ROCHESTER CITY SCHOOL DISTRICT
CONCUR TRAVEL & EXPENSE USER GUIDE

Please review the RCSD travel policy prior to booking travel arrangements. The travel policy can be found on the RCSD website at https://www.rcsdk12.org/cms/lib/NY01001156/Centricity/Domain/32/Travel_Procedures_.pdf and on the Concur home page. All questions can be directed to the Concur Administrator at 585-262-8710 or Concur@RCSDK12.org.

SUBMITTING A TRAVEL REQUEST

1) **Obtain Budget Code to Fund Travel Expenses.** If the budget code is not known, it should be provided by the department manager. A travel request cannot be submitted without a valid budget code.

2) **Log into Concur**. Access Concur by going to www.Concursolutions.com . Log-in ID is your RCSD email address and the default password is "welcome". Single Sign-on access, using your employee ID and network password, is available here: http://intranet/Pages/Applications.aspx .

3) **Search for Travel Arrangements.** Select the "Travel" tab at the top of the screen. This module offers employees a self-serve platform to search for airfare, hotels, car rentals, or train routes. Select the type of travel booking (airfare, hotel, etc.) and enter the preferred travel criteria (destination, travel dates, etc.). Click "Search".

4) **Reserve Travel Arrangements.** Select the preferred travel arrangements and follow the prompts on the subsequent screens to secure the reservation.
   ➢ **NOTE:** A reservation is not final until the travel request is submitted by the traveler and approved by the appropriate manager and/or grant monitor. Reservations are held by the travel agency for 24 hours beginning at the time an employee creates the request. If a request is not approved within the 24 hour window, it is cancelled.

5) **Enter Budget Code.** After a reservation is created, the system prompts the employee to enter additional request details including a valid budget code. After all required fields are entered, the request is ready to be submitted for approval.
   ➢ **NOTE:** If a request is created by a delegate, the delegate is given the option to notify the traveler that the request is ready to submit. Only the traveler can submit a request for approval.

6) **Ensure Request is Approved.** Requests must be approved within 24 hours of creation – approvers should be contacted directly if necessary.

7) **Receive Itinerary.** After a travel request is fully approved, the travel agency emails an itinerary to the traveler which includes confirmation and ticket numbers. All approved travel requests must be closed out with an expense report within 30 days of completion of travel (see below instructions).

SUBMITTING AN EXPENSE REPORT

1) **Create New Expense Report.** There are two ways to create an expense report:

   ➢ **Based on an Approved Travel Request** - All approved travel requests must be closed out with an expense report within 30 days after travel is complete. To create an expense report based on an approved travel request, select the "Requests" tab at the top of the screen and locate the request that needs to be closed out**.** At the far right of the screen, there is a link that says "Expense". Click the "Expense" link to create a new report – all of the request information is copied over to the expense report to save time. Click "Next". Your report is

then created and should automatically contain expense lines for District-paid items (hotel, airfare, etc.).

> **Manual** - Typically used to request reimbursement of in-District mileage or parking. Select the "Expense" tab at the top of the screen then "Create New Report". Enter all required fields (date range, budget code, etc.) and click "Next".

2) **Add Expenses to Report.** You may add expenses to the report by selecting "New Expense" and choosing the appropriate expense type (Parking, Meals, Personal Mileage, etc.). Enter the required expense details and attach receipt(s). Any out-of-pocket expenses should have a payment type of "Employee Paid" to ensure the employee is reimbursed. District-paid expenses will default to a payment type of "Travel/Hotel Card Paid". Please refer to the Travel Policy for more details on reimbursable expenses and required documentation.

3) **Submit Expense Report for Approval.** After all expenses and required documentation are added to a report, select "Submit Report" in the upper right-hand corner of the screen. Any problems with the report will trigger an exception message. If you receive an exception message, read it and follow the instructions for resolution.
> **NOTE:** As is the case with travel requests, expense reports can be created by a delegate but can only be submitted the employee for which the report was created. Delegates have the option to "Notify Employee" that an expense report is ready to submit.

4) **Verify Approval.** After submitting an expense report, it will be routed for approval. You can view the status and approval flow of a report by selecting the "Expense" tab at the top of the screen and locating the report under "Active Reports". Click on the report to open the details, select "Details" and "Approval Flow" to view the names of all required approvers. A report may be sent back to you by an approver if corrections and/or additional documentation is needed. Make any requested corrections, respond to questions using the "Comments" field, and re-submit for approval. An email notification will be sent to the employee every time a report is approved or sent back.