



SOE Student Traveler: Workfront Application and Concur

December 1st, 2023 at 11am



Agenda

Student Conference Travel Grant applications:

1. Program Overview
2. Workfront Application Purpose and Demo
3. GSA & SOE Grant Workflow

Travel and Concur:

1. Concur Overview
2. Travel Procedures (Expense Reports and New Pre-Payment Option)

Questions: Please feel free to Raise Hand or use the chat for questions throughout the presentation.

Graduate Student Conference Travel and Professional Development Program Overview

- SOE provides **\$2,000** per academic year to support conference travel and professional development. This funding can be combined with GSA funds.
- SOE supports up to two professional organization memberships per year. The costs of these membership dues are tracked against your annual \$2,000 allocation.
- *New for AY2023/24: SOE is offering prepayment of eligible travel expenses, including airfare, registration, and membership dues. All prepaid costs must remain within your SOE Award Amount per trip.
- Please review full guidelines for more details, instructions, and region award amounts.
- Effective September 13, 2023, California Assembly Bill 1887 was rescinded, which restricted travel to certain states when using state funds. SOE can now support conference travel to all states.

Contact Information: soebusops@ucr.edu



Why a new Workfront application?

- The SOE Business Operations Team uses a Workfront application process and pre-payment system to manage the student conference travel and professional development program.

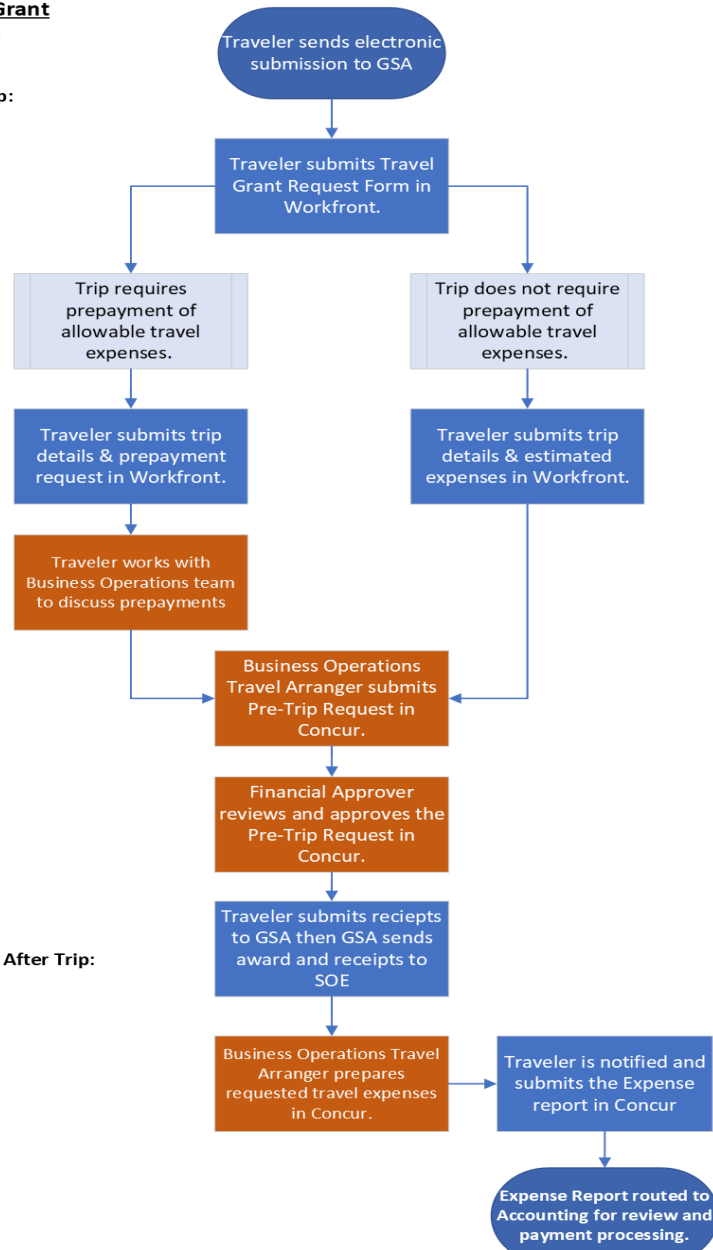
Why?

