

QuickStart Guide  
eTravel/Concur®: Travel and Expense

March 2, 2012



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## **Welcome to Concur Premier**

Concur Premier integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools users need to book travel as well as create and submit expense reports. Managers use the service to review and approve expense reports. Back-office employees use the service to produce audit reports, ensure compliance, and deliver business intelligence to help your company reduce its costs.

**Section 1: Log on to Concur Premier through your regular SSO menu. If your organization did not participate in Concur, then you will not be able to login to Concur.**

## Section 2: Explore the My Concur Page

The **My Concur** page includes several sections that make it easy for you to navigate and find the information you need.

The screenshot shows the My Concur web interface. At the top is the Concur logo and a navigation bar with tabs: My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. The main content area is divided into several sections:

- Not Sure Where You Are?**: A promotional banner for mobile GPS-enabled search for hotels, restaurants, and cars, with a link to "Register Concur for mobile." and an image of a smartphone.
- Trip Search**: A section with tabs for Flight, Car, Hotel, Taxi, Rail, Flight Status, and Dining. It includes radio buttons for Round Trip, One Way, and Multi-Segment. Below are input fields for Departure City (SEA - Seattle Tacoma Intl Arpt - Seattle, WA), Arrival City, and departure/return times (9:00am and 5:00pm). There are also checkboxes for "Pick-up/Drop-off car at airport", "Automatically reserve this car", and "Find a Hotel".
- Expense Reports (7)**: A section with buttons for "New Expense Report" and "View Reports". It contains a table of expense reports.
- Company Info**: A section with a welcome message: "Welcome to Concur Expense and Invoice. Please click the Expense or Invoice tab to start."

Report Name	Status	Report Date	Total
<b>OE Lunches Sept. 14-15</b> Lunches for Intelligence Training	Approved	09/20/2010	\$164.86
<b>Training</b> Training	Not Filed	09/16/2010	\$1,115.00
<b>Elan Expense Training 09/08/10</b> Onsite Expense Training	Final Accounting Approval	09/15/2010	\$231.11
<b>Sales Training</b> Work with new sales system.	Not Filed	09/10/2010	\$0.00
<b>Trip to San Francisco</b> Onsite Expense Training	Sent Back to Employee - Calnan, Brenna M	09/09/2010	\$57.00
<b>Hub International</b> Travel & Expense Training for Hub International	Approved	08/31/2010	\$64.00
<b>Training for Hub International</b> Concur Travel & Expense onsite training for Hub International	Approved	08/23/2010	\$700.74

### How to...

Use the **Trip Search** section.

Look at the **Company Info** section.

Use the **Active Work** section.

Explore the **Approval Queue** section.

### Additional Information

This section provides the tools you need to book a trip with any or all of these: flight, car, and hotel.

This section displays information and links provided by your company.

This section provides links to create a new expense report or view your existing reports. Tabs show existing expense reports, authorization requests, or cash advances (when applicable).

***This section appears on My Concur only if you are an Expense approver and if you have received at least one report to approve.***

Expense reports will need to be reviewed and approved. You will be prompted to certify that you reviewed the receipts. If you are a primary manager in SSO, then you will also approve authorization requests (pre-trip approvals).

## Section 2: Explore the My Concur Page (Continued)

How to...	Additional Information
Explore the <b>Trip List</b> section.	Explore the <b>Trip List</b> section. This section displays the trips booked for airfare, car rental, and/or hotels. <i>This section appears on My Concur only if your company uses Travel.</i>
Explore the <b>Trips Awaiting Approval</b> section.	<i>This section appears on My Concur only for Tarleton, Commerce, Texarkana, and Prairie View Business Office Approvers.</i>
Explore the <b>Available Company Card Charges</b> section.	This section lists all credit card transactions that you charged on your individually named corporate issued credit card including the individually named CBA and IBT (individually billed, individual paid) cards.
Explore the <b>Travel Info</b> section.	This section provides general travel information that is important for your organization.

You can move the panes around the **My Concur** page to better meet your needs. Click the top bar of a pane and drag it to a new position on the page.

## Section 3: Update Your Travel Profile

Before you use Travel for the first time, you must update and save your profile. You must save your profile before you first attempt to book a trip in Travel.

If you are a travel arranger for someone else, you will go to the travel tab and select “Arrangers” under the tab. The dropdown will appear and select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the the).

### Step 1: Change your Time Zone, Date Format, or Language

#### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **System Settings**.
3. On the **System Settings** page, update the appropriate information, and then click **Save**.

#### Additional Information

You can change the system and regional settings (number, currently, date, and time format).

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

The screenshot displays the Concur user interface. At the top, the 'Profile' tab is selected in the navigation bar. Below it, the 'System Settings' link is highlighted. The main content area is titled 'My Profile' and contains a sidebar with various settings categories: Your Information, Travel Settings, Expense Settings, Invoice Settings, and Other Settings. The 'System Settings' section is expanded, showing options for Regional Settings and Language, Calendar Settings, Other Preferences, and Travel Settings. The Regional Settings section includes fields for Default Language (English (United States)), Number Format (1,000.00), Placement of Currency Symbol (Before the amount), Negative Number Format (-100), Negative Currency Format (-100), Date Format (mm/dd/yyyy), Time Format (h:mm AM/PM), Hour/Minute Separator (:), and Time zone (GMT-08:00 Pacific Time (US & Canada; Tijuana)). The Calendar Settings section includes Start week on (Sunday), Start Day View At (8:00 AM), End Day View At (8:00 PM), and Default View (month). The Other Preferences section includes Home Page (My Concur) and Rows per page (25). The Travel Settings section includes checkboxes for sending emails and confirmation emails, and a section for trip reminders.

**Concur**

My Concur Travel Expense Invoice Reporting Administration **Profile**

Personal Information Change Password **System Settings** Mobile Registration Travel Vacation Reassignment System E-Mail Settings

**My Profile**

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me Search

**Your Information**

Personal Information  
Company Information  
Contact Information  
Emergency Contact  
Credit Cards

**Travel Settings**

Travel Preferences  
International Travel  
Frequent-Traveler Programs  
Assistants/Arrangers

**Expense Settings**

Expense Information  
Expense Delegates  
Expense Preferences  
Expense Approvers  
Favorite Attendees

**Invoice Settings**

Invoice Information  
Invoice Delegates  
Invoice Preferences  
Invoice Approvers

**Other Settings**

E-Receipt Activation  
**System Settings**  
Change Password  
Privacy Statement  
System E-mail Settings  
Travel Vacation Reassignment  
Mobile Registration  
I'm Assisting...

**Regional Settings and Language**

Default Language: English (United States)  
Number Format: 1,000.00  
Placement of Currency Symbol: Before the amount  
Negative Number Format: -100  
Negative Currency Format: -100  
Date Format: mm/dd/yyyy  
Time Format: h:mm AM/PM  
Hour/Minute Separator: : 09/20/2010 3:23 PM  
Time zone (local time): (GMT-08:00) Pacific Time (US & Canada; Tijuana)

**Calendar Settings**

Start week on: Sunday  
Start Day View At: 8:00 AM  
End Day View At: 8:00 PM  
Default View: month

**Other Preferences**

Home Page: My Concur  
Rows per page: 25

**Travel Settings**

☒ Send an email every time something is put in or removed from my approval queue  
☒ Send a daily summary of items in my queue  
☒ Let me know when one of my requests is approved or denied  
☒ Send Confirmation Emails  
Do you want to receive an email each time you book travel? Unchecking this box will not stop emails to your assistant or arranger if you use one.  
☒ Send Trip-on-Hold Reminder Emails  
Do you want to receive an email each time you place a trip on hold? Unchecking this box will not stop emails to your assistant or arranger if you use one.  
☒ Send Ticketed Travel Reminder Email  
Do you want to receive an email when a trip you've booked is ticketed? Unchecking this box will not stop emails to your assistant or arranger if you use one.

Save Reset Close



## Section 3: Update Your Travel Profile (Continued)

### Step 3: Update Your Personal Information

#### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **Personal Information**.
3. On the **My Profile** page, update the appropriate information, and then click **Save**.

#### Additional Information

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

Complete these sections of your travel profile:

- Name & Airport Security
- Home Address
- Work Address
- Contact Information
- Emergency contact
- Travel Preferences
- Credit Cards

You must complete all fields marked **Required** (in orange) to save your profile.

Verify that the first and last name fields match the ID used at the airport.

If you cannot edit these fields, contact your travel agency or travel manager to make changes.

The country you select in the work address fields will determine the default map that appears on the **Concur Travel Map** tab.

There are several **Save** buttons on the profile page. You only need to save once as every **Save** button saves the entire profile.

**My Profile**

[Home Address](#) [Work Address](#) [Contact Info](#) [Emergency Contact](#) [Travel Preferences](#) [Assistants](#) [Credit Cards](#)

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me Search

Fields marked **[Required]** must be completed to save your profile. [Change Picture](#)

**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title  First Name **[Required]**  Middle Name  Nickname  Last Name **[Required]**  Suffix

☐ No Middle Name

Concur Cost Center

**Company Information**

Employee ID  Exchange Login

Manager  Position/Title  Org. Unit/Division

## Section 3: Update Your Travel Profile (Continued)

### Step 4: Set Up a Travel Arranger or Assistant

#### How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** dropdown menu, select **Personal Information**.
3. Click **Assistants** at the top of the page.
4. Click **Add an Assistant** to search for your assistant's last name.
5. In the **Search Criteria** field, enter the assistant's name.
6. Click **Search**.
7. Click the **Assistant** dropdown arrow.
8. Select the appropriate name from the dropdown list.
9. Select **Can book travel for me**.
10. Select **Is my primary assistant for travel**.
11. Click **Save**.

#### Additional Information

Use **Assistants & Travel Arrangers** to give other Travel users the ability to view and modify your profile or book travel and trips for you.

The primary assistant's name and work phone number become part of the traveler's GDS profile, if configured.

**Important:** Your assistant must have an existing Travel account before you can add him or her to your profile.

**Hint:** When searching, use the following format: *LastName,FirstName* (no spaces).

For example: Smith,June

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to have this assistant included on any agency-generated emails about your trips. This will only occur if your Travel Management Company has configured your site to send information to your GDS profile.

The screenshot displays the 'Add an Assistant' dialog box overlaid on the 'Assistants and Travel Arrangers' section of the Concur user profile page. The dialog box contains the following elements:

- Title Bar:** Add an Assistant - Mozilla Firefox
- Address Bar:** concursolutions.com https://www.concursolutions.com/profile/Assis
- Buttons:** Add an Assistant
- Text:** Please select the individuals within your organization that you would like to give permission to perform travel functions for you.
- Search Criteria:** Chase
- Search What:** Name, E-Mail, Log-in
- Search Button:** Search
- Assistant:** Chase, Grant Edward (grantc@concur.com)
- Checkboxes:**
  - ☒ Can book travel for me
  - ☒ Is my primary assistant for travel\*
- Footnote:** \*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.
- Buttons:** Save, Cancel
- Status Bar:** Done

The background page shows the 'Assistants and Travel Arrangers' section with a 'Please select the individuals within your organization' message and a 'Refuse Self Assigning Assistants' checkbox.

## Section 4: Make a Travel Reservation

If you are a travel arranger for someone else, you will go to the travel tab and select "Arrangers" under the tab. The dropdown "Choose a Traveler" will appear and select the traveler you want to make travel arrangements for.

### Step 1: Make a Flight Reservation

#### How to...

1. On the **My Concur** page, click the **Flight** tab at the left side of the page.
2. Select the funding source if shown
  - Traveling on local funds
  - Traveling on state funds
  - Traveling on federal funds
3. one of the following types of flight options:
  - Round Trip
  - One Way
  - Multi-Segment

#### Additional Information

If you have a car, hotel, limo, or rail to book without airfare, use the corresponding tabs.

The funding source selection determines what policies (business rules) will be activated when booking the trip. State funding has different rules than local funding.

