

# **MOREHOUSE SCHOOL OF MEDICINE**

## **CONCUR REQUEST, TRAVEL AND EXPENSE WORKBOOK**

Release 2.0 October- 2015



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## GENERAL INFORMATION

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### INTRODUCTION

#### Course Goal

The goal of this workbook is to provide you with the knowledge to request, book and reserve travel using Concur Request and Concur Travel. You will also learn how to reconcile travel related expenses and process employee reimbursements through Concur Expense.

#### Course Objectives

In this course you will learn how to

- Update Profile
- Request Travel
- Approve Reports
- Book Airfare
- Reserve Hotels
- Reserve Cars
- Expense Travel
- Use Concur Mobile
- Process Employee Reimbursements

#### Customer Service

If you need a travel agent for support and assistance, World Travel Service is available Monday-Friday, 8:00 AM-6:00 PM, EST

[TeamB@worldtrav.com](mailto:TeamB@worldtrav.com), or 877-778-7936

**DO NOT CONTACT WORLD TRAVEL FOR BOOKING ASSISTANCE.** Additional fees will apply when their agents book airfare on your behalf and those fees will be charged your budget. You are allowed to contact World Travel for help with receiving special conference rates when reserving Hotels. You may also contact World Travel if the hotel you are looking for is in listed in the Concur platform.

All Concur inquiries should be directed to [ConcurHelpDesk@msm.edu](mailto:ConcurHelpDesk@msm.edu). Please contact Kisha Reeves at 404-752-1928 or Tonya Marshall 404-752-1677 for additional assistance.



## GENERAL INFORMATION

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### PROCESS INTRODUCTION

#### Introduction

We are pleased to announce some exciting changes within the Travel department. After careful review, Morehouse School of Medicine has made several decisions that will change the overall structure and service delivery model of the travel department. These changes will have a profound positive impact on our internal employees that travel and will allow MSM to move forward in a compliant, more automated program leveraging all of our buying power to support our preferred airline, hotel and car rental suppliers as well.

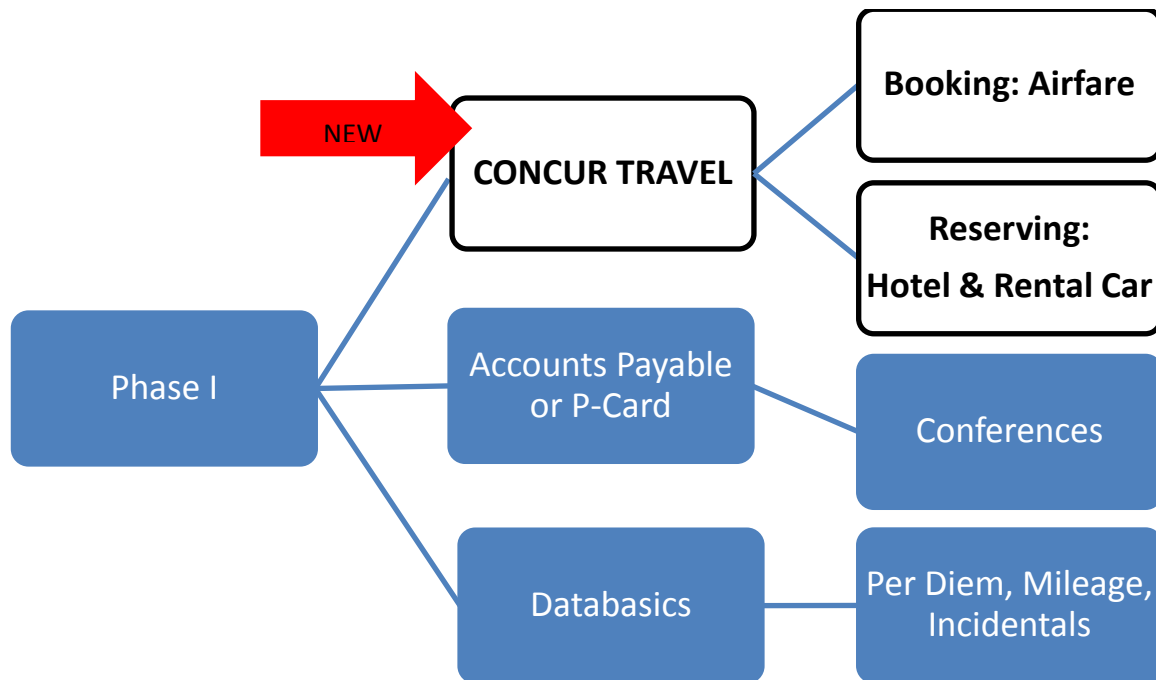
#### New Travel Management Company

A key change involves our Travel Management Company (TMC). Effective **August 17, 2015**, we transitioned our business to **World Travel Services, Inc. (WTS)** from Universal Travel and Brock Tours. WTS is based in Knoxville, Tennessee with offices in Cary, North Carolina and Chattanooga, Tennessee. WTS will also be providing us with strategic support to help us strengthen our travel department and enhance the services we are able to provide to you our internal employees. WTS will support our new consolidated travel program and online initiative by providing MSM a designated agent team during normal working hours and additional team for after-hours support. World Travel will also be responsible for negotiating deeper discounts with our preferred airline, hotel and car rental vendors. In addition, we will implement a new, pre-approval program called Concur Request that will be integrated with Travel as well (**effective September 28, 2015**).

