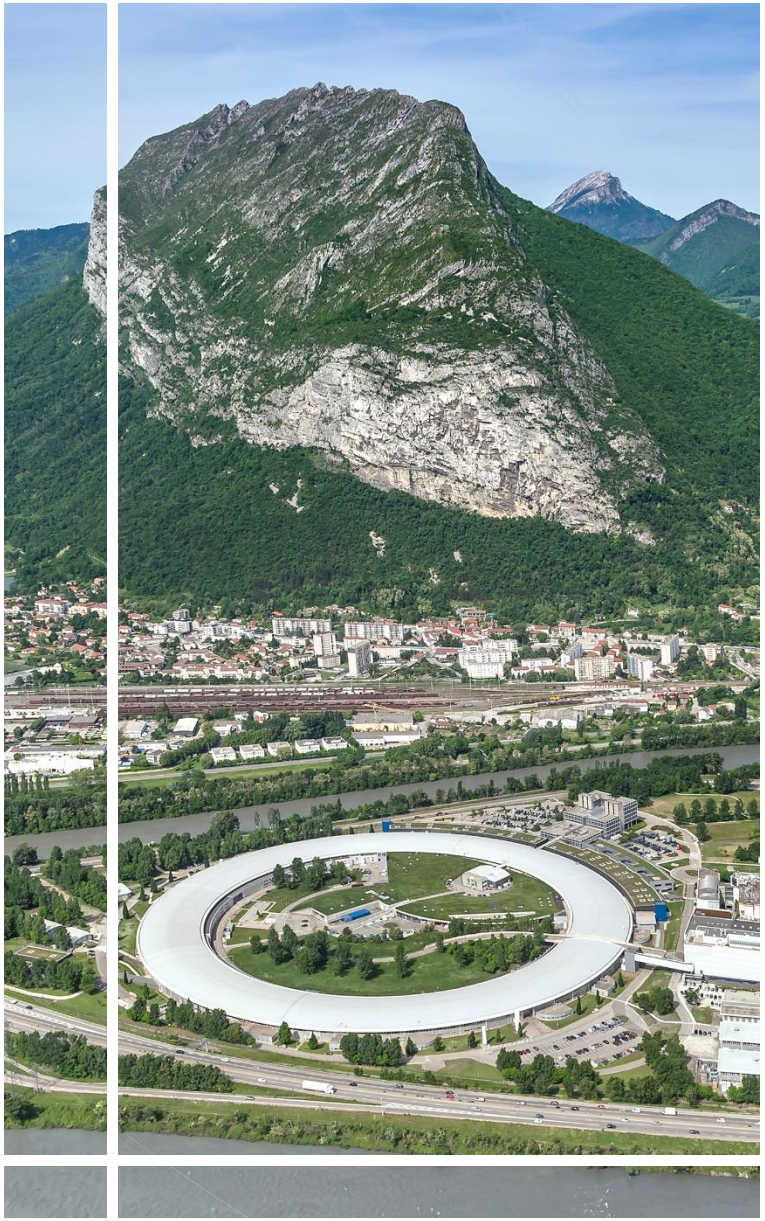
ESRF
The European Synchrotron



SAP Concur

for experimental users

General presentation

GENERAL CONTEXT:

- ESRF travel management organisation was obsolete:
  - ✓ All offline processed, whereas online booking is a common usage
  - ✓ Delays in the processing of reimbursement claims (manual approval workflow, missing original receipts,…)
- Many users requested to know the ESRF contribution in advance
- ESRF travel regulations for users, revised in 2019

  (*https://www.esrf.eu/home/UsersAndScience/esrf-user-policies-and-rules/travel-rules.html*)
- Replacement of the software for the management of travel expenses at the ESRF

