Concur User Essentials
Thanks to Calleen Roper, FCRR
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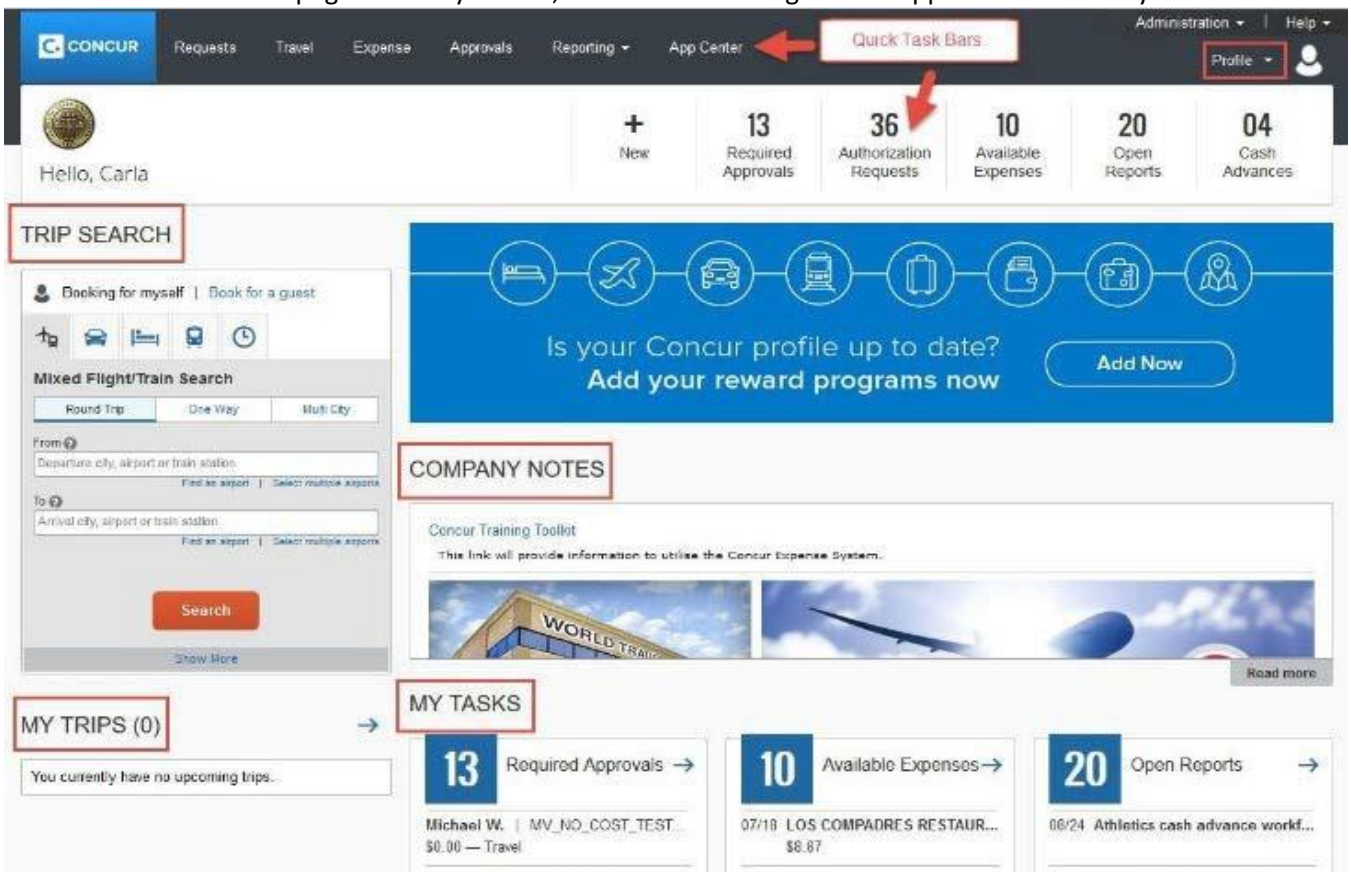
Exploring the Home Page

The home page includes the following sections that make it easy for you to navigate and find the information you need.

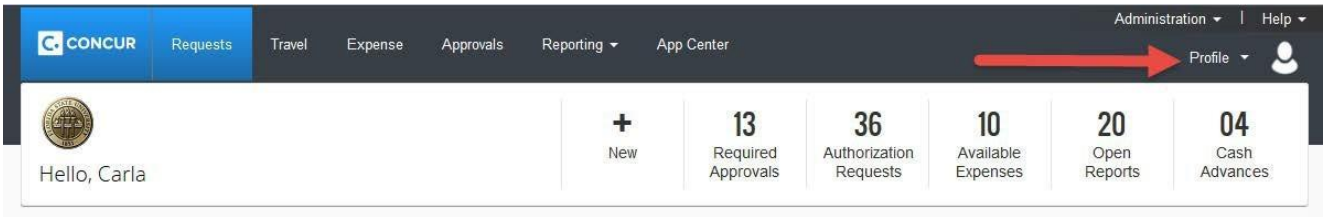
1. **Quick Task Bars** – Provide direct access to create or approve an expense report, authorize a travel request, apply available electronic expenses to an expense report, or access incomplete expense reports
2. **Company Notes** – Displays University specific information
3. **Trip Search/My Trips** – Provides access to travel booking, and upcoming trips.
4. **My Tasks** – Displays a dashboard for your approvals, available expenses, and open reports.
5. **Profile** – Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device

To return to the Home page from any screen, click the **Concur** logo in the upper left corner of your screen.



Updating Your Profile

From the Concur homepage click **Profile,** then **Profile Settings**



Your Information

Name: The complete name should match your government issued photo ID, such as a driver's license or passport, which you will present to airport security. If first/last name are different than what is on user's photo ID, please contact your department HR representative.

First and Last name will be populated from your University HR record.

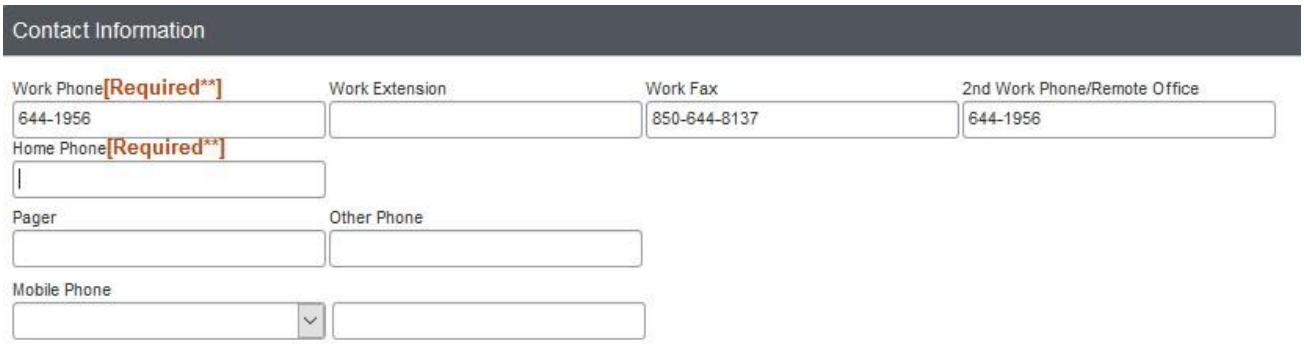
- Verify or add Middle Name and, if applicable, Suffix to match your government issued ID.
- Ensure information is correct. User cannot modify again after saving.
- Click **Save**.

Company Information: Automatically populates

Work & Home Address: Optionally, you may enter work and home address.

Contact Information: **Required**

- Enter a work and home phone number; these can be mobile or land lines



Email Addresses: Required

Verify your email address

- Your '@humboldt.edu' email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the Verify link.
- To verify the email address, click the Verify link.
  - Check your email for a verification message from Concur.
  - Copy the code from the email message into the Enter Code box next to the email address.
  - Click OK
- Additional work and personal email addresses can be added by clicking Add an Email Address. Enter the email address and select whether you want travel notifications to be sent to that email. Click OK.

Emergency Contact Information:

Optional, but when traveling, if there should be an emergency, World Travel Services will have access to the Emergency Contact information.

Travel Preferences:

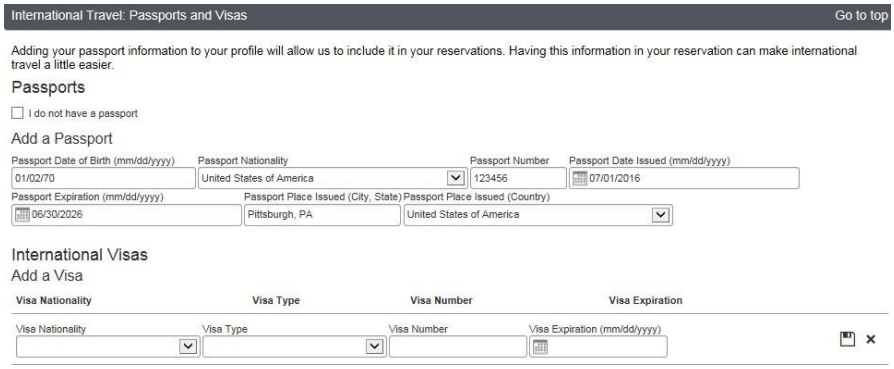
Optional, but recommended for frequent travelers

- If you participate in Frequent Traveler Rewards programs, click **Add a Program**
- Enter air, car rental, and hotel Frequent Traveler program information
- Click "I Agree" to the terms and conditions TSA Secure Flight
- Enter your gender and date of birth
- If you have a TSA Pre-check number, it can be entered

International Travel: Passports and Visas

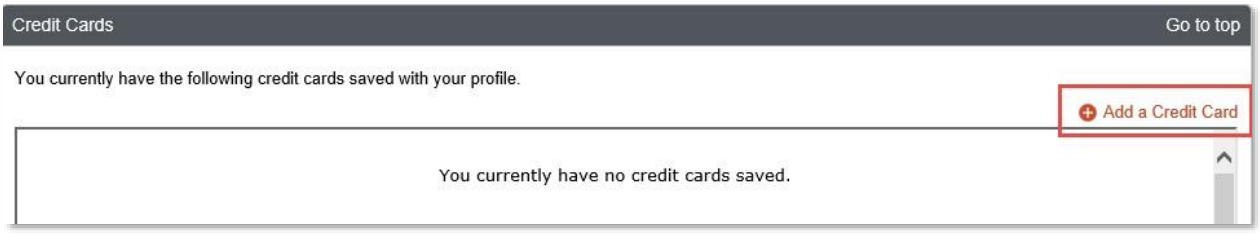
For international travel, entering Passport or International Visa information ahead of time will allow it to be available when using Concur/World Travel to book travel.
Note: User's date of birth will be masked after editing it. If unsure that DOB is correct, users may re-edit the date.

- Click **International Travel**
- Enter Passport or International Visa Information
- Click **Save**



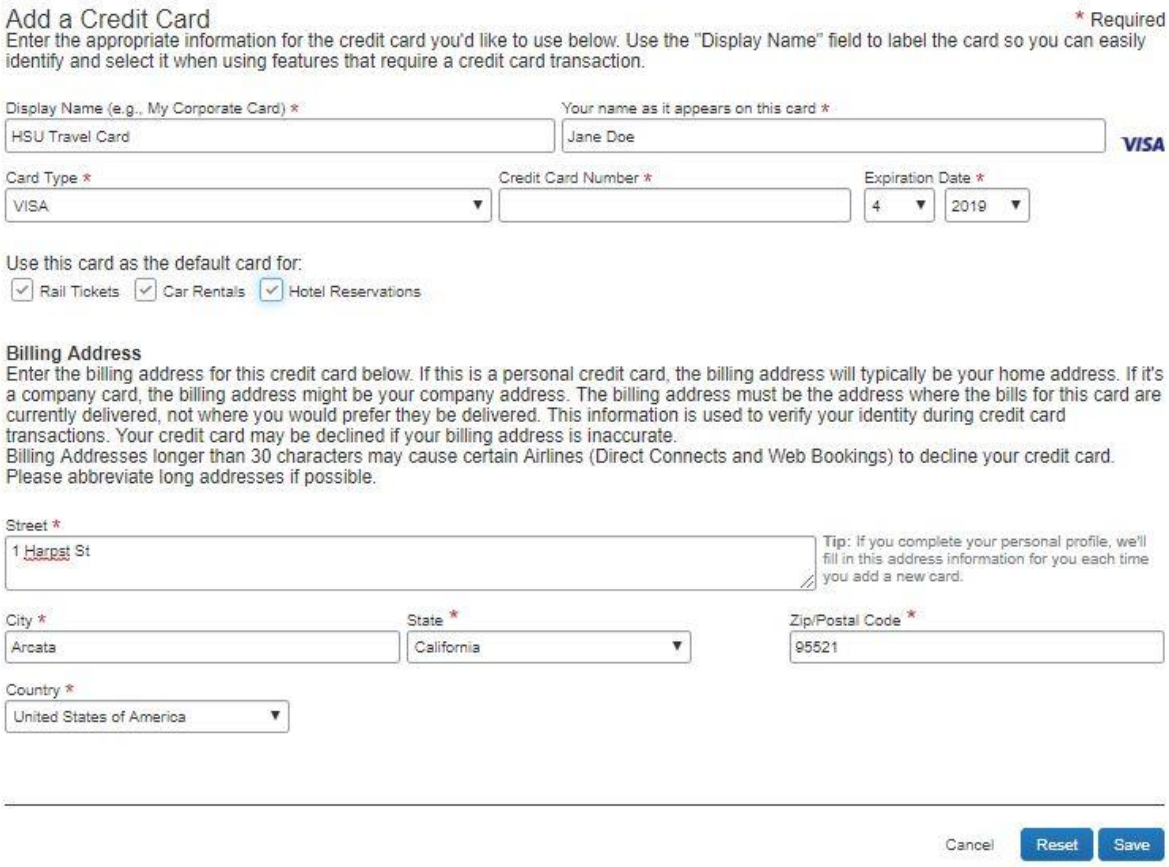
Credit Cards: No personal

- HSU requires the State travel card. If you are a faculty or staff member and do not have a State travel card, please contact travel@humboldt.edu.
- Once you obtain a State travel card, click **Add a Credit Card.** A window should open (check for popups) to fill in the fields.