The screenshot shows the 'Trip Search' form. At the top, there is a dropdown menu labeled 'Please Select Funding Source'. Below this are four tabs: 'Flight', 'Car', 'Hotel', and 'Flight Status', with 'Flight' being the active tab. A red banner reads 'Choose Funding Source First'. Below the banner are three radio buttons for 'Round Trip' (selected), 'One Way', and 'Multi-Segment'. The 'Departure City' field is populated with 'AUS - Bergstrom Intl Arpt - Austin, TX' and has a 'Select nearby airports' link. The 'Arrival City' field is empty and also has a 'Select nearby airports' link. Below these are 'Departure' and 'Return' sections, each with a 'depart' dropdown, a time selector (9:00am for departure, 3:00pm for return), and a '± 2' dropdown. There are three checkboxes: 'Pick-up/Drop-off car at airport', 'Automatically reserve this car', and 'Find a Hotel'. The 'Class of service' dropdown is set to 'Economy class'. At the bottom, there are radio buttons for 'Search flights by: Price' (selected) and 'Schedule', followed by a 'Search' button.

4. In the **Departure City** and **Arrival City** fields, enter the cities for your travel.

When you type in a city, airport name, or code, Travel will automatically search for a match.

5. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.
6. If you need a car, select the **Pick-up/Drop-off car at Airport** checkbox.
7. If you need a hotel, select the **Find a Hotel** checkbox.
8. If also booking for a companion, from **the Number of Adults** dropdown menu, select the number of adults traveling.
9. To search only fully refundable fares, select the **REFUNDABLE only** checkbox.
10. Select **Search flights by Price** or **Schedule**.
11. Click **Search**.

You can also select the appropriate **Departure** and **Return** times and time range. Travel searches before and after the time you select.

Depending on your company's configuration, you can automatically reserve a car, allowing you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.

If you need an off-airport car or have other special requests, you can make these requests on the **Car Results** page or you can skip this step and add a car from the **Itinerary** page.

You can choose to search for the hotel by:

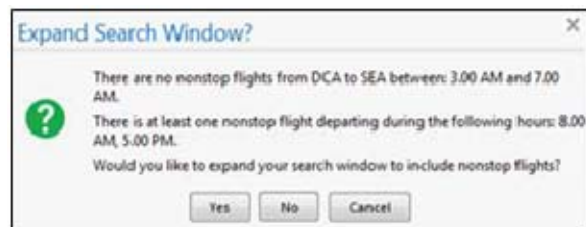
- Airport
- Address
- Company Location
- Reference Point / Zip Code (a city or neighborhood)

If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel from the **Itinerary** page.

Your company decides if this field appears in the Trip Search section. When displayed, if a companion is selected, the payment screen will provide the option to use the credit card from the companion's profile.

The forward tab that you see on the search results screen will depend on which you select.

Depending on your company's configuration, you might be notified that there are non-stop flights, but they don't exactly fit the times you have entered. If you want, you can change your search criteria to include non-stop flights.



To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the right. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

You can also click the **more like this** link.

## Step 1: Make a Flight Reservation (Continued)

### How to...

- Review the search results on the **Shop By Fares** tab, and then click **Show Details**.
- Select any green (unoccupied) seat and position the mouse pointer over a seat to see the seat number.

### Additional Information

Click **show details** to expand flight information, to view fare rules and, if needed, to add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.

To select a seat, click the **View Seatmap** icon next to the flight. A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential.

Select preferential seats (highlighted in yellow) if you have preferred status on the selected airline. Your frequent flyer number must be in your Travel profile. If you select a preferential seat and this information is not in Travel, your seat request might not be honored.

Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.

http://rqa3-cb.outtask.com/twPopup/popup\_seatmap.asp?airv=AS&fltnum=660&bic=V&startdt=2010-12-27&numseats=1&startcity=SEA&endcity=DFW

**Seat Map**

**Alaska Airlines** Flight: 660 Boeing 737-900  
Seattle Tacoma Intl Arpt (SEA) - Dallas Ft Worth Intl (DFW)  
12/27/2010  
Seat Selection:

Select Seat Close

Row	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
F	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
E	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
D	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
C	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
B	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
A	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

Seat assignment is subject to change up until time of departure

Available seat Occupied seat Preferential seat Exit row Selected seat

Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status.

## Step 1: Make a Flight Reservation (Continued)

### How to...

14. Click the appropriate seat to select it, and then click **Select Seat**.
15. Once you have made your seat selection, click **Close**. Repeat for all flights.
16. From the **Shop By Fares** tab, click **Reserve** to select your airfare.

### Additional Information

To change your seat, click the seat you prefer. Point to a seat to view the seat number.

After you select your seat for a flight, you can either click **Change Seat** or select the next flight in your reservation. Travel will prompt you to save your new seat selection.

Policy information appears next to the **Reserve** button. The **Reserve** buttons are color coded as:

- A *green* **Reserve** button indicates the fare is within policy.
- A *yellow* **Reserve** indicates the fare is outside of policy. If you select this fare, you must enter additional information. Yellow buttons will not appear if your company uses Concur Standard.
- A *red* **Reserve** button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager. Not all system members are using the "Manager Approval" feature in Concur Travel and therefore, may not see any red "reserve" buttons.

My Concur Travel Expense Invoice Reporting Administ

Home Trip Library Templates Meetings Meeting Admin Policy Profile

Seattle, WA To Dallas, TX Nov 22 - Nov 25

Baggage Fee Policies

	United	Alaska Airlines	American	Multiple Carriers
All 88 results				
Nonstop 4 results	--	--	317.40 4 results	--
1 stop 84 results	446.56 22 results	364.10 22 results	328.10 17 results	317.60 15 results

Shop by Fares Shop by Schedule

Displaying: 88 out of 88 results.

Price	Carrier	Depart	Arriv
\$364.10 Reserve	Alaska Airlines	SEA 7:00 am DFW 4:35 pm	DFW 7:00 am SEA 4:35 pm
compare			mor
\$364.10 Reserve	Alaska Airlines	SEA 7:00 am DFW 4:35 pm	DFW 7:00 am SEA 4:35 pm
compare			mor
\$364.10 Reserve	Alaska Airlines	SEA 7:00 am DFW 5:50 pm	DFW 7:00 am SEA 5:50 pm
compare			mor

## Section 4: Make a Travel Reservation (Continued)

### Step 2: Select a Car

#### How to...

1. If you selected **Pick Up/Drop off Car at airport** on the **Flight** tab, you will see the results for the car search. Car companies with triple green diamonds are the State of Texas contracted rates. These include the insurance.
2. Select the appropriate rental car, and then click **Reserve**.

#### Additional Information







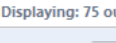
If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

You can sort the car results to help find your selection.

Green diamonds indicate preferred vendors that have a State of Texas contract and your preferred car type will be selected automatically.

Depending on your company's configuration, you might be able to select **In-car GPS system** or **Ski rack** under **Car booking options** on the right. Other preferences or car program ID numbers can also be added.

75 results



	Premium Car	Mini Van	Standard Pickup	Intermediate SUV	Standard SUV	Luxury Car	Premium Pickup
	42.00	52.00	55.00	56.00	56.00	60.00	60.00
	43.50	47.50	--	134.99	47.50	47.50	--
	42.00	52.00	55.00	56.00	56.00	60.00	60.00
	--	--	--	--	--	--	--
	--	--	--	--	--	--	--
	--	--	--	--	--	--	--
	--	--	--	--	--	--	--


Displaying: 75 out of 75 results. <<Previous | Page: 1 of 8 | Next>> | All

Sorted By: Policy - Most Compliant

**Economy Car (Apollo)** ◆◆◆  
\$31.00 per day  
**Reserve** ✓

Unlimited miles  
Pick-up: Terminal: IAH  
Automatic transmission  
Total cost \$53.62\*

**Compact Car (Apollo)** ◆◆◆  
E-Receipt Enabled [more info](#) 

## Section 4: Make a Travel Reservation (Continued)

### Step 3: Select a Hotel

#### How to...

1. If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results appear after you choose your rental car.
2. To filter by hotel chain, , enter the chain name in the **With names containing** box next to the **Sorted by** box
3. Use the filter options to narrow your search by **Amenity** or **Chain**.
4. To filter by neighborhood, select the desired neighborhoods in the **Neighborhood** box on the right.
5. Click the **more info** link for a specific hotel to find more detailed information for the hotel.
6. Click **choose room** to view room rates. |
7. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Reserve**.
8. Review the information on the **Rate details/Cancellation policy** pop-up window, click to agree, and then click **Continue**.

#### Additional Information

You can sort the list of hotels by **Preference**, **Price**, **Rating**, **Distance** and **Policy**.

Depending on your company's configuration, you might be prompted to provide the hotel information if you are booking a roundtrip overnight stay without a hotel.

To filter by multiple chains, in the **Hotel chain** box on right, click **hide all** and then select only the chains you want displayed.

A map of hotels appears at the top of the page. Your company's preferred hotels are indicated with pink dots.

The **Reserve** buttons are color coded as follows:

- A *green* **Reserve** button indicates the hotel rate is within policy.
- A *yellow* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information.
- A *red* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved. Not all system members are using the "Manager Approval" feature in Concur Travel.

You will see a notification if a hotel is outside of policy. You can view the type of rate and room, as well as other information that is available from the agency system.

A *double green* diamond indicates that the hotel property is a State of Texas contract hotel.

After clicking the **Reserve** button, the hotel confirmation page appears.

**Beware that some hotels require a deposit AND WILL NOT BE REFUNDED if cancelled.**




### Step 3: Select a Hotel (Continued)

**Lodging Per Diem limit for Dallas -- Dallas County: \$113**

Displaying: 100 out of 100 results. << Previous | Page: 1 of 10 | Next >> | All

### 1. Ramada Dallas Love Field ♦♦♦

1.56 miles



Love Field  
1575 Regal Row  
Dallas, TX 75247

★ ★ ★ ☆ ☆ ☆

**\$58**  
**\$92**

[more info](#) [compare ↗](#) [hide rooms ➔](#)

Single - \$60.80; Double - \$68.80; 1-bedroom suite - \$103.20; King - \$60.80;  
🍷 Breakfast: Full: Free  
🚗 Parking: Parking: Free

● \$58	Advance Purchase 1 King Bed Non-smoking Room With Free Hot Breakfast Free Wi-fi Desk (Rate Code: NK1SSP) (Apollo)	<a href="#">Rate details / Cancellation policy</a>
● \$58	Advance Purchase 1 King Bed Smoking Room With Free Hot Breakfast Free Wi-fi Desk Hbo (Rate Code: K11SSP) (Apollo)	
● \$58	Advance Purchase Accessible 1 King Bed Non-smoking Room With Raised Toilet Bathroom (Rate Code: PNK1SSP) (Apollo)	
● \$65	Super Special Wyndhamrewards Promo 1 King Bed Non-smoking Room With Free Hot Breakfast Free Wi-fi Desk (Rate Code: NK1ZK2) (Apollo)	


[Use the following Hotel Program:](#) **No Program selected ▼** [Reserve ✓](#)

[Add a Program](#)

---

### 2. Comfort Inn & Suites Market ... ♦♦♦

2.13 miles



7138 N. Stemmons Fwy  
Dallas, TX 75247

★ ★ ★ ☆ ☆ ☆

**\$65**  
**\$130**


[E-Receipt Enabled](#) [more info](#) [compare ↗](#) [choose room ➔](#)

[Click here to join the Choice Privileges rewards program and receive 1,000 start-up points.](#)

---

### 3. Hawthorn Suites Dallas Market Ce... ♦♦♦

1.99 miles



Stemmons Corridor  
7900 Brookriver Dr  
Dallas, TX 75247

★ ★ ★ ☆ ☆ ☆

**\$67**  
**\$129**

[more info](#) [compare ↗](#) [choose room ➔](#)

## Step 4: Complete the Reservation

## How to...

1. Review the details of the reservation, and then click **Next**.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click **Next**.
4. Click **Purchase Ticket** to finalize your trip.

### Additional Information

From here, you can add or make changes to the car, hotel as well as change the dates of the flight. Depending on your company's configuration you may be able to add Parking, Taxi or dining at this time.

The trip name and description data are for your record keeping. If you have any special requests for the travel agent, please enter them into the agent comments section. Some request may result in higher fees.

You will see the name and itinerary, along with the quoted airfare amount.

## Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

### How to...

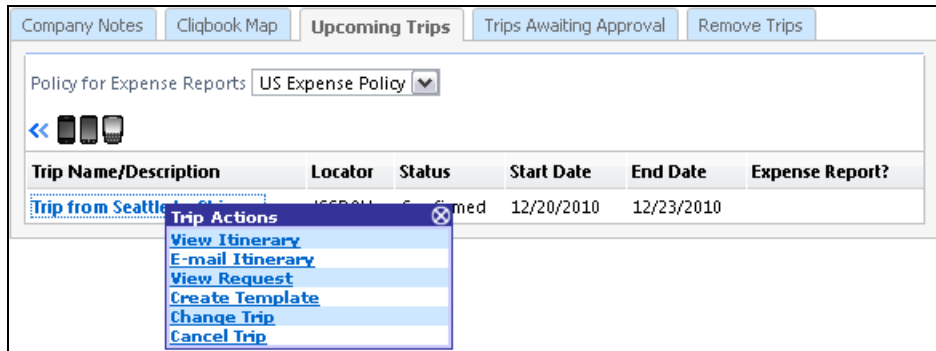
1. At the top of the **My Concur** page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

### Additional Information

Flight changes are available for e-tickets that include a single carrier.

If the trip is already ticketed but has not occurred, you can change the time and/or date of the flight. Your change options will be with the same airline and routing.

Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.



3. From the **Trip Actions** menu, click **Change Trip**.
4. On the **Itinerary** page, select the portion of the trip you want to change.
5. To cancel your entire trip, click the **Upcoming Trips** tab.
6. From the **Trip Actions** menu, click **Cancel Trip**, and then click **OK**.

From the **Itinerary** page, you can:

- Email your itinerary
- Change seat
- Change the flight day or time for travel (you cannot change the airline)
- Add, change, or cancel parking
- Add, change, or cancel a taxi
- Add, change, or cancel car rental
- Add, change, or cancel hotel
- Add, change, or cancel dining

When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips.

# Section 6: Update Your Expense Profile

## Step 1: Review Your Expense Settings

How to...	Additional Information
1. In the left-hand navigation, in the <b>Expense Settings</b> section, click <b>Expense Information</b> .	The <b>Expense Information</b> page is read-only. If the information needs to be changed, contact your site administrator.

## Step 2: Add a Delegate

How to...	Additional Information
1. In the <b>Expense Settings</b> section, click <b>Expense Delegates</b> .	The <b>Expense Delegates</b> page appears.
2. Click <b>Add Delegate</b> .	From this page, you will give other Expense users the ability to prepare, approve, view receipts, approve reports, or receive emails on your behalf.
3. In the <b>Search by employee name, email address or logon id</b> field, type the last name of the delegate you wish to add.	It is best to search by UIN. There are 40,000+ TAMUS travelers in Concur. However you can search by name.
4. Click the name of the delegate from the list.	
5. Click <b>Add</b> .	
6. Select the appropriate task checkboxes.	The delegate can only perform the tasks you select. A delegate will need to be an approver in order to approve reports on your behalf.
7. To add additional delegates, repeat steps 2-6.	
8. Click <b>Save</b> .	

Expense Delegates

Add Delegate

Save

Delete

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

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	Calnan, Brenna brennac@concur.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Section 6: Update Your Expense Profile (Continued)

## Step 3: Select Expense Preferences

How to...	Additional Information
<ol style="list-style-type: none"><li>1. In the <b>Expense Settings</b> section, click <b>Expense Preferences</b>.</li><li>2. In the <b>Send email when</b> section, select the applicable checkboxes.</li><li>3. In the <b>Prompt</b> section, select the applicable checkboxes.</li><li>4. In the <b>Display</b> section, select the applicable checkboxes.</li><li>5. Click <b>Save</b>.</li></ol>	<p>From this page, you can specify when you will receive email notifications and prompts.</p> <p>In this section, you determine when you will receive email notifications.</p> <p>In this section, you determine when Expense will prompt you for further action.</p>

Expense Preferences

Save

Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

☒

The status of an expense report changes

☒

New company card transactions arrive

☒

Faxed receipts are successfully received

☒

An expense report is submitted for approval

☒

The status of an authorization request changes

☒

An authorization request is submitted for approval

Prompt...

☐

For an approver when an expense report is submitted

☐

For an approver when an authorization request is submitted

☒

To add company card transactions to report

Display...

☐

Make the Single Day Itineraries page my default in the Travel Allowance wizard

## Step 4: Review Expense Approvers

How to...	Additional Information
<ol style="list-style-type: none"><li>1. In the <b>Expense Settings</b> section, click <b>Expense Approvers</b>.</li><li>2. Review your <b>Expense Approvers</b>.</li></ol>	<p>Your default Authorization Request Approver is the person marked as your "Primary Manager" in SSO or a virtual "bookkeeper" as seen on FAMIS screen 862.</p> <p>If your company does not allow you to select your approver, verify that the listed approver is correct. Notify your system administrator for any needed corrections.</p>

Expense approvers are left blank. The accounts used on the expense report determine the approver for

that account. These are called “Cost Object Approvers” in Concur and are a reflection of the FAMIS 919 screen.

## Step 5: Add Favorite Attendees

### How to...

1. In the **Expense Settings** section, click **Favorite Attendees**.
2. Click **New Attendee**.
3. Select the **Attendee Type** from the list.
4. Enter the **Last Name** of the attendee.
5. Enter the **First Name** of the attendee.
6. Enter the **Attendee Title**.
7. Enter the attendee's **Company**.
8. Click **Save**.

### Additional Information

The **Favorite Attendees** page appears, which allows you to add, edit, or delete frequently-used attendees.

Types of attendees include Board of Regents, Business Guest, Guest, Participants, Prospective Employee, Spouse, Student

If you need to add more than one attendee, click **Save & Add Another**.

Your favorite attendees list is also updated based on attendees you add to your expense reports.

The screenshot displays the 'Favorite Attendees' interface. At the top, there are tabs for 'Attendees' and 'Attendee Groups'. Below the tabs is a search bar with the text 'Find every attendee where' followed by dropdown menus for 'Last Name' and 'Begins With', and a text input field with an asterisk. A 'Go' button is to the right of the input field, and an 'Advanced Search' button is further right. Below the search bar are buttons for 'New Attendee', 'Edit', and 'Delete'. The main content area is a table with the following columns: 'Attendee Name', 'Attendee Title', 'Company', 'Attendee Type', and 'Annual Total'. There are two rows of data: one for 'King, Susan' with 'This Employee' as the type and '\$0.00' as the annual total, and another for 'Smith, Anne' with 'Business Guest' as the type and '\$0.00' as the annual total. At the bottom of the page, there is a pagination bar showing 'Page 1 of 1' and a refresh icon.

	Attendee Name	Attendee Title	Company	Attendee Type	Annual Total
<input type="checkbox"/>	King, Susan			This Employee	\$0.00
<input type="checkbox"/>	Smith, Anne			Business Guest	\$0.00

## Section 7: Create an Expense Report from a Completed Trip

### How to...

1. On the **My Concur** page or Travel/trip library, you see in the **Expense Report?** Column. Click the button for the appropriate trip.
2. In the Report Header complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.

### Additional Information

The button appears in the **Expense Report?** column after you have completed the trip.

Concur Premier transfers the data from your travel booking itinerary and automatically creates the expense report. The report will have the same name as your trip itinerary and contains all the expense entries for each of the trip reservations, including your airfare, hotel, and car rental.

The screenshot displays the Concur web application interface. At the top, the Concur logo is visible. Below it, a navigation bar includes tabs for "My Concur", "Travel", "Expense", "Invoice", and "Profile". The "Expense" tab is currently selected. On the left side, there is a promotional banner for "A Better Travel Companion" with a smartphone image and text encouraging users to view and manage their itinerary on the fly with their smartphone and to register for mobile. Below this banner is a "Trip Search" section with tabs for "Flight", "Car", "Hotel", and "Flight Status". The "Flight" tab is active, showing radio button options for "Round Trip", "One Way", and "Multi-Segment". Below these options is a "Departure City" field. On the right side, the "Company Info" section displays a welcome message: "Welcome to Concur Expense and Invoice. Please click the Expense or Invoice tab to start." Below this is the "Trip List" section, which includes a dropdown menu for "Policy for Expense Reports" set to "US Expense Policy". A table lists the trips, with one trip highlighted: "Trip from Seattle to Chicago". The table columns are "Trip Name/Description", "Locator", "Status", "Start Date", "End Date", and "Expense Report?". The "Expense Report?" column for the highlighted trip contains a button with a document icon.

Trip Name/Description	Locator	Status	Start Date	End Date	Expense Report?
Trip from Seattle to Chicago	JSSD0U	Confirmed	12/20/2010	12/23/2010	

## Section 8: Create a New Expense Report

### Step 1: Create a New Report

#### How to...

1. If you are not creating a trip from the trip library: in the **Active Work** or **Expense Reports** section of the **My Concur** page, click **New Expense Report**.
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.

#### Additional Information

The **Create a New Expense Report** page appears. The fields that appear on this page are defined by your company.

- Destination: Location you are traveling to. Your department and/or university may have certain naming conventions for this field.
- Trip Start Date: the date your trip started
- Trip End Date: the date your trip ended
- Report Date: defaults to today's date
- Policy: Will always be FAMIS
- Purpose and Benefit: The purpose of the trip and the benefit to your organization
- Report Key: a number that is automatically assigned by Concur. The Report Key can be used to search for Expense Reports in the travel office
- System/System Member/Dept-Sub dept/Account/: The account you are traveling on. If multiple accounts will be used on this expense report, indicate the most used account here and it will default on all your expense types.
- Account Attribute: this value is either "local", "state", or "OSRS". This indicates the funding source and is tested against the rules to determine policy.
- Personal Travel included: a department and/or system member may require a note as to whether this trip includes any personal travel. If so, note personal travel details in the "Notes".
- Dept Reference Number: This number is transferred to the FAMIS Ref 4 number.
- Travel classification: The travel classification is used to determine the object codes associated with each expense type. One expense report could have multiple classifications and that can be indicated on each expense type line item.
- Notes: may be required by your department
- Status: determines whether or not the attached authorization request encumbrance

will be fully or partially liquidated.

FAMIS External VID: If the expense report is for guest travel or a non-Concur participating employee, this field contains the External VID as noted at the top of FAMIS vendor screen 203. *On that screen there is a PF11 key that sends you to panel 2 that has the "Send to eTravel" flag or you can just press enter. If you have update access and it meets a couple of our edits, you can change the flag to "Y" in that field. Tonight it will pick up the flag (FCAR117) and submit it to Concur. It should be on Concur's list tomorrow.*

3. Attach your Authorization Request by selecting "Add".
4. Once you create the header, your organization may require you to attach GSA defined information to the report. This is accomplished by clicking on Details then "New Itinerary". You will import your trip information from available itineraries (generated by Concur bookings), or you will build your trips start and end days. This must be done PRIOR to creating any expenses for the report.
5. Once an itinerary is created, you check the "Travel Allowance" box in hotel and/or meals. If you go over the GSA limit or policy limit for your organization, you must itemize the amount and claim the overage as a personal expense or charge it to a department allowed account through allocations.

Not all system members are requiring Authorization Requests. Please consult your travel office.

Travel Allowances For Report: Montgomery, AL

1 Create New Itinerary 2 Available Itineraries

**Itinerary Info**

Itinerary Name: Montgomery, AL Selection: Without Limits

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arriva
No Itinerary Rows Found		

☐ Travel Allowance



## Create a New Expense Report

### Report Header

Destination	Trip Start Date	Trip End Date	Report Date	Policy
<input type="text"/>	<input type="text"/>	<input type="text"/>	02/27/2012	FAMIS
Purpose & Benefit	Report Key	System	System Member	Department / Sub-Department
<input type="text"/>	<input type="text"/>	1 FAMIS	2	3
Account	Account Attributes	Personal Travel Included? <a href="#">h?</a>	Department Reference Number	Travel Classification
4	5	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes	Status	Famis External VID <a href="#">h?</a>		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

#### Authorization Requests

					Add	Remove
<input type="checkbox"/>	Request Name	Request ID	Request Total	Amount Approved	Amount Remaining	

## Section 8: Create a New Expense Report (Continued)

### Step 2: Add a Company Card Transaction to the New Expense Report

Company card transactions (your individual “company billed company paid card transactions”, your “individually billed individually paid (IBT)” transactions as well as the airfare transactions on a department/central CBA card) are automatically imported into Expense for you – ready to be added to an expense report. Credit card transactions are added nightly.