SAP Concur

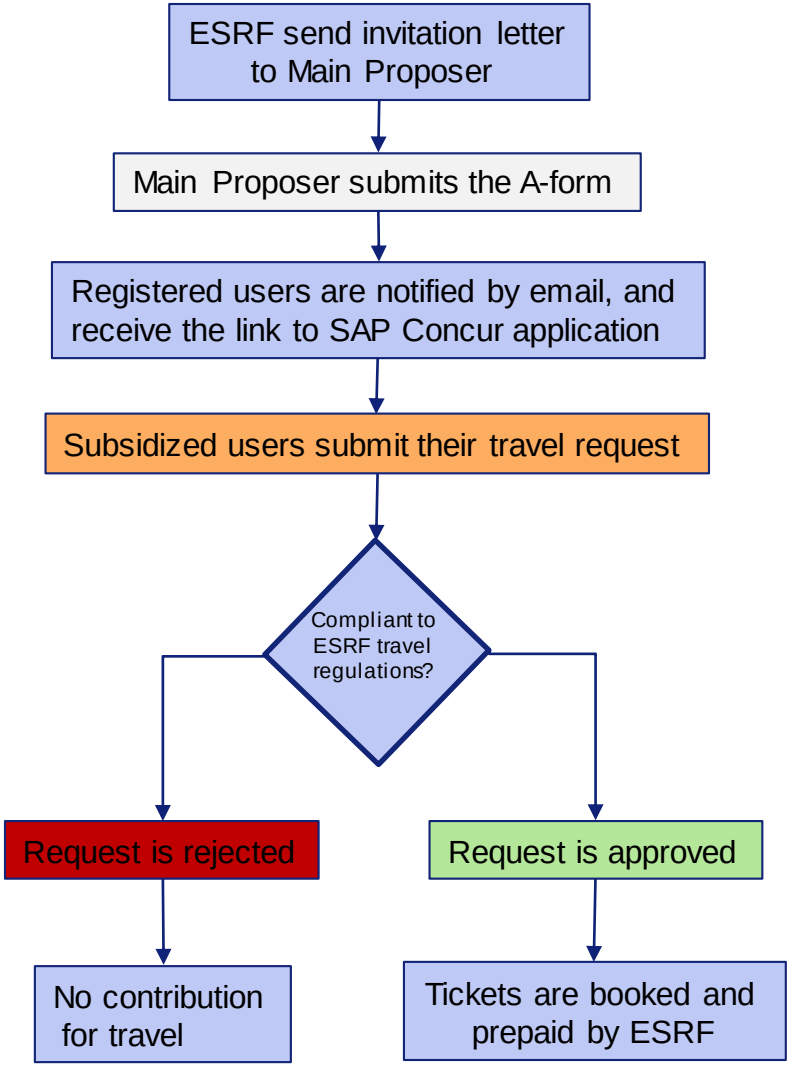
- Worldwide group,
  currently present in 150 countries, 45000 customers
- + 7000 employees
- 25 years of expertise in the T&E management
- At the ESRF: a common application for both staff and non-staff travelers

In SAP Concur, as subsidised user, you will be able to:

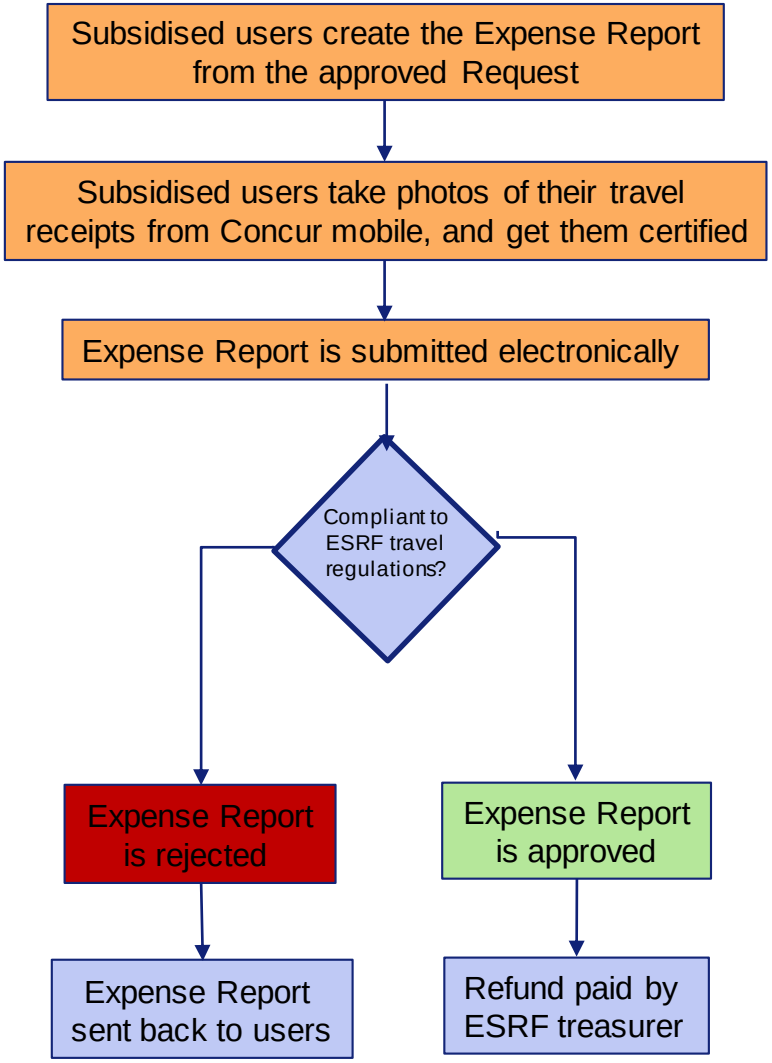
- Look for the best travel schedules
- Book for travel tickets, directly paid by the ESRF
- Submit your travel request for approval
- Take pictures of travel receipts from SAP Concur mobile application and get them certified (replacing paper receipts)
- Add these receipts to your reimbursement claim, and submit it electronically

GENERAL WORKFLOW

TRAVEL REQUEST



EXPENSE REPORT



TRAVEL REQUEST

- Travel request is mandatory for all subsidized users:
  - ✓ **To get ESRF contribution** for travel costs
  - ✓ Travel request must be submitted, **at least 2 weeks before arrival** (if not**, no travel contribution**)
  - ✓ **Submit your travel requests as soon as possible**, in order to get a larger choice of tickets and a higher flexibility if done >3 weeks in advance
  - ✓ User will know the ESRF contribution **before the trip** (as soon as travel request is approved)
- The ESRF takes care of the travel purchase:
  - ✓ **Give preference to online booking suggested via SAP Concur**
  - ✓ No need to get a pre-paid ticket from your institute, no need to claim reimbursement to the ESRF, no need to refund your institute afterwards, …
  - ✓ Tickets bought by user will **only** be reimbursed if approved on the travel request

ONLINE BOOKINGS

- In SAP Concur, online booking must be done **before the creation of the travel request**
  - ✓ Several data will then, automatically populate the travel request header
- Online booking takes into account ESRF travel policy
  - ✓ It provides flights to either Lyon or Geneva airports (i.e the closest airports to reach the ESRF)
  - ✓ When appropriate, travel alternatives by train can be suggested
  - ✓ The most economical and available tickets are suggested, **with a higher flexibility, if more than 3 weeks in advance.**
  - ✓ **No booking is possible less than 2 weeks before arrival**
- Low-cost flights
  - ✓ **Low-cost flights** can be booked online, but **are charged to the ESRF, as soon as selected.** As non-refundable, you must be sure of your choice…

SAP CONCUR MOBILE APPLICATION AND EXPENSE REPORT

- The ESRF recommends that you download the SAP Concur mobile application:
  - ✓ To take photos of your travel expenses and **get them certified**
- Thanks to certified receipts (i.e, photo taken from the SAP Concur mobile):
  - ✓ **Paper receipts are no longer requested (*)**
  - ✓ Submit your claim electronically (no paper form, no sent by postal mail)
- Your expense report must be:
  - ✓ **Created from the approved travel request**, as the application will populate the expense report header on your behalf
  - ✓ **Created upon your departure to the ESRF**, in order to add the certified receipts of your travel expenses
  - ✓ Submitted **not later than 1 month** after the end of your trip (take care of email reminders)

(*) if you attach “non-certified” receipts, paper receipts must be received by ESRF Travel office, not later than 30 days after the end of your trip