

SAPCONCUR

TRAVEL EXPENSE MANAGEMENT SOLUTION



GRAMBLING UNIVERSITY

MEET OUR TRAVEL TEAM

Stephanie Williams

Travel Supervisor & GSU Program Administrator

Controller's Office/Travel Office

Office Phone : 318-274-6170

Email: williamsstep@gram.edu

Chantia Spivey

Disbursement Accountant

Travel Office

Office Phone: 318-274-6091

Email: spiveyc@gram.edu

Vacant

Travel Specialist

Travel Office

Office Phone: 318-274-2576

Email: @gram.edu

GAIN ACCESS TO CONCUR

Complete the SAP User Request Form

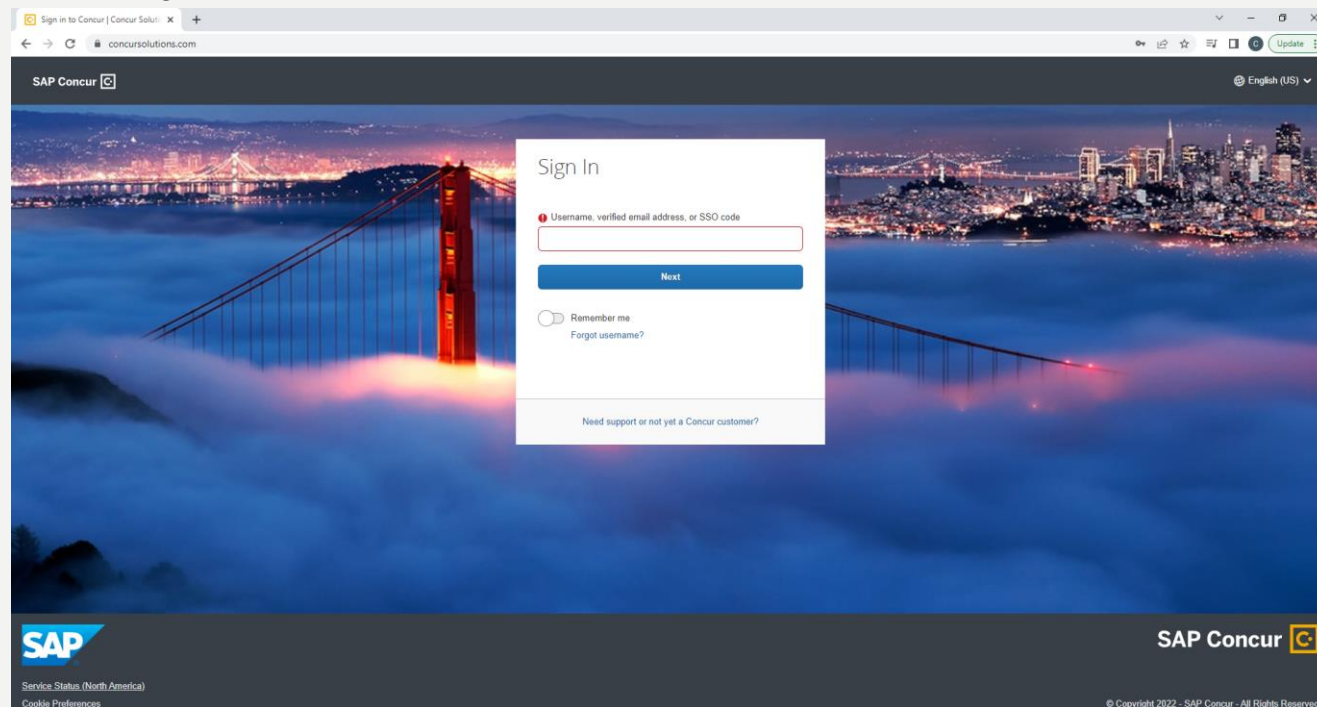
- Go to GSUNet
- Docusign (on the left side of the screen)
- Travel Information (on the left side of the screen)
- The form is listed under Travel Documents & Forms

ENCUMBRANCE NUMBER

- Contact the Information Technology Center for Banner Encumbrance Training if needed
- Prior to submitting your Travel Request you must:
 1. If you do not have access to encumber the funds, then contact the custodian of the account that you are using.
 2. Go into Banner 9 and encumber the funds needed to fund the travel.
 3. Obtain all applicable management approval for this Encumbrance.
 4. Enter the Encumbrance Number on the Travel Request.
 5. Save or screenshot the approved encumbrance sheet and attach it to the request. It should only show awaiting approval from Purchasing **(THIS IS REQUIRED)**
 1. To obtain the approved encumbrance sheet by the custodian who encumbered the funds
 2. Go to Banner Web
 3. Finance
 4. View Document
 5. Choose Type: Encumbrance
 6. Document Number: enter the encumbrance number
 7. Select Approval History
 8. Save as PDF or screenshot
 9. Send to the traveler so the approved encumbrance sheet can be attached to the travel request

LOG IN TO SAP CONCUR

- Go to www.concursolutions.com
- Select Log in at the top of the page
- To log in to SAP Concur:
 - In the **Username** field, enter your username (this is your university email address).
 - In the **Password** field, enter your password.
- **FIRST TIME USERS**
 - In the first Username field, enter your username (university email address), then select Forgot password. A link will be sent to your university email address so that you can set up your password.
- If you are not sure how to log in, then check with the travel administrator for additional assistance.



PROFILE INFORMATION

To view your profile parameters:

Click **Profile>Profile Setting**. The **Profile Options** page appears.