#### How to...

1. Click **Next**.
2. On the **Expense Report** page, from the **Import** dropdown menu, select **Charges & Expenses**.

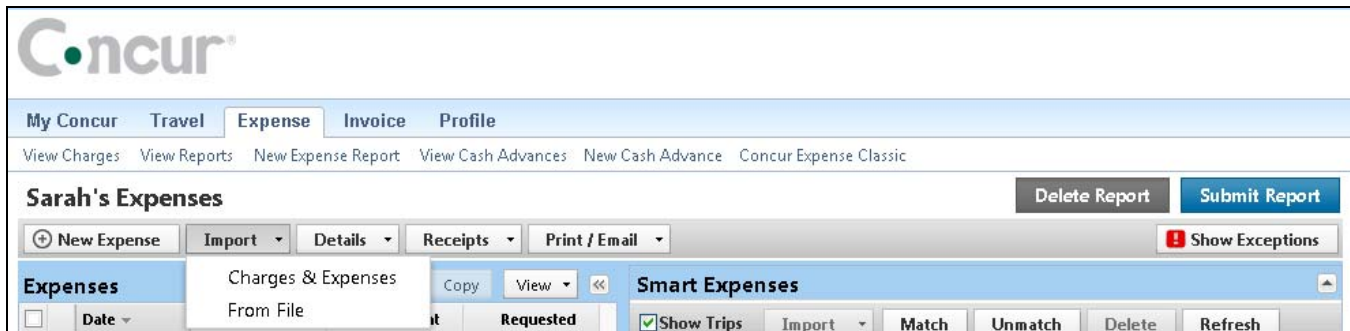
#### Additional Information

The expense report page to enter expense details appears.

This dropdown menu is titled “Import.”

The **Smart Expenses** pane appears. A Smart Expense combines: trip data from Travel, corporate credit card data, and e-receipt data.

If you have activated the option in your **Expense Settings** to be prompted to add company card transactions, you will not need to select **Charges & Expenses** from the **Import** dropdown menu.

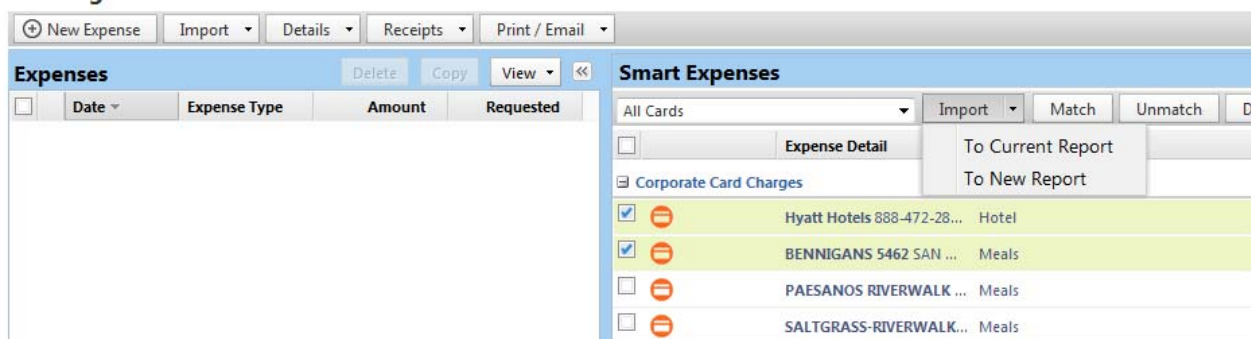


The screenshot shows the Concur Expense Report interface for 'Sarah's Expenses'. The 'Import' dropdown menu is open, showing 'Charges & Expenses' as the selected option. The 'Smart Expenses' pane is visible on the right side of the interface.

3. In the **Unmatched Charges** section, select each transaction that you want to assign to the current expense report and check it.
4. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**.

You can also add **Unmatched Charges** to an expense report by dragging and dropping into the **Expense List** area of the page.

Once imported, the expense will appear on the left side of the page, with all applicable icons.



The screenshot shows the Concur Expense Report interface for 'Sarah's Expenses'. The 'Import' dropdown menu is open, showing 'To Current Report' as the selected option. The 'Smart Expenses' pane is visible on the right side of the interface, displaying a list of transactions including 'Hyatt Hotels 888-472-28...', 'BENNIGANS 5462 SAN ...', 'PAESANOS RIVERWALK ...', and 'SALTGRASS-RIVERWALK...'.

## Section 8: Create a New Expense Report (Continued)

### Step 3: Add a Personal Credit Card Transaction to the New Expense Report

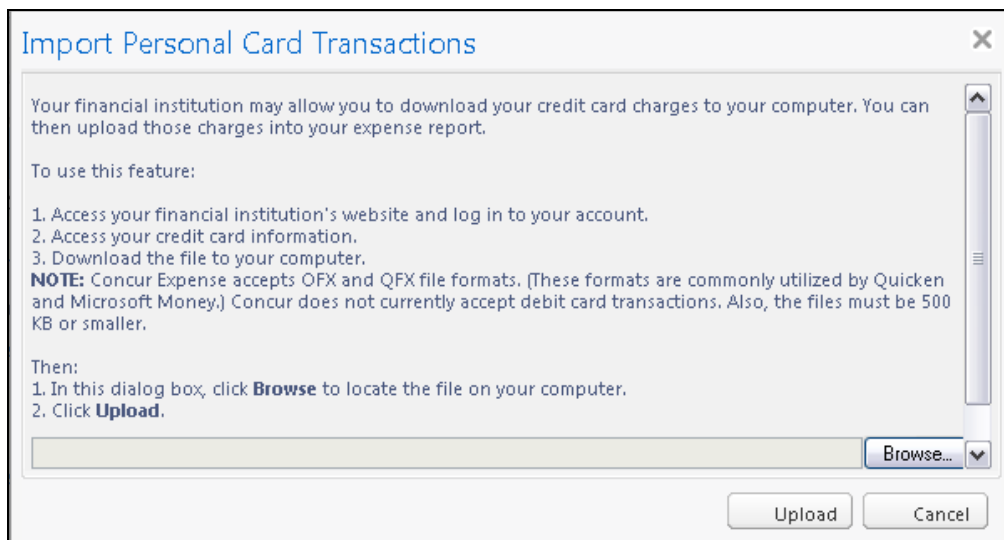
Using Concur Premier, you can import into an expense report a personal credit card transaction that you download from a financial institution.

#### How to...

1. On the **Expense Report** page, from the **Import** dropdown menu, select **From File**.
2. In the **Import Personal Card Transactions** window, click **Browse**.

#### Additional Information

Before you can import the personal credit card transactions, you need to download the transactions from the financial institution, and then save them to your computer. Debit card transactions are not supported. You need to download a QFX or OFX file which is typically a Quicken or MS Money file.



3. Locate the file you want to attach.
4. Click **Upload**.

### Step 3: Add a Personal Credit Card Transaction to the New Expense Report (Continued)

#### How to...

- 5. Select each transaction that you want to assign to the current expense report.
- 6. Click **Import**.

#### Additional Information

The imported card transaction will appear as an **Undefined** expense type. You will need to update the expense type and add any additional information required by your company.

### Import Personal Card Transactions

You have selected to import the following credit card transactions. The credit card charges you would like to add to your expense report. The credit card charges will be converted to expenses and saved to your expense report.

<input type="checkbox"/>	Expense Detail	Date Paid
<input type="checkbox"/>	PURCHASE WITH PIN TARGET T1957 B	07/20/2017
<input type="checkbox"/>	CHECK	07/20/2017
<input type="checkbox"/>	PURCHASE WITH PIN TOP FOOD AND DRUGS	07/20/2017
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) CHIPOTLE	07/20/2017
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) STARBUCK	07/21/2017
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) SUBWAY	07/21/2017
<input checked="" type="checkbox"/>	VISA PURCHASE (NON-PIN) SAFEWAY	07/22/2017
<input checked="" type="checkbox"/>	VISA PURCHASE (NON-PIN) FAMILY P	07/22/2017
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) ICHI TER	07/22/2017
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) PANERA B	07/22/2017
<input type="checkbox"/>	PURCHASE WITH PIN SAFEWAY STORE	07/22/2017

# Section 8: Create a New Expense Report (Continued)

## Step 4: Add an Out-of-Pocket Expense to the New Expense Report

### How to...

- 1. Click **New Expense**.
- 2. On the **New Expense** tab, select the appropriate expense type.

Date	Expense Type	Amount	Requested
Adding New Expense			

Expense Type

To create a new expense, click the expense on the left

- Communications
- Phone
- Entertainment
- Business Meal
- Business Meal-Alcohol
- Individual Meals
- Meals
- Sales Tax Charged in E
- Lodging
- Hotel
- Rent-Apartment/Housi
- Other

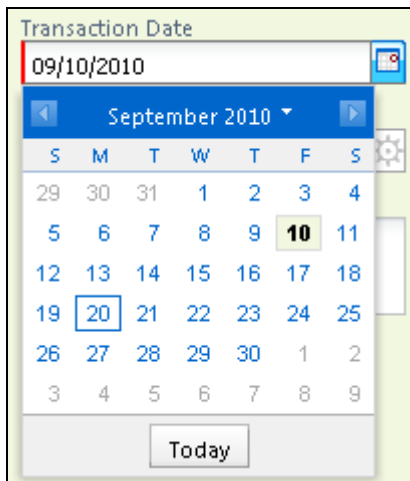
### Additional Information

The **New Expense** tab appears.

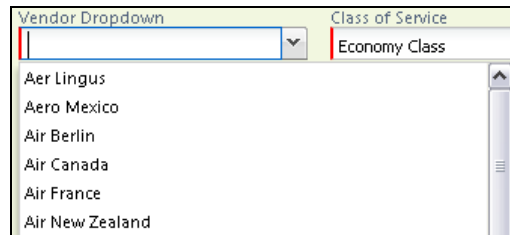
The page refreshes, displaying the required and optional fields for the selected expense type.

## Step 4: Add an Out-of-Pocket Expense to the New Expense Report (Continued)

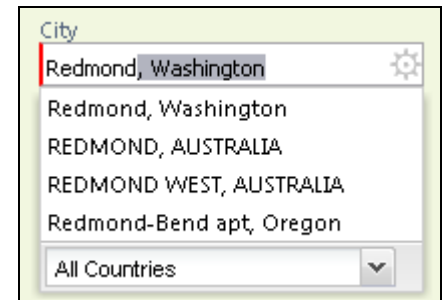
For date fields, use the calendar to select the date of the expense.

A calendar interface for selecting a transaction date. The title is "Transaction Date". The current date shown is 09/10/2010. Below the date is a calendar for September 2010. The days of the week are labeled S, M, T, W, T, F, S. The date 10 is highlighted in yellow. A "Today" button is at the bottom.

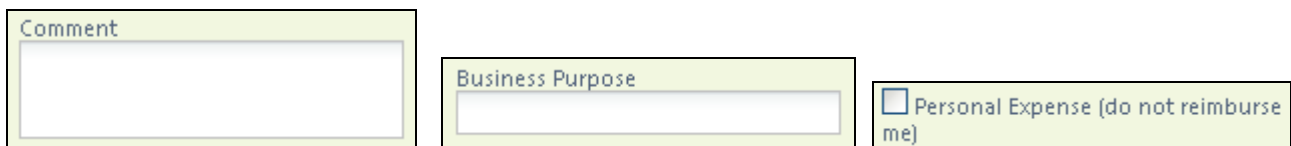
For lists, select from the list.

Two dropdown menus. The first is labeled "Vendor Dropdown" and has a list of vendors: Aer Lingus, Aero Mexico, Air Berlin, Air Canada, Air France, and Air New Zealand. The second is labeled "Class of Service" and has a list with "Economy Class".

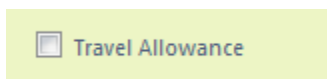
For auto-complete fields, type the first portion of your choice and then select from the list.

An auto-complete dropdown menu for "City". The text "Redmond, Washington" is entered in the input field. Below the input field is a list of suggestions: "Redmond, Washington", "REDMOND, AUSTRALIA", "REDMOND WEST, AUSTRALIA", and "Redmond-Bend apt, Oregon". At the bottom is a button labeled "All Countries".

