



College of Natural &
Agricultural Sciences

Concur Overview & Basics: Submitting a Pre-Trip Request

Concur Overview

What is Concur?

- Online system for:
 - Travel arrangements
 - Submitting travel expense reports
 - Reconciling T&E Card transactions
- Used by:
 - Faculty, staff, delegates, and affiliates

Provisioning Process

- Applies to all University community members using Concur
- Roles provisioned include:
 - Travel Arranger
 - Financial Previewer
 - Financial Approver

Important Notes

- Accountability structures (travel workflow routing) must be set up when these roles are provisioned
- Routing assigned in EACS requires an overnight update
 - Changes are not reflected in Concur in real time



Pre-Trip Request Overview

- Purpose of Pre-Trip Request:
 - Supports Duty of Care for all university travelers (faculty, staff, students, guests)
 - Enables direct billing via the university's preferred travel agency (Anthony's Travel)
 - Streamlines expense reporting by associating trip costs easily
- Submission Process:
 - Travelers or their Travel Arrangers must submit a Pre-Trip Request before creating an expense report
 - System Integration:
 - Information from the Pre-Trip Request automatically populates the expense report
 - Trip details can be updated as needed

Step-by-Step: Submitting a Pre-Trip Request

The screenshot shows the R'SPACE portal interface. At the top, a yellow banner contains the text "Log into your R'Space and click on 'Authorized Apps'" inside a blue oval callout bubble. The bubble has an arrow pointing to the "Authorized Apps" tab in the navigation bar. The navigation bar also includes "Staff", "PAMIS", and a "Log Out" link. The main content area is divided into several sections: "Favorites" on the left, "UCR Spotlights" in the center, "Announcements" on the right, "UCR Videos" below announcements, and "UCR News" below spotlights. The "Favorites" section lists various applications like Oracle Financials, Time and Attendance Reporting System, Concur, Fleet Commander, LinkedIn Learning, Transportation and Parking Services Account Center, ServiceNow - Work Order Systems, DocuSign, Guest Traveler Routing, ePay - Online Payment System, Looker, and iReport. The "UCR Spotlights" section features a banner for the "FACULTY & STAFF Picnic" on Tuesday, Sept. 9, 2025, from 11:30 a.m. to 1:00 p.m. at HUB Plaza. The "Announcements" section includes a notice about "ScotSurplus Brings Back Saturday Summer Sales". The "UCR Videos" section shows a video titled "Early Zoom classes" with a thumbnail of a dog. The "UCR News" section lists various news items. The bottom of the page has a "Training & Tools" section and a "News Reader" section.

R'SPACE

Staff Authorized Apps PAMIS Log Out

Log into your R'Space and click on 'Authorized Apps'

Search

YOUR OPINION IS IMPORTANT TO US [+]

Favorites

- Oracle Financials
- Time and Attendance Reporting System
- Concur
- Fleet Commander
- LinkedIn Learning
- Transportation and Parking Services Account Center
- ServiceNow - Work Order Systems
- DocuSign
- Guest Traveler Routing
- ePay - Online Payment System
- Looker
- iReport

You can favorite any portlet you are using via the contextual options menu accessed from its title bar.

Training & Tools

Access & Training

UCR Spotlights

FACULTY & STAFF Picnic

TUESDAY, SEPT. 9, 2025

11:30 a.m.-1:00 p.m. | HUB Plaza

Faculty & Staff Picnic: Save the Date

UCR News

News

- Chemical shield stops stressed DNA from triggering disease
- Inhaled agricultural dust disrupts gut health
- UC Riverside scientists develop tool to detect fake videos
- School of Business joins council of global business schools
- Solid-state batteries charge faster, last longer
- Cleaner East Asian air unmasks a much hotter planet
- Riverside Free Clinic: A health resource for the community
- Scientists find new way to control electricity at tiniest scale
- UC Riverside scholar reimagines student engagement
- Pair of malaria parasite proteins could lead to therapies

Announcements

Faculty & Staff Announcements

ScotSurplus Brings Back Saturday Summer Sales

ScotSurplus has announced their on-campus public sale dates for the summer. The sale dates will be June 28th, July 1st and 26th, and August 5th and 23rd. They will run from 11:00 am to 4:00 pm on Tuesdays and 8:00 am to 1:00 pm on Saturdays.

See also: <https://cbs.ucr.edu/scotsurplus>

UCR Videos

Early Zoom classes

When you have summer session classes on Zoom at 8am

Watch on YouTube

News Reader

Arts and Culture - Los Angeles Times

The news "Arts and Culture - Los Angeles Times" is currently unavailable.

