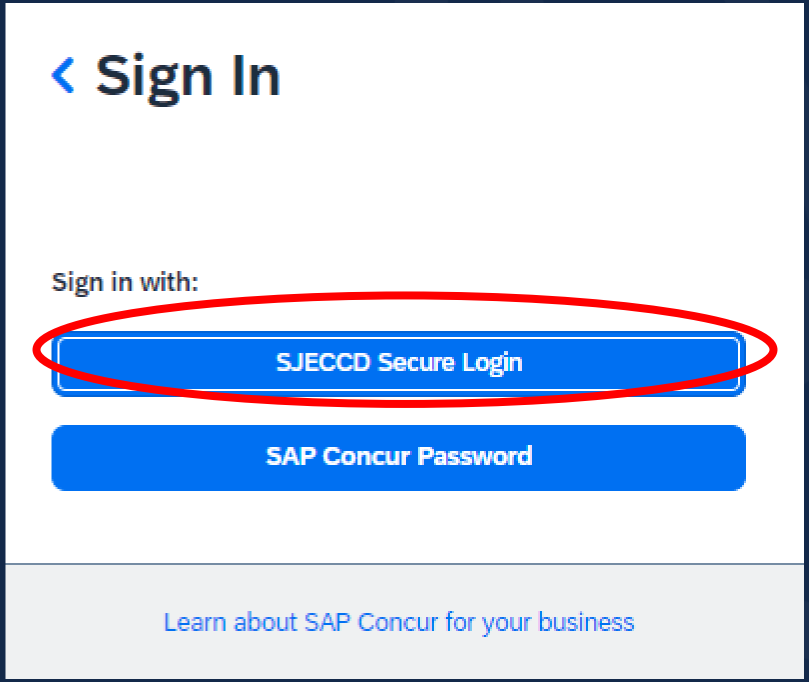
1) Login through https://myapps.microsoft.com/ and select "Concur"



Sign In

Username, verified email address, or SSO code

Next
Remember me
Forgot username
Need help signing in
Learn about SAP Concur for your business



Sign In

Sign in with:

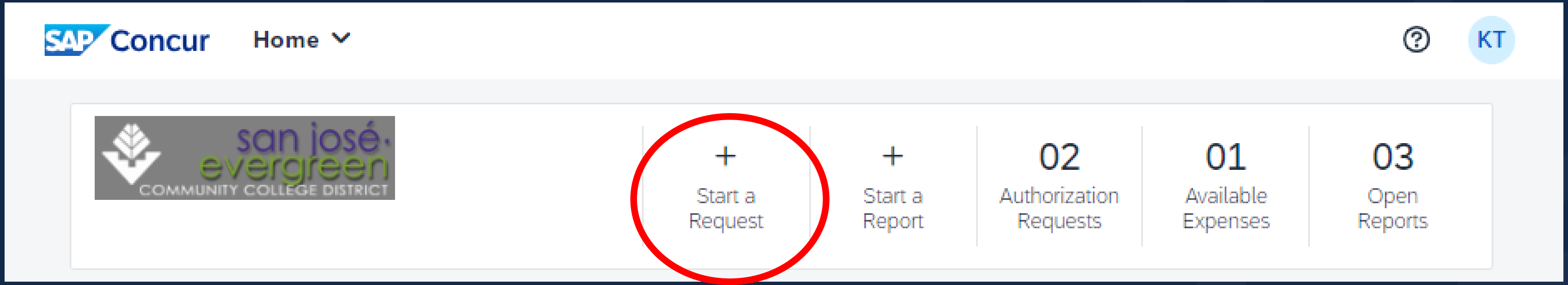
SJECCD Secure Login
SAP Concur Password
Learn about SAP Concur for your business