#### What's New

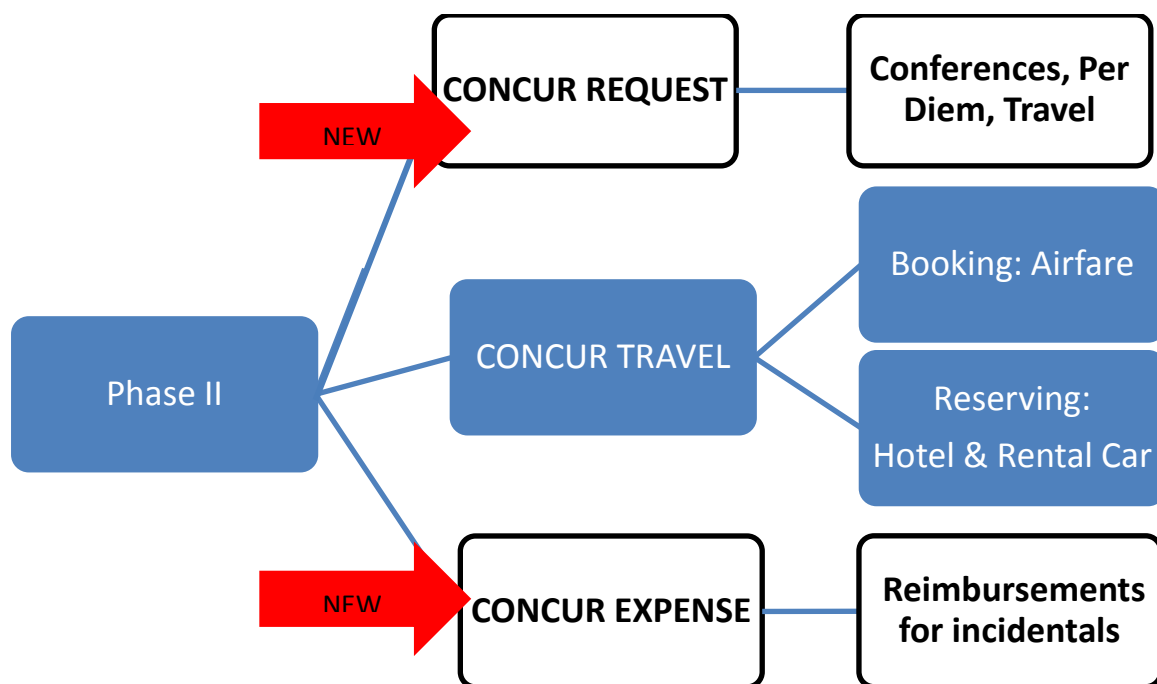
During Phase I, MSM user will no longer have to submit a requisition to pay for airfare. Airline tickets will be paid directly through MSM's travel card which is linked to every user's profile. MSM employees will also be able to reserve their hotel and rental car through Concur Travel. Some hotels may allow you to pay with the card that is on file so make sure to call your hotel in advance to discuss. If the hotel requires a physical card during check out, please use your personal card and request an expense reimbursement after you return from your trip. During Phase II, all travel related expenses will be paid using the Concur platform and the P-Card will be integrated during Phase III.

### Flow Diagram: Phase I



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### Flow Diagram: Phase II



## GENERAL INFORMATION

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### UPDATING YOUR PROFILE

#### Overview

Concur requires that all employees update their profile upon entering the site. Your name and employee ID have already been added to your profile. If your name or ID is incorrect, please contact [ConcurHelpDesk@msm.edu](mailto:ConcurHelpDesk@msm.edu) with the necessary corrections.