Fill in the required fields:

- Display Name: i.e. HSU Travel Card
- Your name as it appears on this card: Must match card exactly
- Card Type: VISA
- Credit Card Number: Must match card exactly
- Expiration Date: Must match card exactly
- **Use this card as the default for**: Rail Tickets, Car Rentals, and Hotel Reservations.
- Billing Address:
  - Street: 1 Harpst St.
  - City: Arcata
  - State: California
  - Zip/Postal Code: 95521
  - Country: United States of America



Concur Connected Apps

To take full advantage of the functionality in the Concur application, we recommend that you download the following applications onto your smartphone or mobile device. These are optional, but provide convenience to users.

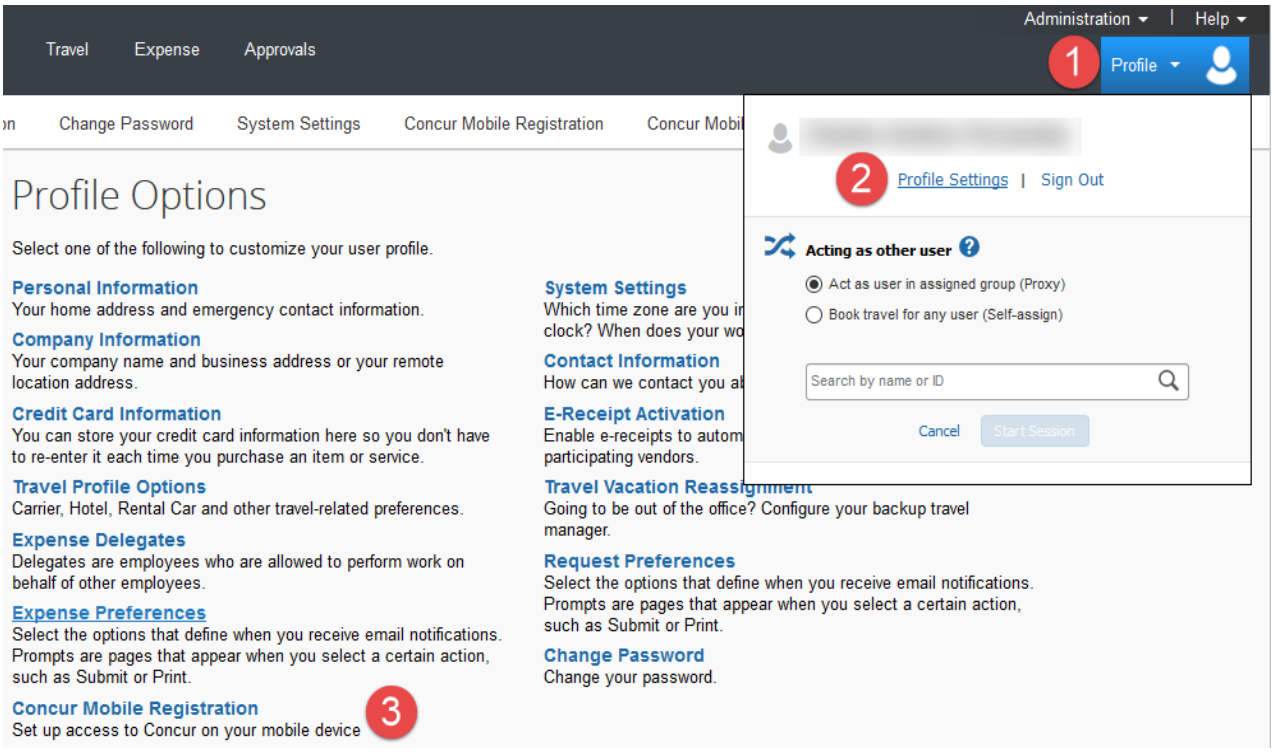
1. **Concur Mobile** allows a user to manage trips and expenses. Users can collect data for an Expense Report and submit it, or approve an employee's Expense Report. Concur Mobile now contains ExpenseIt's receipt recognition technology, which allows users to create an expense line item and match the receipt to a card transaction.

2. **Tripit Pro** organizes travel plans putting all trip information in one place. The app will provide the user with updates during travel on things like gate changes, cancellations, etc., and provides the ability to select alternate flights when plans have changed or a flight has been cancelled. Family members can be provided visibility to travel plans by including them as part of the user's "**inner circle**". Consider it a personal travel assistant while on the road.

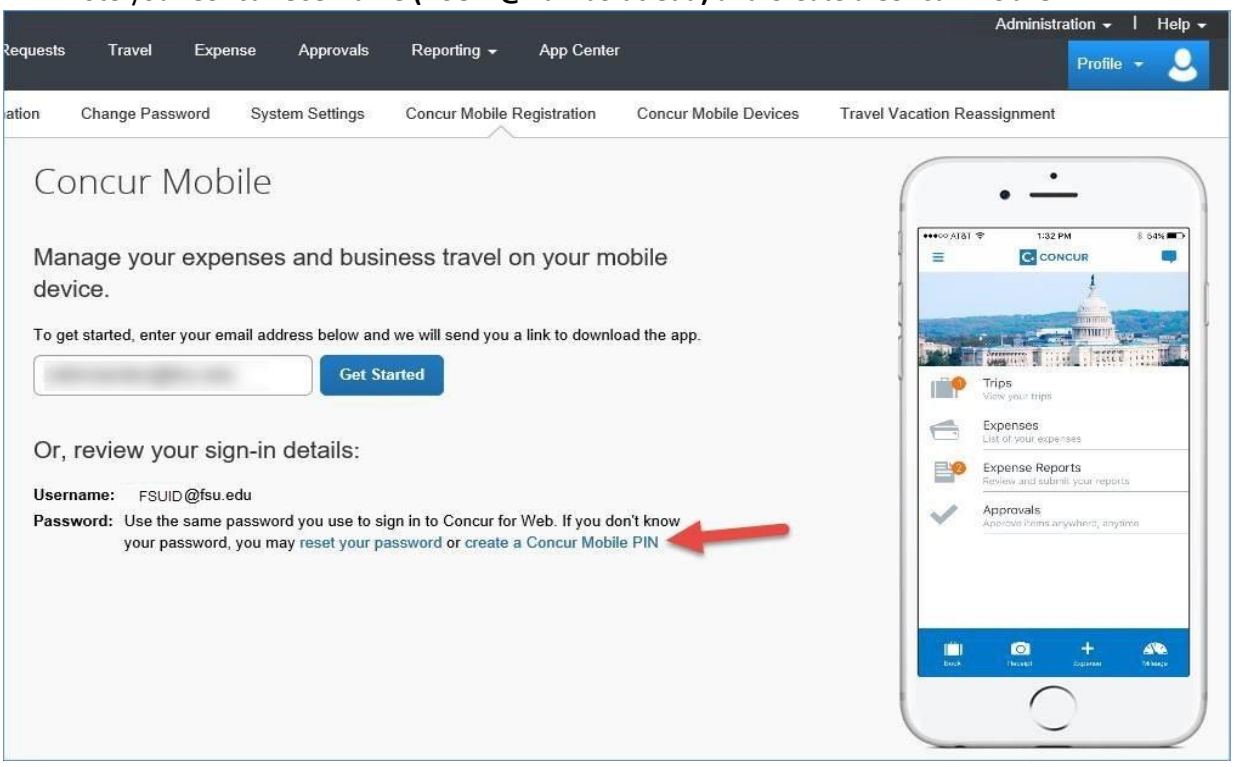
Concur Mobile & Registration:

Use this guide to set up your own mobile phone to capture receipts, submit expense reports, and address approvals.

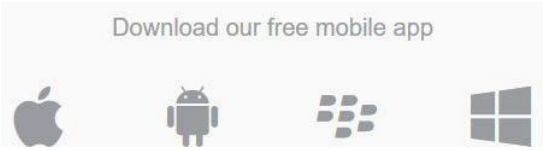
1. Proceed to 1) **Profile**, 2) **Profile Settings**, 3) **Concur Mobile Registration**



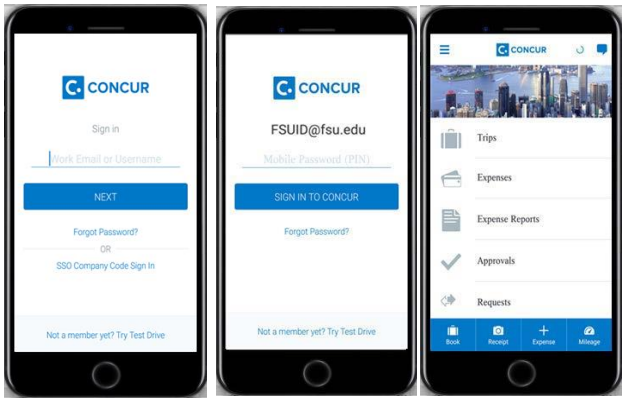
Note your **Concur Username (HSUID@humboldt.edu)** and Create a **Concur Mobile PIN**



1. Download the Concur application to your phone (Note: If you've already downloaded the app, open it from your mobile device)



2. **Concur Mobile will require a password or lock is used to unlock your mobile device if one is not created.**



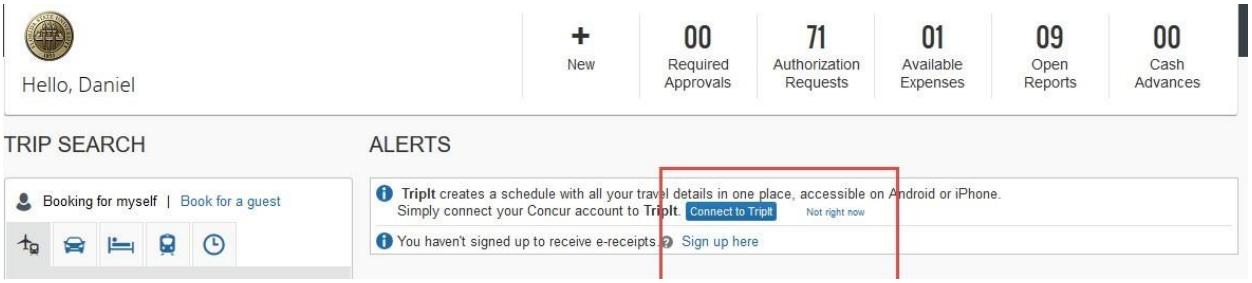
3. Login to Concur via mobile device, using your **Concur Username** as seen in the initial mobile registration page and use the PIN you have set as your password

4. Click **OK**, to allow Concur to send Notifications concerning approvals, expenses, etc. can be customized later.

You are now registered for access to Concur Mobile.

Tripit Pro:

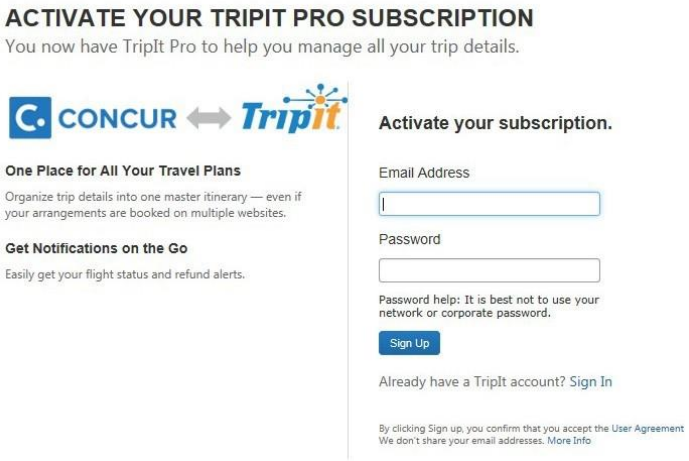
On the Concur home page, under Alerts, you will see a message regarding eligibility for a free Tripit Pro subscription from time to time. Click Connect to Tripit.



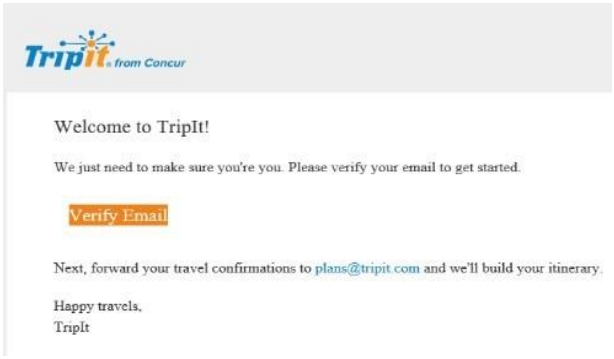
Note: Tripit can also be initialized by proceeding to 1) **Profile**, 2) **Profile Settings 3) Connected Apps**

1. Enter your "a@humboldt.edu" email address, and a password. This password should be different from your University account password. (TripIt passwords are not managed by the University, and caution should be taken to protect your account)

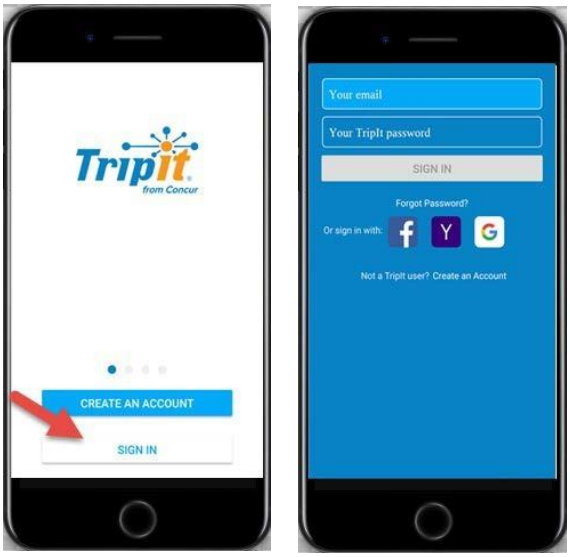
2. Tripit will send a verification email to your @humboldt.edu email address. Click the link in the email to verify the account.



