

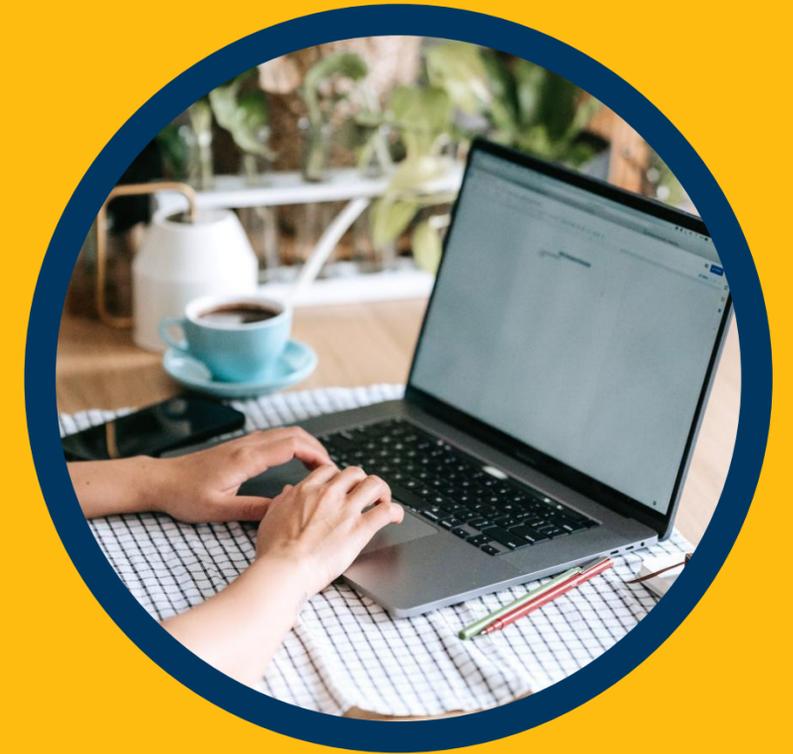


# Concur Training

Conquer Concur with Confidence!



# Introductions



**Julie Dunson-CNSI MSO**

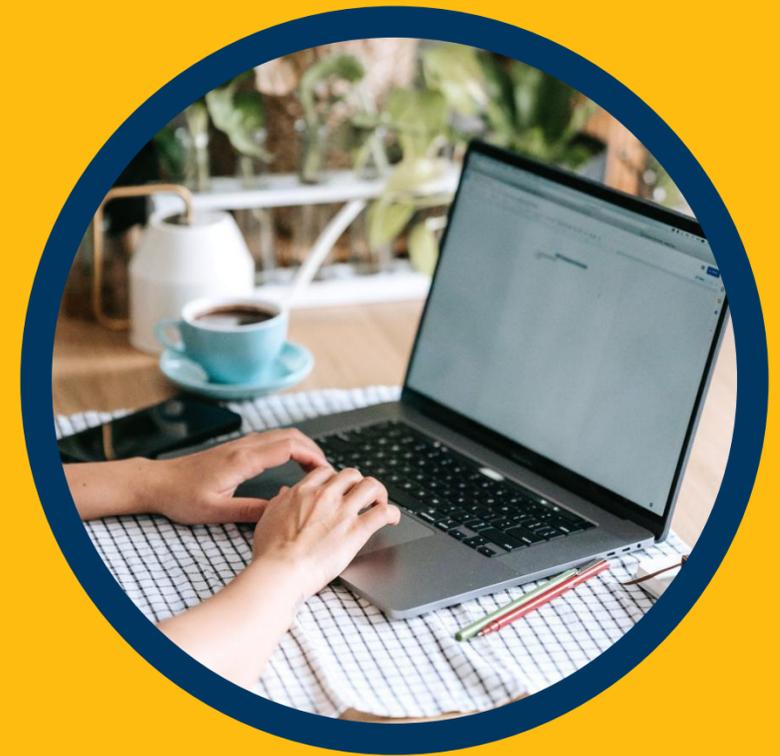
**Melecia Valdez & Laura Reynolds-CNSI Analyst/Concur Approver**