EVERGREEN VALLEY COLLEGE

SUBMIT CONCUR: TRAVEL REQUEST

2) Select “Start a Request” on the menu bar

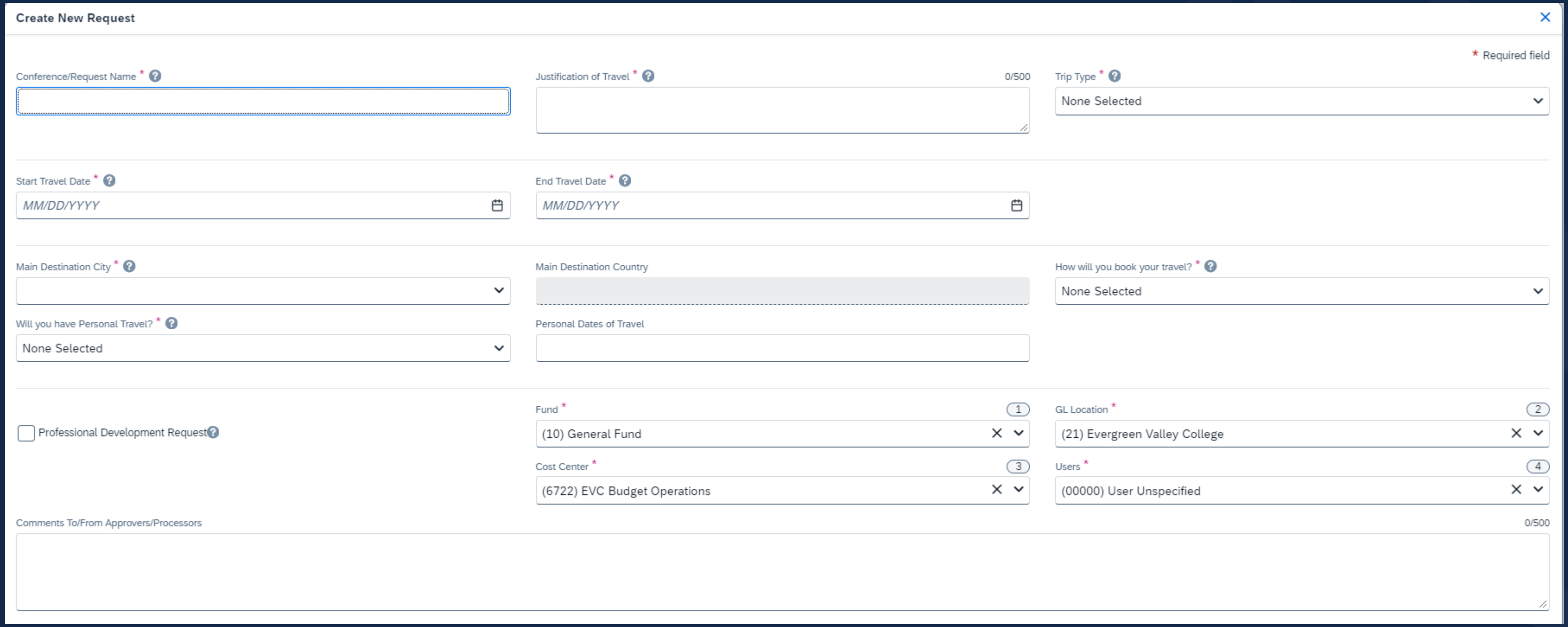
- *If you don’t see “Start a Request” contract Business Services*


SAP Concur
Home
KT
san josé·evergreen COMMUNITY COLLEGE DISTRICT
+ Start a Request
+ Start a Report
02 Authorization Requests
01 Available Expenses
03 Open Reports

EVERGREEN VALLEY COLLEGE

SUBMIT CONCUR: TRAVEL REQUEST

3) Complete the “Create New Request” header page



Create New Request

* Required field

Conference/Request Name *

Justification of Travel * 0/500

Trip Type * None Selected

Start Travel Date * MM/DD/YYYY

End Travel Date * MM/DD/YYYY

Main Destination City *

Main Destination Country

How will you book your travel? * None Selected

Will you have Personal Travel? * None Selected

Personal Dates of Travel

☐ Professional Development Request

Fund * (1) (10) General Fund

GL Location * (2) (21) Evergreen Valley College

Cost Center * (3) (6722) EVC Budget Operations

Users * (4) (00000) User Unspecified

Comments To/From Approvers/Processors 0/500

SUBMIT CONCUR: TRAVEL REQUEST

4) Header page

- *Conference/Request Name: Give it a meaningful name*
- *Justification of Travel:*
- *Tripe Type: (In State, International, Non-Travel, Out of State)*
- *Sate Travel Date:*
- *End Travel Date:*
- *Main Destination City:*
- *How will you book your travel?*
  - *Agency Booked -* ***(DO NOT USE)***
  - *Self-booked outside of Concur Travel - Will booked all travel by yourself or through Concur Travel*
  - *Non-Travel – Online Conference*

SUBMIT CONCUR: TRAVEL REQUEST

4) Header page - continue

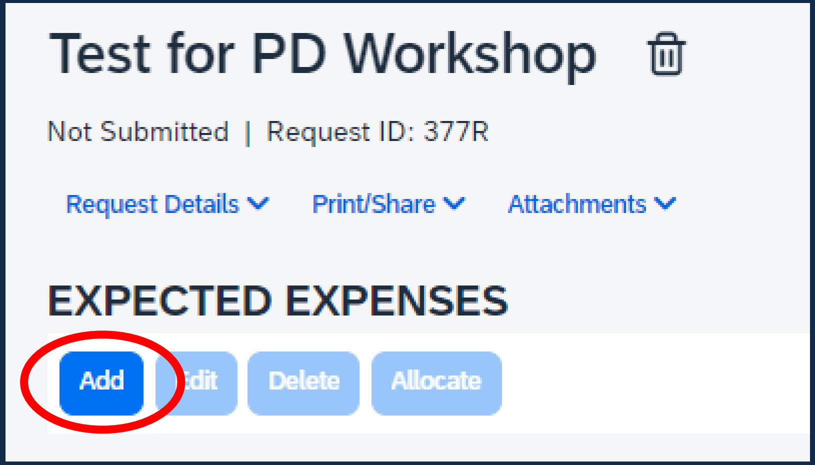
- *Will you have Personal Travel? If Yes, state the dates*
- *Remember to check "Professional Development Request"*
- *GL Account:*
  - *Fund:*
  - *GL Location:*
  - *Cost Center:*
  - *User:*
- *Click "Create Request"*

**Check the aware letter that was sent to you by the PD Chair to get the Account Number*

SUBMIT CONCUR: TRAVEL REQUEST

5) Your request header has been created, now add all major expense activities.

