



SAP Concur 

Concur Travel & Expense Overview

Judy Wessler
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What is **Concur Travel & Expense**?

The **Concur Travel & Expense** solution allows you to submit Requests, book travel and complete your Expense Reports in one application.

Eliminates AdobeSign process for conference requests and expenses, employee reimbursements, mileage reports, and P-card reconciliations.



Benefits to You



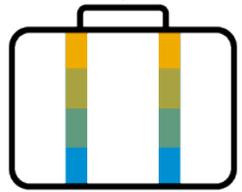
User-friendly experience

- Use one seamless process for submitting requests, booking travel and creating and submitting expense reports for approval
- Get e-mail notifications to keep you up to date
- Upload and track your receipts easily
- Add itemizations to expenses quickly
- Allocate to multiple GLs in one Expense Report

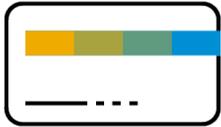
Travel Request and Trip Expense Report Process

- **REQUEST:** Enter in Concur. Delegate can enter, User submits.
- **Approval:** Direct Manager; Cost Center Approver; President or VC.
- **Funds encumbered until Travel Expense Report submitted.**

TRAVEL REQUEST AND APPROVAL

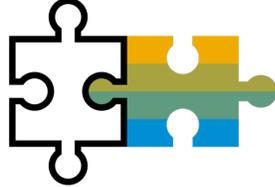


Book and Travel



CA Travel Store downloads transaction to Traveler's account

Click to add text



Add transaction to Expense Report and attach receipt



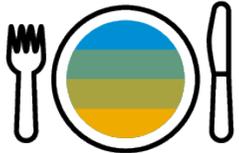
Submit expense report for approval



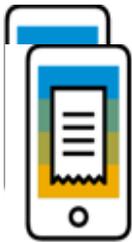
Expense report approval



Reimbursement



Your Out-of-Pocket or P-Card Expenses

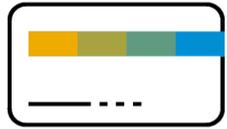


Capture receipt data
Capture receipt data

- **EXPENSE REPORT:** Enter in Concur. Delegate can enter, User submits.
- **Approval:** Direct Manager, Cost Center Manager, Business Services, A/P.
- **Colleague encumbrance released.**

P-Card Reconciliation and Employee Reimbursement Expense Reports

P-Card Reconciliation



P-Card transactions downloaded from US Bank to Cardholder



Capture receipt data

Employee Reimbursement

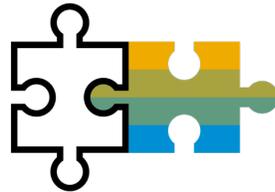


Your Out-of-Pocket Expenses



Capture receipt data

- Enter in Concur. Delegate can enter, User submits.
- Approvals: Direct Manager, Cost Center Approver, Business Services, A/P
- Funds encumbered until Expense Report submitted.



Add transaction to Expense Report and attach receipt



Submit expense report for approval



Expense report approval



Reimbursement

Accessing SAP Concur

You can access SAP Concur at any time.

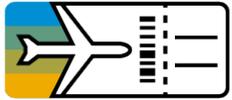
- **SSO:** Access SAP Concur through the SJECCD SSO login site.
- **On the Web:** <https://www.Concursolutions.com> or **SSO:** SAP Concur
- **On your mobile device:** Download the SAP Concur mobile app by going to your device's app store and following the instructions.

Login:

- **Use SSO login name and Password**
- **SAP Concur mobile application:** In your **Profile**, you can create a mobile PIN or use the same login information as the SAP Concur site,

EMAILS: Status Updates and Approval Notifications

Status updates are sent by e-mail every time you make a travel reservation or your expense report status changes. Or you can opt out.



Travel:

- Sending to Agency
- Confirmed
- Issued
- Ticketed
- Upcoming Travel

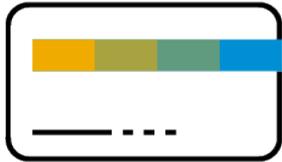


Expense:

- Submitted and Pending Approval
- Sent Back
- Approved & in Accounting Review
- Processing Payment

- Approving managers receive e-mail notification when a report is sent for approval.
- Delegates can receive email notifications for Traveler and/or Manager.