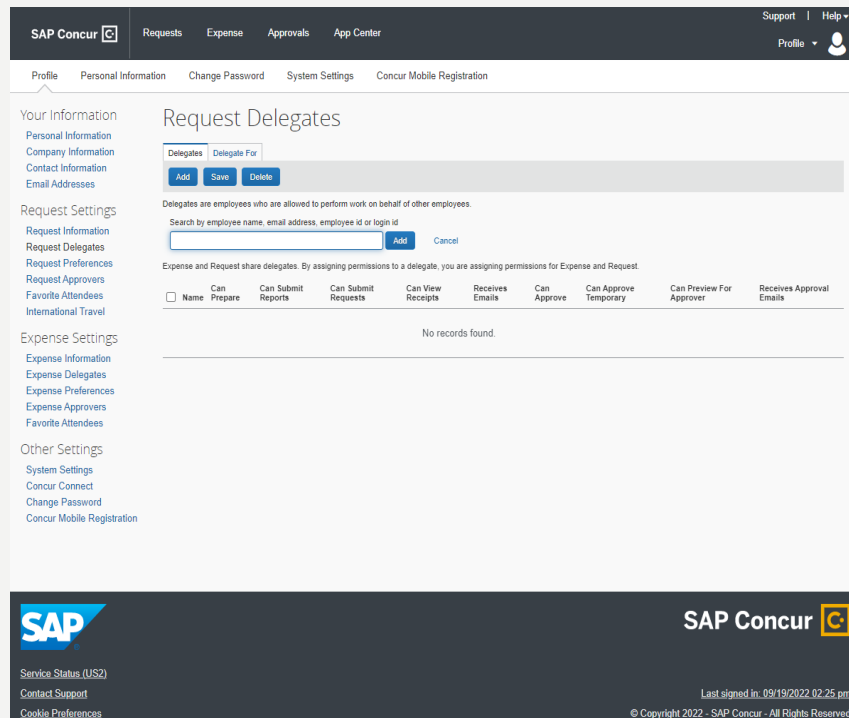
Click the appropriate option from the left-side menu.

Note: To see your **FOPAL** information. On the Profile Options Page, select Expense Information

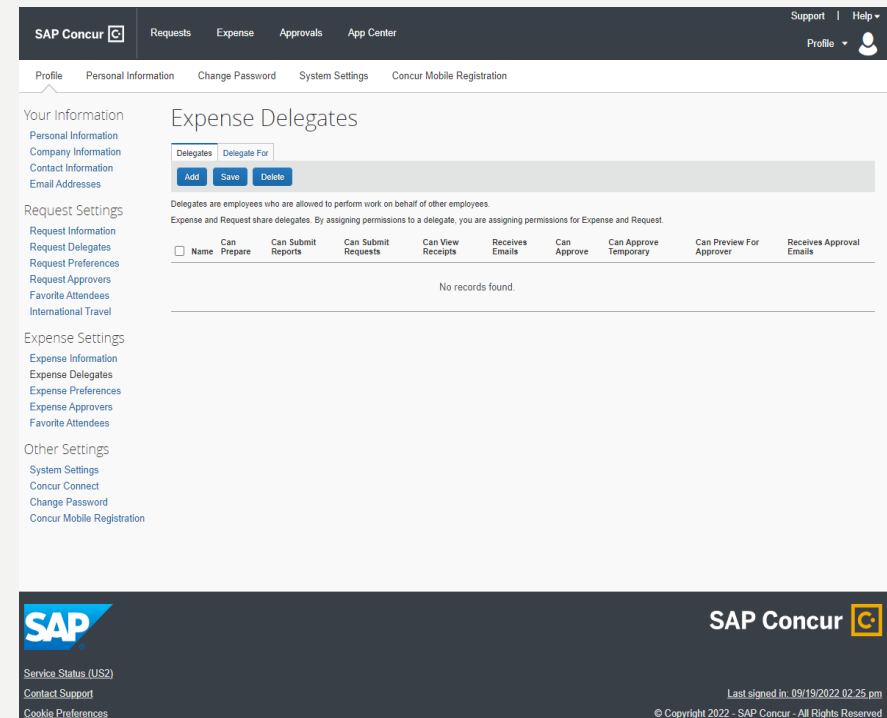
The screenshot displays the SAP Concur user interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. A user profile dropdown shows 'Profile' and a user icon. Below the navigation bar, the 'Profile Options' page is visible, with a left-hand menu containing categories like 'Your Information', 'Request Settings', 'Expense Settings', and 'Other Settings'. The main content area shows 'Profile Options' with sub-sections: 'Personal Information', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. An 'Acting as other user' dialog box is overlaid on the right, featuring a search input field and 'Cancel' and 'Start Session' buttons. The footer contains the SAP logo, 'Service Status (US2)', 'Contact Support', 'Cookie Preferences', the SAP Concur logo, 'Last signed in: 09/19/2022 02:25 pm', and '© Copyright 2022 - SAP Concur - All Rights Reserved'.

ADD A DELEGATE

- To add a Request or Expense delegate to your profile:
- Click **Profile>Profile Settings**. The **Profile Options** page appears.
- Click the appropriate option from the left side menu. (Request and/or Expense Delegate)
- Select Add, Enter the delegate's name in the box, then select a delegate from the list of employees in the system.
- Assign the permission, then **SAVE**.
- If you are acting as an Expense Delegate for another employee:
- Any changes you make on this page affect only the delegator and do not change your personal information.



The screenshot shows the SAP Concur user interface for the 'Request Delegates' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The left sidebar contains a menu with 'Profile' selected, and sub-items like 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Request Delegates' and features a search box for delegates, an 'Add' button, and a table for assigning permissions. The table has columns for Name, Can Prepare, Can Submit Reports, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The page footer includes the SAP logo, 'SAP Concur', and copyright information.