**Kelsey Moore-Quantum Foundry & Eddleman Account Delegate**

**Jewels Bolden-CNSI Account Delegate**

**Debbie Kleinpeter-BioPacific MIP Account Delegate**

# What We Will Talk About



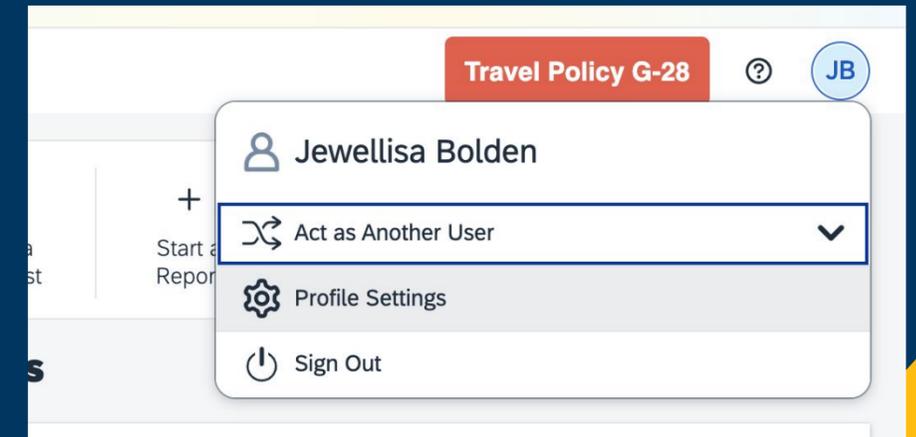
1. Delegates & Prior to Travel Items
2. Booking Through Concur
3. Introduction to Concur Reports
4. Processing Domestic Travel
5. Foreign Travel Request & Report

# Adding a Concurrent Delegate

You will add a delegate by selecting your profile and click settings

Click the expense delegate selection under expense settings

Click add and type in the email for a new delegate, select all boxes and click save



## Expense Settings

- [Expense Information](#)
- [Expense Delegates](#)
- [Expense Preferences](#)
- [Expense Approvers](#)
- [Favorite Attendees](#)

## 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 Delegates

Delegates Delegate For

Add Save Delete

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

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 Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Leonard, Kelsey kelsey_moore@ucsb.edu	<input type="checkbox"/>				

# Prior to Travel



- CNSI requires prior travel approval (Concur Travel Request) for foreign travel only.
- Travelers should also receive confirmation from PI (faculty) that funding is available prior to all travel.
- The **TRAVELER** is responsible for entering all the expenses and adding in details. CNSI will review the report via a delegate prior to submission.
- It is the travelers responsibility to reach out to the delegate for review - it is not automated.

# Creating a Travel Expense Report

# Booking Through Concur

**Trip Search**

Booking for myself | [Book for a guest](#)

COVID-19 implications may exist for your trip. Stay informed by visiting our COVID-19 Information Hub. [Click here.](#)

CONTACT THE DESIGNATED GOVERNMENT AGENCY IN YOUR COUNTRY OF CITIZENSHIP FOR PASSPORT/VISA REQUIREMENTS. TRAVEL INTO U.S. MAY REQUIRE ESTA AUTHORIZATION. FOR DETAILS VISIT [THE ESTA WEBSITE](#)

**Warning- Duplicate air bookings may result in fees from the airlines. Duplicate bookings are defined as reserving multiple seats on the same flight or different flights for the same time frame.**

**Flight Search**

Round Trip  One Way  Multi City

From 

[Find an airport](#) | [Select multiple airports](#)

To 

[Find an airport](#) | [Select multiple airports](#)

[Show More](#)

## Booking Travel Through Concur: Flights, Hotel, Car Rental

- If you book your flight through Concur, it can be charged to a campus linked card, reducing your out of pocket expense.
- Hotel and Car Rental will require a personal card.
- Economy flight and Standard Car Rental only

# Concur Report Header

## Create New Report

required field

Policy \*

Travel and Entertainment Expense



Event/Trip Name \*

ABC Conference

Report Type \*



Event/Trip Purpose \*

Full description sentence of the purpose.  
EXAMPLE: Attended and Presented X at X conference. **Cannot** just put "conference".



Business Purpose \*



0/500

Event/Trip Start Date \*

MM/DD/YYYY



Event/Trip End Date \*

MM/DD/YYYY



Payee Type \*



## Report Header

ExFAB Summer School Event + Costco | \$517.44

Type of CCOA \*

Project Strings

Funding Source

(13558) Educational & Opportunity Fund

Fund

Program

Activity

1

FRU/Project \*

2

(M001061) Ex-FAB - 22085 (CNSI) - Resource Allocation Commitment

3

Entity \*

(1811) UC Santa Barbara Campus, excluding separately reported blend

Purpose

(44) Research

Commitment

Host Name (for Entertainment Expenses)

Sherylle Mills

Report Id \*

If it is a project string you would put the Project number instead of the FRU

## Concur Report Header

- Legacy project code needs to be noted in the header comment section at the bottom.
- Purpose is listed for CNSI as 44.