Benefits to You



Corporate card automation

- US Bank Visa imports P-card transactions daily to the P-Card Holder's account.
- CA Travel Store Lodge Card transactions import to Traveler's account

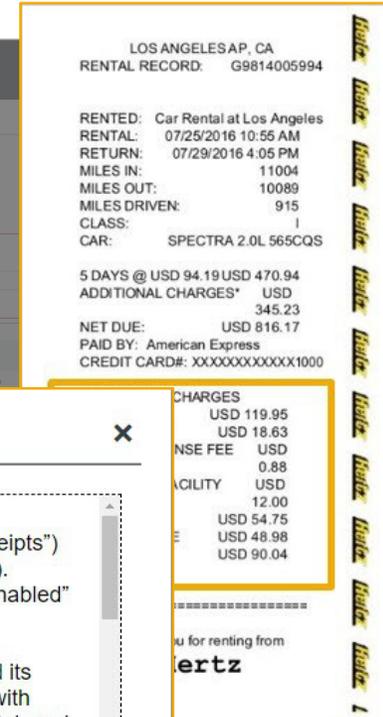
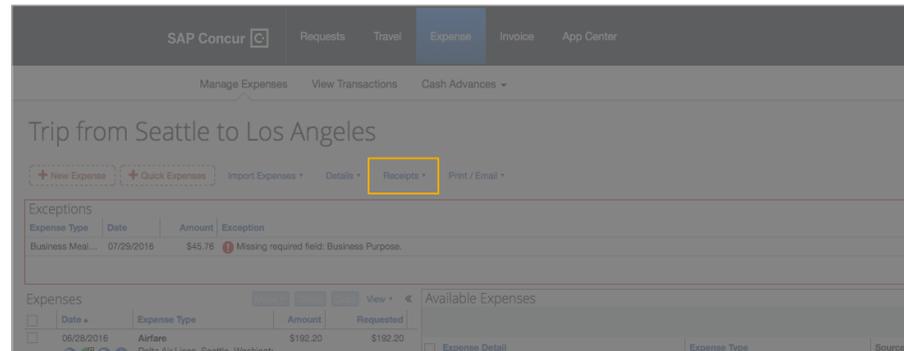
E-Receipt Activation for Traveling

Activate e-receipts in your **Profile**.

E-receipts are electronic receipt images sent to SAP Concur directly from the vendor. They help eliminate paper receipts and make it easier for you to complete your expense reports.

E-receipts work with:

- Credit cards used at participating suppliers
- Participating hotels, car rentals, and airlines
- Certain App Center partners (e.g., Uber and Lyft)



E-Receipt Activation

Concur can enable the automatic collection of the electronic receipts and folio data (“e-receipts”) generated by your transactions with participating travel suppliers (“Participating Suppliers”). Participating Suppliers in Concur Travel search results are designated with an “e-receipt enabled” label.

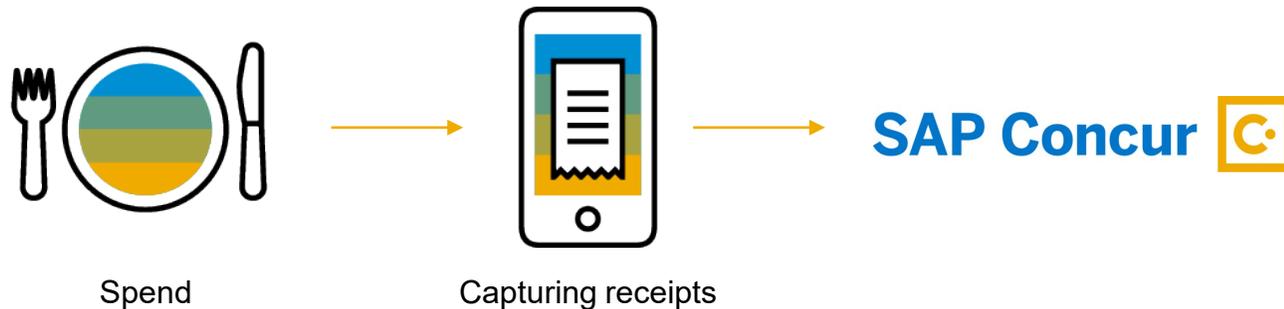
By clicking “I Agree” below to turn on the e-receipts functionality, you authorize Concur and its corporate affiliates to receive, transfer and use e-receipts generated by your transactions with Participating Suppliers in connection with Concur services, including air, rail, hotel, car rental, and other ground transportation suppliers, and you authorize such Participating Suppliers and their respective agents and affiliates to share such e-receipts with Concur. To retrieve e-receipts from Participating Suppliers, Concur may need to share certain details about you and your travel plans