- *Registration*
- *Hotel*
- *Airfare*

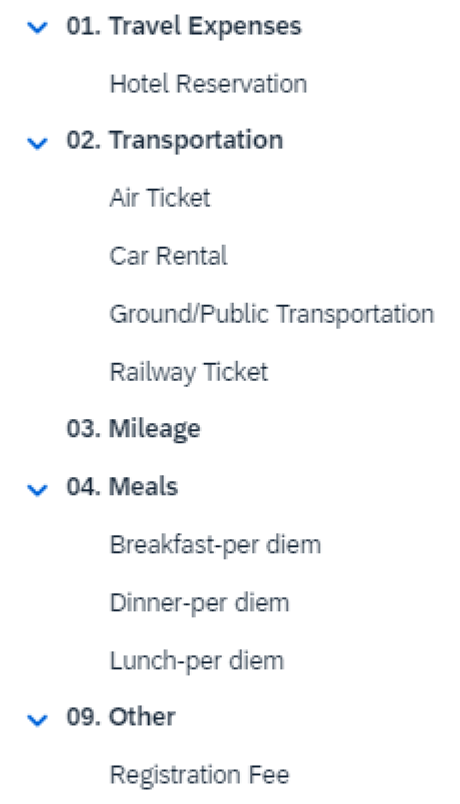


Test for PD Workshop

Not Submitted | Request ID: 377R

EXPECTED EXPENSES

Request Details
Print/Share
Attachments
Add
Edit
Delete
Allocate



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

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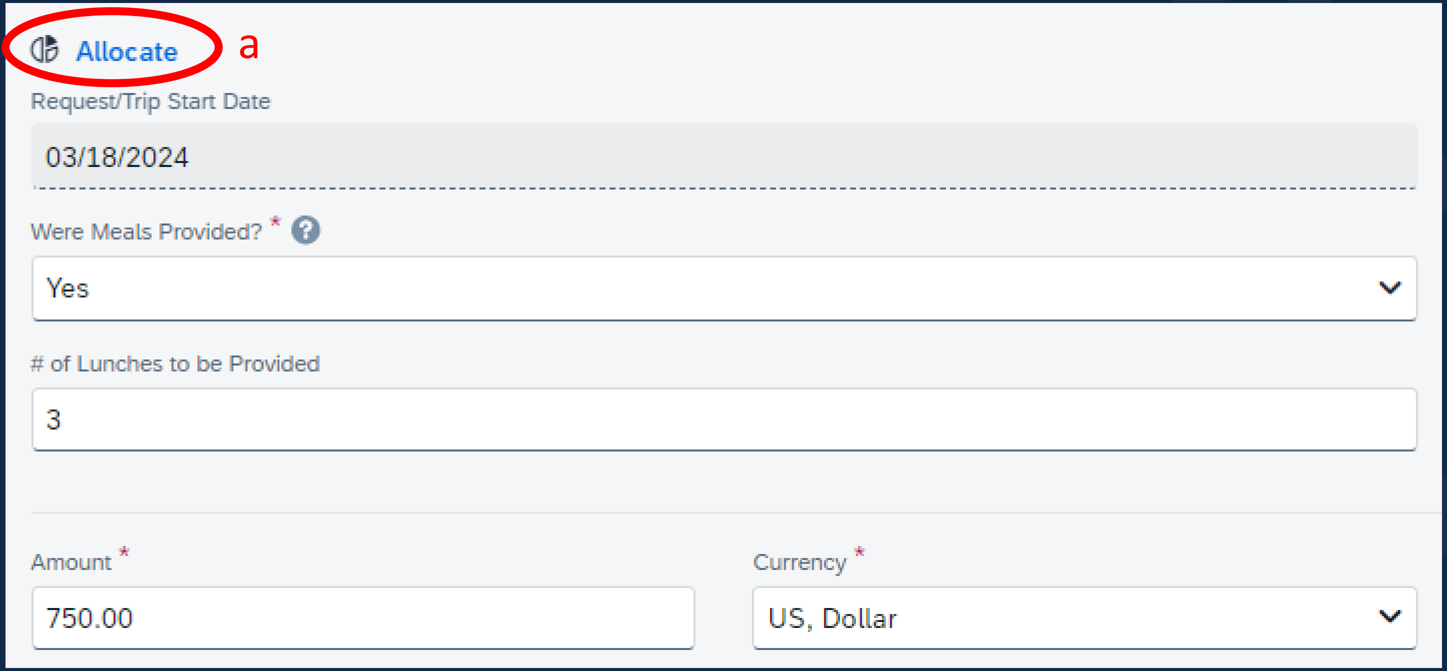
SUBMIT CONCUR: TRAVEL REQUEST

6) If you have supplemental funding, proceed as follows:

a) Click on the respective line and select "Allocate"