- Decrease financial burden on students
- Greater visibility to students on status of grants/reimbursements
- One place for students and SOE to manage receipts and award letters
- Process student travel more timely

Workfront Demo: <https://ucriversion.my.workfront.com/requests>

GSA & SOE Grant Process

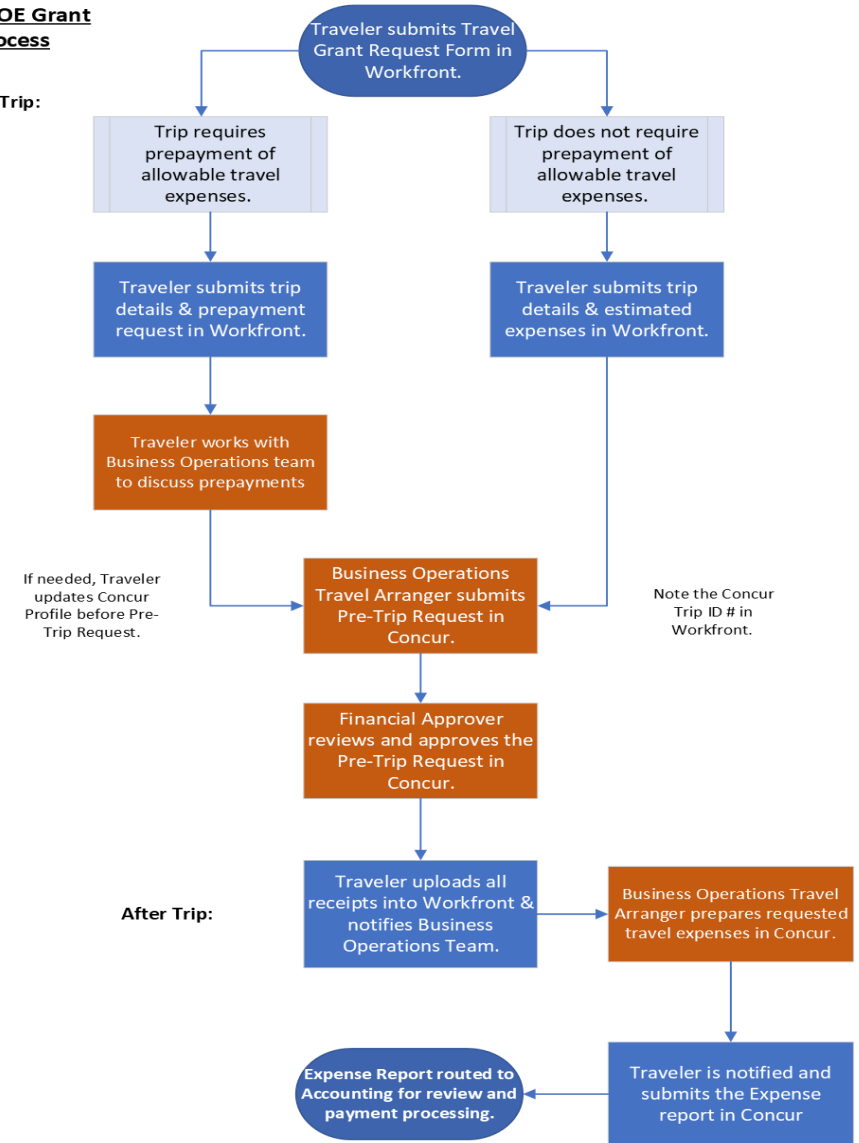
Before Trip:



After Trip:

Only SOE Grant Process

Before Trip:



After Trip:



Concur: Travel Overview

- Concur for Travel is based on two steps:
 - (1) **Travel Request:** typically submitted prior to travel and is used to ensure COA is correct and sufficient funds are available. The Travel Request is required to prepay airfare. Travel Arrangers can submit Travel Requests on behalf of Travelers.
 - (2) **Expense Report:** submitted after travel is completed and is the request that kicks off reimbursement processing. Travel Arrangers cannot submit Expense Reports on behalf of Travelers.
- **Note:** Please contact our team anytime you need assistance resolving Red Alerts and/or additional issues in Concur.