I Agree
I Decline

Capturing Receipts

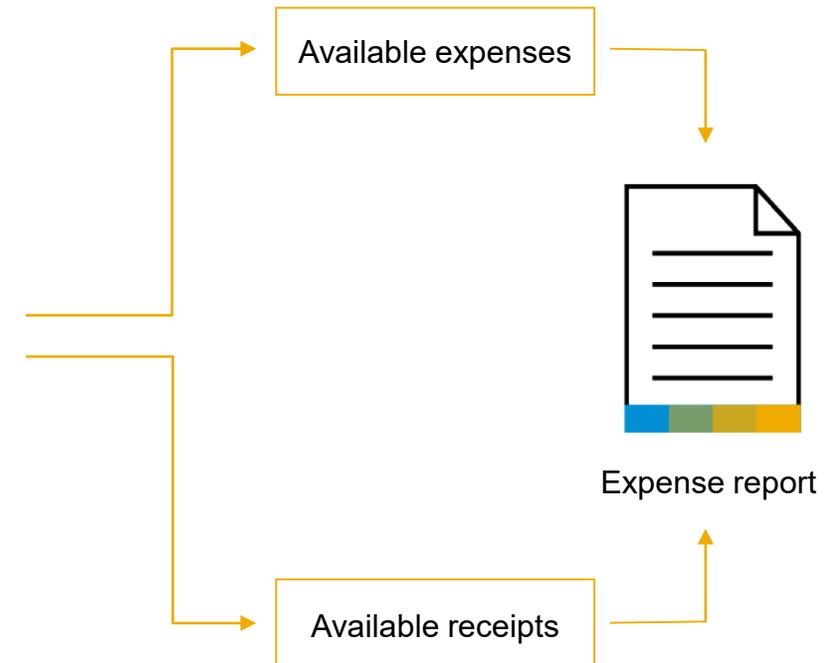
Ways to capture receipt images:

- **VERIFY EMAIL in Concur Profile**
- E-mail to receipts@concur.com



Ways to capture, review, and analyze receipts:

- ExpenseIt within the SAP Concur mobile app
- E-mail to receipts@expenseit.com





SAP Concur Mobile App

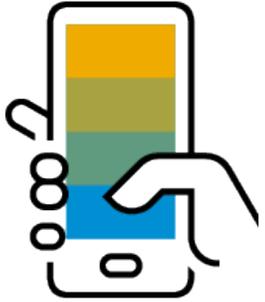
Expense Review and

Expenses
List of your expenses

Approvals
Approve items anywhere.

Book

Message



Mobile App capabilities

- Create, submit, and approve expense reports on-the-road using the SAP Concur mobile app
- Take a photo to upload your receipts, attach to expense report
- Get flexibility by directly syncing the SAP Concur mobile app with the Web version

Thank You

SUPPORT CONTACTS:

Joseph Chesmore: jose.chesmore@sjeccd.edu

Jonathan Camacho: jonathan.camacho@sjeccd.edu

Saloshni Chand: saloshni.chang@evc.edu

Priscilla Louangrath: thiphavanh.louangrath@sjcc.edu