Request/Trip Start Date

03/18/2024

Were Meals Provided? *

Yes

# of Lunches to be Provided

3

Amount *

750.00

Currency *

US, Dollar

EVERGREEN VALLEY COLLEGE

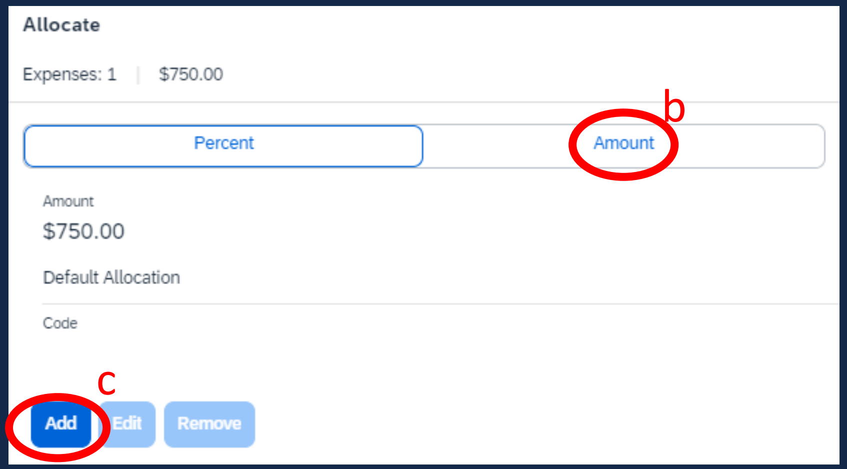
SUBMIT CONCUR: TRAVEL REQUEST

6) If you have supplemental funding, proceed as follows:

b) Select “Amount”

c) Click “Add”

d) Enter the 2nd Funding Account and “Save”



Allocate

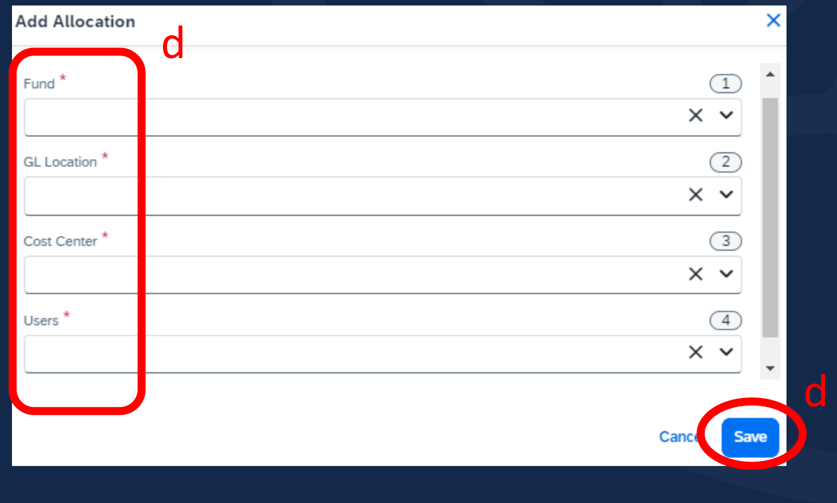
Expenses: 1 | $750.00

Amount
$750.00

Default Allocation

Code

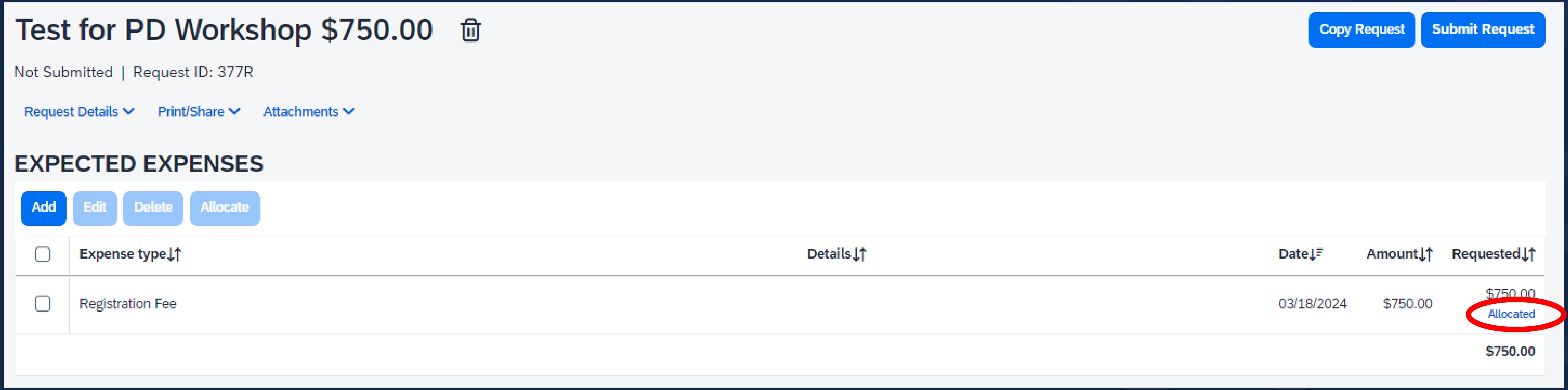
Percent
Amount
b
c
Add
Edit
Remove



Add Allocation

d
Fund *
1
GL Location *
2
Cost Center *
3
Users *
4
Canc
Save
d

SUBMIT CONCUR: TRAVEL REQUEST



Test for PD Workshop $750.00

Copy Request
Submit Request

Not Submitted | Request ID: 377R

Request Details
Print/Share
Attachments

EXPECTED EXPENSES

Add
Edit
Delete
Allocate

☐	Expense type	Details	Date	Amount	Requested
☐	Registration Fee		03/18/2024	$750.00	$750.00 Allocated
					$750.00