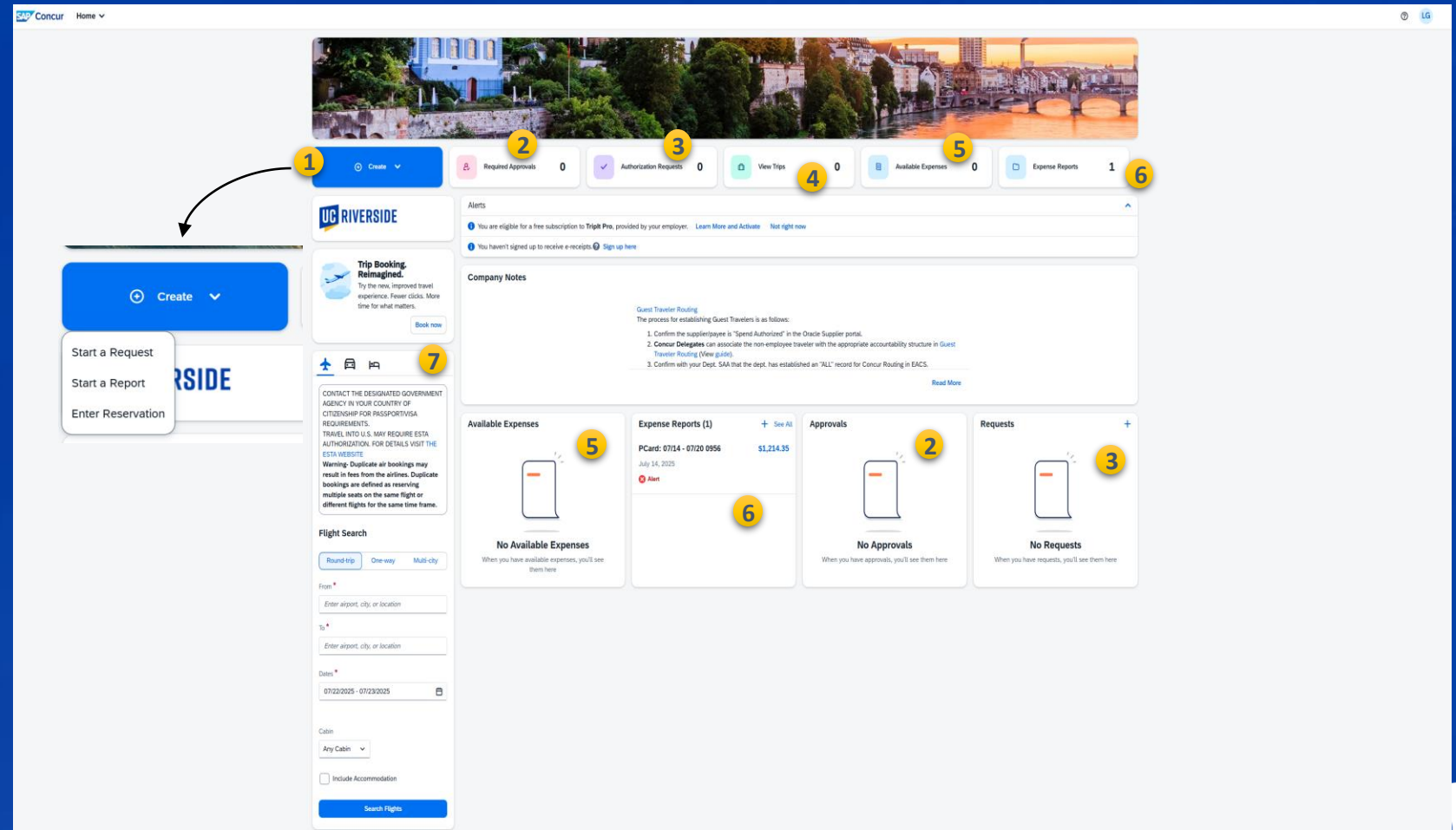
Filter Authorized Apps

 Banner Student Academic Summary	 DocuSign	 Hazardous Materials Shipping	 JD Library	 Time and Attendance Reporting System	 Transportation and Parking Services Account Center
 Guest Traveler Routing	 eBuy - UCR Purchasing System	 iEval	 Journal Documentation System	 Photo Roster	 Concur
 Training - Oracle Financials	 Employer's First Report of Injury (EFR)	 Enterprise Access Control System	 LinkedIn Learning	 ServiceLink	 UC Learning Center (LMS)
 Oracle Financials	 Google Email and Calendar	 Fleet Commander	 Mail Services	 Startup Request System	 UCPath Portal
 ServiceNow - Work Order Systems	 Office 365 Email and Calendar	 Syllabus Repository	 Facilities Work Orders	 CNAS FAU Management System	 UCR Library

Click on the Concur icon

Once logged in, you will arrive at the Concur homepage.