Complete other text fields and checkboxes as usual.

Three form fields. The first is a "Comment" text area. The second is a "Business Purpose" text field. The third is a checkbox labeled "Personal Expense (do not reimburse me)".

See section 8: step 1 (#5) for information on travel allowance

A checkbox labeled "Travel Allowance".

### How to...

3. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
4. Click **Save**.

### Additional Information

For different types of expenses, such as hotel or car mileage, or for expenses incurred in a currency other than your reimbursement currency, refer to *Using Special Features* in this guide.

The expense appears on the left side of the page.

# Section 9: Review and Edit an Expense Report


You should review for accuracy and edit (if necessary) your reports and all expenses, including company card transactions, before submitting your expense report.

## Step 1: Review the Report Information

How to...	Additional Information
1. On the <b>Expense Report</b> page, in the <b>Expense List</b> , click any transaction to view the details.	The expense details appear on the right side of the page.
2. From the <b>Details</b> dropdown menu, select <b>Report Header</b> .	The <b>Report Header</b> page appears and you can view and update report header information.
3. Make the appropriate changes, and then click <b>Save</b> .	

## Step 2: Review the Exceptions

How to...	Additional Information
1. On the <b>Expense Report</b> page exceptions appear at the top of the report.	A yellow indicates a message, reminder, or warning but you still can submit your report. Messages will remain when the report is submitted.
	A red exception (as seen below) must be cleared with the appropriate action or you will not be able to submit your report.
2. Click the exception that you want to review.	The <b>expense detail</b> pane opens for you to make the necessary correction.

Exceptions			
Expense Type	Date	Amount	Exception
Local Phone	09/13/2010	\$20.00	 Missing required fields: City

3. Make the appropriate changes, and then click **Save**.

## Section 9: Review and Edit an Expense Report (Continued)

### Step 3: Edit Multiple Expenses

#### How to...

1. On the **Expense Report** page, in the **Expense List**, select the checkbox for the expenses that you want to update.
2. Select the action you would like to perform for the expenses.

#### Additional Information

The multiple expense options box appears. When you select more than one expense, you will have the ability to delete, allocate, or edit the expenses at the same time.

If you choose to **Edit** the selected expenses, you will be prompted for all of the field(s) that you can update.

Training

Delete ReportSubmit Report

New ExpenseImportDetailsReceiptsPrint / Email

Expenses

DeleteCopyView<<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	09/10/2010	Business Meals - Meetings Morton's, San Francisco, California	\$150.00	\$150.00
<input checked="" type="checkbox"/>	> 09/10/2010	Office Supplies Staples, San Francisco, California	\$200.00	\$200.00
<input type="checkbox"/>	> 09/09/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00

You have selected multiple expenses. What would you like to do?

1. Delete the selected expenses

2. Edit one or more fields for the selected expenses



# Section 10: Use Special Features

## Itemize Nightly Lodging Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. These expenses must be itemized so that they can be accounted for correctly. Concur Premier gives you the tools to quickly itemize your lodging-related expenses.

### Step 1: Verify Auto-Itemized Hotel Expenses

The hotel auto-itemization feature automatically itemizes any card transactions that have hotel folio data or an e-receipt from a hotel vendor. Your company determines if your hotel expenses are automatically itemized. If not, you can manually itemize your hotel expenses as described in Step 2 below.

The result of hotel auto-itemization is similar to what you see if you manually itemize the hotel expense. Expense itemizes the hotel expense based on predetermined mapping. Examples of the itemizations you will see on your expense report are: parking, meals, and internet access. You can update the auto-itemized expenses and itemize any remaining balance as described below.

New Expense

Receipt Store

Expense Type

Hotel

Transaction Date

Business Purpose

Vendor

City

Payment Type

Out of Pocket

Amount

USD

☐ Travel Allowance

Comment

Clearing Account

FAMIS REF-A

FAMIS REF-B

Travel Classification

Out of State

Attendees

Attendees: 0 | Attendee Total: \$0.00 | Remaining: \$0.00

Edit

Remove

Create Group

>>

Search

Favorites

Enter last or first name

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Amount

Itemize

Allocate

Attach Receipt

Cancel

# Itemize Nightly Lodging Expenses (Continued)

## Step 2: Create and Itemize a Lodging Expense

### How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select the hotel expense type.
3. Complete the required fields on the page as usual. (in red)
4. Click **Itemize**.

### Additional Information

The **New Expense** tab appears.

Lodging types include hotel and rent-apartment/house.

The expense appears on the left side of the page and the **Nightly Lodging Expenses** tab appears.

5. On the **Nightly Lodging Expenses** tab, in the **Check-in Date** field, type the date or use the calendar.
6. In the **Room Rate** field, enter the amount that you were charged per night for the room.
7. In the **Room Tax** fields, enter the amount of each room tax that you were charged.
8. In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
9. In the **Amount** field, enter the amount of the expense.

The number of nights appears automatically.

If the hotel receipt included the room rate and city taxes in the same amount, you can click "Combine room rate and taxes into a single entry".

## Step 2: Create and Itemize a Lodging Expense (Continued)

### How to...

- Repeat steps 8-9 using the second **Expense Type** field if you have more than one recurring additional charge.
- Click **Save Itemizations**.

### Additional Information

If there is a remaining amount to be itemized (indicated in top of itemization section on the right side), the remaining amount is displayed and the **New Itemization** tab appears.

The screenshot displays the Concur Expense report interface. The top navigation bar includes links for My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below this, there are tabs for View Charges, View Reports, and New Expense Report. The main section is titled "Training" and includes buttons for New Expense, Import, Details, Receipts, and Print / Email. A "Show Exceptions" button is also present. The "Expenses" table shows a summary of the expense with columns for Date, Expense Type, Amount, and Requested. The total amount is \$270.00, and the total requested is \$270.00. The "New Itemization" tab is active, showing a list of itemizations with columns for Date, Expense Type, Amount, and Requested. The total amount is \$300.00, the itemized amount is \$270.00, and the remaining amount is \$30.00. The "Expense Type" dropdown menu is open, showing "Choose an expense type".

Date	Expense Type	Amount	Requested
09/10/2010	Hotel	\$300.00	\$270.00
Marriott, San Francisco, California			
Adding New Itemization			
09/09/2010	Hotel	\$75.00	\$75.00
09/09/2010	Hotel Tax	\$15.00	\$15.00
09/08/2010	Hotel	\$75.00	\$75.00
09/08/2010	Hotel Tax	\$15.00	\$15.00
09/07/2010	Hotel	\$75.00	\$75.00
09/07/2010	Hotel Tax	\$15.00	\$15.00

TOTAL AMOUNT: \$270.00 | TOTAL REQUESTED: \$270.00

Expense Type: Choose an expense type

Total Amount: \$300.00 | Itemized: \$270.00 | Remaining: \$30.00

Save Cancel

## Step 3: Itemize the Remaining Balance

### How to...

1. If the amount remaining is more than zero, on the **New Itemization** tab, click the **Expense Type** dropdown arrow, and then select the appropriate expense from the dropdown list.
2. Complete all required and optional fields as directed by your company.
3. Click **Save**.
4. Repeat steps 1-3 until the **Remaining Amount** equals \$0.00.

### Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page and the remaining amount equals zero.

## Section 10: Use Special Features (Continued)

### Add Attendees

For some expense types, such as business meals or entertainment, your company might require that you list the attendees who were present at these events.

#### How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select an Entertainment, Business Meals, or Group Meals expense type.
3. Complete all required fields *except* the attendee information.

#### Additional Information

The **New Expense** tab appears.

Your company defines the expense type names that apply to entertaining clients, customers, or group meals that include employees.

The page refreshes, displaying the required and optional fields for the selected expense type.

In the attendee area, your name automatically appears as an attendee with the full amount of the expense. As you add attendees to the expense, the expense amount is distributed over all attendees.

Your company decides whether your name appears automatically and whether you can manually adjust the amounts allotted to attendees.

The screenshot shows the Concur 'New Expense' form. The 'Expense Type' is 'Business Meals - Meetings'. The 'Transaction Date' is '09/08/2010'. The 'Business Purpose' is 'Client Dinner'. The 'Enter Vendor Name' is 'Morton's' and the 'City' is 'San Francisco, California'. The 'Payment Type' is 'Cash'. The 'Amount' is '150.00' USD. The 'Attendees' section shows one attendee: 'Dorsey, Kevin' with an 'Amount' of '\$150.00'. The 'Expenses' table on the left shows a total amount of '\$300.00' and a total requested amount of '\$300.00'.

Date	Expense Type	Amount	Requested
09/10/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00

Attendee Name	Attendee Title	Company	Attendee Type	Amount
Dorsey, Kevin			Employee	\$150.00

## Add Attendees (Continued)

### How to...

4. Click **Favorites**.
5. On the **Favorites** tab in the **Search Attendees** window, select the attendees for this expense, and then click **Add to Expense**.
6. To add a new attendee to the expense, click **New Attendee**, complete the required information, and then click **Save**.
7. To search for an attendee, click **Search**, enter your search criteria in the **Search Attendees** window, and then click **Add to Expense**.
8. Click **Save**.

### Additional Information

The **Search Attendees** window opens.

You can also locate an attendee that is already in your **Favorites** list by typing the first letter of the attendee name in the **Favorites** field, and then selecting the attendee name from the dropdown list.

The new attendee is added to the list. The expense amount is distributed among the attendees. (Employees are automatically loaded into the attendee list and would not be a "new attendee". Instead, you would "search" for the employee. *Your organization may not allow employees as attendees.*

The "found" attendee is added to the list. The expense amount is distributed among the attendees.

The expense appears on the left side of the page.

## Section 10: Use Special Features (Continued)

### Itemize Expenses

You itemize expenses to account for expenses that include both business and personal items or to make sure that each of your expenses is billed to the correct department in your organization.

#### How to...

1. On the **Expense Report** page, click the expense you want to itemize.
2. Click **Itemize**.
3. On the **New Itemization** tab, click the **Expense Type** dropdown arrow, and then select the appropriate expense.

#### Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page. The **New Itemization** tab appears which displays the total amount, itemized amount, and remaining amount.

The page refreshes, displaying the required and optional fields for the selected expense type.

The screenshot displays the Concur Expense Report interface. At the top, there's a navigation bar with tabs: My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below this, there are links for View Charges, View Reports, and New Expense Report. The main header area includes 'Training' and buttons for 'Delete Report' and 'Submit Report'. A sub-header bar contains 'New Expense', 'Import', 'Details', 'Receipts', and 'Print / Email'. The 'Expenses' table on the left lists three items: a Hotel expense for \$300.00, a Software expense for \$100.00, and a Business Meals - Meetings expense for \$150.00. The 'New Itemization' tab is active on the right, showing a form for 'Office Supplies' with fields for Transaction Date (09/10/2010), Business Purpose, Enter Vendor Name (Staples), City (San Francisco, California), Payment Type (Cash), Amount (50.00 USD), and a checkbox for Personal Expense. A summary bar at the top of the form shows 'Total Amount: \$100.00 | Itemized: \$0.00 | Remaining: \$100.00'. At the bottom of the interface, a summary bar shows 'TOTAL AMOUNT \$550.00' and 'TOTAL REQUESTED \$550.00'. 'Save' and 'Cancel' buttons are located at the bottom right of the form.

Expenses	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	> 09/10/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00
<input type="checkbox"/>	09/10/2010	Software Staples, San Francisco, California	\$100.00	\$100.00
Adding New Itemization				
<input type="checkbox"/>	09/08/2010	Business Meals - Meetings Morton's, San Francisco, California	\$150.00	\$150.00

TOTAL AMOUNT \$550.00    TOTAL REQUESTED \$550.00

4. Complete all required and optional fields as directed by your company.

## ***Itemize Expenses (Continued)***

### **How to...**

5. Click **Save**.
6. Repeat steps 3-5 until the **Remaining Amount** equals \$0.00.

### **Additional Information**

The itemized item appears in the expense list and the totals are adjusted accordingly.

As you click **Save** for each item, the remaining total changes accordingly.



## Section 10: Use Special Features (Continued)

### Convert Foreign Currency Transactions

When adding an out-of-pocket expense that was incurred in a currency other than your reimbursement currency, Expense will assist you in converting the expense to your standard reimbursement currency.