3. Click **Verify Email**.
4. Install Tripit from your device application store.
5. Open Tripit
6. Login with your previously created and verified username and password



Note: Users of Tripit can forward confirmation emails to plans@concur.com from any **verified email address** and can view itinerary information from Tripit while traveling for status updates, gate changes, and more. You can add additional email addresses by going to **Profile** > **Profile Settings** > **Personal Information** > **Email Addresses.**



Additional information on Tripit can be found at the following site:
http://www.concurtraining.com/triplink/end_user

Forgot Your Mobile Pin?

If you forget your mobile PIN there is a link under **Other Settings** in your **Profile Settings.**

For Device Specific Information

Please see http://www.concurtraining.com/pr/mobile
For all other questions, send your emails to Travel@humboldt.edu or call Denise Gentry at x3512 for further assistance and troubleshooting.

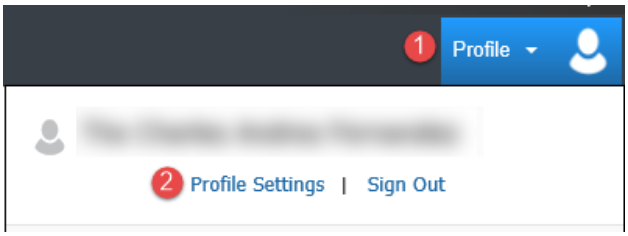
Travel Request & Expense Settings

Request/Expense Delegates - Important!

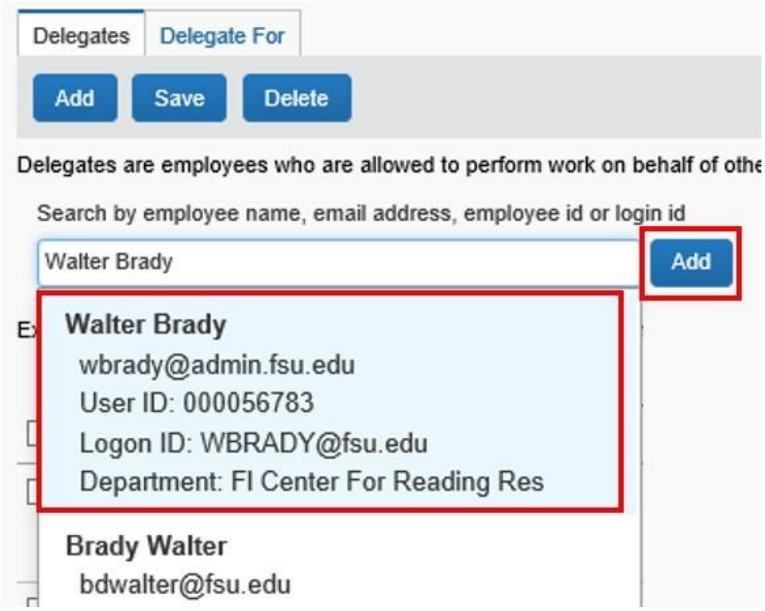
- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare and submit travel requests, book travel, and prepare, but not submit an expense report on behalf of the traveler.
- **It is the responsibility of the traveler to add or delete Delegates.**
- **Request Delegates & Expense Delegates** are linked, changes to one will impact the other.

To Add or Remove a Delegate (Someone who may enter/approve travel on your behalf):

1. Navigate to Profile
2. Profile Settings
3. Click on Request Delegates
4. Click Add.



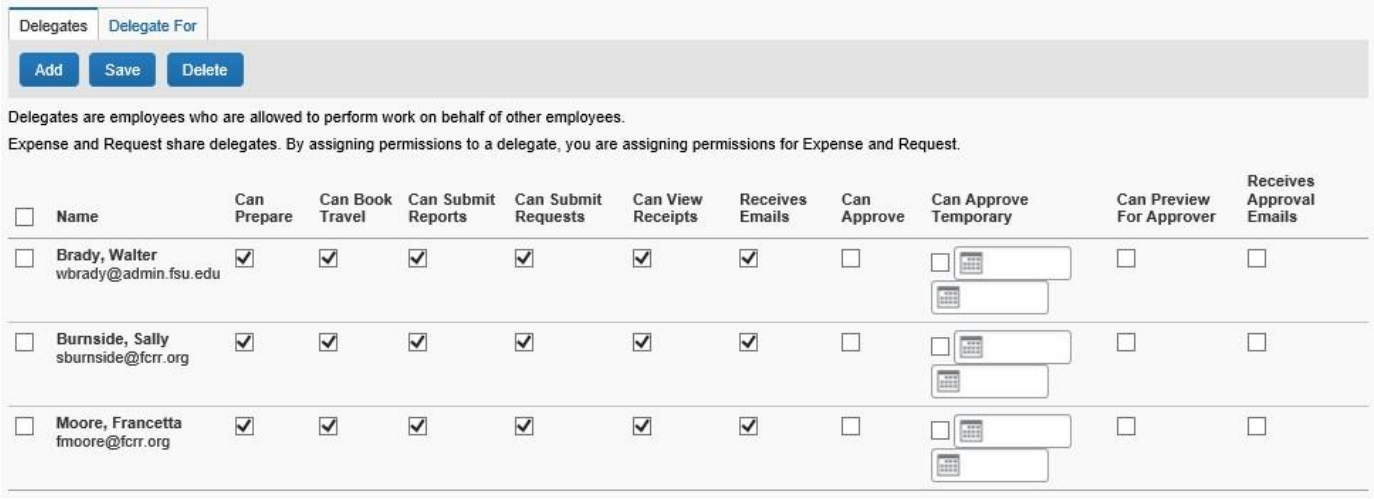
5. Search for the person you wish to add as a Delegate, and click Add.



6. Check the boxes that correspond with the permissions you are granting to the delegate**. Travelers should ask their department who they should add as a travel rep.**
7. Click **Save**.

Delegate Permissions

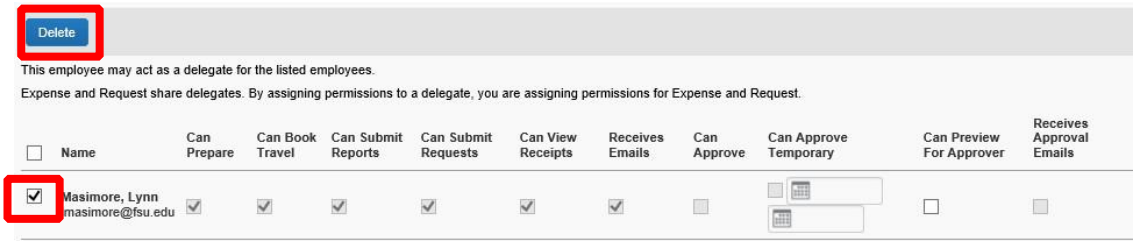
Recommended permissions for Delegates acting as Travel Delegates (*) or Approver Delegates (~)



- **(*) Can Prepare** – delegate has authority to prepare travel requests and expense reports
- **(*) Can Book Travel** – delegate has authority to book travel (select with Can Submit Requests)
- **(*) Can Submit Requests** – delegate has authority to submit travel requests
- **(*) (~) Can View Receipts** – this will check automatically, when you select "Can Prepare" or "Can Approve"
- **(*) Can Submit Reports** – delegate can click "submit" in order to check for audit rules, but the traveler still must submit the report
- **(*) Receives Emails** – delegate receives email notifications

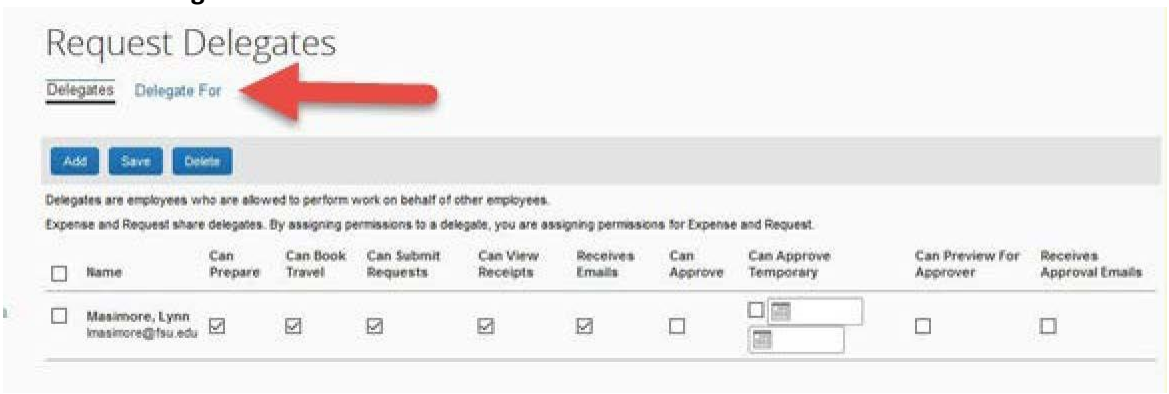
- **(~) Can Approve (for approvers only)** – this allows an approver to delegate approval authority to someone else. Approval authority can be permanent or temporary.
  - Approval authority should not be delegated to a subordinate employee. Approval authority should be given to the immediate supervisor above the approver or to another approver of equal rank (i.e. another supervisor of staff, or a budget manager).

To delete a delegate, click the checkbox to select the person, click Delete and confirm deletion.



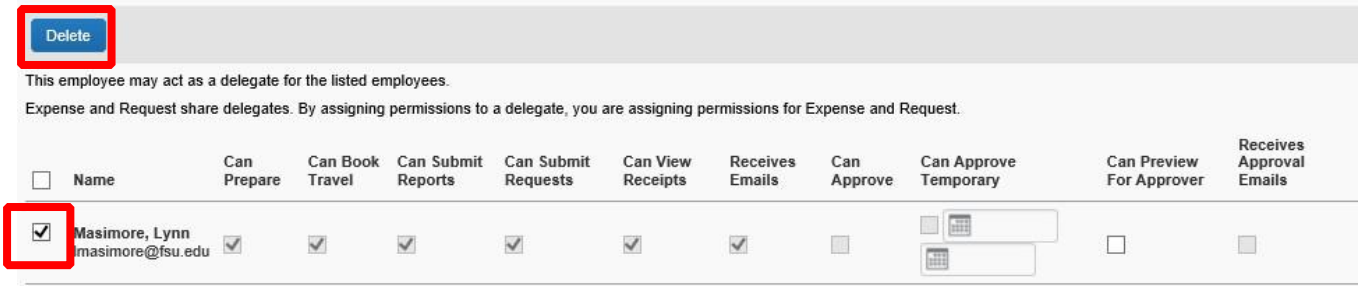
To See Who You are a Delegate For

Click **Delegate For**



To remove the ability to act as a delegate on behalf of another user

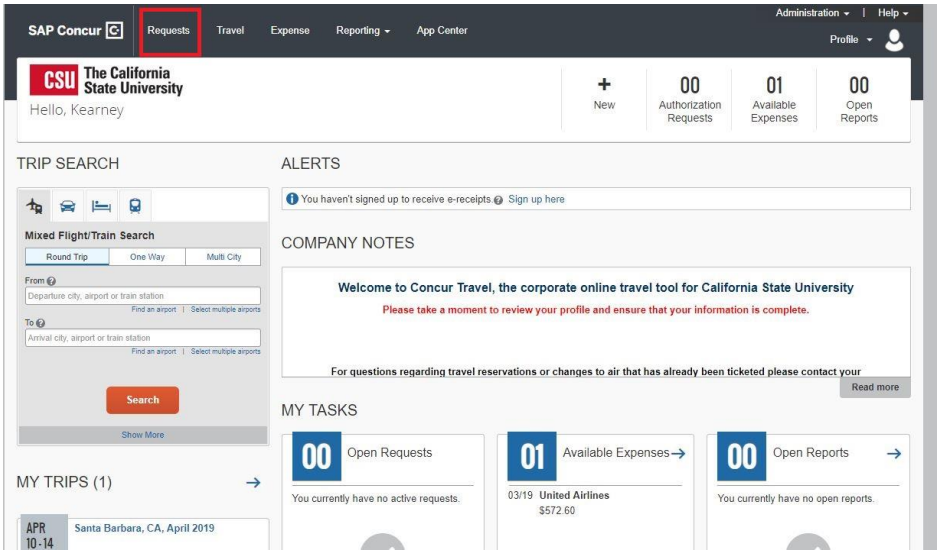
- Select the check box to the left of the individual(s) and click **Delete**
- **Important! Once you remove yourself as a delegate you will need to communicate with that user to be added back as a Delegate in the future.**