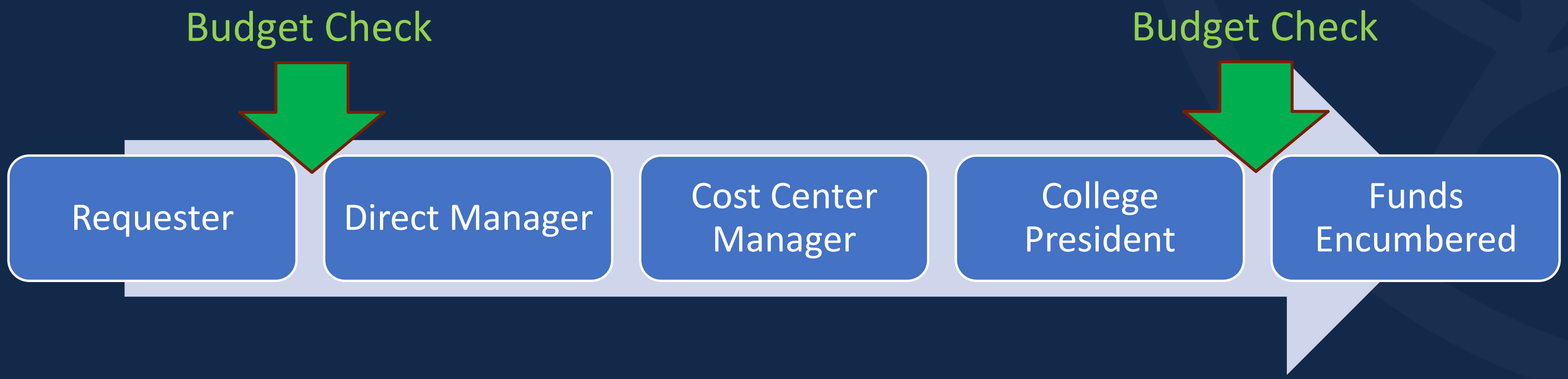
EVERGREEN VALLEY COLLEGE

SUBMIT CONCUR: TRAVEL REQUEST

7) Click “Attachment” to attached the needed documents: (PDF Only)

- *Professional Development Funding Approval Letter*
- *Conference Details (Agenda, Flyers, etc.)*

8) Click “Submit Request”

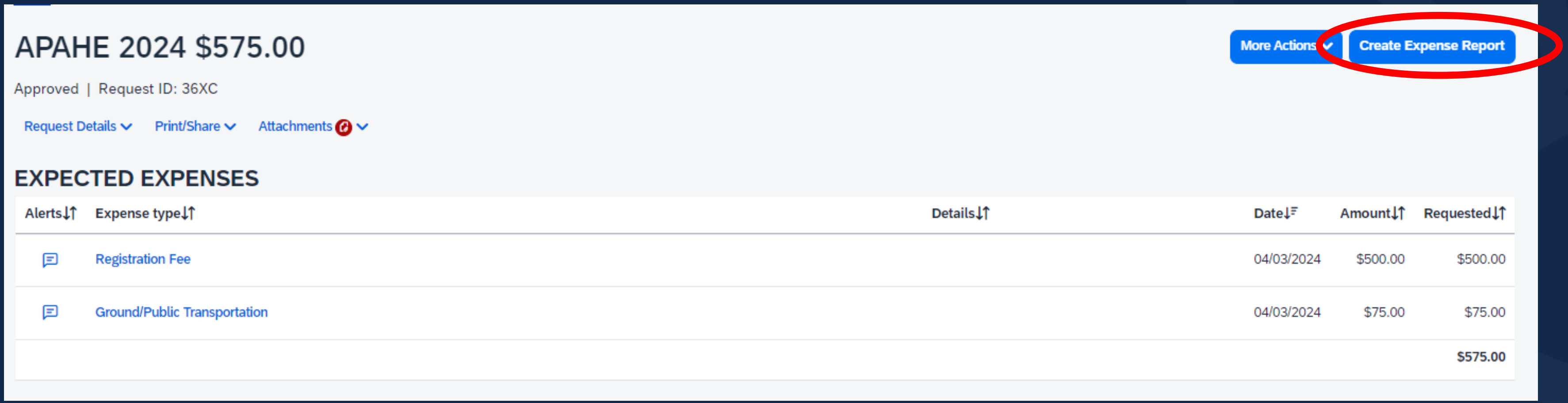


Budget Check
Budget Check
Requester
Direct Manager
Cost Center Manager
College President
Funds Encumbered