#### How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select the appropriate expense type.
3. Complete all required fields as usual *except* **Amount**.
4. In the **Amount** field, enter the foreign currency amount.
5. Select the “spend” currency from the dropdown list to the right of the **Amount** field.
6. Click the multiplication sign to switch, if needed, and then click **Save** (or click **Itemize** to itemize the expense).

#### Additional Information

The **New Expense** tab appears.

The page refreshes, displaying the required and optional fields for the selected expense type.

Because the currency conversion rate is based on the Transaction Date that you select, be sure to select the exact Transaction Date.

If you select a **City** that has a different currency than your reimbursement currency, Expense automatically selects the spend currency for you.

Expense supplies the **Rate** and calculates the reimbursement **Amount**.

Currency can be converted by multiplying by a particular rate or dividing by a different rate. You may need to switch from multiplication to division of the rate, depending on the type of rate you received, by clicking the symbol above the rate field.

**Trip to San Francisco** Delete Report Submit Report

New Expense Import Details Receipts Print / Email

**Expenses** Delete Copy View

Date	Expense Type	Amount	Requested
Adding New Expense			

**New Expense**

Expense Type: Taxi Transaction Date: 09/02/2010

Business Purpose: Enter Vendor Name

City: Payment Type: Cash

Amount: 60.00 CAD Rate (USD=1 CAD): 0.94650000 Amount in USD: 56.79

Comment: Personal Expense (do not reimburse)

TOTAL AMOUNT: \$0.00 TOTAL REQUESTED: \$0.00

Save Remize Allocate Cancel

## Section 10: Use Special Features (Continued)

### Work with Personal Car Mileage

#### How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select "Personal Car Mileage".
3. In the **Transaction Date** field, type the date or use the calendar.
4. In the **From Location** field, enter the starting location of your trip.
5. In the **To Location** field, enter the ending location of your trip.
6. Click the **Mileage Calculator**.
7. Click **Add Mileage to Expense**.
8. Complete any additional required fields as directed by your company and then click **Save**.

#### Additional Information

The **New Expense** tab appears.

The **Mileage Calculator** helps you to determine mileage between locations. Notice that the To and From locations that you entered for the expense automatically appear. Using the **Mileage Calculator**, you can change the locations or add additional locations. The distance between locations will appear for you to add to your expense report.

The expense appears on the left side of the page.

The screenshot displays the 'Sarah's Expenses' application. On the left, a table lists existing expenses with columns for Date, Expense Type, Amount, and Requested. The table includes entries for Breakfast, Miscellaneous, Airfare, Business Meal, Postage, and another Airfare entry. At the bottom of the table, it shows a TOTAL AMOUNT of \$936.15 and a TOTAL REQUESTED of \$868.25. On the right, the 'New Expense' form is visible. It includes fields for Expense Type (set to Personal Car Mileage), Transaction Date (10/02/2009), City, Purpose of the Trip (Client Dinner), From Location, To Location, Payment Type (Cash), Distance (0 to 0.00), Tax Posted Amount, Division, Cost Center, Department, and Location. A 'Mileage Calculator' button is also present. At the bottom right of the form, there are 'Save', 'Allocate', and 'Cancel' buttons. The top of the interface has navigation tabs like 'New Expense', 'Import', 'Details', 'Receipts', and 'Print / Email', along with 'Delete Report' and 'Submit Report' buttons.

Date	Expense Type	Amount	Requested
10/15/2009	Breakfast Jimmy John's, Seattle, Washington	\$8.32	\$8.32
10/15/2009	Miscellaneous	\$25.00	\$25.00
10/14/2009	Airfare United Airlines, Seattle, Washington	\$267.90	\$200.00
10/14/2009	Miscellaneous	\$25.00	\$25.00
10/02/2009	Business Meal (attendees) Fedex, Seattle, Washington	\$145.76	\$145.76
09/15/2009	Postage Fedex, Seattle, Washington	\$35.67	\$35.67
09/01/2009	Airfare United Airlines, Seattle, Washington	\$428.50	\$428.50

TOTAL AMOUNT: \$936.15  
TOTAL REQUESTED: \$868.25

# Section 10: Use Special Features (Continued)

## Copy an Expense

Use the copy feature to copy an expense within an expense report. You can then edit the copied expense, as needed.

### How to...

1. On the **Expense Report** page, from the **Expense List**, select the checkbox next to the expense you wish to copy.
2. Click **Copy**.
3. Click on the new expense.
4. Make all necessary changes to the new expense.
5. Click **Save**.

### Additional Information

The expense is highlighted.

The new expense appears below the original.

The expense details appear.

The screenshot shows the Concur Expense Report interface. At the top, there's a navigation bar with 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below this, there's a sub-navigation bar with 'View Charges', 'View Reports', and 'New Expense Report'. The main header is 'Trip to San Francisco' with a 'Delete' button. Below the header, there's a tabbed interface with 'New Expense', 'Import', 'Details', 'Receipts', 'Print / Email', and 'View'. The 'View' tab is selected, and the 'Copy' button is highlighted with a red box. The 'Expenses' table is visible, showing two rows: 'Local Phone' and 'Taxi-Shuttle-Train'. The 'Taxi-Shuttle-Train' row is selected, and its details are shown on the right. The details include 'Expense Type' (Taxi-Shuttle-Train), 'Transaction Date' (09/02/2010), 'Business Purpose' (Enter Vendor Name), 'City' (Seattle, Washington), 'Payment Type' (Cash), 'Amount' (\$45.00), 'Project' (CONQ-INTER), 'Top Task' (INTERNAL), 'Sub Task' (Non-Travel Expense), 'Billable' (NO), 'Non Billable Reason Code' (Administrative), 'Billing Remarks', and 'Comment'.

Date	Expense Type	Amount	Requested
09/02/2010	Local Phone Seattle, Washington	\$12.00	\$0.00
09/02/2010	Taxi-Shuttle-Train Seattle, Washington	\$45.00	\$45.00

TOTAL AMOUNT: \$57.00  
TOTAL REQUESTED: \$45.00

## Section 10: Use Special Features (Continued)

### Allocate Expenses

The Allocations feature allows you to allocate expenses to projects or departments. The departments you choose will be charged for those expenses.

#### How to...

1. Complete all expenses as usual.
2. Select the expense you wish to allocate from the expense list **OR** select “Details” then “Allocations”.
3. Click **Allocate** near the lower right-hand corner of the expense details section (if you selected the individual expense option).

#### Additional Information

The expense details appear. **Or you can do all of your allocations from the allocations page.**

The **Allocate Report** window appears.

**Concur**

My Concur Travel Expense Invoice Profile

View Charges View Reports New Expense Report View Cash Advances New Cash Advance Concur Expense Classic

**Sarah's Expenses** Delete Report Submit Report

New Expense Import Details Receipts Print / Email Show Exceptions

Expenses	Delete	Copy	View
<input type="checkbox"/> 10/15/2009 <b>Breakfast</b> Jimmy John's, Seattle, Washington \$8.32 \$8.32			
<input type="checkbox"/> 10/15/2009 <b>Miscellaneous</b> \$25.00 \$25.00			
<input type="checkbox"/> 10/14/2009 <b>Miscellaneous</b> \$25.00 \$25.00			
<input type="checkbox"/> 10/02/2009 <b>Business Meal (attendees)</b> Fedex, Seattle, Washington \$145.76 \$145.76			
<input type="checkbox"/> 09/15/2009 <b>Postage</b> Fedex, Seattle, Washington \$35.67 \$35.67			
<input checked="" type="checkbox"/> 09/01/2009 <b>Airfare</b> United Airlines, Seattle, Washington \$428.50 \$428.50			

TOTAL AMOUNT \$668.25 TOTAL REQUESTED \$668.25

Expense

Transaction Date: 09/01/2009 Expense Type: Airfare Business Purpose:

Vendor: United Airlines Enter Vendor Name: United Airlines City: Seattle, Washington

Payment Type: CBCP Amount: 428.50 USD Tax Posted Amount:

Comment:

☐ Personal Expense (do not reimburse) Division:

Cost Center:  Department:  Location:

Airline Fee Type Code: None Selected

Save Itemize **Allocate** Cancel

4. From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.
5. In the **Allocate By** field, enter the **Percentage** or **Amount**.
6. Click in the field under the **Department** column heading.
7. Select the department that will receive the

Depending on your company's configuration, you might see different fields, other than Department, to complete on the **Allocate Report** page.

allocation.

## Allocate Expenses (Continued)


Allocations							
Total:\$8.18   Allocated:\$8.18 (100%)   Remaining:\$0.00 (0%)							
Allocate By: ▾   Add New Allocation   Delete Selected Allocations							
<input type="checkbox"/>	Percentage	* System	* System Member	* Department / ...	* Account	* Account Attrib...	Code
<input type="checkbox"/>	100	FAMIS	(02) TEXAS A&M...	(CSCN) Computi...	(203840 00000) ...	(L) LOCAL	FAM

- Click **Add New Allocation**.
- Repeat steps 5-7 for each new allocation.
- Click **Save**.
- In the confirmation message box, click **OK**.
- In the **Allocate Report** window, click **Done**.

A new allocations field appears.

Add as many allocations as necessary. You can adjust the amounts and percentages. You do not have to allocate 100% of the total. The amount that you do not allocate is charged as usual, probably to your own cost center.

The allocation icon (color wheel) appears on the left side of the page with the expense.

Expenses		
<input checked="" type="checkbox"/>	Date ▾	Expense Type
<input checked="" type="checkbox"/>	11/18/2011 	Meals AMER CUP SNACK30085500, San Die

## Section 10: Use Special Features (Continued)

### Allocate Multiple Expenses

If you have multiple expenses in a report to allocate, you can select and allocate all applicable expenses at the same time.

#### How to...

1. Complete all expenses as usual.
2. Select all the expenses you wish to allocate from the expense list.

#### Additional Information

A message appears in the right pane, which states that you have selected multiple expenses and provides three options.

The screenshot shows the Concur Expense report interface. At the top, there's a navigation bar with tabs: My Concur, Travel, Expense, Invoice, and Profile. Below this is a sub-navigation bar with links: View Charges, View Reports, New Expense Report, View Cash Advances, New Cash Advance, and Concur Expense Classic. The main header is "Sarah's Expenses" with buttons for "Delete Report" and "Submit Report". Below the header is a toolbar with buttons: "New Expense", "Import", "Details", "Receipts", "Print / Email", and "Show Exceptions". The main content area is titled "Expenses" and contains a table with columns: Date, Expense Type, Amount, and Requested. The table lists several expenses, including Breakfast, Miscellaneous, Business Meal, Postage, and Airfare. A red box highlights a message box on the right side of the table, which contains the text: "You have selected multiple expenses. What would you like to do?" followed by three options: 1. Delete the selected expenses, 2. Allocate the selected expenses, and 3. Edit one or more fields for the selected expenses.

	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	10/15/2009	Breakfast Jimmy John's, Seattle, Washington	\$8.32	\$8.32
<input type="checkbox"/>	10/15/2009	Miscellaneous	\$25.00	\$25.00
<input type="checkbox"/>	10/14/2009	Miscellaneous	\$25.00	\$25.00
<input type="checkbox"/>	10/02/2009	Business Meal (attendees) Fedex, Seattle, Washington	\$145.76	\$145.76
<input checked="" type="checkbox"/>	09/15/2009	Postage Fedex, Seattle, Washington	\$35.67	\$35.67
<input checked="" type="checkbox"/>	09/01/2009	Airfare United Airlines, Seattle, Washington	\$428.50	\$428.50

3. Click **Allocate**.
4. From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.
5. In the **Allocate By** field, enter the *Percentage* or *Amount*.
6. Click in the field under the **Department** column heading.
7. Select the department that will receive the allocation.
8. Click **Add New Allocation**.

The **Allocate Report** window appears.

A dropdown list of departments appears. Depending on your company's configuration, you might see different fields, other than Department (i.e., Cost Center or Project), to complete on the **Allocate Report** page.

A new allocations field appears.

## ***Allocate Multiple Expenses (Continued)***

### **How to...**

9. Repeat steps 5-7 for each new allocation.
10. Click **Save**.
11. In the confirmation message box, click **OK**.
12. In the **Allocate Report** window, click **Done**.