- 1 Use the drop-down menu to create a pre-trip request, expense report, or enter travel booked through other vendors. Concur uses this information to pre-populate your expense report.
- 2 If you have permission to approve reports, you will find them here.
- 3 This is where you can view all pre-trip requests. You can access them using the tab above or the tab below, which provides a preview of each request.
- 4 This tab displays all of your Concur travel reservations.
- 5 Any T&E or Ghost Card (Concur company card for airfare) charges will appear here.
- 6 This tab contains your expense reports and indicates how many have not yet been submitted.
- 7 This section allows you to book reservations for lodging, airfare, and rental cars directly through Concur.



Click on
Requests.

The screenshot displays the SAP Concur user interface. At the top left, the 'SAP Concur' logo is visible next to a 'Home' dropdown menu. A blue callout bubble with the text 'Click on Requests.' and an arrow points to the 'Requests' option in the left sidebar. The sidebar also includes options for Home, APPLICATIONS, Travel, Expense, Approvals, TripLink, and App Center. The main header area features a large landscape image and a row of five summary cards: 'Required Approvals' (0), 'Authorization Requests' (0), 'View Trips' (0), 'Available Expenses' (0), and 'Expense Reports' (1). Below these are sections for 'Alerts' (containing two messages about Triplt Pro and e-receipts) and 'Company Notes' (starting with 'Guest Traveler Routing' and a list of three steps). A 'Book now' button is located in the 'Trip Booking. Reimagined.' section on the left. The bottom of the page includes a footer with travel icons and a note about contacting government agencies for passport/visa requirements.

SAP Concur Home

Home

APPLICATIONS

Requests

Travel

Expense

Approvals

TripLink

App Center

Required Approvals 0

Authorization Requests 0

View Trips 0

Available Expenses 0

Expense Reports 1

Alerts

You are eligible for a free subscription to **Triplt Pro**, provided by your employer. [Learn More and Activate](#) [Not right now](#)

You haven't signed up to receive e-receipts. [Sign up here](#)

Trip Booking. Reimagined.

Try the new, improved travel experience. Fewer clicks. More time for what matters.

[Book now](#)

Company Notes

Guest Traveler Routing

The process for establishing Guest Travelers is as follows:

1. Confirm the supplier/payee is "Spend Authorized" in the Oracle Supplier portal.
2. **Concur Delegates** can associate the non-employee traveler with the appropriate accountability structure in [Guest Traveler Routing \(View guide\)](#).
3. Confirm with your Dept. SAA that the dept. has established an "ALL" record for Concur Routing in EACS.

[Read More](#)