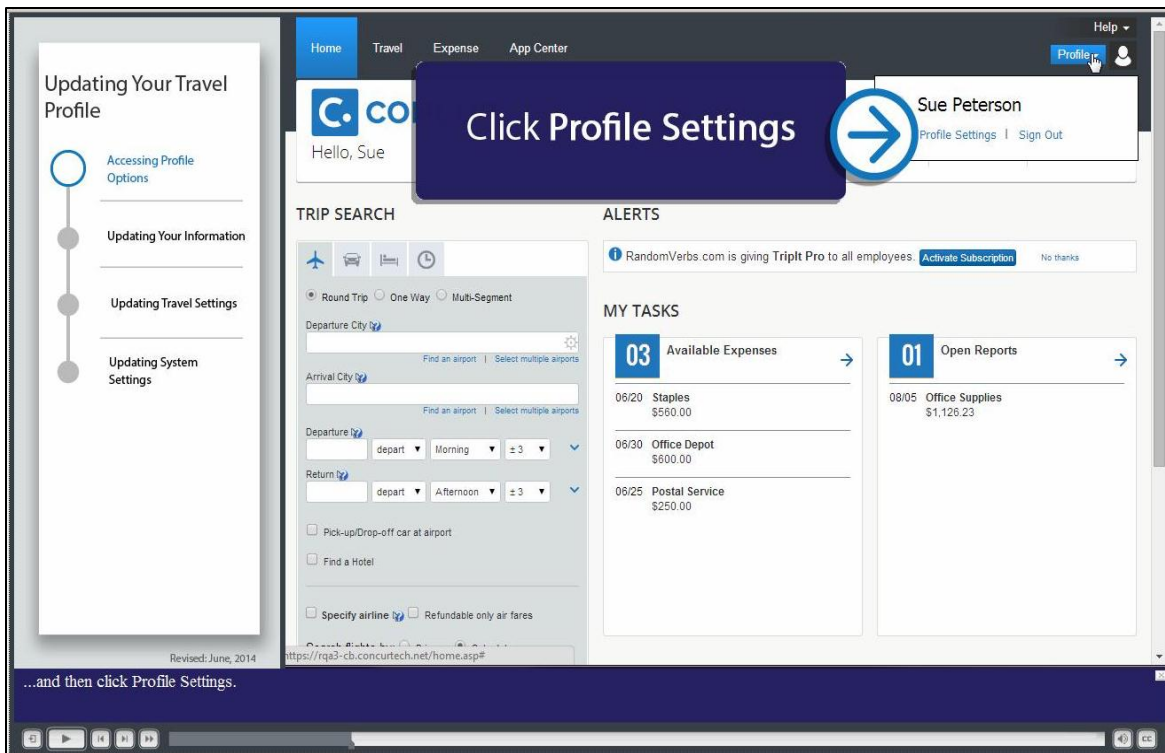
#### Steps

1. Log on to Concur using the following link :<https://www.concursolutions.com/>
2. Enter User Name: **Your username is your msm.edu email address**
3. Default Password: **Your password will be emailed to you**

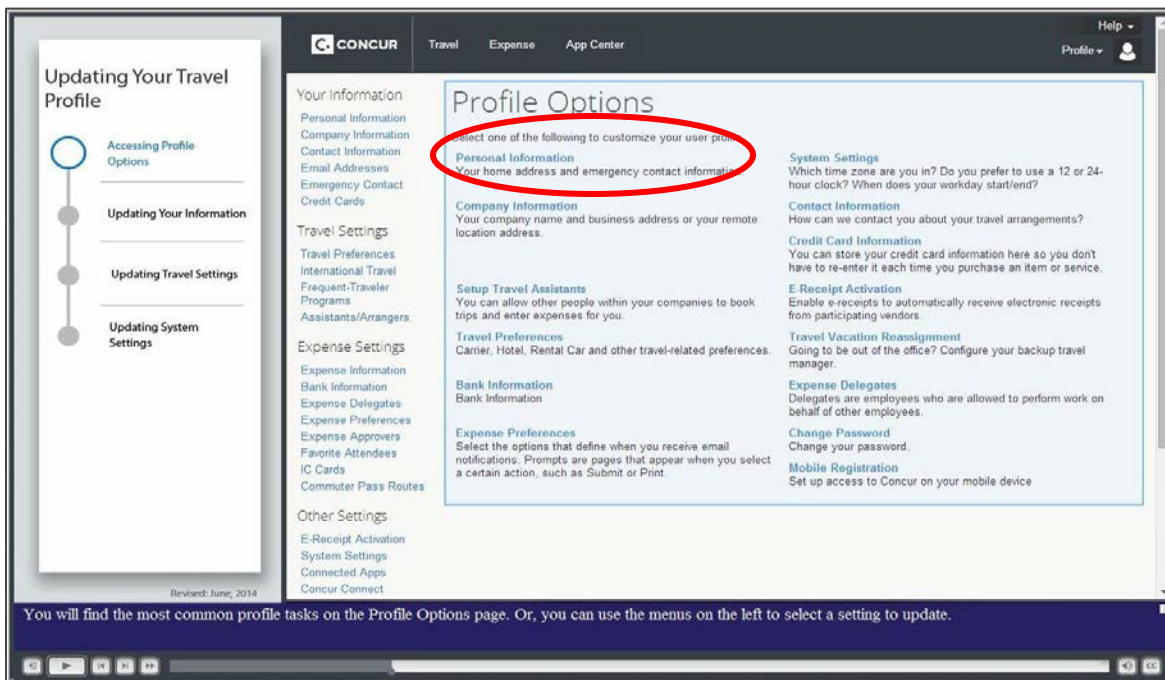
4. You will be prompted to change your password