EVERGREEN VALLEY COLLEGE

SUBMIT EXPENSE REPORT: EMPLOYEE REIMBURSEMENT

1) Go back into Concur through SSO
2) On the menu bar, click “Request”
3) Open your approved Travel Request
4) Click “Create Expense Report”



More Actions
Create Expense Report
Request Details
Print/Share
Attachments

APAHE 2024 $575.00

Approved | Request ID: 36XC

EXPECTED EXPENSES

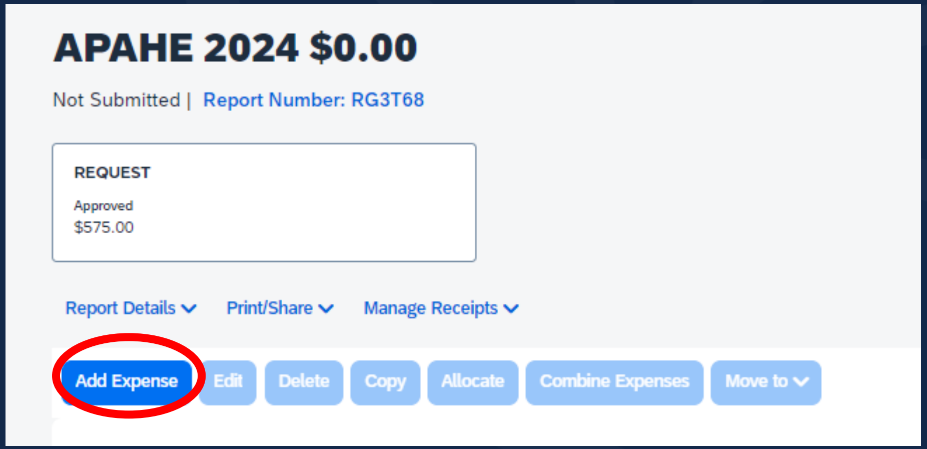
Alerts↓↑	Expense type↓↑	Details↓↑	Date↓	Amount↓↑	Requested↓↑
	Registration Fee		04/03/2024	$500.00	$500.00
	Ground/Public Transportation		04/03/2024	$75.00	$75.00
					$575.00

EVERGREEN VALLEY COLLEGE

SUBMIT EXPENSE REPORT: EMPLOYEE REIMBURSEMENT

5) Click “Add Expense”

- *Add all expensed that you incur during this trip such as: Registration, Airfare, Hotel, Mileage, Per-diem, etc.*
- *Attached itemized invoice/receipts with proof of payment (last 4 digits of credit card #)*
- *Payment types are:*
  - *Out of Pocket*
  - *Prepaid by P-card*
  - *Paid with District Check (RFC)*
- *Upload receipts and save expense*



APAHE 2024 $0.00

Not Submitted | Report Number: RG3T68

REQUEST
Approved
$575.00

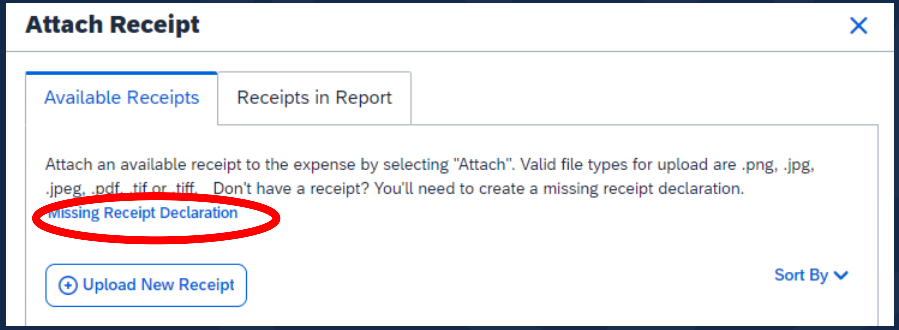
Report Details
Print/Share
Manage Receipts
Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move to

EVERGREEN VALLEY COLLEGE

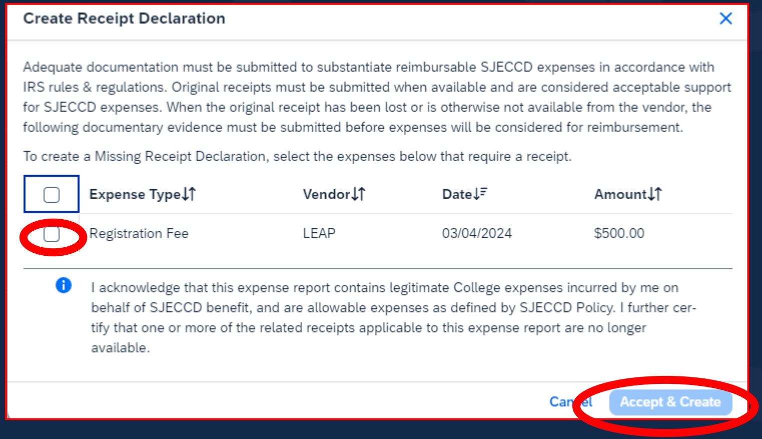
SUBMIT EXPENSE REPORT: EMPLOYEE REIMBURSEMENT

6) If you do not have a receipt for one of the items, complete the affidavit of missing receipt in Concur

- *Select the line with the missing receipt*
- *Click "Add Receipt"*
- *Click "Missing Receipt Declaration"*
- *Click "Save Expense"*


Attach Receipt
Available Receipts
Receipts in Report
Missing Receipt Declaration
Upload New Receipt
Sort By

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration.