The screenshot shows the SAP Concur user interface for the 'Expense Delegates' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The left sidebar contains a menu with 'Profile' selected, and sub-items like 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Expense Delegates' and features a search box for delegates, an 'Add' button, and a table for assigning permissions. The table has columns for Name, Can Prepare, Can Submit Reports, Can Submit Requests, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The page footer includes the SAP logo, 'SAP Concur', and copyright information.

PROCESSING TRAVEL AS A DELEGATE

- Click **Profile**
- Under **Acting as other user** enter the user's name that you are performing duties for, or select the name from the drop-down list.
- Then select **Start Session**
- To end the Session under profile, select **End Session**

The screenshot displays the SAP Concur user interface for Chantia Spivey. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's name 'CHANTIA SPIVEY' is visible in the top right corner, along with 'Profile Settings' and 'Sign Out' links. A modal dialog box titled 'Acting as other user' is open, featuring a search input field labeled 'Search by name or ID' and 'Cancel' and 'Start Session' buttons. The main content area shows the 'GRAMBLING STATE UNIVERSITY' logo, 'COMPANY NOTES' with contact information for the Concur System Admin, and 'MY TASKS' section with three cards: 'Required Approvals', 'Available Expenses', and 'Open Reports', all showing zero counts and a checkmark icon.

CREATING A NEW REQUEST

- On the home page, place your mouse over **New** then click **Start a Request**
- Or Click the **Request Tab**, then click **Create New Request**

The screenshot shows the SAP Concur home page for Grambling State University. The navigation bar includes 'Requests', 'Expense', 'Approvals', and 'App Center'. The 'New' button is highlighted with a red box, and a dropdown menu is open showing 'Start a Request', 'Start a Report', and 'Upload Receipts'. Below the navigation bar, there are sections for 'COMPANY NOTES' and 'MY TASKS'. The 'MY TASKS' section shows three cards: 'Required Approvals', 'Available Expenses', and 'Open Reports', each with a '00' status and a checkmark icon.

The screenshot shows the SAP Concur 'Manage Requests' page. The 'Requests' tab is selected in the navigation bar. The page displays 'THERE ARE NO ACTIVE REQUESTS' and a message to 'Click Create New Request to create a new request'. A red box highlights the 'Create New Request' button. The footer includes the SAP logo, 'SAP Concur', and copyright information.

REQUEST HEADER

TRAVEL REQUESTS ARE REQUIRED TO BE SUBMITTED 10 DAYS PRIOR OF THE TRAVEL START DATE

Complete ALL required fields (marked with red bars) and the customized optional fields, as need.

NOTE: The format for the **Request/Trip Name** for **ALL** request is your last name, first name initial, and the start date of the travel.

Example: SpiveyC10/1/22

PURPOSE OF TRAVEL: The purpose of travel does not have a red bar, but it is required.

FUND, ORGANIZATION & PROGRAM must match what is on the encumbrance sheet in **Banner Web**.

Once you have completed all required fields, then click **Create Request**

Create New Request

Encumbrance Number ⓘ
E0012345

Request/Trip Start Date * 10/01/2022

Request/Trip Name * SpiveyC10/1/22

G Number * G00000000

Travelers Title * Disbursement Accountant

Department * Controller's Office

Office Ext 6091

Request/Trip End Date * 10/04/2022

Request/Purpose of Travel * Conference Travel

Tier * Tier 1

Destination City * US | Baton Rouge, Louisiana

Destination Country * UNITED STATES (US)

Traveler Type * Administrative

Trip Type * In-State

Does this trip contain personal travel? * No

Personal Dates of Travel

Purpose of Travel ABC Conference

Fund * (100) Current Unrestricted Fund

Organization * (1110) Controller's Office

Program * (60) Institutional Support

Cancel Create Request

REQUEST HEADER TRAVELER TYPE

- This is split into 6 categories:
- **Administrative**-selected by University Staff when travel does not include students
- **Conference**-selected by University Staff when travel does not include students
- **Group**- selected by University Faculty or Staff when travel does not include students
- **Recruiting**- selected by University Faculty or Staff when recruiting
- **Team Travel**- Selected by University Athletic Staff when travel does include students for competition

Edit Request Header ✕
SpiveyC10/1/22 | Request ID: 374L

Encumbrance Number ? * Required field
E0012345

Request/Trip Start Date * 10/01/2022 📅 Request/Trip Name * SpiveyC10/1/22 G Number * G00000000

Travelers Title * Disbursement Accountant Department * Controller's Office Office Ext 6091

Request/Trip End Date * 10/04/2022 📅 Request/Purpose of Travel * Conference Travel Tier * Tier 1

Destination City * US ▼ Baton Rouge, Louisiana Administrative Travel Conference Travel Field Travel Group Travel Other ABC Conference

Traveler Type * Administrative ▼ Does this trip contain personal travel? * No ▼

Personal Dates of Travel Fund * ▼ (100) Current Unrestricted Fund 1

Organization * ▼ (1110) Controller's Office 2

Cancel Save

REQUEST HEADER TRIP TYPE

- This is split into 6 categories:
- **Athletics**
- **Group**
- **In-State**
- **International**
- **Out of State**
- **Recruiting**

Edit Request Header

SpiveyC10/1/22 | Request ID: 374L

Request/Trip End Date: 10/04/2022

Request/Purpose of Travel: Conference Travel

Tier: Tier 1

Destination City*: US | Baton Rouge, Louisiana

Destination Country*: UNITED STATES (US)

Traveler Type*: Administrative

Trip Type*: In-State

Does this trip contain personal travel?*: No

Personal Dates of Travel:

Fund*: (100) Current Unrestricted Fund

Organization*: (1110) Controller's Office

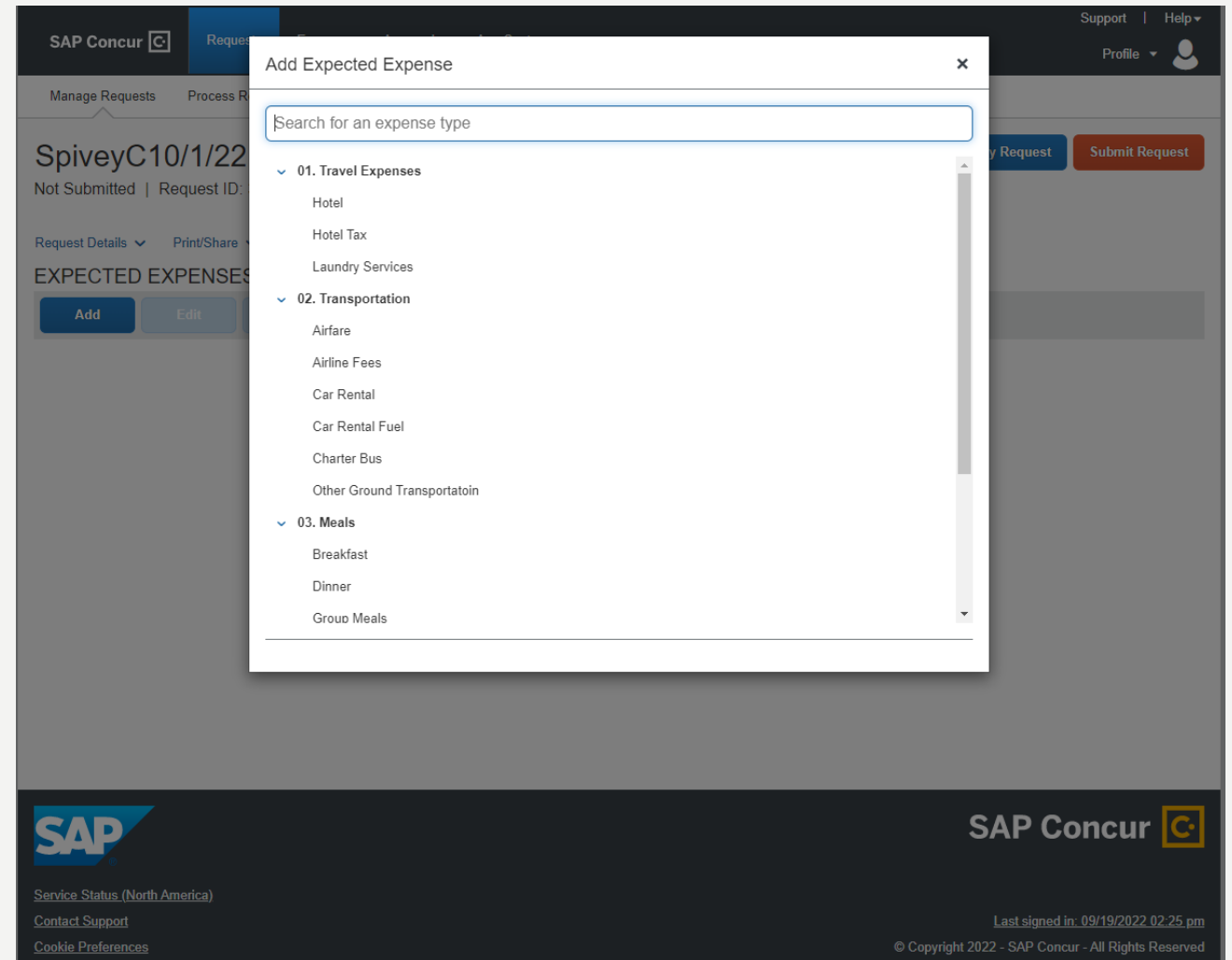
Program*: (60) Institutional Support

Comments To/From Approvers/Processors:

Cancel Save

ADDING TRANSACTIONS TO A TRAVEL REQUEST

- Once you have completed the request header tab, proceed to the expense tab to add expense items to your travel request
- Select **ADD**
- Choose from the list of expenses and continue to add expenses until you have added all the applicable expenses for your upcoming travel.



The screenshot displays the SAP Concur interface for managing travel requests. A modal dialog titled "Add Expected Expense" is open, featuring a search bar and a list of expense categories. The background shows a travel request for "SpiveyC10/1/22" with a status of "Not Submitted".

Add Expected Expense

Search for an expense type

- 01. Travel Expenses
 - Hotel
 - Hotel Tax
 - Laundry Services
- 02. Transportation
 - Airfare
 - Airline Fees
 - Car Rental
 - Car Rental Fuel
 - Charter Bus
 - Other Ground Transportatoin
- 03. Meals
 - Breakfast
 - Dinner
 - Group Meals

SAP Concur

Service Status (North America)
Contact Support
Cookie Preferences

Last signed in: 09/19/2022 02:25 pm
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ADDING TRANSACTIONS TO A TRAVEL REQUEST

- Once you choose from the list of expenses, complete ALL required fields (marked with red bars) and the customized optional field, as needed.
- Attach supporting documents as needed to support request
- Then save

****Note: Indicate whether the transaction is paid by travel card, paid by travel office, or self funding by selecting the appropriate checkbox.**

If supporting documentation is required, the system will not allow you to submit your request for approval until support has been attached.

If you are missing any attachments, the travel office will send the travel request back to the user.