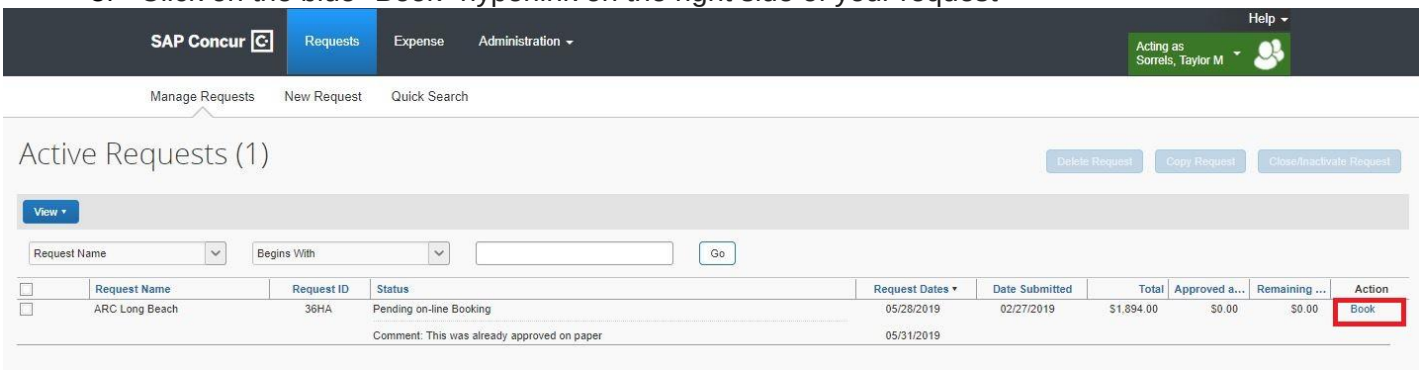
Travel: Making Travel Reservations

Airfare

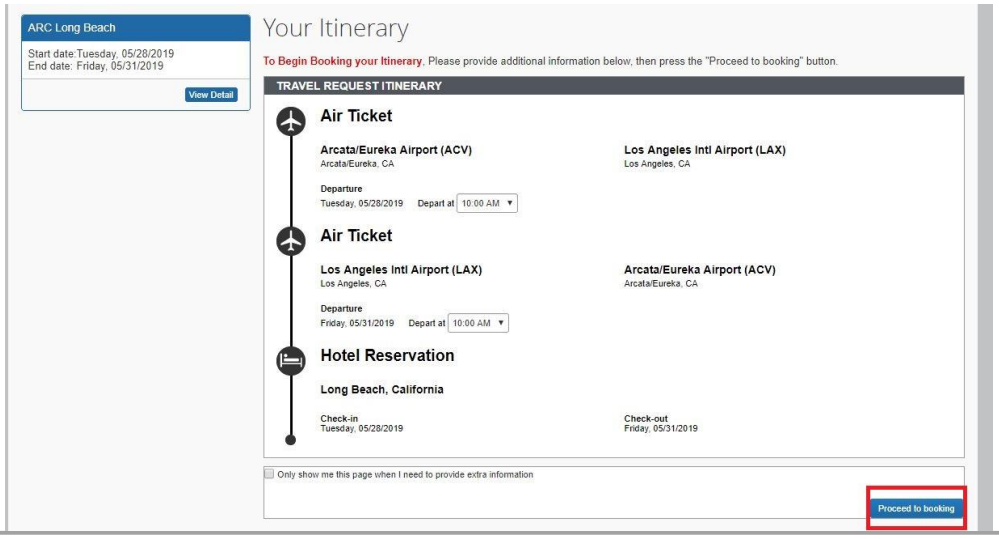
1. Log into SAP Concur
2. Click on "Requests" in the upper left



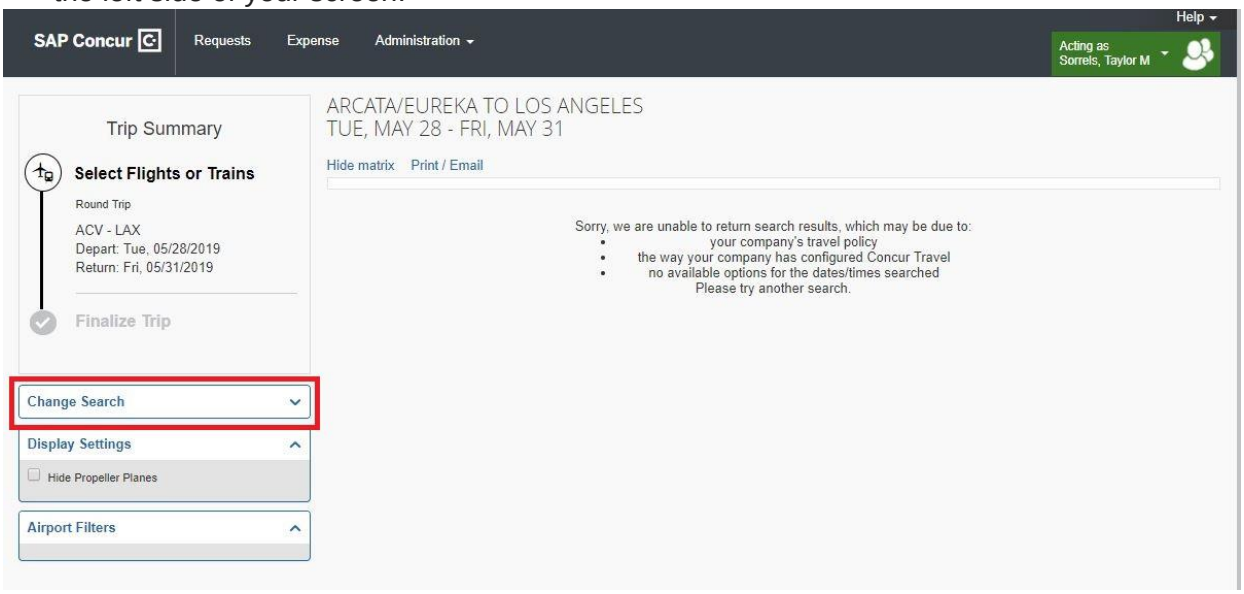
3. Click on the blue "Book" hyperlink on the right side of your request



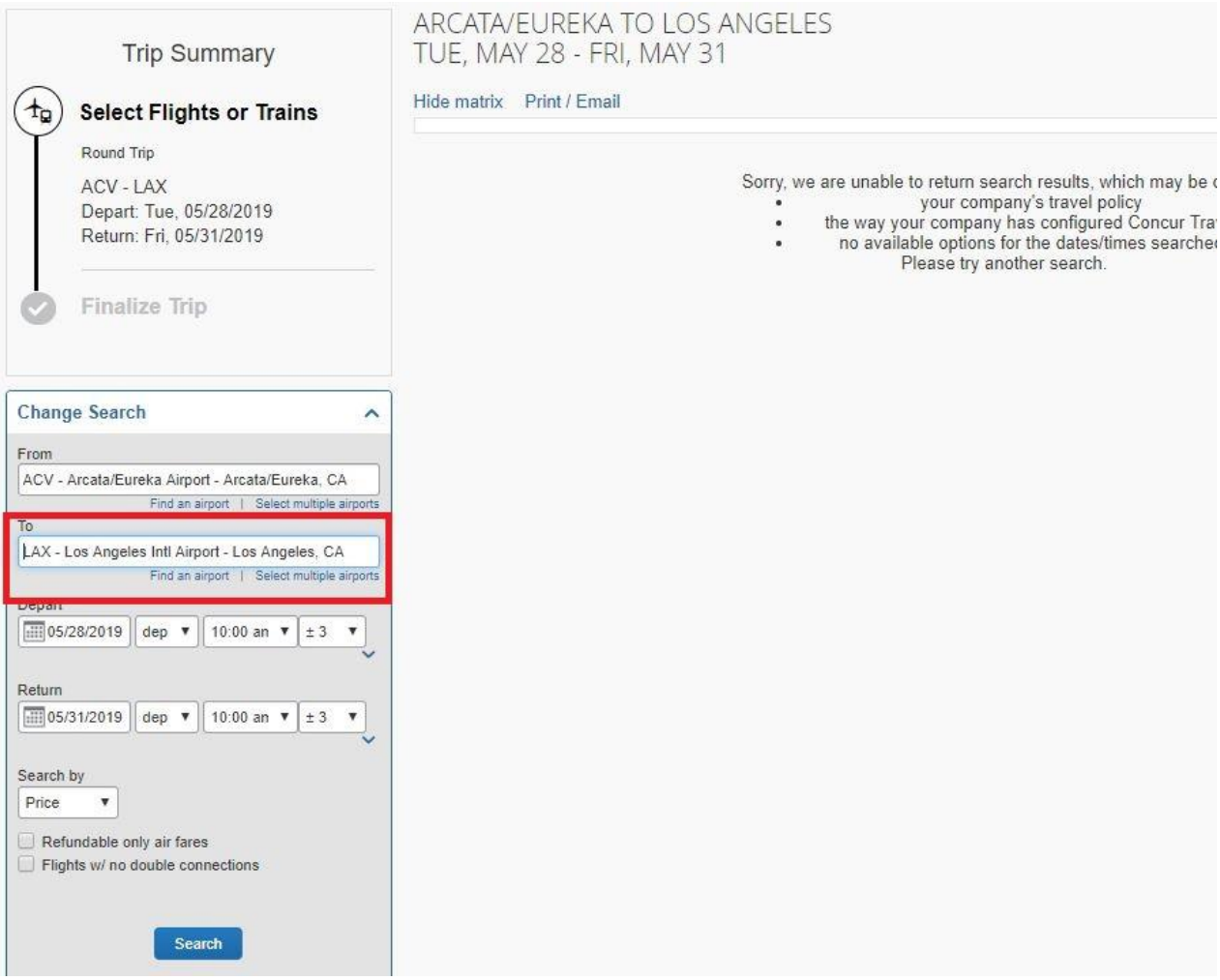
4. Your Itinerary will show the segment(s) you had requested to book through Concur.
5. Click on "Proceed to Booking" in the bottom right.



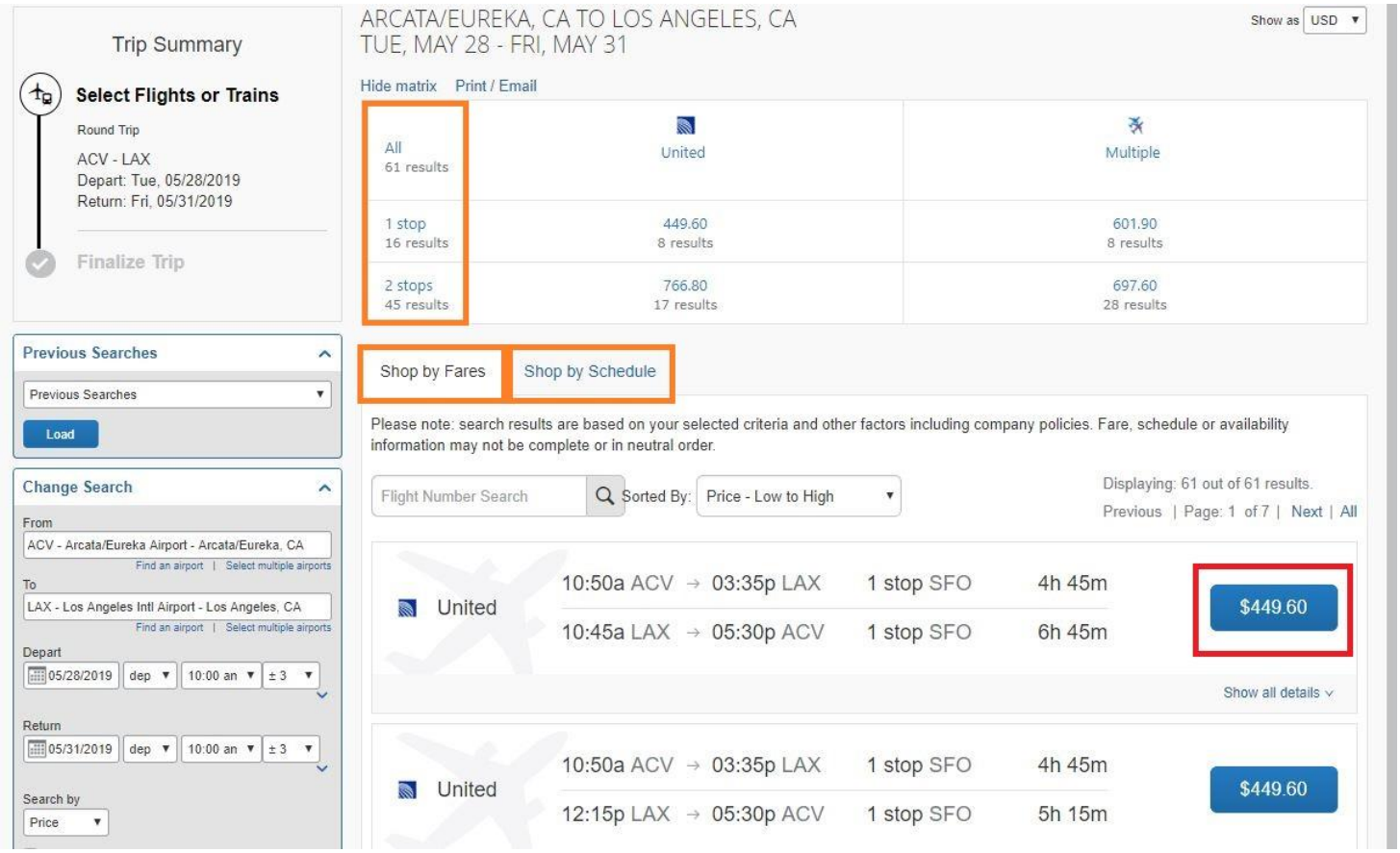
6. If you get an error message that shows that there are no results, click on "Change Search" on the left side of your screen.