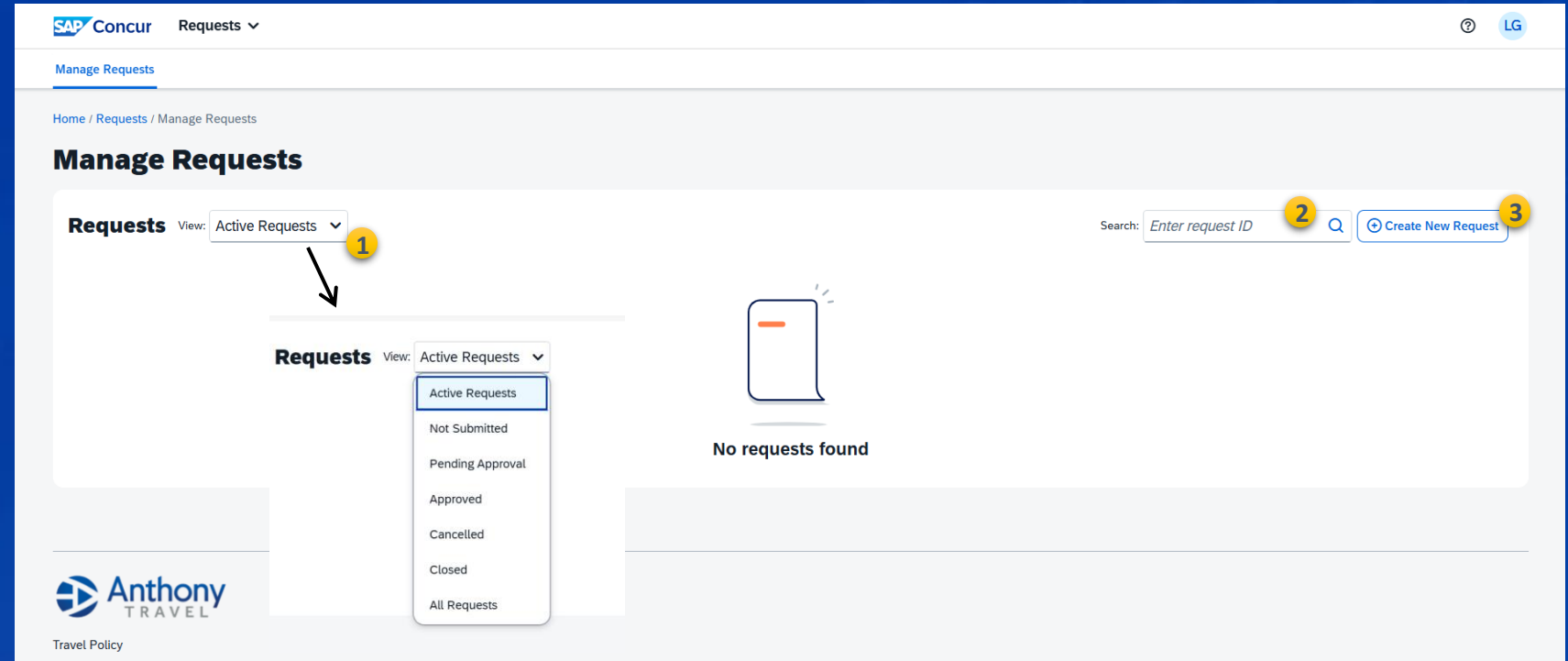
CONTACT THE DESIGNATED GOVERNMENT AGENCY IN YOUR COUNTRY OF CITIZENSHIP FOR PASSPORT/VISA

The Manage Requests page is where all pre-trip requests are located.

1 Use the View drop-down menu to filter your pre-trip requests by status.

2 The Search box allows you to locate a specific request using the Request ID (see next slide for reference).

3 Click here to create a new Pre-Trip Request.



- 1 Select Travel Request
- 2 Create a trip name for your request
- 3 Select the traveler type if they are a UC employee or a guest traveler

Create New Request

Request Type *

1

*Travel Request

Trip Name *

2

UC Conference - San Francisco

Traveler Type *

3

Search by Text

Employee

Guest-Consultant

Guest-Foreign Visiting Scholars

Guest-Postdocs and Other Non-Degree Candidate

Guest-Pro prospective employee

Guest-Pro prospective student

Guest-Spouse/Domestic Partner/Dependent/Dependent Care Provider/

Trip Type *

1. In-State

Trip Purpose *

Business Travel Start Date *

MM/DD/YYYY

Business Travel End Date *

MM/DD/YYYY

Personal Travel Dates

Main Destination City *

Employee ID *

1

(10403293) Lindsay Gomez

ORG *

2

Accountability Structure *

3

Approver ID *

4

Cancel

Create Request

4 Select the trip type (please refer to G28 Policy regarding OCONUS travel)

5 Select the purpose of this trip

6 Enter additional information for the trip

Create New Request

Request Type *
*Travel Request

Trip Type * 4
1. In-State

Business Travel Start Date *
MM/DD/YYYY

Personal Travel Dates

Employee ID * 1
(10403293) Lindsay Gomez

Approver ID * 4

Trip Name *
UC Conference - San Francisco

Trip Purpose * 5
This field is missing required information.
Business Meeting/Event (Bus-79)
Conference/Professional Meeting (G-28)
Fieldwork
Group Travel
Official Visits
Other Purpose (Comment Required)
Professional Development

Traveler Type *
Employee

Business Purpose/Additional Information * 6
0/500

Will this trip include personal travel? *

Payment Option * ?
EFT

Accountability Structure * 3

Cancel Create Request

Trip Type *
Search by Text
1. In-State
2. Out-of-State / OCONUS
3. Foreign

7 Include the start and end dates of the trip.

8 If any personal travel will occur during the trip, be sure to include those dates as well.

9 Enter your trip destination.

10 Check and EFT (direct deposit) are the most commonly used payment methods.

- For guest travelers, always select Check as the payment method.