HOTEL EXPENSE TYPE

- ✓ If the hotel is paid by the travel office, then attach the hotel credit card authorization form (can be obtain by the hotel) to the request.
- ✓ If the form is filled out electronically, then copy and paste the link in the comment section under the hotel expense.
- ✓ For in state hotels, you must provide the hotel with a hotel tax exemption form before or upon arrival
- ✓ Once all the fields are completed then select Save
- ✓ Be sure to check all alerts

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

New Expense: Hotel \$297.00 | Cancel | Save

Allocate

Vendor: (A.H.M.I. Hotels) A.H.M.I. Hotels | Hotel City: Baton Rouge, Louisiana

Check In Date: 10/01/2022 | Check Out Date: 10/04/2022

Transaction Amount: 297.00 | Currency: US, Dollar

Paid with Travel Card (See tool tip) ?

Paid by Travel Office (See tool tip) ?

Self-Funding

Comment: https://www.sertifi.com/HiltonPalacioDelRio_SATPD/stream.aspx?Passthrough=1&roomid=AQDbwBr2f51MnEZ6EDXr2xw0

Save | Cancel

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

Alerts: 1

SpiveyC10/1/22 \$297.00 | Not Submitted | Request ID: 374L | Copy Request | Submit Request

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Alerts	Expense type	Date	Amount	Requested
<input type="checkbox"/>	Hotel	Baton Rouge, Louisiana	10/01/2022	\$297.00

Alerts: \$297.00

Action: Please attach the Hotel Confirmation. The CC Authorization should be attached if available for hotel paid by the Travel Office. View https://www.sertifi.com/HiltonPalacioDelRio_SATPD/stream.aspx?Passthrough=1&roomid=AQDbwBr2f51MnEZ6EDXr2xw0

SPIVEY,CHANTIA 09/19/2022

AIRFARE EXPENSE TYPE

*** Once the Travel Office has approved your travel request, then you will receive an email stating you may proceed with booking your flight.

To book a flight you must first create a profile

<https://legacy.cbtravel.com/business/profile/stateofla/>

Once you have created a profile, you will receive a welcome email within 24 hours!

Log in <https://app.cbtravel.com/authentication/?url=%2F>

Go to **Book Travel**

Book/Manage Online Trips

Then it will route you to Concur

(Look to the right to see how your screen should show)

The travel office pays for ALL airfare

For the method of payment please select the CBA card that is already on file ending

In *1111.

Attach the list of flight options to your travel request.

TO BOOK FOR AN EMPLOYEE

- Go to Profile
- Under **Acting as other user** enter the user's name that you are performing duties for, or select the name from the drop-down list.
- Then select **Start Session**

TO BOOK FOR A STUDENT

- Book for guest should be to the right of TRIP SEARCH, if it is not, then you will have to contact Christopherson

Business Travel to add it to your profile

Once you select book for guest, then insert the student's information and proceed with booking the flight

The screenshot displays the SAP Concur Travel web application. At the top, there is a navigation bar with 'SAP Concur' and 'Travel' tabs, along with a user profile icon and 'Help'. Below the navigation bar, there is a header section with the state seal of Louisiana and a 'View Trips' button showing '00' trips. The main content area is divided into two columns: 'TRIP SEARCH' and 'COMPANY NOTES'. The 'TRIP SEARCH' section features a 'Mixed Flight/Train Search' form with options for 'Round Trip', 'One Way', and 'Multi City'. It includes fields for 'From' and 'To' with dropdown menus and a 'Search' button. A red warning message is displayed above the search form, stating: 'PRIOR TO BOOKING TRAVEL PLEASE CHECK PROFILE TO ENSURE YOU ARE IN THE CORRECT AGENCY. DELAYS IN TICKETING AND ADDITIONAL FEES MAY OCCUR.' The 'COMPANY NOTES' section contains a welcome message: 'Welcome to the State of Louisiana's online booking tool! Thank You for Your Business! Please take a moment to review your profile and ensure that your information is complete. Traveling must be for official state business only. Travelers must follow State of Louisiana PPM49 (https://www.doa.la.gov/daal/ostl). Read more'. Below this, there is a 'MY TRIPS (0)' section with a right-pointing arrow and the text 'You currently have no upcoming trips.' The footer of the page includes the SAP logo on the left and the Christopherson Business Travel logo on the right.

Never pay for airfare with your travel credit card

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

New Expense: Airfare \$448.99

Cancel Save

Allocate

Vendor: (American Airlines) American Airlines

Business Travel Start Date: 10/01/2022

Amount: 448.99 | Currency: US, Dollar

Comment:

Save Cancel

Change Search

From: SHV - Shreveport Regional Airport - Shreveport, LA

To: BTR - Baton Rouge Airport - Baton Rouge, LA

Depart: 10/01/2022 dep 09:00 am ± 3

Return: 10/04/2022 dep 09:00 am ± 3

Class: Economy class | Search by: Price

Flights w/ no double connections

Search

Depart - Sat, Oct 1

Depart: 06:00 A - 11:45 A

Arrive: 09:47 A - 05:42 P

Return - Tue, Oct 4

Depart: 06:00 A - 10:17 A

Arrive: 09:56 A - 05:46 P

Price

Price: \$448.99 - \$1,523.62

Display Settings

Display Settings

Hide Non-refundable Fares

Shop by Fares | Shop by Schedule

Please note: search results are based on your selected criteria and other factors including company policies. Fare, schedule or availability information may not be complete or in neutral order.

Flight Number Search | Sorted By: Price - Low to High | Displaying: 26 out of 26 results. Previous 1 2 3 Next | All

United	07:15a SHV → 01:14p BTR	1 stop IAH	5h 59m	\$448.99	View Fares
	09:12a BTR → 03:26p SHV	1 stop IAH	6h 14m		Show all details
United	07:15a SHV → 01:14p BTR	1 stop IAH	5h 59m	\$448.99	View Fares
	07:01a BTR → 10:58a SHV	1 stop IAH	3h 57m		Show all details
United	07:15a SHV → 11:20a BTR	1 stop IAH	4h 05m	\$448.99	View Fares
	09:12a BTR → 03:26p SHV	1 stop IAH	6h 14m		Show all details
United	07:15a SHV → 11:20a BTR	1 stop IAH	4h 05m	\$448.99	View Fares
	07:01a BTR → 10:58a SHV	1 stop IAH	3h 57m		Show all details
United	11:45a SHV → 05:42p BTR	1 stop IAH	5h 57m	\$448.99	View Fares
	09:12a BTR → 03:26p SHV	1 stop IAH	6h 14m		Show all details

- The airfare quotes should look the example above and attach it to the travel request.
- Select Shop by Fares to show the amount.