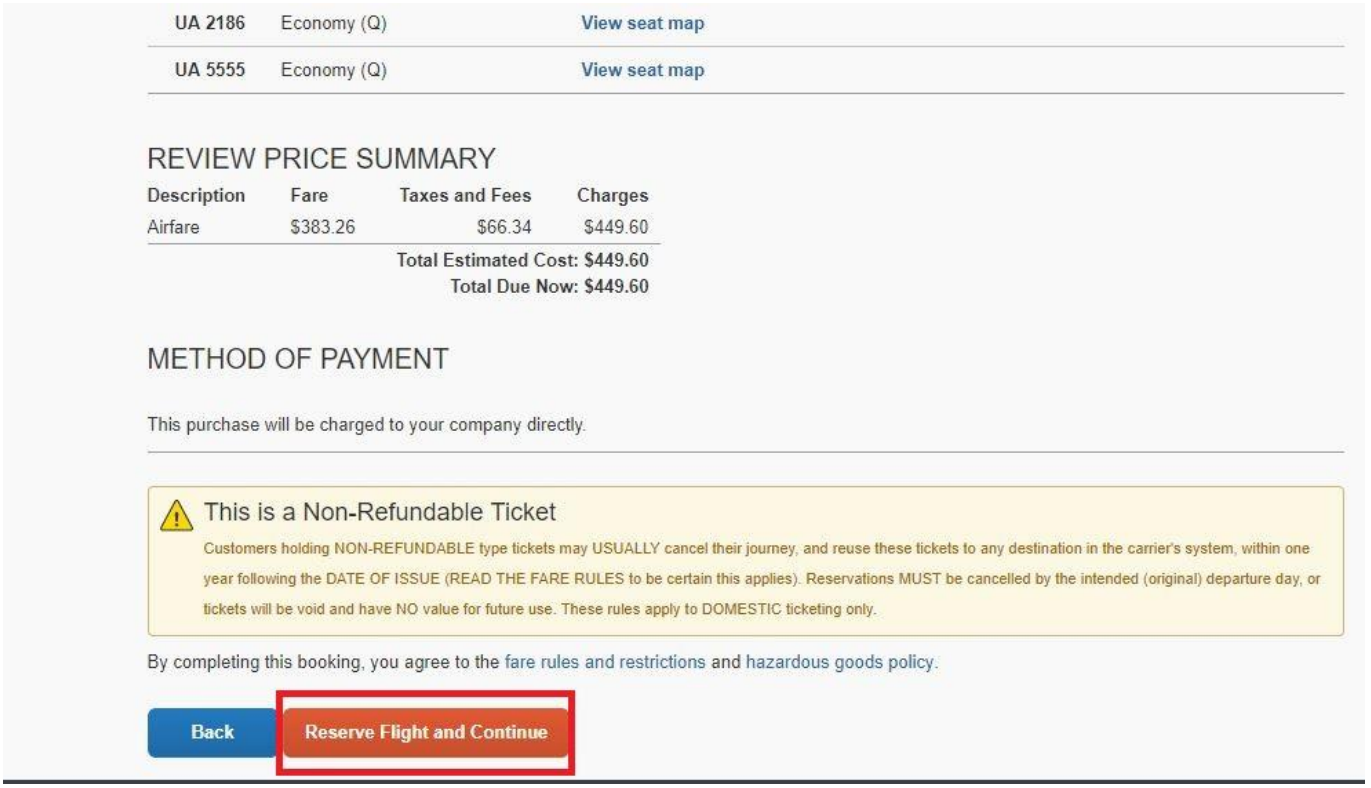
7. Change the To destination as the Airport you will be flying into. Then hit "Search"



Multiple flights will show up after you hit search. You can sort the flights by All, 1 stop, 2 Stops, Fares, or Schedule. Once you have found a flight you'd like to choose, click on the amount on the right of the flight.



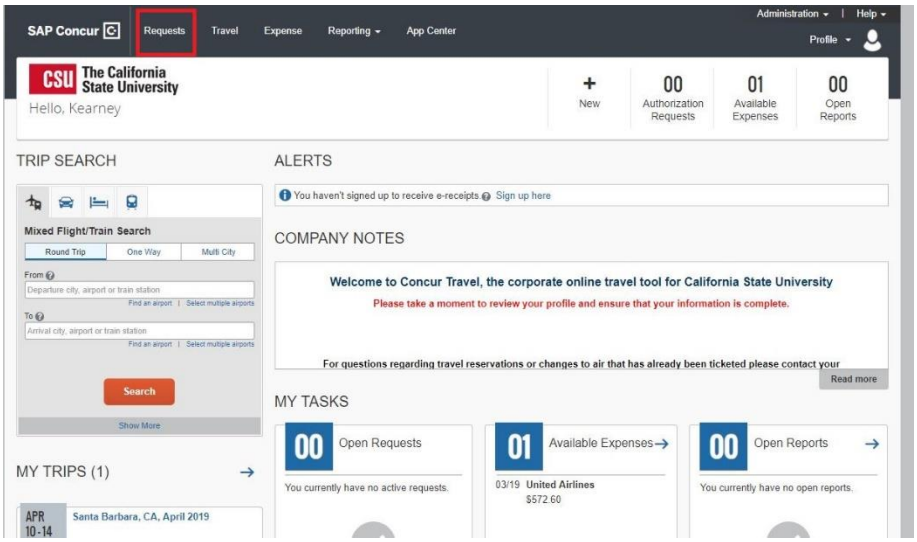
8. Once you have chosen your departing and returning flights, Concur will show you an overview before purchasing your tickets. Scroll down and approve your selection by clicking "Reserve Flight and Continue."



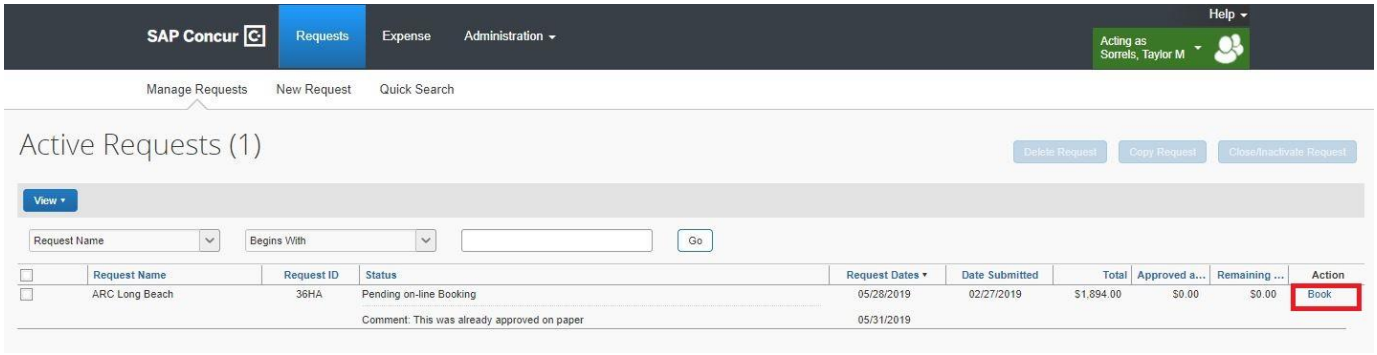
9. If you have multiple segments, Concur will prompt you to the next step for booking either a rental car, or your hotel.

Hotel

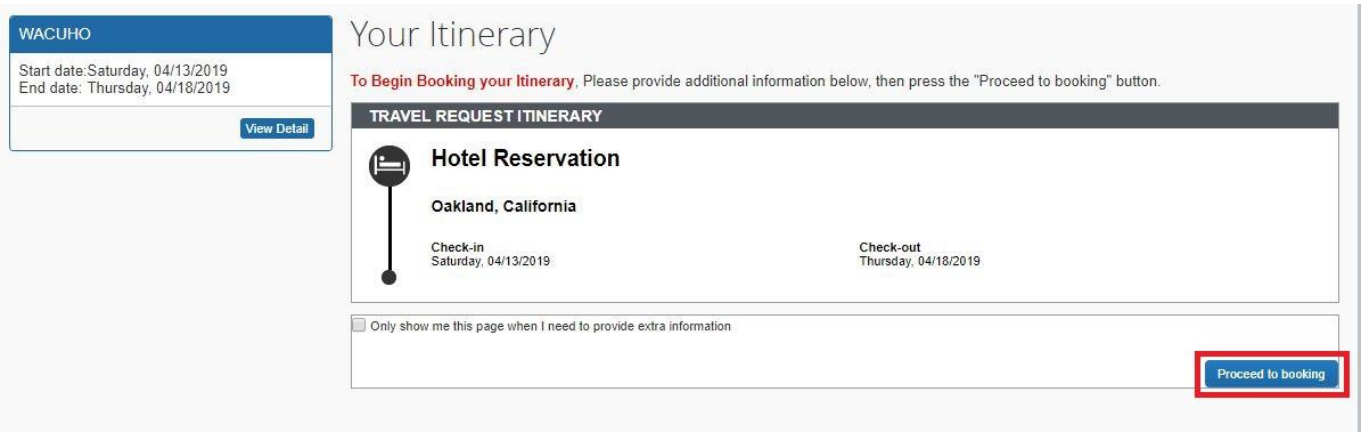
1. Log into SAP Concur (if you were not prompted to Hotel after booking airfare)
2. Click on "Requests" in the upper left



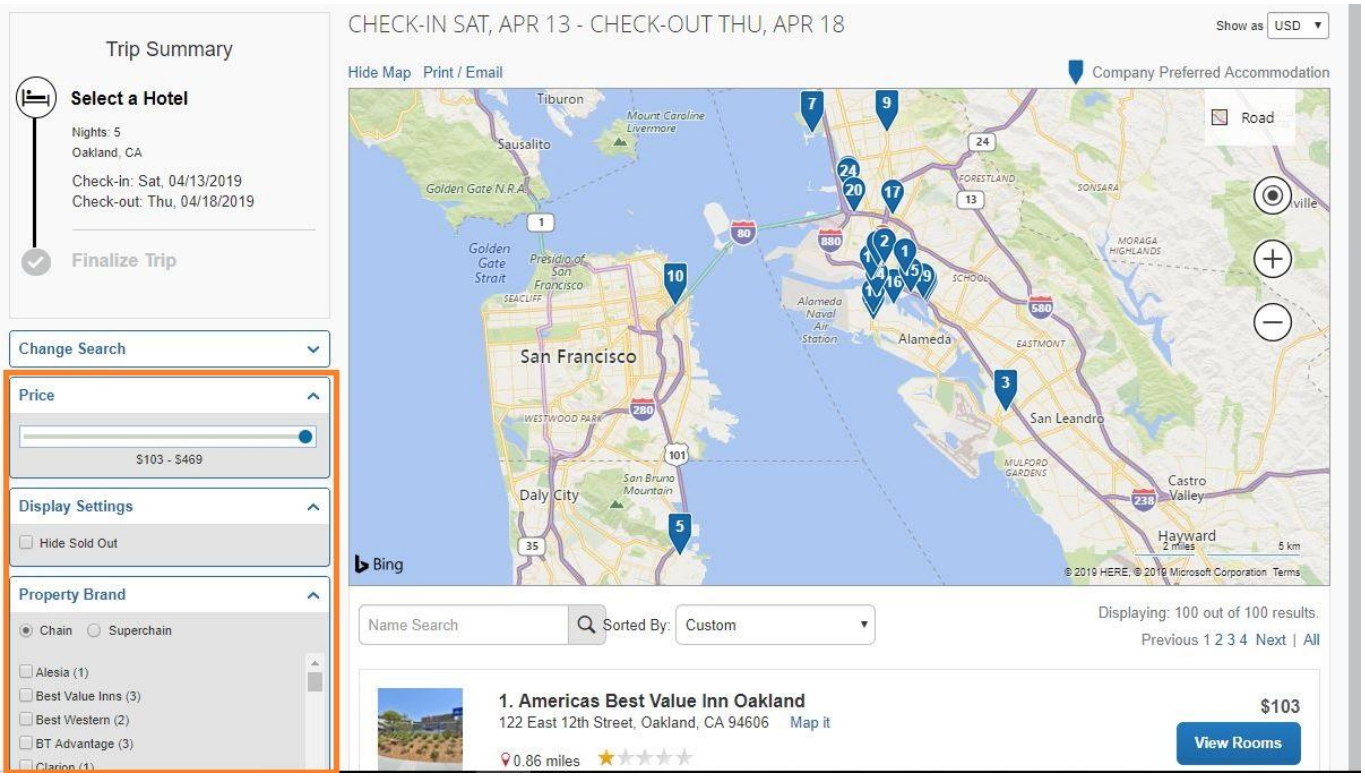
3. Click on the blue “Book” hyperlink to the right of your request



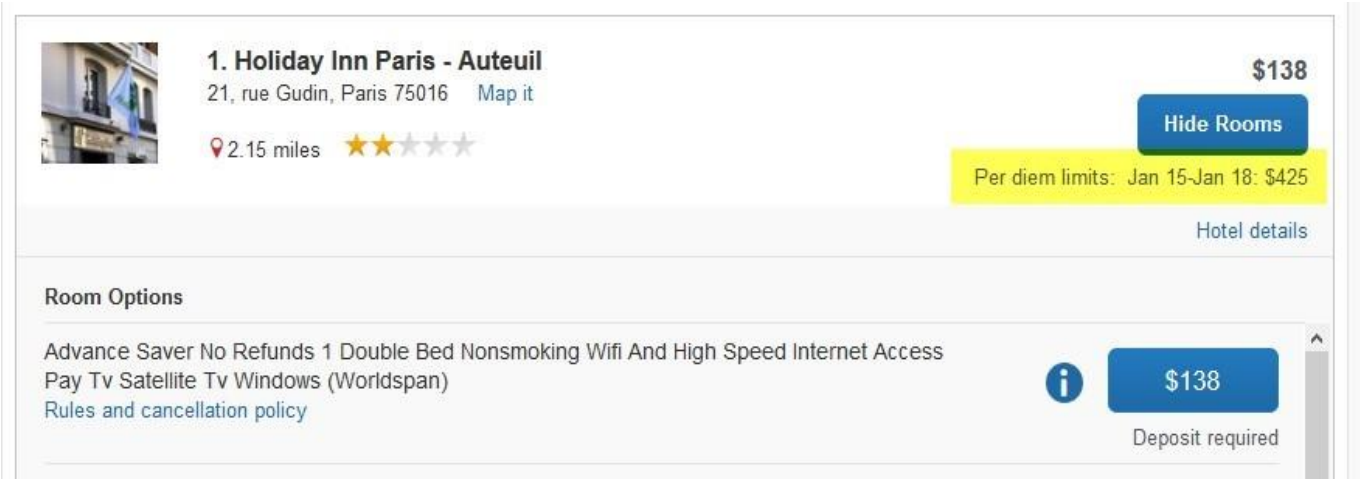
4. Your Itinerary of segment(s) you had requested to book through Concur will show.
5. Click on “Proceed to booking”



6. A map of your destination with hotel options will show. You can search for a hotel using the map or the options on the left side of your screen.