Create Receipt Declaration
Cancel
Accept & Create

Adequate documentation must be submitted to substantiate reimbursable SJECCD expenses in accordance with IRS rules & regulations. Original receipts must be submitted when available and are considered acceptable support for SJECCD expenses. When the original receipt has been lost or is otherwise not available from the vendor, the following documentary evidence must be submitted before expenses will be considered for reimbursement.

To create a Missing Receipt Declaration, select the expenses below that require a receipt.

☐	Expense Type	Vendor	Date	Amount
☐	Registration Fee	LEAP	03/04/2024	$500.00

I acknowledge that this expense report contains legitimate College expenses incurred by me on behalf of SJECCD benefit, and are allowable expenses as defined by SJECCD Policy. I further certify that one or more of the related receipts applicable to this expense report are no longer available.

SUBMIT EXPENSE REPORT: EMPLOYEE REIMBURSEMENT

7) **Adding Mileage to your reimbursement**

- *Click "Add Expense"*
- *Select "Personal Car Mileage"*
- *Select "Mileage Calculator"*
- *Enter To and From address, then click "Add Mileage to Expense"*
    - *Remember to provide more details in the comment: IE – Work to Conference*

8) **After entering all expenses, submit the expense report**

For those claiming round-trip travel, it is mandatory to travel round-trip on the **same day.*
If your return date differs, you will need to create a separate line item in your expense report

EVERGREEN VALLEY COLLEGE

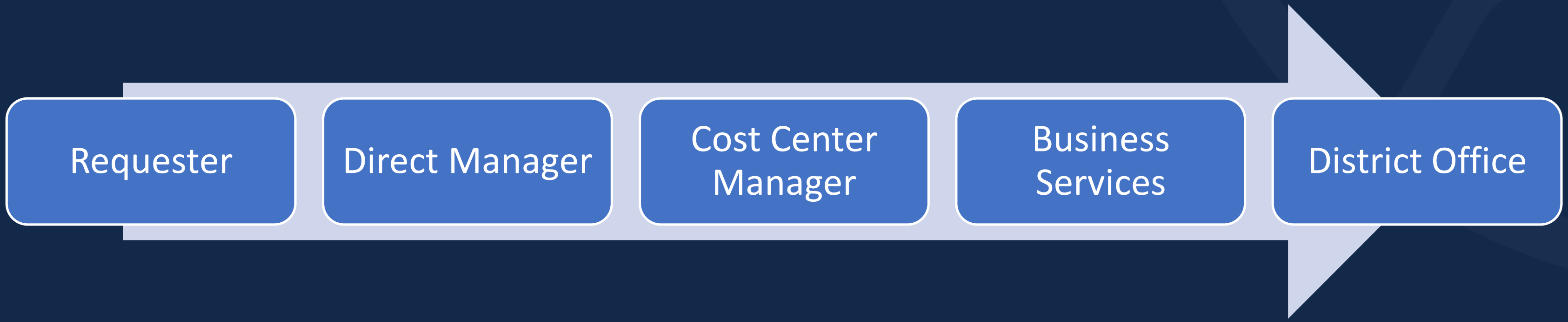
SUBMIT EXPENSE REPORT: EMPLOYEE REIMBURSEMENT

Key notes to take away:

☑ The total mileage that can be claimed is 300 miles one way or 600 miles round trip.

☑ Gratuity should be 20% max of the service.

☑ If you are claiming per-diem, you MUST provide an agenda, no receipt is required.

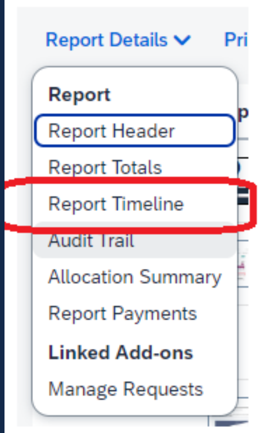


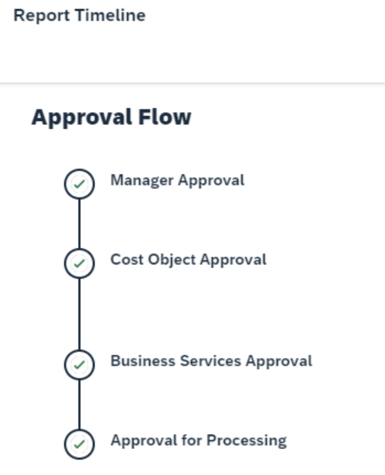
Requester → Direct Manager → Cost Center Manager → Business Services → District Office