CAR RENTAL EXPENSE TYPE

- Attach the Enterprise or Hertz car rental booking form to the travel request
- If you are requesting a larger size vehicle and there are less than 4 passengers, then a justification letter is required.
- Provide the address on the booking form for all reservations that are made outside of Ruston.
- If you have a travel card, then you can pay the car rental and gas with your card for **OUT OF STATE RENTALS ONLY**.
- Out of state car rentals for non cardholders will be reserved and paid by the Travel Office and the traveler will get reimbursed for gas. (receipts are required).
- If you received an error that you are not an authorized driver, then contact Safety and Risk Management.

Once you have completed the training, the program Administrator will update your status in Concur.

The screenshot displays the SAP Concur interface for a car rental expense request. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's profile is visible in the top right corner. The main content area shows a request for 'SpiveyC10/1/22' with a total amount of '\$945.99'. The request is 'Not Submitted' and has a 'Request ID: 374L'. There are buttons for 'Copy Request' and 'Submit Request'. Below this, there are options for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section contains a table with columns for 'Alerts', 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. The table lists three expense types: 'Hotel' (\$297.00), 'Airfare' (\$448.99), and 'Car Rental' (\$200.00), all for the date 10/01/2022. A total amount of '\$945.99' is shown at the bottom of the table. An 'Alerts' pop-up window is open, displaying three messages: a red warning about the user not being an authorized driver, a yellow warning about using the Voyager Fuel Card, and a blue message about the user's location and date. The SAP logo and 'SAP Concur' branding are visible at the bottom of the interface.

Alerts	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel	Baton Rouge, Louisiana	10/01/2022	\$297.00	\$297.00
<input type="checkbox"/>	Airfare		10/01/2022	\$448.99	\$448.99
<input type="checkbox"/>	Car Rental	Baton Rouge, Louisiana	10/01/2022	\$200.00	\$200.00
					\$945.99

CAR RENTAL FUEL EXPENSE TYPE

- For in state car rental, once your travel request is approved, the Travel Office will you an email to pick up your gas card from Becky Fields.
- Out of state car rental (Cardholders) must purchase gas with your travel card
- Out of state car rental (Non Cardholders) must purchase gas out of pocket and will be reimbursed.

The screenshot displays the SAP Concur interface for entering a Car Rental Fuel expense. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. On the right, there are links for 'Support', 'Help', and 'Profile'. Below the navigation, there are tabs for 'Manage Requests' and 'Process Requests'. An alert box states: 'Alerts: 1 Please Note: The Voyager Fuel Card should be used with In-state vehicle rental fuel purchases only.' The main form title is 'Car Rental Fuel \$150.00'. The transaction date is '10/01/2022'. The transaction amount is '150.00' and the currency is 'US, Dollar'. The 'Type of Rental Fuel' is set to 'In-State Rental'. There is a 'Description' field which is currently empty. At the bottom, there is a 'Comment' field and 'Save' and 'Cancel' buttons.

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

Alerts: 1

⚠ Please Note: The Voyager Fuel Card should be used with In-state vehicle rental fuel purchases only.

← → Car Rental Fuel \$150.00 🗑 Cancel Save

10/01/2022

⚙ Allocate

Transaction Date *
10/01/2022

Transaction Amount *
150.00

Currency *
US, Dollar

Type of Rental Fuel *
In-State Rental

Description

Comment

Save Cancel

CHARTER BUS EXPENSE TYPE

- The confirmation must be attached.

The screenshot displays the SAP Concur interface for creating a new expense entry. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. On the right, there are links for 'Support', 'Help', and 'Profile'. Below the navigation, there are tabs for 'Manage Requests' and 'Process Requests'. The main content area shows a breadcrumb trail with a back arrow, a right arrow, and the text 'Charter Bus \$1,000.00' with a trash icon. To the right of this are 'Cancel' and 'Save' buttons. Below the breadcrumb, the date '10/01/2022' is displayed. An 'Allocate' button is visible. The form contains three input fields: 'Business Travel Start Date' with the value '10/01/2022' and a calendar icon, 'Amount' with the value '1,000.00', and 'Currency' with the value 'US, Dollar' and a dropdown arrow. A 'Comment' field is present but empty. At the bottom left, there are 'Save' and 'Cancel' buttons.

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

← → Charter Bus \$1,000.00 🗑️ | Cancel | Save

10/01/2022

⚙️ Allocate

Business Travel Start Date * | Amount * | Currency *

10/01/2022 | 1,000.00 | US, Dollar

Comment

Save | Cancel

OTHER GROUND TRANSPORTATION EXPENSE TYPE

This expense consists of 5 options

- 1) Lyft
- 2) Shuttle
- 3) Taxi
- 4) Train
- 5) Uber

The screenshot shows the SAP Concur interface for creating an expense request. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's profile and support options are visible in the top right. The main content area is titled 'Other Ground Transportation' with a value of '\$50.00'. Below the title, there are fields for 'Type of Transportation' (set to 'Shuttle'), 'Amount' (50.00), 'Currency' (US, Dollar), and 'Business Travel Start Date' (10/01/2022). A 'Comment' field is also present. The form includes 'Save' and 'Cancel' buttons.