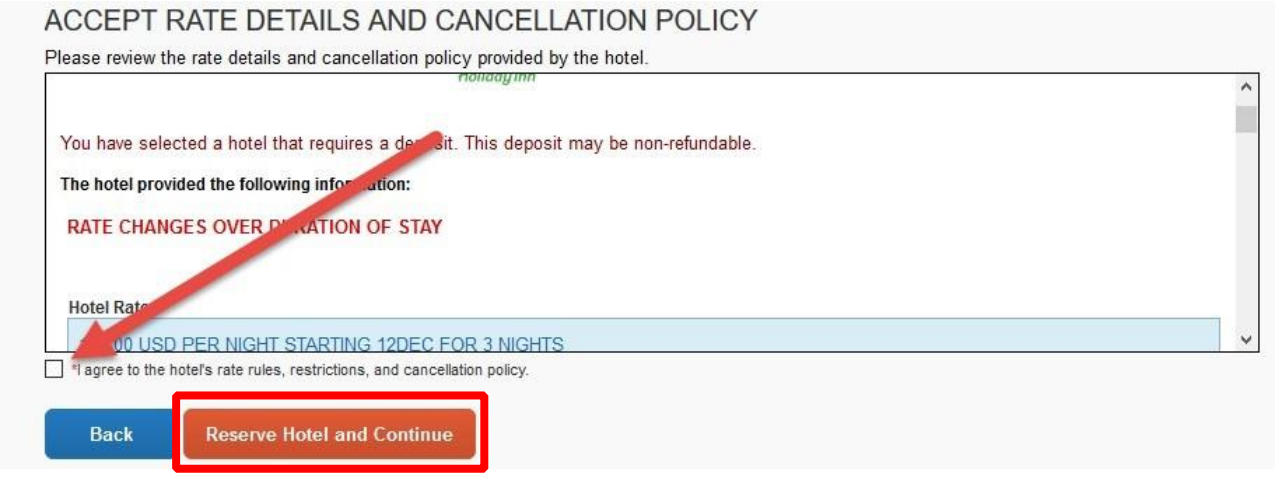


7. If you click on "View Rooms" on a hotel you are interested in booking, it will provide you with the hotel room options and prices.



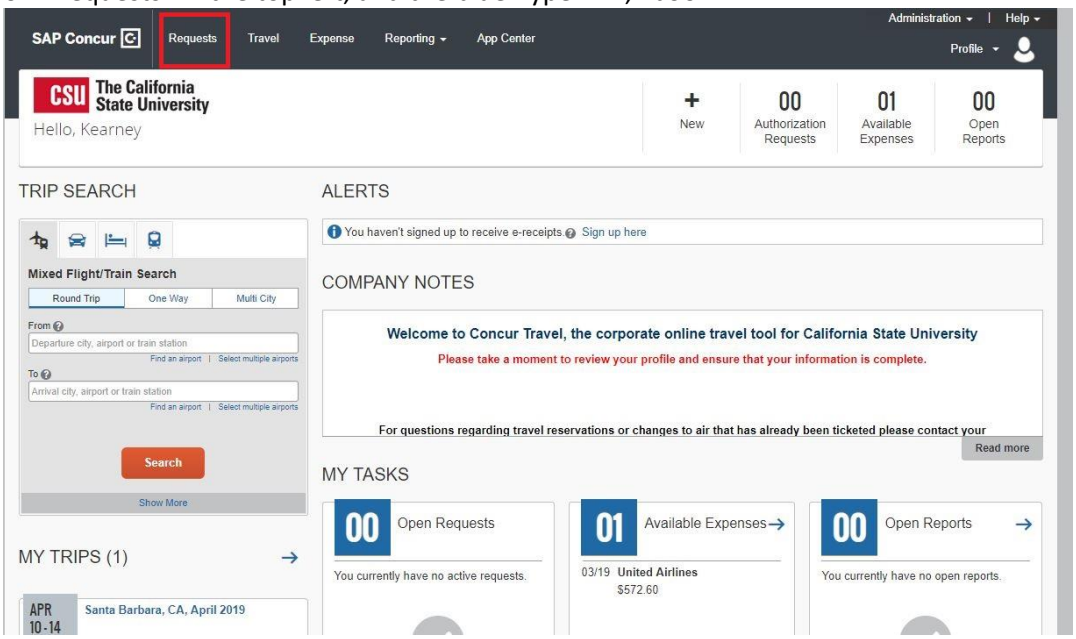
8. Note that international hotel reservations have the foreign maximum lodging limits for that location listed as a guide to use when reserving a room.
9. On the Review and Reserve Hotel page, verify all information and check the box I agree to the hotel's rate rules, restrictions, and cancellation policy.

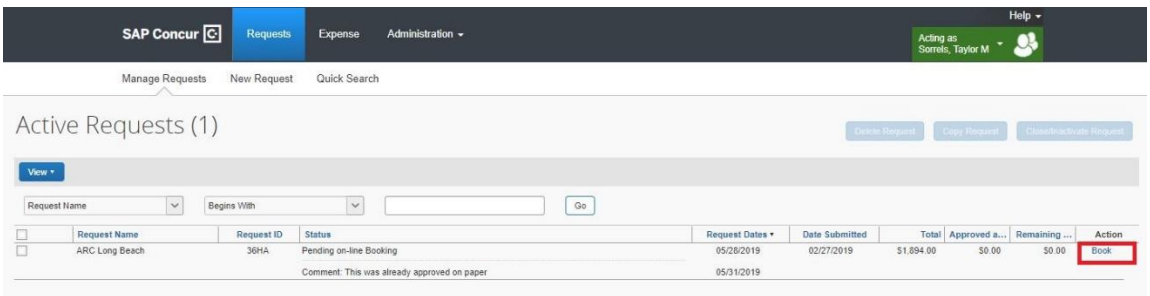
10. Click **Reserve Hotel** and **Continue**



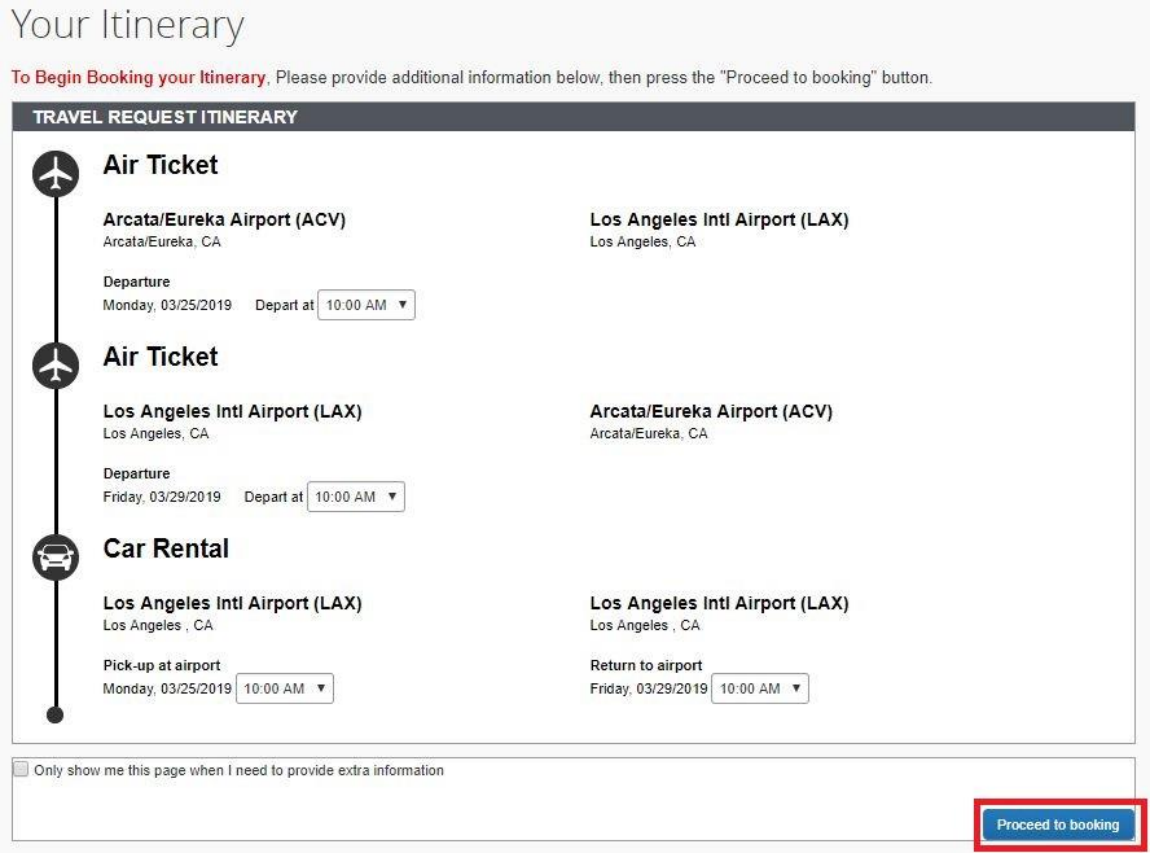
Rental Car

1. If you have already begun your booking process, you will be prompted to book your Rental Car automatically. If you are returning to your booking for your rental car, begin by clicking on "Requests" in the top left, and the blue hyperlink, "book."

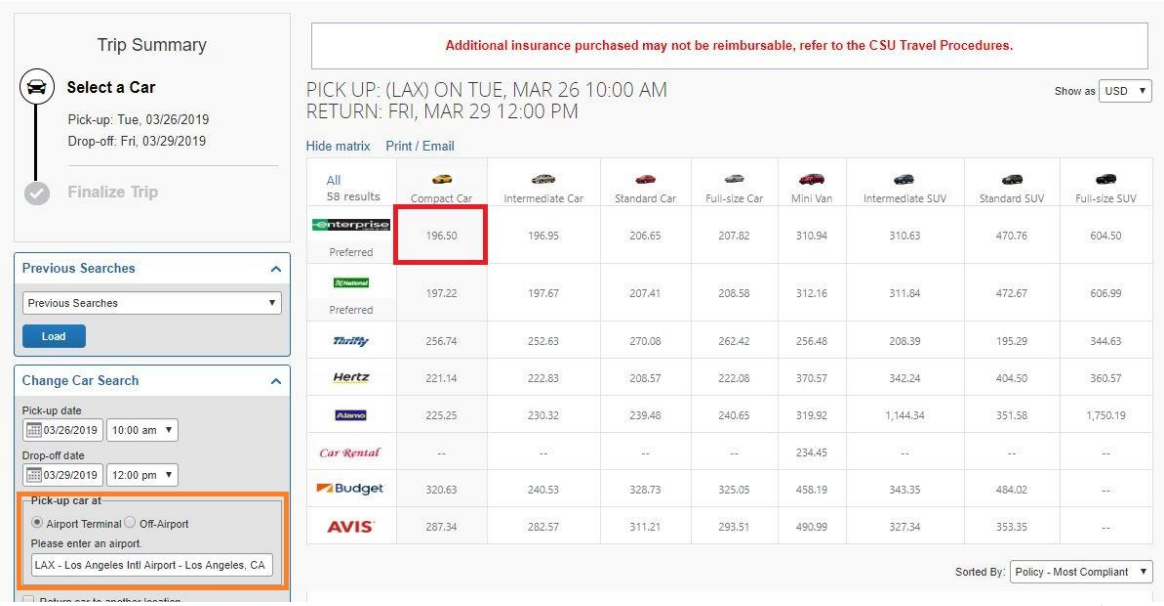




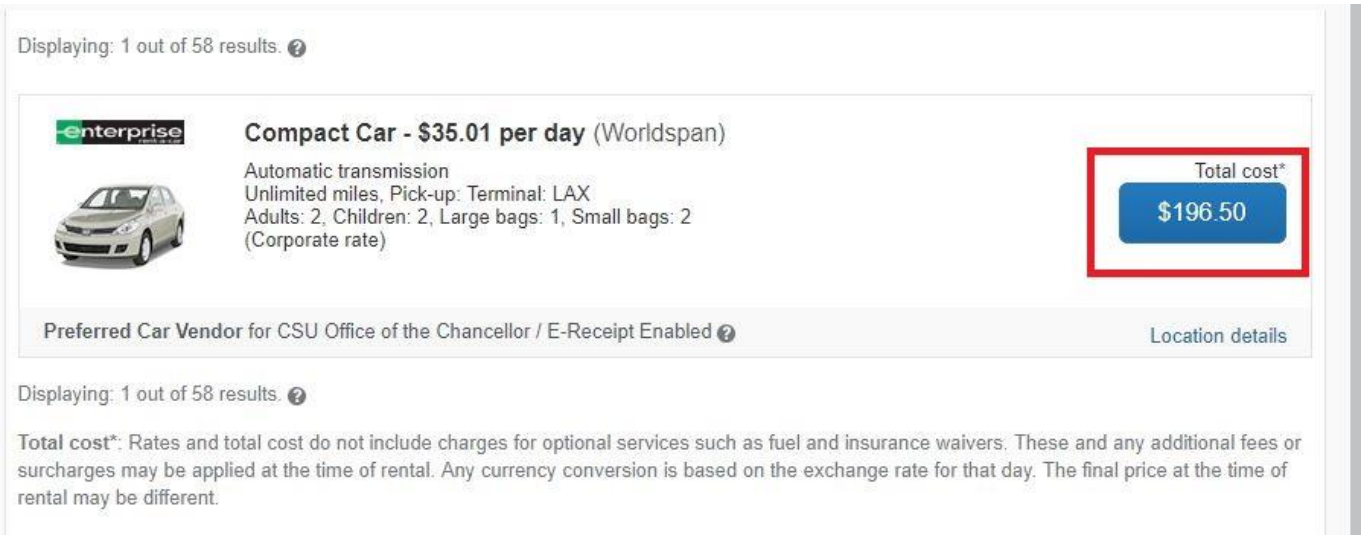
2. Your Itinerary summary will show. Click on the “Proceed to booking” in the lower right.