### **Additional Information**

Add as many allocations as necessary. You can adjust the amounts and percentages. You do not have to allocate 100% of the total. The amount that you do not allocate is charged as usual, probably to your own cost center.

The allocation icon appears on the left side of the page with the expense. If the expense is 100% allocated, the icon is yellow, red, and green. If the expense is not 100% allocated, the icon is blue and gray.

## Section 11: Print and Submit/Resubmit Expense Reports

### Preview and Print Your Expense Report

#### How to...

1. From the **Print** menu, select the appropriate print option.

#### Additional Information

The three print options:

- For a fax cover page to use with Concur Imaging, select **Fax Receipt Cover Page**.
- For a listing of expenses that require receipts, select **Receipt Report**.
- For a detailed report, select **Detailed Report**.

The report appears in a separate window.

2. To print the report, click **Print**.



### Fax or Attach Scanned Receipt Images

If your company uses Concur Imaging, you can fax your receipts or you can attach scanned images of your receipts.

#### Fax Images

#### How to...

1. From the **Print** dropdown menu, select **Fax Receipt Cover Page**.
2. Click **Print**.
3. Fax the cover page and the receipts to the number on the cover page.
4. To view the faxed receipts, from the **Receipts** dropdown menu, select **Check Receipts**.

#### Additional Information

The fax cover page appears.

After you have checked receipts for the first time, you will see two different options on the **Receipts** menu: **View Receipts in New Window** and **View Receipts in Current Window**.



## Fax or Attach Scanned Receipt Images (Continued)

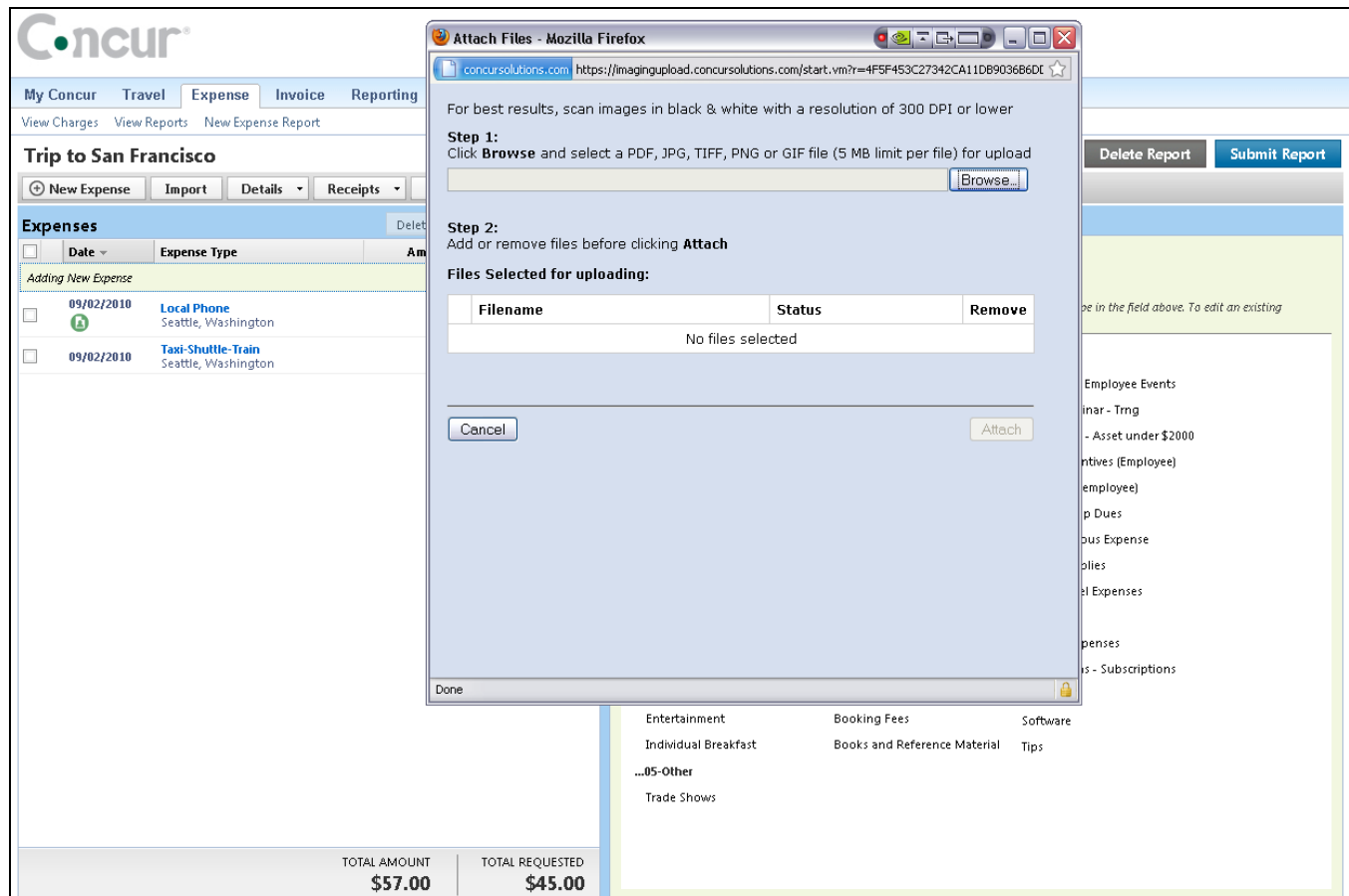
### Attach Scanned Images

#### How to...

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Attach Receipt Images**.

#### Additional Information

The **Attach Files** window appears.



2. Click **Browse**, and then locate the file you want to attach.
3. Click the file, and then click **Open**.
4. To attach another image, click **Browse**, and then repeat the process.
5. Click **Attach**, and then click **Done**.
6. To view the attached receipts, from the **Receipts** dropdown menu, select **Check Receipts**.

The selected file appears in the **Files Selected for uploading** section of the window.

After you have checked receipts for the first time, you will see two different options on the Receipts menu: **View Receipts in New Window** and **View Receipts in Current Window**.

# Section 11: Print and Submit/Resubmit Expense Reports (Continued)

## Delete Receipt Images

### How to...

- 1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Delete Receipt Images**.
- 2. In the confirmation window, click **Yes**.

### Additional Information

A confirmation window appears.

When you select the **Delete Receipt Images** option, all attached images are deleted. You cannot delete individual receipt images.



# Section 11: Print and Submit/Resubmit Expense Reports (Continued)

## Use E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. If your company allows e-receipts, you must opt in from your Profile before e-receipts will show in Expense. If your company has enabled e-receipts, you will be notified in the Alerts section on the **My Concur** page.

## Enable E-Receipts

How to...	Additional Information
<div>1. On the <b>My Concur</b> page, in the <b>Alerts</b> section, click <b>Sign up here</b>.</div> <div></div> <div>2. Click <b>E-Receipt Activation</b>.</div>	<div>The E-Receipt Activation page appears.</div> <div>The <b>E-Receipt Activation and Use Agreement</b> appears.</div> <div></div>

3. Click **I Accept**.

The e-receipts confirmation appears.

Once you have confirmed the e-receipt activation, all of your corporate cards are included. From your Profile, you can choose to exclude a particular card.

As you create your expense reports, you will see the e-receipt icon next to any transactions that have an e-receipt. You can click the icon to view the e-receipt.




## Use E-Receipts (Continued)

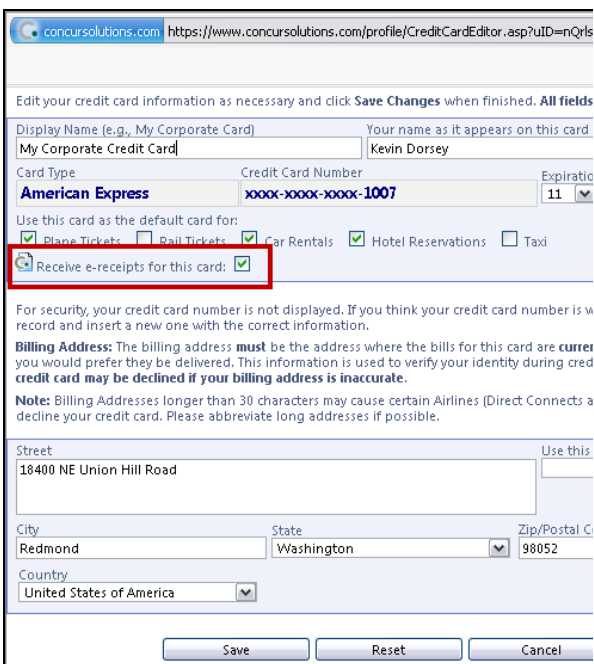
### Exclude a Credit Card from E-Receipts

If you have a credit card listed in your Profile for which you do not want to receive e-receipts, you can exclude that credit card.

#### How to...

1. From the **Profile** page, click **Personal Information**.
2. In the **Credit Cards** section, click the edit  icon for the credit card you wish to exclude.
3. Clear the **Receive e-receipts for this card** checkbox.
4. Click **Save Changes**.

#### Additional Information



concursolutions.com https://www.concursolutions.com/profile/CreditCardEditor.asp?uID=nQrIs

Edit your credit card information as necessary and click **Save Changes** when finished. **All fields**

Display Name (e.g., My Corporate Card) Your name as it appears on this card  
My Corporate Credit Card Kevin Dorsey

Card Type Credit Card Number Expiration  
American Express XXXX-XXXX-XXXX-1007 11

Use this card as the default card for:  
☒ Plane Tickets ☐ Rail Tickets ☒ Car Rentals ☒ Hotel Reservations ☐ Taxi

☒ Receive e-receipts for this card: ☒

For security, your credit card number is not displayed. If you think your credit card number is wrong, record and insert a new one with the correct information.

**Billing Address:** The billing address **must** be the address where the bills for this card are **current** you would prefer they be delivered. This information is used to verify your identity during credit card **may be declined if your billing address is inaccurate**.

**Note:** Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects) to decline your credit card. Please abbreviate long addresses if possible.

Street Use this  
18400 NE Union Hill Road

City State Zip/Postal Code  
Redmond Washington 98052

Country  
United States of America

Save Reset Cancel

# Section 11: Print and Submit/Resubmit Expense Reports (Continued)

## Submit Your Completed Expense Report

If your expenses use multiple accounts that require different signatures, your expense report will be sent to multiple approvers at the same time. If one of the approvers makes changes to your expense report, you will be notified and the report might need to go through the approval process again. Cost object approval allows multiple approvers to review a report at once and helps to ensure control, compliance, and visibility of expenses.

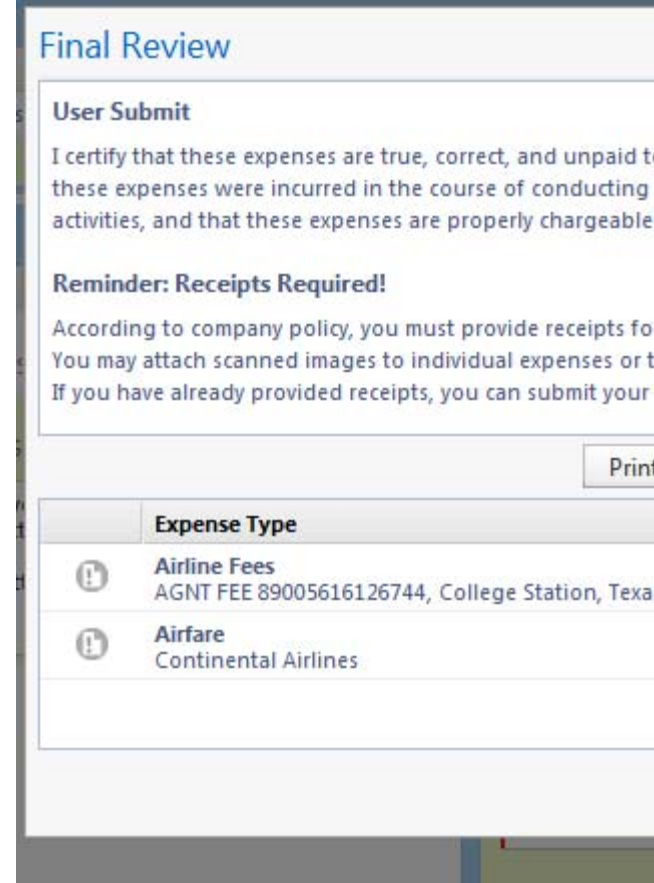
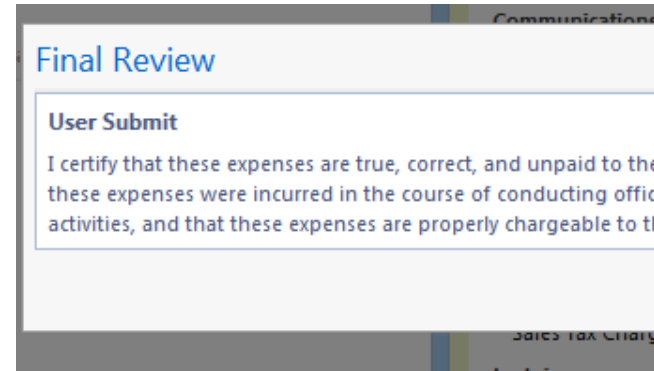
### How to...