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

← → Other Ground Transportation \$50.00 🗑️ | Cancel | Save

10/01/2022

⚙️ Allocate

Type of Transportation * | Business Travel Start Date *

Shuttle | 10/01/2022

Amount * | Currency * | Comment

50.00 | US, Dollar

Save | Cancel

Shuttle Services for cardholders can be pre-paid prior to the trip start date.

MEAL EXPENSE TYPE

This expense consists of 4 options

1. **Breakfast**
2. **Lunch**
3. **Dinner**
4. **Group Meals**

If paid out of pocket for students or received a cash advance for meals, then a meal per diem list is required with signatures.

A cash advance can be requested for meals for recruits. (You cannot use your travel card)

Refer to the pocket guide on the travel page to determine the meal allowance.

If you are requesting group meals, then change the trip type to group travel.

The screenshot shows the SAP Concur 'Process Requests' interface for a 'Breakfast' expense. The form is titled 'Breakfast \$64.00' and includes the following fields and options:

- Transaction Date:** 10/01/2022
- Meal Allowance:** 16
- Number of Days:** 4
- Transaction Amount:** 64.00
- Currency:** US, Dollar
- Description:** (Empty text area)
- Comment:** (Empty text area)

Navigation and action buttons include 'Cancel', 'Save', and 'Allocate'. The top navigation bar shows 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The user's profile and support options are visible in the top right corner.

OTHER ALLOWABLE EXPENSE TYPE

This expense consists of 5 options

1. **Baggage**
2. **Internet**
3. **Other Allowable**
4. **Parking**
5. **Telephone**

The screenshot displays the SAP Concur interface for creating an expense request. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. The right side of the bar has 'Support | Help', 'Profile', and a user icon. Below the navigation bar, there are tabs for 'Manage Requests' and 'Process Requests'. The main content area shows a form titled 'Other Allowables \$60.00' with a trash icon and 'Cancel' and 'Save' buttons. The form includes a date field '10/01/2022', an 'Allocate' button, and several input fields: 'Type of Other Allowable' (set to 'Baggage'), 'Business Travel Start Date' (set to '10/01/2022'), 'Amount' (set to '60.00'), and 'Currency' (set to 'US, Dollar'). A 'Comment' field is also present at the bottom. At the very bottom of the form, there are 'Save' and 'Cancel' buttons.

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile | User Icon

Manage Requests | Process Requests

← → Other Allowables \$60.00 🗑️ | Cancel | Save

10/01/2022

⚙️ Allocate

Type of Other Allowable *
Baggage

Business Travel Start Date *
10/01/2022

Amount *
60.00

Currency *
US, Dollar

Comment

Save | Cancel

REGISTRATION/FEES EXPENSE TYPE

If paid by the Travel Office, then attach the website link and your login information in the comment section.

Please specify which course you are registering for if there are more than one option.

If a check is needed to pay for the registration fee, then attach the W-9 form.

The screenshot displays the SAP Concur interface for creating an expense request. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', and 'App Center'. On the right, there are links for 'Support', 'Help', and a 'Profile' dropdown. Below the navigation, there are tabs for 'Manage Requests' and 'Process Requests'. An alert box states: 'Alerts: 1' and 'Action: Registration documents must be attached when using the Seminar expense type. Please attach and re-submit.' The main form title is 'Registration/Fees \$25.00' with navigation arrows and a trash icon. Below the title, there are 'Cancel' and 'Save' buttons. The form fields include: 'Transaction Date' (10/02/2022), 'Transaction Amount' (25.00), and 'Currency' (US, Dollar). There is an 'Allocate' button and a checkbox for 'If payment made by Travel Office, attach website link.' The 'Comment' field contains the text: 'www.naas.org' and 'login: chantia20 password: abc123'. At the bottom, there are 'Save' and 'Cancel' buttons.

SAP Concur | Requests | Expense | Approvals | App Center | Support | Help | Profile

Manage Requests | Process Requests

Alerts: 1

Action: Registration documents must be attached when using the Seminar expense type. Please attach and re-submit.

← → Registration/Fees \$25.00 🗑️ | Cancel | Save

10/02/2022

⚙️ Allocate

Transaction Date * | Transaction Amount * | Currency *

10/02/2022 | 25.00 | US, Dollar

Description

If payment made by Travel Office, attach website link. ?

Comment

www.naas.org
login: chantia20 password: abc123

Save | Cancel

MILEAGE EXPENSE TYPE

- *The 99 mile reimbursement limitation has been removed but a state owned vehicle or state rented vehicle should be used prior to a personal vehicle when mileage exceeds 99 miles
- *If a traveler is requesting to take his/her personally owned vehicle out-of-state for a purpose that will benefit the agency, then the department head may, on a case-by-case basis determine to pay a traveler for all or part of en route travel expenses.
- *Documentation must be kept on file to show cost savings or justification as to why a traveler is requesting to use his/her personal vehicle mileage
- * Driving directions are required to be attached in order to be reimbursed.