AFTER SUBMITTAL: REPORT STATUS

To check the status of your report in the system, follow these steps:

1. **Open the report in the system,**
2. **Go to Report Details > Report Timeline**
   - *Flow will have a check mark if the step has been completed*

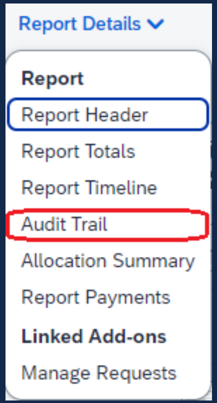

Report Details
Pri
Report
Report Header
Report Totals
Report Timeline
Audit Trail
Allocation Summary
Report Payments
Linked Add-ons
Manage Requests

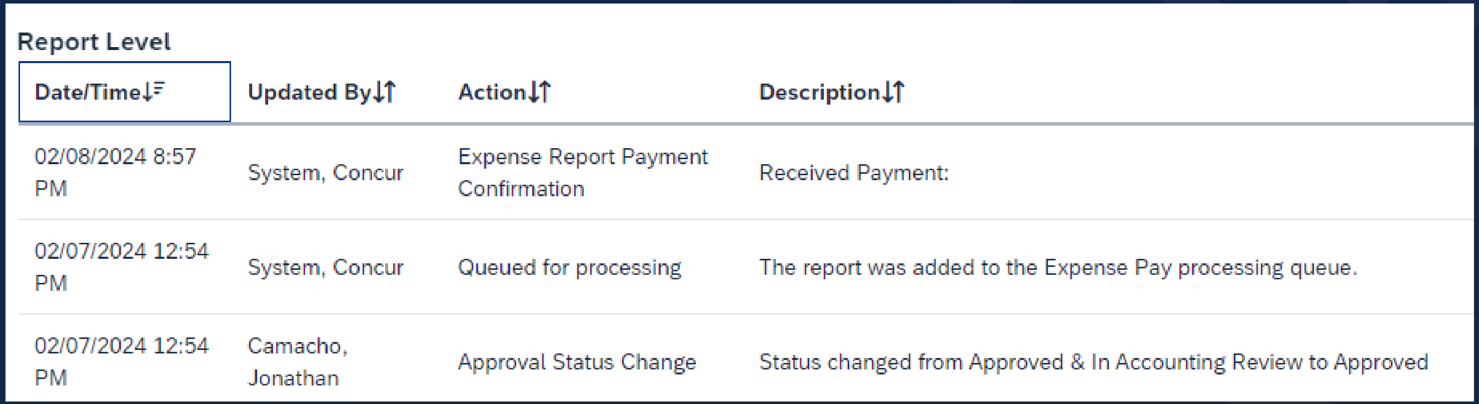

Report Timeline
Approval Flow
✓ Manager Approval
✓ Cost Object Approval
✓ Business Services Approval
✓ Approval for Processing

AFTER SUBMITTAL: PAYMENT STATUS

To check the status of your payment, follow these steps:

1. Open the report in the system,
2. Go to Report Details > Audit Trail


Report Details
Report
Report Header
Report Totals
Report Timeline
Audit Trail
Allocation Summary
Report Payments
Linked Add-ons
Manage Requests



Report Level

Date/Time	Updated By	Action	Description
02/08/2024 8:57 PM	System, Concur	Expense Report Payment Confirmation	Received Payment:
02/07/2024 12:54 PM	System, Concur	Queued for processing	The report was added to the Expense Pay processing queue.
02/07/2024 12:54 PM	Camacho, Jonathan	Approval Status Change	Status changed from Approved & In Accounting Review to Approved

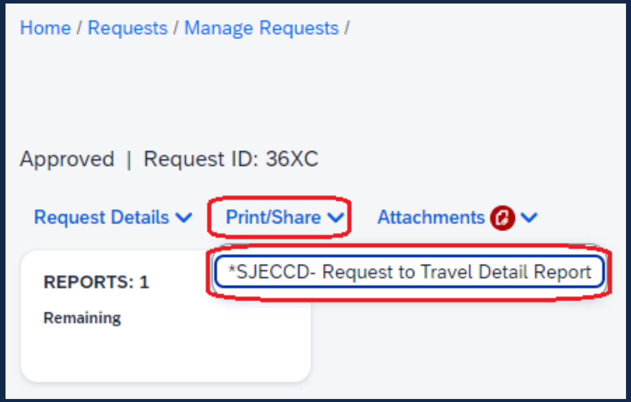
REQUEST FOR CHECK:

☑ **Complete the Request For Check from**

- *Form can be found on the [District's Accounting Toolbox]*

☑ **Backup documents that are needed:**

- *Invoice*
- *Print out of the approved Conference Request in Concur*
    - *Print/Share > *SJECCD – Request to Travel Detail Report*


Home / Requests / Manage Requests /

Approved | Request ID: 36XC

Request Details
Print/Share
Attachments
*SJECCD- Request to Travel Detail Report
REPORTS: 1
Remaining

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VALLEY COLLEGE

THANK YOU!