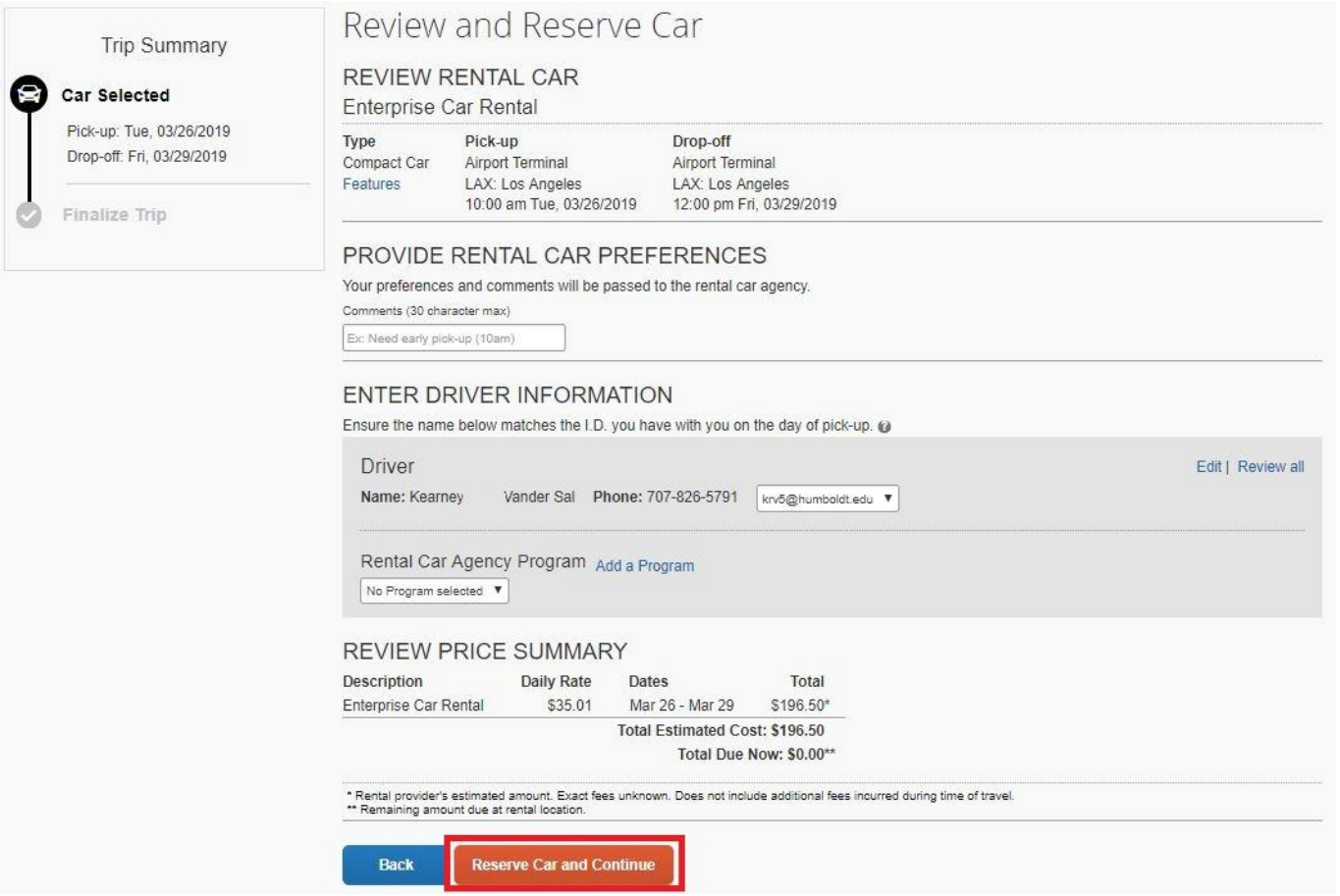
3. Check to make sure your pick-up location is correct in the lower left of your screen. If you edit the airport or city, be sure to hit “Search” again to update your choices.
4. The middle of your screen will show many different options for rental cars from the airport or city. The CSU is contracted with Enterprise and National, so you will be covered through the CSU insurance.
5. Once you see a car type you like, click on the amount as shown below.



6. Detailed information about the car will show including the total amount for your travel on the right side. Click the amount in the blue button to continue to the review and confirm screen.



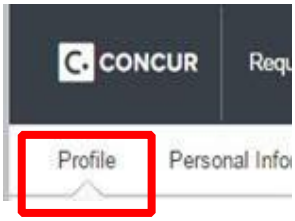
7. You will be prompted to review your rental information. If everything looks good, click on "Reserve Car and Continue" on the bottom of your screen.



Receipt Submission Methods

E-receipt Activation in Concur

Must have Verified Email Address



Many vendors provide electronic versions of traditional paper receipts. If E-Receipts are activated in a user's Concur profile, when electronic receipts are available, they will flow directly into the user's Available Receipts.
Click **Profile** and select **Other Settings**.

Enabling E-receipts allows the automatic collection of electronic receipts and folio data (e.g., lodging), or "e-receipts", from participating suppliers.

1. Click the link **E-Receipt Activation**
2. Accept the E-Receipt Activation and Use Agreement
3. You will receive a confirmation that E-Receipts has been activated
4. When booking travel (airfare, hotel, car rental) in Concur, vendors participating in E-Receipts will display the following Icon

Mobile App

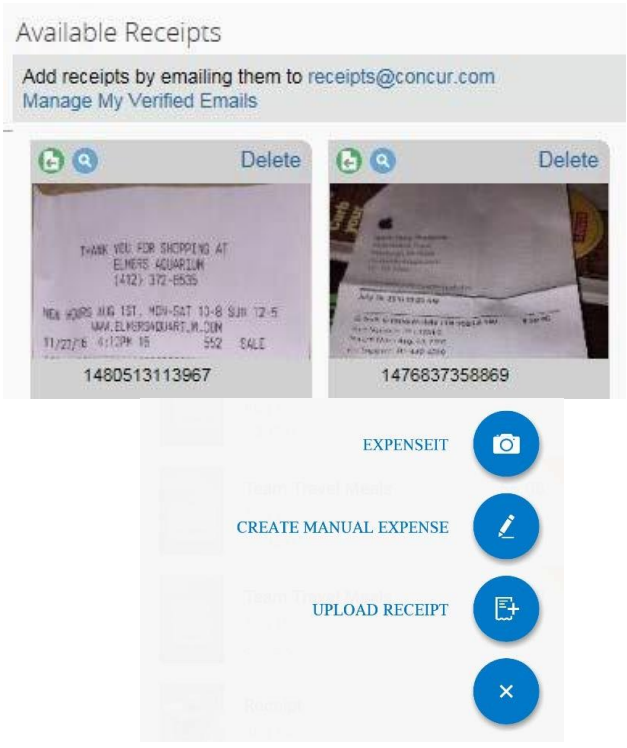
- **Note**: See Concur Mobile Registration for directions to install the Concur application on a mobile device. This must be done before receipt images can be uploaded from a cell phone or other mobile device.

- There are three options in Concur Mobile when you go to "Expenses" and click on the blue plus sign. (See screenshot)

- **ExpenseIt** – Uses Optical Character Recognition (OCR) to turn images paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the "Expenses" area on the mobile app, or once you add the expense to an ER.

- **Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since requires a lot of manual entry on the phone. (Does not count as a receipt)

- **Upload Receipt** – This is the best option for including pictures of things like conference agendas, copies of online transactions, digital or handwritten notes, etc.



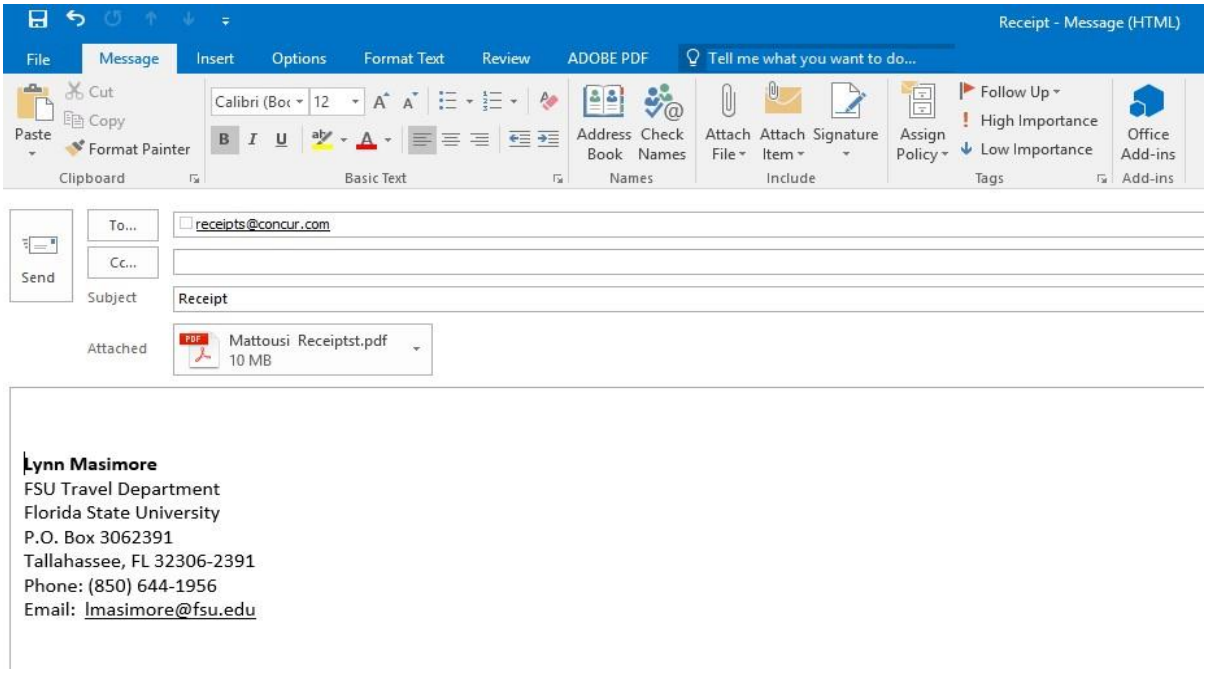
Scanned Images & Email

Your email address must be verified in your Concur Profile.

Scan your receipts and save the file(s) to your computer
Save files as .png, .jpg, .jpeg, .pdf, .html, .tif, or.tiff
5MB limit per file

Email your e-receipt or receipt images as attachments to receipts@concur.com. The receipts will be added to your **Receipts Store**.

From your expense report, click **Receipt Store** (or click **Receipts, View Available Receipts**). Drag a receipt to the corresponding expense line item on your report.



Submitting an Expense Report

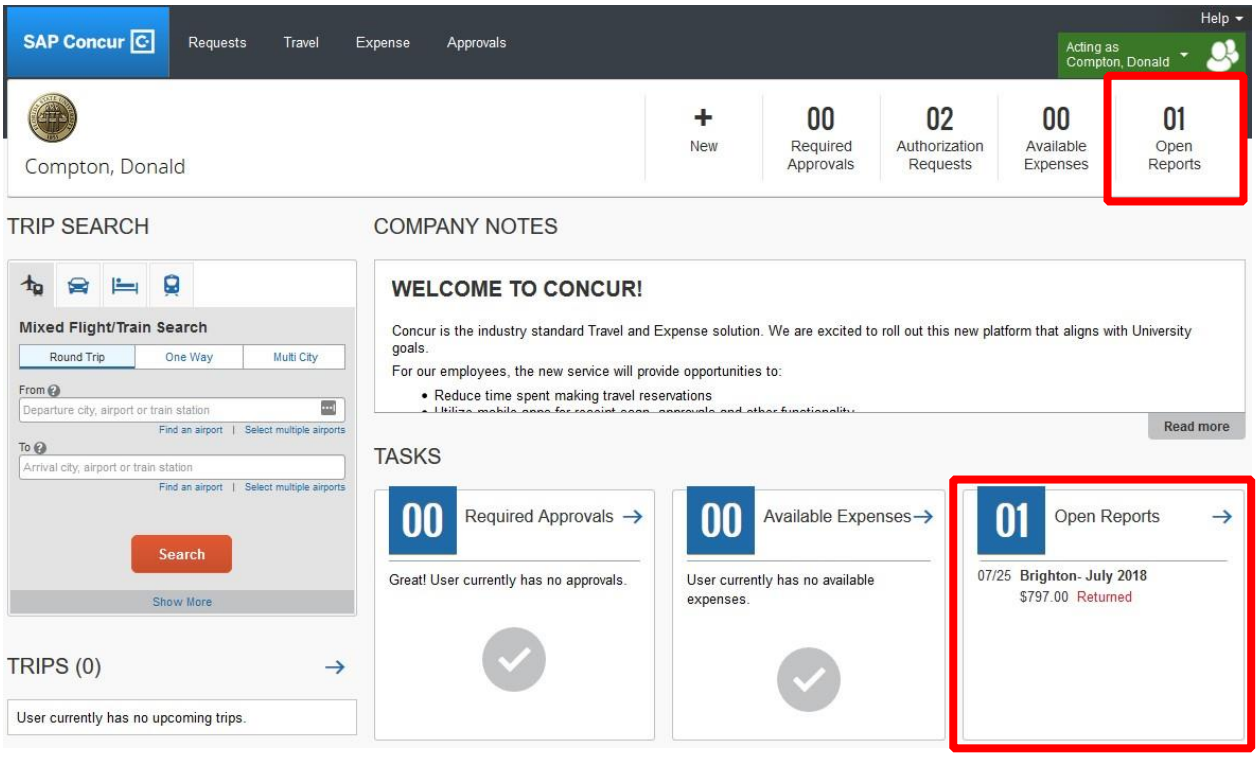
Delegates (travel reps) may create and complete expense reports on behalf of a traveler; however, the traveler must ensure that the expense report is correct and submit it. **Delegates cannot submit expense reports on behalf of other people**

When your expense report is ready to submit, you will receive notification from your travel delegate to let you know the ER is ready for your review and submission. If you have any questions regarding the ER, please contact travel@Humboldt.edu before submitting.