5. Update your Profile by going to the top of the My Concur page and clicking **Profile**.

6. Click **Profile Settings**



7. Click **Personal Information** in the middle of the page.



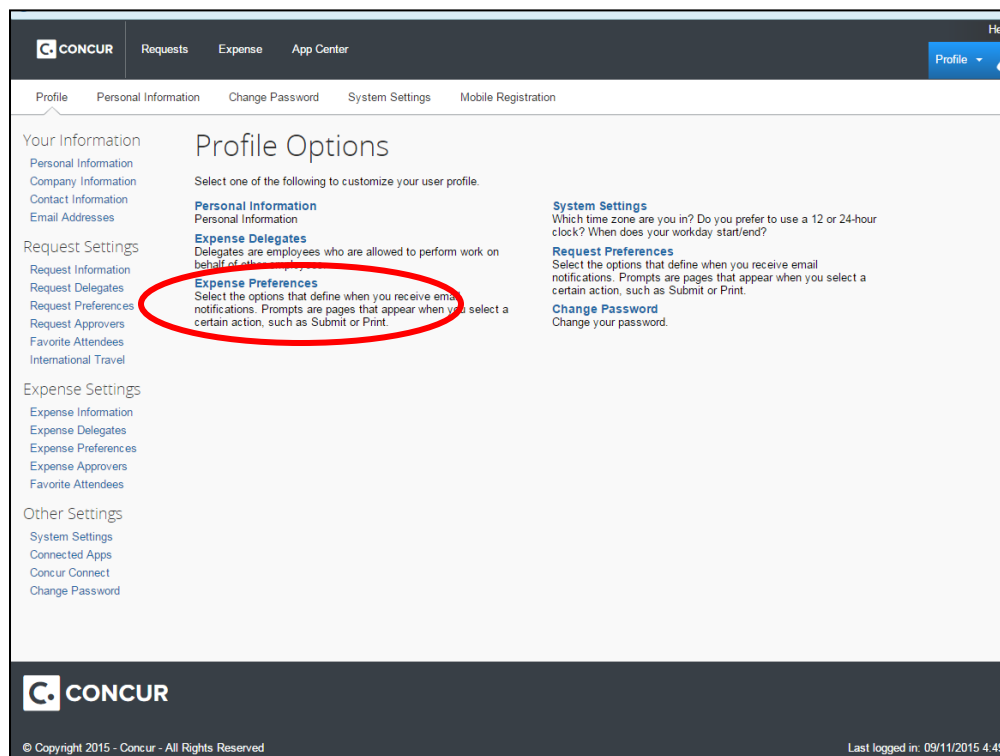
8. Add all appropriate information to your profile
  - a. Company Information
  - b. Contact Information
  - c. Email Addresses
  - d. Travel Preferences
  - e. Emergency Contact
  - f. Personal Credit Card Information(optional)
  
9. Click **Save** after each section.

## GENERAL INFORMATION

### SET UP EMAIL PREFERENCES

#### Steps

1. Select **Profile** at the top of your **My Concur** homepage, then **Profile Settings**, then **Personal Information**, and lastly **Expense Preferences** (on the left menu bar).



2. When in your **Expense Preferences**, under the “**Send email when...**” header, select when you would like to receive emails by clicking the boxes on the left of the options.

**CONCUR** Requests Expense App Center Help

Profile

Profile Personal Information Change Password System Settings Mobile Registration

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses

**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

**Expense Settings**

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

**Other Settings**

- System Settings
- Connected Apps
- Concur Connect
- Change Password

## 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 a cash advance changes
- ☒ A cash advance is submitted for approval
- ☒ The status of an expense report changes
- ☐ New company card transactions arrive
- ☒ Faxed receipts are successfully received
- ☒ An expense report is submitted for approval

**Prompt...**

- ☐ For an approver when an expense report is submitted

**Display...**

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

3. Click **Save** when finished.



## GENERAL INFORMATION

### HOW TO ASSIGN A DELEGATE (PROXY)

By assigning permissions to a delegate, you are assigning permission for Expense and Request.

#### Steps

1. Click **Profile**
2. Click **Profile Settings**
3. Click **Expense Delegates**

The screenshot shows the 'Profile Options' page. At the top, there are navigation links: 'Information', 'Change Password', 'System Settings', and 'Mobile Registration'. On the right, the user is identified as 'Morehouse Traveler1' with links for 'Profile Settings' and 'Sign Out'. The main content area is titled 'Profile Options' and includes the instruction: 'Select one of the following to customize your user profile.' Below this, there are four options: 'Personal Information', 'Expense Delegates', 'Expense Preferences', and 'System Settings'. The 'Expense Delegates' option is circled in red. It includes the text: 'Delegates are employees who are allowed to perform work on behalf of other employees.' The other options also have brief descriptions.

4. Click **Add**.

The screenshot shows the 'Request Delegates' page. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the tabs, there are three buttons: 'Add', 'Save', and 'Delete'. A red arrow points to the 'Add' button. Below the buttons, there is a description: 'Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' Below this, there is a table with columns: 'Name', 'Can Prepare', 'Can Submit Reports', 'Can Submit Requests', 'Can View Receipts', and 'Receives Emails'. The table is currently empty, and a message 'No records found.' is displayed at the bottom.

5. Begin typing the name of the person you would like to delegate for you. When their name pops up, click the person's name. Then click **Add**.

# Request Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

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

Search by employee name, email address, employee id or login id

[Add](#) [Cancel](#)

Reed, James  
jreed@msm.edu  
User ID: M00025856  
Login ID: jreed@msm.edu

Reese, Crystal  
creese@msm.edu  
User ID: M00045461  
Login ID: creese@msm.edu

Reese, LeRoy  
lreese@msm.edu  
User ID: M00026088  
Login ID: lreese@msm.edu

Reeves, Takisha  
treeves@msm.edu  
User ID: M00046036  
Login ID: treeves@msm.edu

When you add a delegate, you are assigning permissions for Expense and Request.

ports	Can Submit Requests	Can View Receipts	Receives Emails
No records found.			

- Checkmark which functions should be permitted by the delegate and then click **Save**. By clicking the appropriate check mark, you can allow an MSM employee to request and/or approve travel on your behalf.