1. On the **Expense Report** page, click **Submit Report**.

2. If you did not attach required receipts, you will get an additional reminder message and it will give you the opportunity to attach receipts.

### Additional Information

The **Final Review** window appears requiring you to certify your expenses.



3. Attach receipts, if applicable, and certify expenses.
4. The total page appears to confirm your total expenses and amounts owed by company or traveler.
5. Click **Close**.

If you have a red exception for a receipt and you do not attach receipts, the system will not let you submit the expense report.

## Correct and Resubmit a Report Sent Back by Your Approver

If your approver requires changes or additional information, he/she will return your expense report.

The returned report appears in the **Expense Report** or **Active Work** section of the **My Concur** page, along with a comment from your approver.

### How to...

1. Click the report name (link) to open the report.
2. Make the requested changes.
3. Click **Submit Report**.

### Additional Information

The **Expense Report** page appears.

The screenshot displays the Concur Expense Reports interface. On the left, there's a 'Trip Search' section with filters for Flight, Car, Hotel, Taxi, Rail, Flight Status, and Dining. Below this, there are fields for Departure City (SEA - Seattle Tacoma Intl Arpt - Seattle, WA) and Arrival City. The main section is titled 'Expense Reports (7)' and contains a table with the following data:

Report Name	Status	Report Date	Total
OE Lunches Sept. 14-15 Lunches for Intelligence Training	Approved	09/20/2010	\$164.86
Training Training	Not Filed	09/16/2010	\$550.00
Elan Expense Training 09/08/10 Onsite Expense Training	Approved	09/15/2010	\$231.11
Sales Training Work with new sales system.	Not Filed	09/10/2010	\$20.00
Trip to San Francisco Onsite Expense Training	Sent Back to Employee - Calnan, Brenna M	09/09/2010	\$57.00
Hub International Travel & Expense Training for Hub International	Approved	08/31/2010	\$64.00
Training for Hub International Concur Travel & Expense onsite training for Hub International	Approved	08/23/2010	\$700.74

## Section 12: Review and Approve Expense Reports

As an approver, you can approve an expense report "as is"; send an expense report back to the employee to modify and resubmit; or adjust the authorized amount of one or more expenses to comply with company policy and then approve the expense report for the lowered amount. (Your company may or may not allow you to adjust authorized amounts.)

TAMUS uses cost object approval and an employee's expense report will be sent to multiple approvers at the same time if more than one account was selected in the allocation process and two different approvers are responsible for those accounts. If one of the approvers makes changes to your expense report, the report might need to go through the approval process again. Cost object approval allows multiple approvers to review a report at once and helps to ensure control, compliance, and visibility of expenses.

## Review and Approve an Expense Report

All reports awaiting your review and approval appear in the **Approval Queue** section of **My Concur**.

### How to...

1. Click the report name (link) to open the report.
2. To review the report information, from the **Details** dropdown menu, select **Report Header** (under **Report**).
3. To review expense entry information, click an expense entry.
4. Review the receipt information. From the **Receipts** dropdown menu, select **view receipts in new (or current) window**.
5. Review exceptions.
6. Review allocations.
7. If the cost object icon appears, you are approving the expense report for those expenses.
8. When ready to approve, click **Approve**.

### Additional Information

The **Expense Report** page appears.

The **Report Header** page appears. Ensure that the right account was used on the header. Click **Cancel** on the **Report Header** page.

The expense entry details appear on the right side of the page.

Validate that the receipts match the expenses listed.

Validate that the exceptions are acceptable.

If an allocation icon appears next to the expense type, review the accounts. If there are no allocation icons, the expense will default to the Report Header account.

Other expenses belong to another approver or they are marked as personal.

The report moves to the next step in the workflow.

## Send an Expense Report Back to the Employee

All reports awaiting your review and approval appear in the **Approval Queue** section of the **My Concur** page. On review, there may be a need to return it to the traveler for corrections. When you send the report back to the employee, you are required to leave a comment. All comments stay with the expense report and will appear on the report in the back office. Another option is to have the employee "recall" the report and make the necessary changes and resubmit.

### How to...

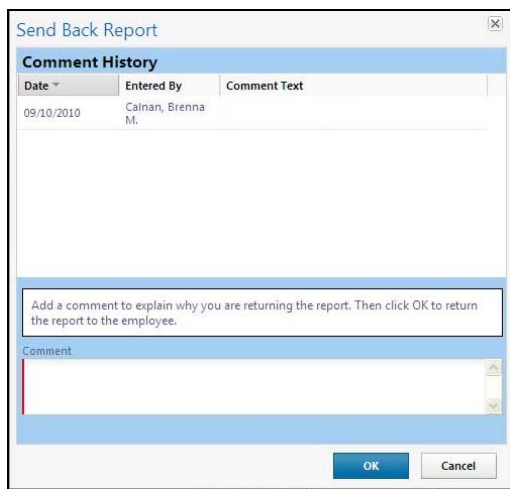
1. Click the report name (link) to open the report.
2. Click **Send Back to Employee**.
3. Enter a comment for the employee, and then click **OK**.

### Additional Information

The **Expense Report** page appears.

The **Send Back Report** box appears.

The report is returned to the employee.



**Send Back Report**

**Comment History**

Date	Entered By	Comment Text
09/10/2010	Calnan, Brenna M.	

Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.

Comment

OK Cancel

## Section 12: Review and Approve Expense Reports (Continued)

### *Send Single Expenses Back to an Employee*

Expense allows you to send back an individual expense item to an employee for correction instead of sending back the entire expense report.

#### How to...

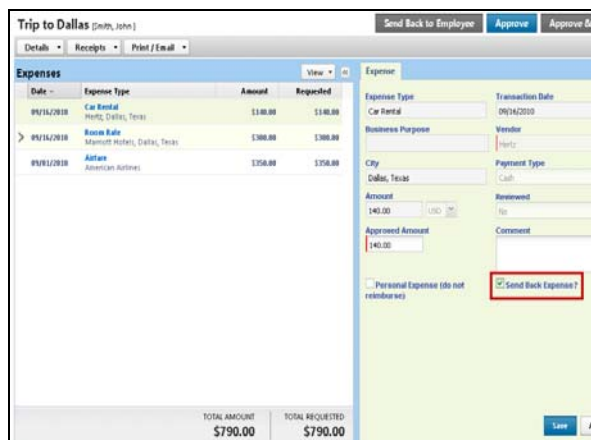
1. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.
2. Review the expense report.
3. Click the expense you wish to send back for correction.
4. In the expense details sections, select the **Send Back Expense?** checkbox.
5. Click **Approve**.

#### Additional Information

The expense report opens.

The expense details appear.

You can send back multiple expenses on an expense report without sending back the entire report. You will repeat the steps for each expense that needs to be sent back.



**Trip to Dallas** [Smith, John] Send Back to Employee Approve Approve & P

**Expenses**

Date	Expense Type	Amount	Requested
09/15/2010	Car Rental Hertz, Dallas, Texas	\$180.00	\$180.00
09/15/2010	Business Rate Marriott Marquis, Dallas, Texas	\$380.00	\$380.00
09/15/2010	Airfare American Airlines	\$139.00	\$139.00

**Expense Details**

Expense Type: Car Rental  
Transaction Date: 09/14/2010  
Business Purpose: Vendor  
City: Dallas, Texas  
Payment Type: Cash  
Amount: \$180.00  
Approved Amount: \$180.00  
Personal Expense (do not reimburse): ☐ **Send Back Expense?** ☒

TOTAL AMOUNT: \$790.00 TOTAL REQUESTED: \$790.00 Save AB



## Section 12: Review and Approve Expense Reports (Continued)

### ***Review Approval Flow for an Expense Report***

You can view the approval path for an expense report. For example, if an expense report has an amount that is greater than your authorized approval limit or if the expense report has an allocation to a cost center that is not within your approval authorization, you can manually select the appropriate approver for the report.

#### How to...

1. On the **My Concur** page in the **Approval Queue** section, click the report name (link) to open the report.
2. Click **Details** and then **Approval Flow**.

#### Additional Information

The **Expense Report** page appears.

The **Approval Flow** window appears. TAMUS does not allow travelers or approvers to select or add additional approvers. The flow for expense report approvers is established in the FAMIS eOffice DTV path.

Approval Flow for Report: Trip to Dallas







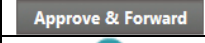














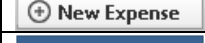











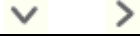


**Manager Approval:**  
Falkmore, Artemis N.

**User-Added Approver:**  
Search Approvers By

**Approval for Processing:**

Approve Send Back Save Workflow Cancel

## Section 13: Action Buttons and Icons

Button/Icon Description	
	<b>Add New Allocation:</b> Add a new allocation row.
	<b>Airfare:</b> Click to view your airfare booking information.
	<b>Allocate By:</b> Choose between allocating by percentage or amount.
	<b>Allocations:</b> Indicates that an expense entry has been allocated.
	<b>Attendees:</b> Indicates that an expense entry has associated attendees.
	<b>Approve:</b> Approve the expense report for processing.
	<b>Approve &amp; Forward:</b> Add additional review steps for an expense report.
	<b>Car Rental:</b> Click to view booking information for your car rental.
	<b>Credit Card Transaction:</b> Indicates that an expense entry was from a credit card transaction.
	<b>Comments:</b> Indicates that an expense entry has comments associated with it.
	<b>Create Expense Report From Trip:</b> Creates an expense report from a completed trip.
	<b>Delete Report:</b> Deletes the current expense report.
	<b>Details:</b> Provides options to view details of the expense report such as the report header, allocations, and audit trail.
	<b>E-Receipt:</b> Indicates that an e-receipt was imported for this entry.
	<b>Exceptions:</b> Indicates that an expense entry has an exception associated with it.
	<b>Import:</b> Provides access to import trip details or credit card charges to the current expense report.
	<b>Itemize:</b> Save the current expense entry and begin the itemization process.
	<b>Lodging:</b> Click to view your lodging booking information.
	<b>Mobile Expense:</b> Indicates that the expense was entered in Concur Mobile.
	<b>Multiply:</b> Reverses the exchange rate when working with foreign out of pocket transactions.
	<b>New Attendee:</b> Add a never before used attendee to an expense report.
	<b>New Expense:</b> Create an out of pocket expense entry.
	<b>New Expense Report:</b> Create a new expense report.
	<b>Next:</b> After creating the expense report header go to the next step in the process.
	<b>Personal:</b> Indicates that an expense entry was marked as personal.
	<b>Print:</b> Print the fax cover page or detail report for the current expense report.
	<b>Rail:</b> Click to view your rail booking information.
	<b>Receipts:</b> Access to attach receipt images or view previously attached receipts.
	<b>Reserve:</b> Reserves the selected trip details.
	<b>Seat map:</b> Click to view the flight seat map.
	<b>Send Back to Employee:</b> Allows the approver to send the expense report back for corrections.
	<b>Submit Report:</b> Submit the expense report for approval.
	<b>Tooltip:</b> Click the tooltip icon to view the associated field-related help.
	<b>Show / Hide Itemization:</b> Click this icon to view or hide itemization specifics.
	<b>Yellow Diamond:</b> Indicates a company preferred vendor.
	<b>Cost Object Approver:</b> Indicates which expenses the approver is approving.

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