The screenshot shows a 'Create New Request' form with the following fields and callouts:

- 7** Callouts point to the 'Business Travel Start Date' (08/04/2025) and 'Business Travel End Date' (08/06/2025) fields.
- 8** Callout points to the 'Will this trip include personal travel?' dropdown menu, which is currently set to 'No'.
- 9** Callout points to the 'Main Destination City' dropdown menu, which is set to 'San Francisco, California'.
- 10** Callout points to the 'Payment Option' dropdown menu, which is open and showing 'Check', 'EFT', and 'Wire (Exceptional)' options. 'EFT' is highlighted.

Other fields on the form include:

- Request Type**: *Travel Request
- Trip Name**: UC Conference - San Francisco
- Traveler Type**: Employee
- Trip Type**: 1. In-State
- Trip Purpose**: Conference/Professional Meeting (G-28)
- Business Purpose/Additional Information**: Attending UC Conference for professional development.
- Employee ID**: (10403293) Lindsay Gomez
- OR**: [Empty]
- Approver ID**: [Empty]

At the bottom right, there are 'Cancel' and 'Create Request' buttons.

Create New Request

08/04/2025 08/06/2025 No

Personal Travel Dates Main Destination City * Payment Option *
 San Francisco, California EFT

Employee ID * 1 (10403293) Lindsay Gomez

Appraiser ID * 4

Entity * (1511) UCR CAMPUS

Function * Flex 1 * Flex 2 *

Comment 0/500

ORG * 2 Text Search by Text 11

Most Recently Used
 (ORG14-D01277-10005996) Robert Sutton
 (ORG14) College of Natural & Agricultural Sciences

Accountability Structure * 3

Activity * Project *

Cancel Create Request

- 11 Click the drop-down menu and select your department's financial approver.
- Once selected, Concur will auto populate the rest of the accountability structure.

Create New Request

Employee ID * 1 (10403293) Lindsay Gomez

Appraiser ID * 4 (10005996) Robert Sutton

Entity * (1511) UCR CAMPUS

Function * Flex 1 * Flex 2 *

Comment 0/500

ORG * 2 (ORG14) College of Natural & Agricultural Sciences

Accountability Structure * 3 (D01277) BEES Administrative Unit Dept

Fund * Activity * Program * Project *

Cancel Create Request

- 12 Enter the COA funding provided by the analyst.
- 13 Click Create Request to proceed.

Click this button to add your expected or estimated expenses.

Your estimated expenses will then populate in the request.



16

Once all expenses have been entered, click Submit Request.

17

17. A pop-up window titled UCR Travel Request User Confirmation will appear. Click Accept & Continue to submit your request for approval.

SAP Concur Requests

Manage Requests

Home / Requests / Manage Requests / UC Conference - San Francisco

UC Conference - San Francisco \$740.00

Not Submitted | Request ID: 7RJY

Request Details Print/Share Attachments

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> 04. Individual Meals		08/04/2025	\$200.00	\$200.00
<input type="checkbox"/> 02. Lodging		08/04/2025	\$200.00	\$200.00
<input type="checkbox"/> 01. Airfare		08/04/2025	\$340.00	\$340.00
				\$740.00

Buttons: Add, Edit, Delete, Allocate

Buttons: Submit Request, Copy Request, Edit Approval Flow, Delete Request

SAP Concur Requests

Manage Requests

Home / Requests / Manage Requests / UC Conference - San Francisco

UC Conference - San Francisco

Not Submitted | Request ID: 7RJY

Request Details Print/Share Attachments

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> 04. Individual Meals		08/04/2025	\$200.00	\$200.00
<input type="checkbox"/> 02. Lodging		08/04/2025	\$200.00	\$200.00
<input type="checkbox"/> 01. Airfare		08/04/2025	\$340.00	\$340.00
				\$740.00

Buttons: Add, Edit, Delete, Allocate

Buttons: Submit Request, Copy Request, Edit Approval Flow, Delete Request

***UCR Travel Request User Confirmation**

By clicking on the 'Accept & Submit' button, I certify that:

- This is a true and accurate estimation of expenses that will be incurred to accomplish authorized official business for University of California, Riverside.
- This request is in compliance with UC Travel policy and other restrictions as applicable (e.g. Award Terms & Conditions, NCAA, etc.).

Business & Finance Bulletin G-28: <https://policy.ucop.edu/doc/3420365>

Buttons: Cancel, Accept & Continue