Project string is 4005002 & GL string is 4005001

Funding source is filled out if it is a Project string only

Fund is filled out if it is a GL string only

Activity is listed here if it is a GL string

# Angelcon 2024 \$200.00

Not Submitted | Report Number: AYXXXU

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

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

## Concur Report Timeline

- Add your Faculty/PI as a “User Added Approver”
- Department Approver
  - (Julie Dunson for CNSI)
  - Home department will auto populate
  - If you have split funding, be sure to

add the account approver for that funding source.

Do not submit the report before you have contacted your delegate.

France ABC Conference | \$1,648.88

### Approval Flow

Edit

- Department Approval
  - Julie Dunson
- Cost Object Approval
- Central Office Approval

- Department Approval
  - Approver Name \* Julie Dunson
  - Add above this step
  - Add below this step
- Cost Object Approval
- Central Office Approval

- New Approver
  - Approver Name \* Faculty/PI
  - Search by Last Name
- Department Approval
  - Approver Name \* Department Approver
  - Julie Dunson
- Cost Object Approval
- Central Office Approval

# What should be in an Expense Report

- **Lodging**
  - Itemized Receipt
  - \$333 Max Daily
- **Transportation**
  - **Air**
  - **Ground**
    - **Personal Car**
    - **Car Rental**
    - **taxi, bus, train**
- **Meals & Incidentals**
  - **Maximum per day \$92**
  - **Use Daily Meal Log**
- **Itemized receipts for all expenses over \$75**

# Lodging

## New Expense

Cancel Save Expense

Details **Itemizations**

Expense Type\* Lodging

Description Date Range\* 04/02/2024 - 04/05/2024 Nights: 3

Transaction Date\* 04/05/2024 Vendor Search for Vendor

Expense Location\* Santa Barbara, California Dept\* (CNSI) CALIF NANO SYSTEMS INSTITUTE

FAU\* (CNSI-ISPL01-8-447810-67468) CNSI|ISPL01|INCUBATOR|67468 Sub Account 5-Special Items

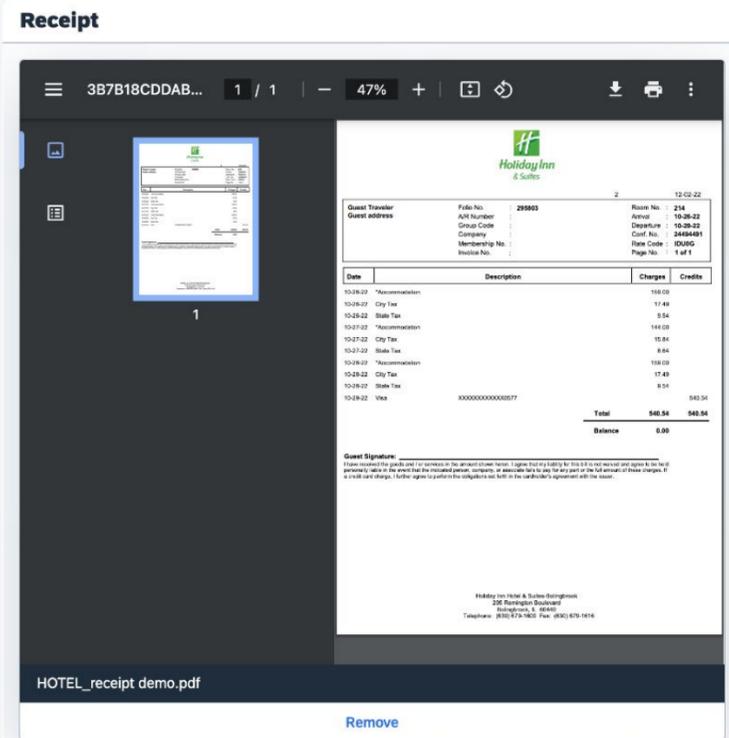
Cost Type Payment Type\* Select employee out of pocket Pending Card Transaction

Travel Allowance

Transaction Amount\* 540.54 Currency\* US, Dollar (USD)

Comment 0/500

Save Expense Save and Add Another Cancel



## Lodging \$540.54

04/05/2024 Cancel Delete Expense Save Expense

Details **Itemizations**

Amount \$540.54 Itemized \$540.54 Remaining \$0.00

Create Itemization Edit Delete Copy Allocate

Alerts	Date	Expense Type	Requested
<input type="checkbox"/>	04/02/2024	Lodging	\$159.00
<input type="checkbox"/>	04/02/2024	Lodging Tax	\$27.03
<input type="checkbox"/>	04/03/2024	Lodging	\$144.00
<input type="checkbox"/>	04/03/2024	Lodging Tax	\$24.48
<input type="checkbox"/>	04/04/2024	Lodging	\$159.00
<input type="checkbox"/>	04/04/2024	Lodging Tax	\$27.03