**Request Delegates**

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees. Expense and request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Name	Can Prepare Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approval	Receives Approval Emails
Yevette, Concur yconcur@msm.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yevette, Concur yconcur2@msm.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

© Copyright 2015 - Concur - All Rights Reserved. Last logged in: 09/16/2015 5:28 PM

## GENERAL INFORMATION

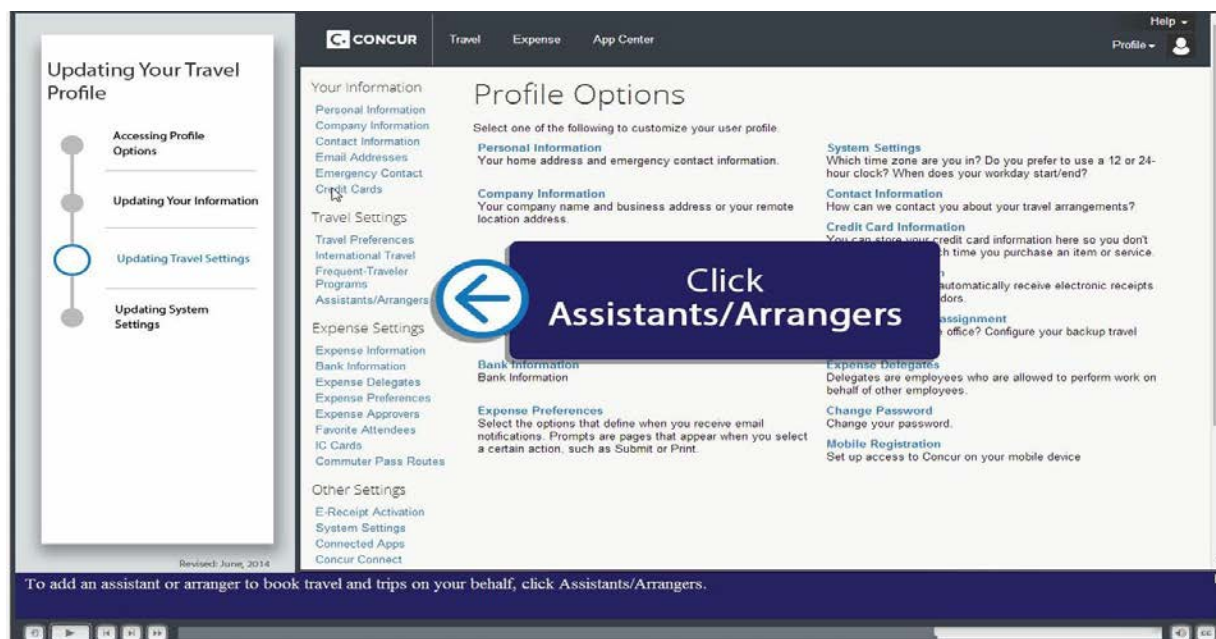
### ASSIGNING A TRAVEL ASSISTANT

#### Overview

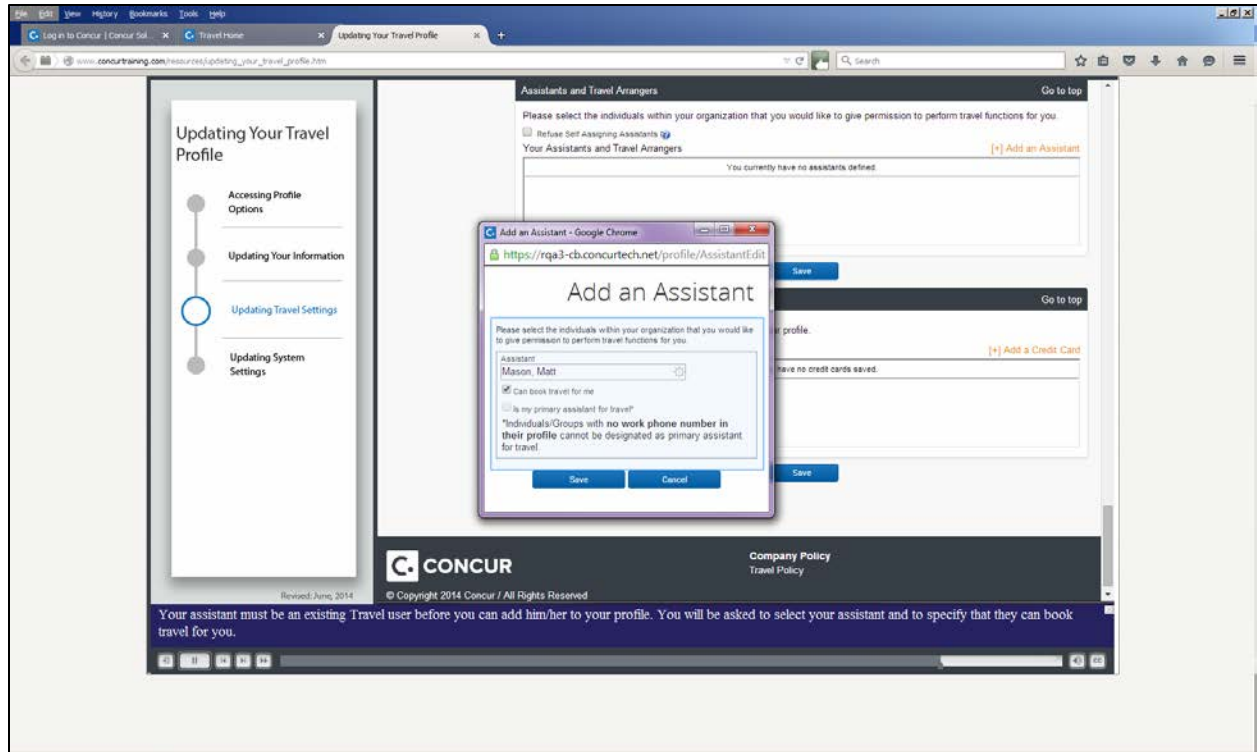
Concur Travel allows you to assign an assistant to book travel on your behalf. You can enter this information during the **Personal Information** section of your **Profile Settings** or by completing the following steps.