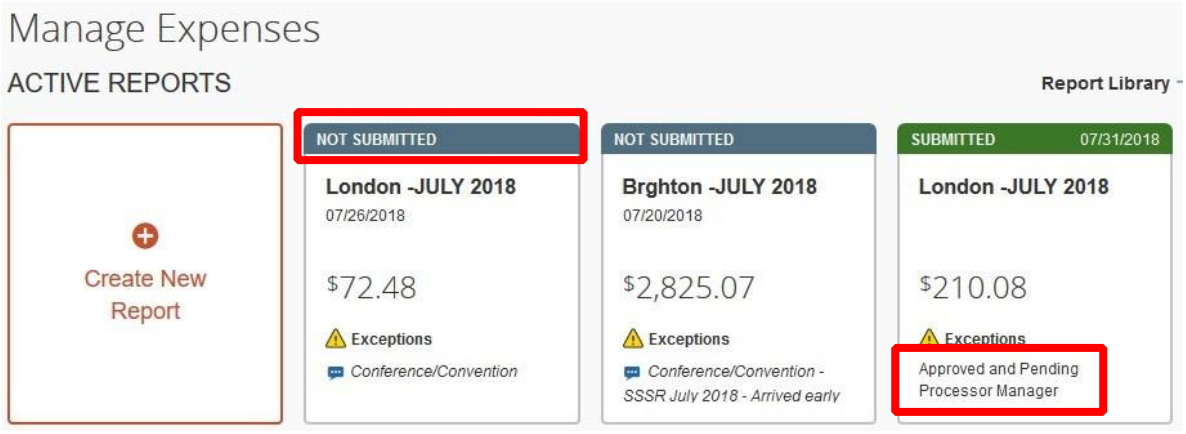
If a travel rep is processing your expense report, DO NOT submit the expense report until you receive notification stating it is ready for submission!

To submit an expense report:

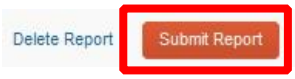
1. In Concur, there are two ways to access Open Reports:



2. On the Manage Expenses screen, select the report indicated in the email received from your Travel Delegate – be sure match the trip name and amount to the email to ensure you are accessing and reviewing the correct report.
   - **NOTE:** Each ER button indicates the status of the report: Not Submitted, Submitted, or Returned. For submitted reports, the lower part of the expense button will indicate the status of approval.

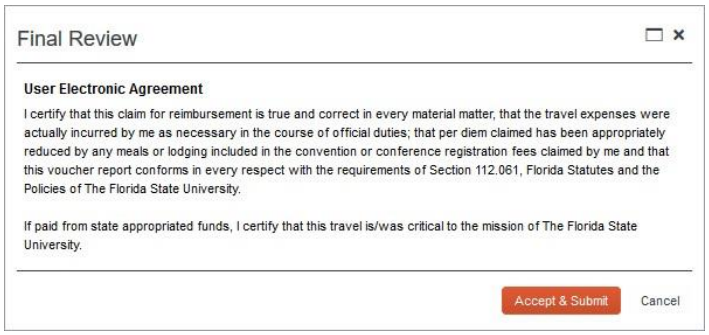


3. Review expense report details including totals, receipts, and any comments
4. If the information listed on the ER is correct, click the **Submit Report** button in the upper right corner.



   - **NOTE:** If you feel the information listed is incorrect, please contact your travel rep to discuss the changes needed. DO NOT submit until all issues are addressed.

5. The Final Review window will appear.
6. Read the statement and if you agree, click **Accept & Submit**.



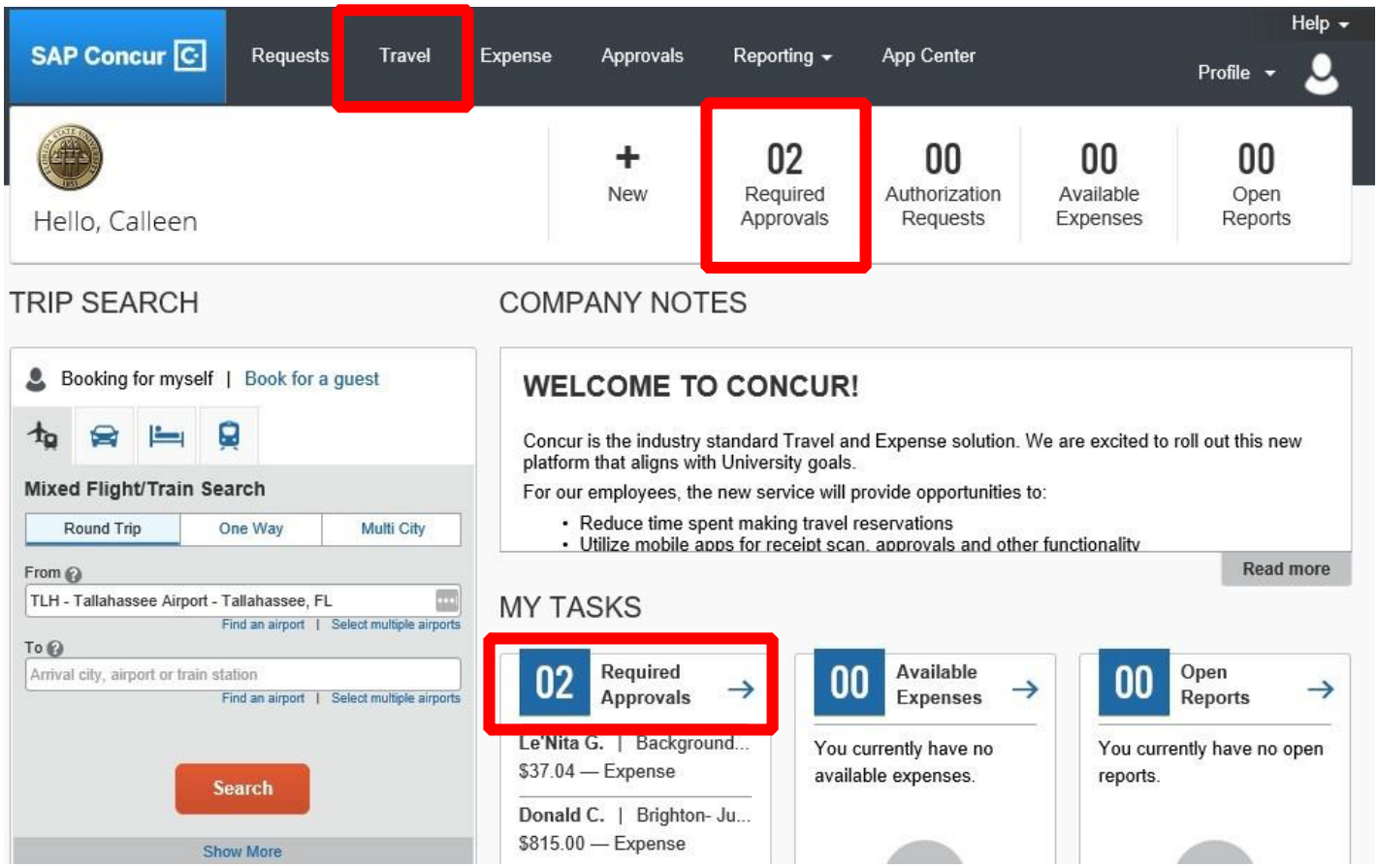
If you cannot successfully submit the report or a message appears describing a report error or exception, please contact your travel rep or travel@Humboldt.edu.

Reviewing and Approving a Transaction

This section is for individuals who are responsible for approving requests or reports submitted by users.

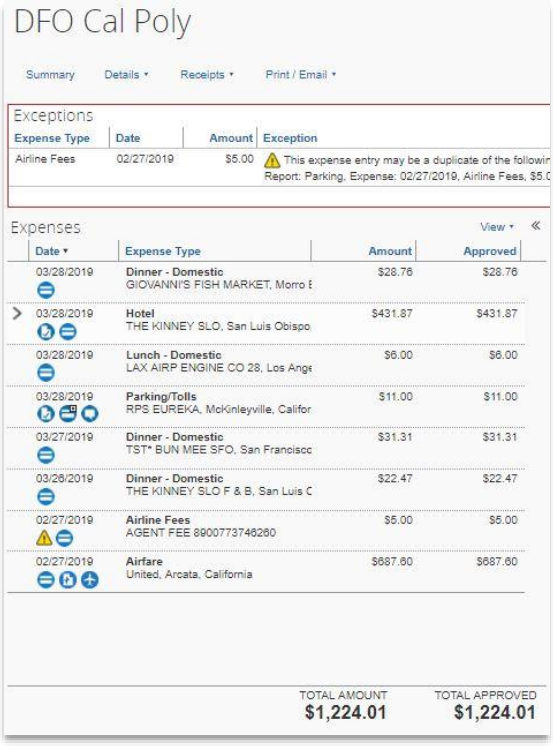
Expense reports pending approval can be accessed from multiple links on the Concur Home page.

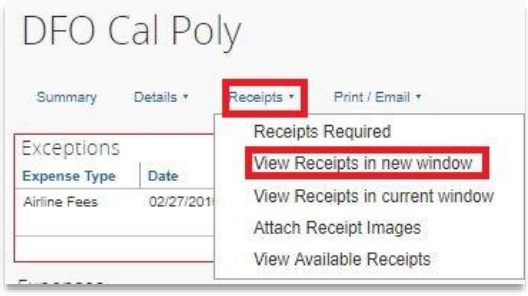
- **Approvals** link on the Quick Task Bar
- **Required Approvals** link next to the HSU- Concur welcome message
- **Required Approvals** link found under My Tasks

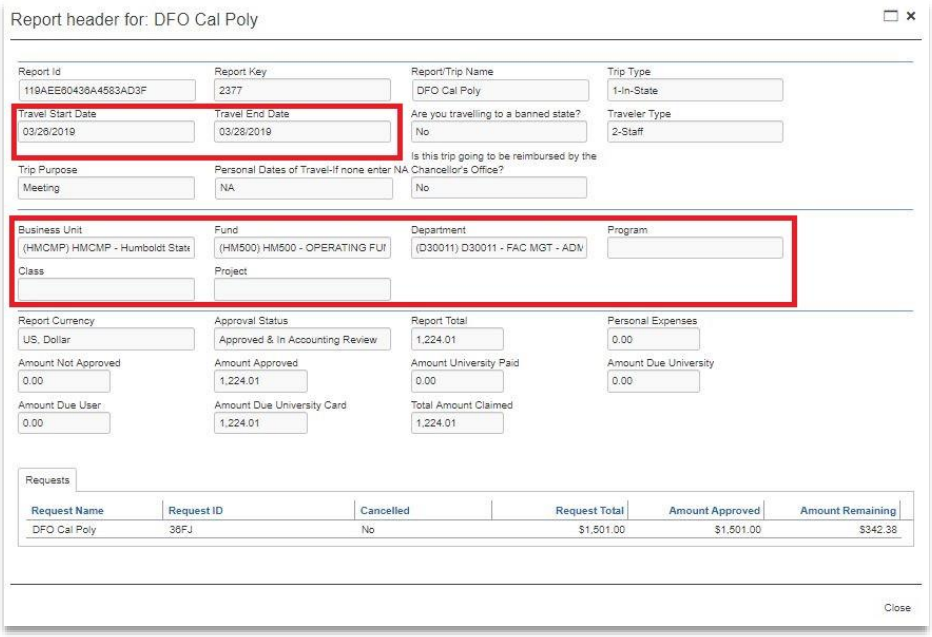


Approving submitted transactions

1. Click the name of the request or report you want to open
2. Review the expense items listed to ensure they are appropriate for the trip taken.
    a. To review the budgetary information, click the “Details” link and select “Report Header.” This will allow you to review the travel dates, and budget info (see picture below).
    b. To review receipts, click the “Receipts” link and select “View Receipts in a New Window” as per picture below.







3. If all items are approved, click Approve. The expense report will then route to the department budget manager and project managers for further review/approval.

Send a Transaction Back to the Preparer

To return the entire expense report to the preparer for correction:

1. Click Send Back to User
2. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.

Concur Buttons and Items

Concur users will encounter many icons while using the system. Knowing their meanings can increase user efficiency. Hovering over icons encountered in travel requests and expense reports can reveal more information without the need to click to a different window.

Various displays and operating systems may render icons in different colors.

	Attendees: Indicates that an expense entry has associated attendees.
	Trip Data: Indicates trip information from an itinerary.
	Taxi: Indicates a Taxi expense.
	Credit Card Transaction: Indicates that an expense entry was a credit card transaction.
	Electronic Receipt: Indicates Electronic receipt has been sent by a vendor to a users account.
	Exception: Indicates that an expense entry exception must be resolved before submission.
	Full Allocation: Indicates that the expense entry has been fully allocated.
	Partial Allocation: Indicates that the expense entry has only been partially allocated.
	OCR Receipt: Indicates that an expense entry has an Optical Character Recognition (OCR) receipt.
	Paper Receipt Required: Indicates that an expense requires a paper receipt.
	Receipt Required: Indicates that an expense requires a receipt.
	Receipt Attached: Indicates that the required receipts have been attached.
	Receipt Affidavit: Indicates a missing receipt affidavit has been attached to the expense.
	XML Receipt Attached: Indicates that an XML receipt is attached to the expense.
	Pending Processor Review: Indicates that the submitted expense report is pending review.
	Personal Expense: Indicates that an expense entry was marked as personal.
	Report Ready for Submission: Indicates that the expense report is ready for submission.