### Receipt

Date	Description	Charges	Credits
10-28-22	*Noncommission	168.00	
10-28-22	City Tax	17.48	
10-28-22	State Tax	9.54	
10-27-22	*Noncommission	144.00	
10-27-22	City Tax	15.86	
10-27-22	State Tax	8.84	
10-28-22	*Noncommission	188.00	
10-28-22	City Tax	17.48	
10-28-22	State Tax	9.54	
10-28-22	Vice		540.54
	<b>Total</b>	<b>540.54</b>	<b>540.54</b>
	<b>Balance</b>	<b>0.00</b>	

- Lodging
  - Itemized Receipt
- AirBnB: Even if multiple travelers are staying in the same unit, you cannot combine you “daily max” of \$333. If you do choose to share with another traveler, only one person can submit for reimbursement.
- Was your lodging included? Did you stay with a friend? If it was \$0, it still needs to be added to the report.

# Transportation - Personal Car

Details Itemizations Show Receipt

**Mileage Calculator** Allocate

\* Required field

Expense Type \* Personal Car/Business Use - Mileage X

Description

Transaction Date \* 04/04/2024

License Plate Number \* ABCDEFG Insured? Yes

From Location \* Santa Barbara, CA 93106, USA To Location \* Los Angeles, CA 90095, USA

Payment Type Employee Out of Pocket Dept (CNSI) CALIF NANO SYSTEMS INSTITUTE X

FAU (CNSI-ISPL01-8-447810-67468) CNSI|ISPL01|INCL X Sub Account 5-Special Items

Cost Type

Distance \* 197 Transaction Amount 131.99 Currency US, Dollar (USD) Reimbursement Rates USD 0.67 per mile

Comment 0/500

Save Expense Save and Add Another Cancel

■ Calculate your Personal Car Mileage with the Mileage Calculator in Concur.

Mileage Calculator

Avoid Tolls  Avoid Highways

Waypoints

- Santa Barbara, CA 93106, USA 98.6 Mi Personal
- Los Angeles, CA 90095, USA 98.5 Mi Personal
- Santa Barbara, CA 93106, USA

Calculate Route

Directions

United States, California, University of California-Santa Barbara

98.8 mi About 1 hour 46 mins

- Head south toward Ocean Rd 108 ft
- Turn right toward El Colegio Rd 256 ft
- Turn left toward El Colegio Rd 174 ft
- Continue onto El Colegio Rd 0.1 mi
- Turn right onto Ocean Rd 0.4 mi
- Turn right onto Mesa Rd 0.6 mi
- At the traffic circle, take the 2nd exit onto CA-217 E-Ward Memorial Blvd 2.5 mi
- Take the ramp onto US-101 S 85.3 mi
- Take exit 19A to merge onto I-405 S/San Diego Fwy 6.5 mi
- Take exit 57 toward Sunset Blvd 0.1 mi
- Turn left onto N Church Ln 410 ft
- Turn left at the 1st cross street onto W Sunset Blvd 220 ft
- Keep left to stay on W Sunset Blvd 2.0 mi
- Turn right onto Hilgard Ave 0.3 mi
- Turn right onto Winton Dr 177 ft
- Turn left onto Charles E Young Dr E 0.1 mi
- Charles E Young Dr E turns right and becomes Dickson Ct 0.2 mi
- Turn left onto Portola Plaza 0.2 mi
- Turn left to stay on Portola Plaza 0.2 mi

308 Westwood plaza Ackerman, A-261, Los Angeles, CA 90095

TOTAL PERSONAL 0.0 MI TOTAL BUSINESS 197.1 MI



# Print Share for your Delegate

**\*UCSB-Travel & Expense Detail Report** ✕

Show Expenses  Show Itemizations

**Report Name :** ABC Conference  
**Report Start Date :** 10/01/2024  
**Report End Date :** 10/03/2024

**Employee**  
**User Name :** Jewellisa Bolden  
**User ID :** 10202569

**Report Header**  
**Policy :** Travel and Entertainment Expense  
**Business Purpose :** Attending/presenting at ABC Conference in Los Angeles.  
**Report Id :** B554822CB6874D1DBEA9

[Close](#) [Print](#) [Save as PDF](#) [Email](#)

## ABC Conference \$1,142.99

Not Submitted | [Report Number: G10LVG](#)

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel](#)

**Expenses** \*UCSB-Travel & Expense Detail Report

- Once you complete the report click print share and click the email option

# Creating a Foreign Travel Request

# Foreign Travel Request

If you plan travel out of the US you will need to submit a prior approval request before you travel.