#### Steps

1. Go to **Travel Settings** on the left hand side
2. Click **Assistants/Arrangers**



3. Click Add an Assistant
4. The Add an Assistant box will pop up.



5. Select the individual that you would like to give permission to perform travel functions for you.
6. Check the box entitled “Can book travel for me”
  - Note: You will NOT be able to click “Primary Assistant for Travel”. Clicking this option would mean that you would never be able to book travel for yourself.
7. **Click Save**

## GENERAL INFORMATION

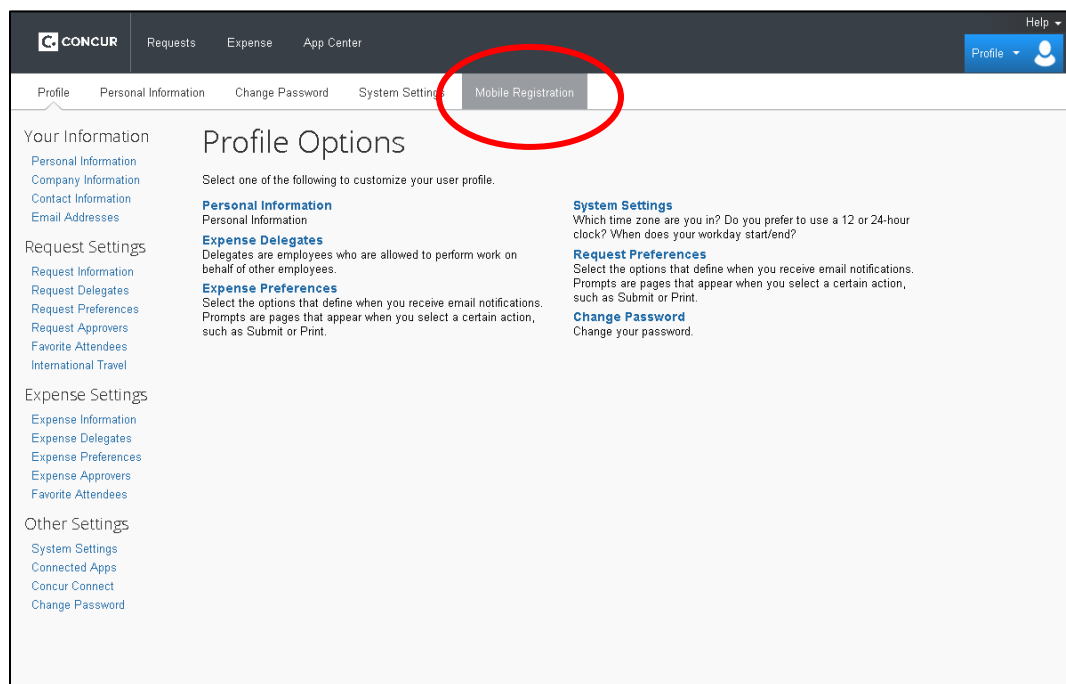
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### HOW TO SIGN UP FOR MOBILE REGISTRATION

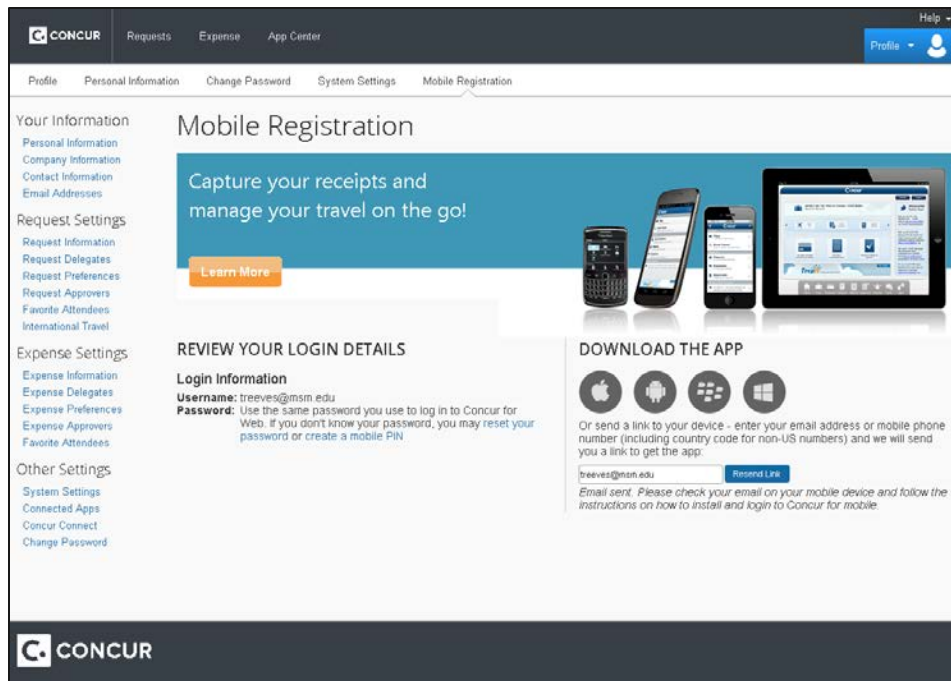
Concur allows you to book and reserve travel as well as reconcile your expense report using your smart phone.