TRAVEL REQUEST TIMELINE

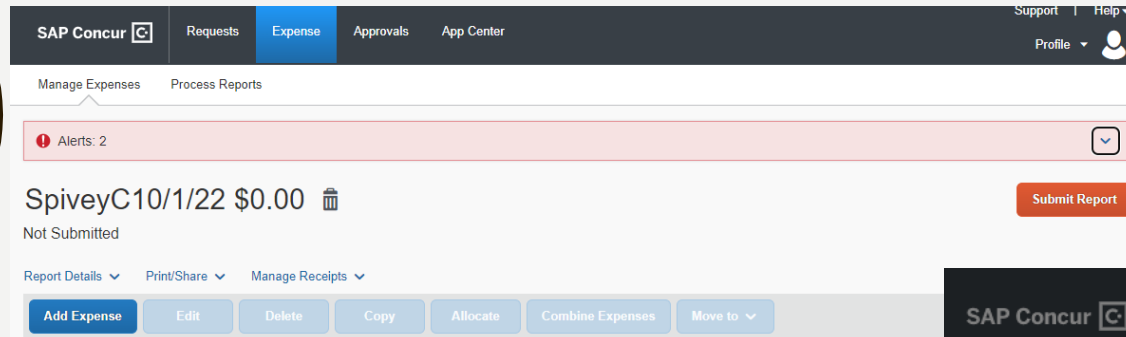
- **SUPERVISOR APPROVAL**
- **TITLE III APPROVER**
- **GRANT OFFICE APPROVAL**
- **BUDGET HEAD**
- **ATHLETICS REVIEW**
- **VP OF FINANCE APPROVAL**
- **REQUEST ADMIN (TRAVEL OFFICE)**

CREATING A NEW EXPENSE REPORT

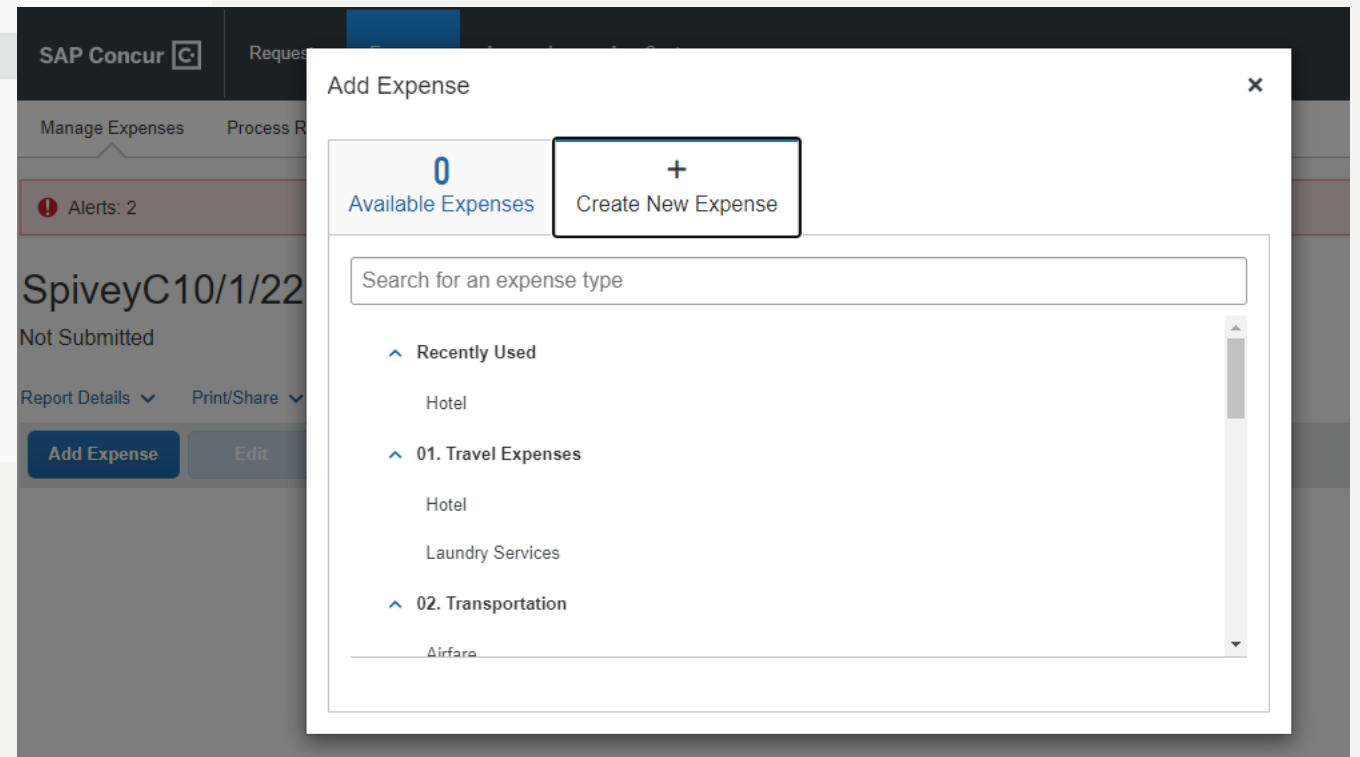
- To create a report
 - Select from the following
 - On the home page, click Requests
 - View Active Requests (Click on the request you are ready to submit an expense report for)
 - If the request is not showing then select View All Request then select the requests you are ready to submit an expense report for
 - Select Create Expense Report
- I. Complete all required fields (marked with red bars) and the customized optional fields customized, as needed.

****** PLEASE REMEMBER WHEN SELECTING DEPARTURE AND ARRIVAL TIMES THAT THE SYSTEM USES MILITARY TIME******

ADDING EXPENSES TO THE EXPENSE REPORT



Select ADD Expense



Choose from the list of expenses

ADDING EXPENSES TO THE EXPENSE REPORT

- Complete all required fields (marked with red bars) and the customized optional fields, as needed
- Attach the actual receipts and documents as needed to support request
- Invoices and hotel confirmations should not be attached to the expense report.
- Indicate whether the transaction is paid for by the traveler's card, travel office, voyager or out of pocket by selecting the appropriate checkbox
- If supporting documentation is required, the system will not allow you to submit your request for approval until supporting documentation has been attached.

HOTEL EXPENSE

- The hotel expense is required be itemized
- Enter all required information
- The total that is on the receipt is the amount you should put in Concur
- Select save expense