The image shows a screenshot of a web application interface. On the left, there is a 'My Tasks' section with three task cards. The first card, '01 Open Requests', is highlighted with a red border and contains a list of travel requests: '01/03 trip \$1,200.00 — Travel'. The other two cards are '03 Available Expenses' and '02 Open Reports'. On the right, there is a 'Create New Request' form with various fields for request details, including policy, report type, business purpose, dates, and destination.

**My Tasks**

- 01 Open Requests** →
  - 01/03 trip  
\$1,200.00 — Travel
- 03 Available Expenses** →
  - 10/07 JACK'S BISTRO & ...  
\$474.80
  - 10/02 KYLE'S KITCHEN ...  
\$608.17
  - 05/13 American Airlines  
\$593.78
- 02 Open Reports** →
  - 11/22 France ABC Confe...  
\$1,648.88
  - 04/03 ABC Conference  
\$1,818.48

**Create New Request**

\* Required field

Request Policy \*  
Travel/Entertainment Request

Report Type \*  
None Selected

Business Purpose \*  
0/500

Request/TripStart Date \*  
MM/DD/YYYY

Payee Type \*  
Employee

Destination City \*

Event/Trip Name \*  
[Empty]

Request/Trip Purpose \*  
None Selected

Request/Trip End Date \*  
MM/DD/YYYY

Group Travel \*  
None Selected

Destination Country \*  
Search by Country/Region

Cancel Create Request

- You will need to confirm with a prior approval request that foreign travel is allowed on the funding you have selected.
- You must include your advisor and the approver for the account funds in the timeline.
- Add estimated expenses (lodging and flight).

# Foreign Travel and Per Diem for Foreign Travel

Create the report from the original request. When making the report you must select the foreign per diem addition to your report

**ABC Conference \$3,347.98**  
Not Submitted | Report Number: 97OL3H

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Add Expense Edit Delete Copy Allocate **Manage Travel Allowance**

<input type="checkbox"/>	Alerts↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑
<input type="checkbox"/>	✖		Employee Out of Pocket	Travel - Foreign Daily Meal Per D

Travel Allowances For Report: ABC Conference

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

**Itinerary Info**  
Itinerary Name  
ABC Conference

Add Stop Delete Rows Import Itinerary

<input type="checkbox"/>	Departure City↑	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

**New Itinerary Stop**

Departure City  
Date Time  
Arrival City  
Date Time

- It is located on the header page of a new report
  - The header
  - Select “Yes, I require a travel allowance” at the bottom of the header page
  - Add departure as one stop and return as the second

# Per Diem for Foreign Travel

- All rates are located on the USDS web page.
- You will need to attach a print out pdf of the rate for your location of travel
- [https://aoprals.state.gov/web920/per\\_diem.asp](https://aoprals.state.gov/web920/per_diem.asp)

Add this print out to your report in the manage receipts/manage attachments section

U.S. DEPARTMENT OF STATE  
DIPLOMACY IN ACTION

Home > Under Secretary for Management > Bureau of Administration > Office of Allowances

**Office of Allowances**

**Foreign Per Diem Rates by Location  
DSSR 925**

You may use the dropdown box below to select a country. Entering the first letter of the country name will jump to that portion of the listing. Clicking "Go" will display Per Diem data for all locations within the country selected.

Country:

Select by Location  
Select by Allowance Type  
Printer Friendly

## ABC Conference \$1,142.99

Not Submitted | Report Number: G10LVG

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allow

Expenses View: Standard

Manage Attachments

View Receipts in New Window

Receipt↓↑ Payment

Missing Receipt Declaration

# TIPS

- Concur Mobile App (SAP)
- CNSI Reimbursement Web Page
  - See Related Links box

BioPACIFIC MIP Delegate: Debbie Kleinpeter,  
[debbie.kleinpeter@ucsb.edu](mailto:debbie.kleinpeter@ucsb.edu)

Quantum Foundry Delegate: Kelsey Leonard Moore,  
[kelsey\\_moore@ucsb.edu](mailto:kelsey_moore@ucsb.edu)

General CNSI (including Heeger Travel Awards):  
Jewels Bolden, [jewels@ucsb.edu](mailto:jewels@ucsb.edu)

# FEEDBACK