#### Steps

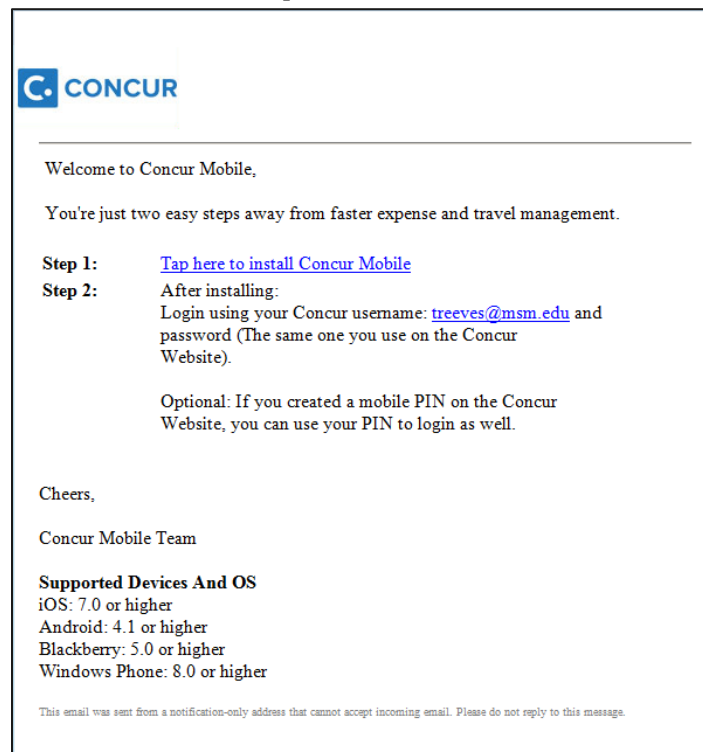
1. Click **Profile**
2. Click **Profile Settings**
3. Click **Mobile Registration**



4. Review your log in credentials ( Hint: The same Log in information that you use when you log onto [www.concursolutions.com](http://www.concursolutions.com) will be the same info you use for the mobile app)



5. An email will be sent to you with instruction on how to download the Concur App. Instructions on how to use Concur Mobile will be further explained in the Concur Travel and Concur Expense sections.



## GENERAL INFORMATION

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### FAQs

#### What will I use Concur for?

Concur is used for tracking and reconciling employee travel, P-Card (Phase III) and reimbursable out-of-pocket expenses. It can be used to make travel arrangements (book airfare, hotel accommodations, car rental, etc.)

#### Do I have to use Concur?

Yes. It will be necessary to use Concur to track and reconcile all travel, P-Card, and reimbursable out-of-pocket expenses. It is strongly encouraged to use Concur's travel booking feature because of potential cost savings and efficiencies.

#### How will I access Concur?

Access to Concur will be available through login using your MSM.edu email address and your chosen password.

#### Can I log in to Concur from any computer?

Yes. You can log in to Concur from any computer and also through mobile applications (visit [www.concursolutions.com](http://www.concursolutions.com) for more information).

#### What should I do the first time I log into Concur?

The first time you log into Concur Travel & Expense, you should change your password. If you are not prompted to change your password after logging in for the first time, follow these instructions:

1. On the **My Concur** page, click the **Profile** link on the menu bar at the top of the screen.
2. In the **Other Settings** menu, click the **Change Password** link.
3. Enter your new password and then click **Save**.

Before you use Concur Travel & Expense to reserve travel, click the **Profile** link to review and update your profile. You must save your profile before you first attempt to book a trip in Concur Travel & Expense.

If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** list on the **My Concur** page immediately after you

initially log into the service.

### **What if I forgot my password?**

If you go to [www.concursolutions.com](http://www.concursolutions.com) and click on “**Forgot my password**”, you will receive an e-mail with instructions on how to retrieve or request a new password.

### **What are the required fields on the profile page?**

The fields required on the **Profile** page are name, employee ID, contact telephone numbers, email address, gender and birth date. You can also enter travel preferences such as frequent flier information and seating preferences.

### **Who can make changes to an employee’s profile?**

The employee can modify his/her own profile in Concur. If the employee has an assigned delegate, the delegate can make changes to the employee’s profile except for the Expense Delegate and the Travel Arranger assignments. Any assignments of delegation must be done by the employee directly. Delegates must obtain the approval of the employee when making any changes to the employee’s profile.