Reimbursement Checks and Direct Deposit:

- **Active UCR Employees** will receive their reimbursement payments in the same manner that they receive their payroll payments. If you have selected direct deposit in UCPATH, your reimbursements will post to that same direct deposit account.
- **Non-Employees** will receive their reimbursement payments via check sent to the mailing address set up through the Oracle Supplier Registration Portal.




1 Home Menu –
Requests This tab is used to make or access pre-trip travel requests
Expense Create, edit, and submit expense reports here

2 Profile Settings – Update profile through profile settings, such as verify email address, enable e-receipts, add personal travel preferences, and update emergency contact information.

3 Trip Search – This panel is only available if you are authorized to use Concur Travel. Use this section for pre-payment for airfare.

4 My Tasks – Shows a summary of key information pertaining to your usage. The number of cards displayed shows your number of Open Requests, Available Expenses, and Open Reports.

5 My Trips – Displays upcoming trips for quick access.

Note: Error messages in concur will either be a **red exclamation point icon** , which indicates that the error must be resolved before the transaction can be submitted. The **yellow exclamation point icon**  indicate  you might want to address the issue, but the system will allow the transaction to be submitted.

Submitting Expense Reports

SAP Concur

Home

Home

APPLICATIONS

Requests

Travel

Expense

App Center

RIVERSIDE

+
Start a
Request

+
Start a
Report

+
Enter
Reservation

00
Authorization
Requests

00
Available
Expenses

00
Open
Reports

Search



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
Departure city, airport or train station

To
Arrival city, airport or train station

Search

Show More

My Trips (0)

You currently have no upcoming trips.

Alerts

As an employee of University of California, Riverside, you are eligible for a free **Triplt Pro** subscription. [Learn More and Activate](#)

Not right now

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

Company Notes

***NOTICE: EPR Validation Issue

Project teams are actively addressing a **known issue where reports get stuck in the "ERP Validation" or "External Validation" status**. This matter is receiving priority attention, and no additional ticket is needed for resolution. This notice will be removed once the issue is completely resolved.

[Guest Traveler Routing is now available!](#)

The process for establishing Guest Travelers is as follows:

[Read more](#)

My Tasks

00 Open Requests

You currently have no active requests.



00 Available Expenses

You currently have no available expenses.



00 Open Reports

You currently have no open reports.



SM

Submitting Expense Reports

SAP Concur 

Expense ▾



[Manage Expenses](#)

[Home](#) / [Expense](#) / [Manage Expenses](#)

Manage Expenses

Report Library

[+ Create New Report](#)

 View: Active Reports ▾

2023 Digital Media Conference
11/13/2023
\$1,137.91
[Not Submitted](#)

[Home](#) / [Expense](#) / [Manage Expenses](#) / 2023 Digital Media Conference

2023 Digital Media Conference \$1,137.91

Not Submitted | Report Number: SFGGCQ

[Delete Report](#) [Copy Report](#) [Submit Report](#)

REQUEST

Approved

\$1,137.91

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

[View Available Receipts](#) 

Available Expenses

[Delete](#) [Combine Expenses](#) [Move to](#) ▾

View: All Expenses ▾



No Available Expenses

New/Incoming expenses will be added to this list.
To find missing transactions: [Card Transactions](#)

Pre-Payment




Before the trip:

1. Traveler submits Travel Request via Workfront and requests pre-payment. (Airfare, Registration fees, and/or Memberships dues)
2. Business Operations Team creates and submits Pre-trip Request in Concur before pre-payment finalization.
3. Traveler creates itinerary for Airfare for Travel Arranger to book Airfare or Meet via Zoom. Traveler may attach documentation for preferred flights in Workfront.
4. Traveler meets with Travel Arranger to process payment for registration fees and membership dues.

Airfare Note: All pre-paid airfare must be booked via Concur Travel.

Reminder: We cannot do a pre-payment for Lodging.

Trip Search


  

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Flight Search

Round Trip One Way Multi City

From 

Departure city, airport or train station

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

To 

Arrival city, airport or train station

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

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