### **How do I set up a delegate?**

1. When logged in, click on Profile.
2. Click Profile Settings
3. On the right hand side, Click the Request **Delegates**.
4. Click **Add Delegate** to add a new delegate
5. Search for the staff member who will prepare your expense report. Click on their name and select **Add**.
6. Checkmark which functions should be permitted by the delegate [Can Prepare; Can View Images] and then click **Save**.
  - By assigning permissions to a delegate, you are assigning permission for Expense and Request.

### **Can I receive e-mail reminders from the Concur Expense Service?**

Yes. You can decide which reminders you receive by:

1. Select **Profile** at the top of your **My Concur** homepage, then **Profile Settings**, then **Personal Information**, and lastly **Expense Preferences** (on the left menu bar).
2. When in your **Expense Preferences**, under the “**Send email when...**” header, select when you would like to receive emails by clicking the boxes on the left of the options.
3. Click **Save** when finished.



### How do I get help for using Concur Travel & Expense website?

Click **Help** on the **My Concur** page. In the **Help** section, you can find specific instructions for the task you are trying to complete. You can also view demonstrations of the most important tasks. For more information regarding completed travel reservations, please call your agency representative.

### Who should I contact for assistance with navigating in Concur?

You may e-mail your questions to [concurhelpdesk@msm.edu](mailto:concurhelpdesk@msm.edu). Concur also has guides on the website under **Help**.

<b>Business Policy &amp; Concur Process Assistance</b>	Media Osayi	404-756-8948
<b>Concur System Assistance</b>	Takisha Reeves	404-752-1928
<b>Concur Payment Assistance</b>	Tonya Marshall	404-752-1677
<b>Purchasing Card Assistance</b>	Donna Florence	404-752-1660
<b>Hotel Reservation Assistance</b>	World Travel	<a href="mailto:TeamB@worldtrav.com">TeamB@worldtrav.com</a> , or 877-778-7936
<b>General Inquires</b>	Concur Help Desk	ConcurHelpDesk@msm.edu

# CONCUR REQUEST

## CONCUR REQUEST

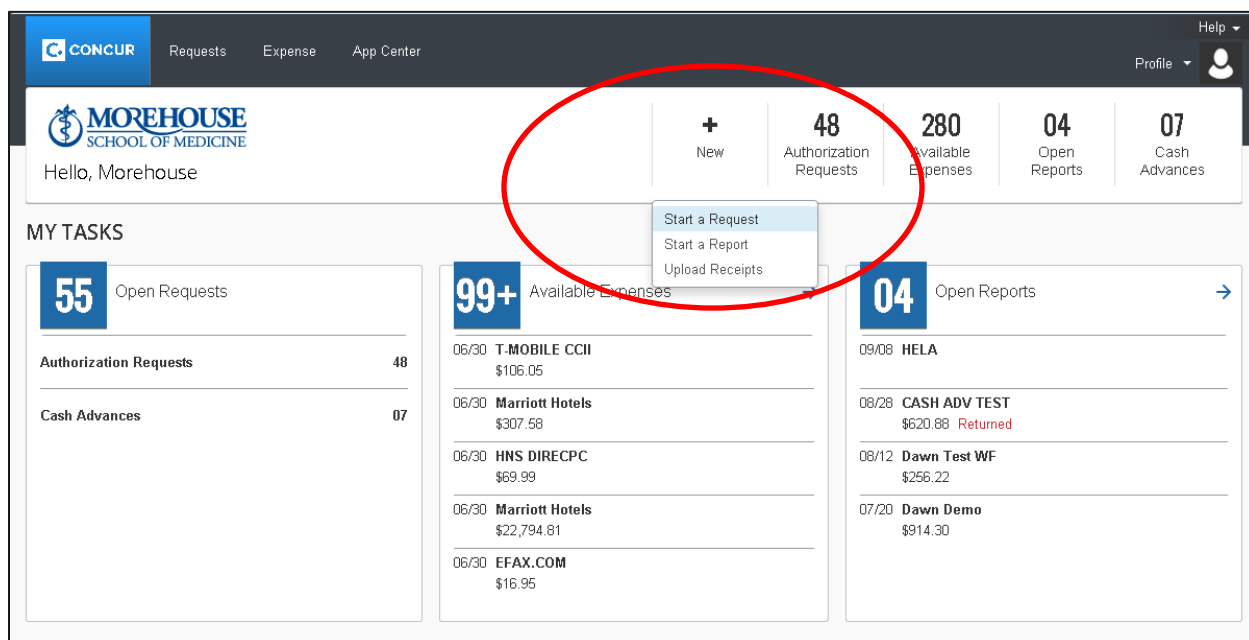
### CREATING A REQUEST

#### Overview

During Phase I, MSM employees were allowed to reserve their airfare, hotel, and car through Concur and the airline ticket was actually purchased after the supervisor's approval. In Phase II, the employee must first submit a request to their immediate supervisor before they are allowed to book their travel. Please utilize [www.expedia.com](http://www.expedia.com) or [www.travelocity.com](http://www.travelocity.com) to obtain the desired location and times for your itinerary.

#### Steps

1. Place your cursor over the **New** section of you Concur Homepage. Click **Start A Request**.



2. Type your **Request/Trip Name**

The screenshot shows the Concur 'Request' form. The 'Request/Trip Name' field is highlighted with a red circle and contains the text 'Leadership Institute Conference'. Other fields include 'Destination City', 'Trip Start Date', 'Chart' (set to '(1) Morehouse School of Medicine'), 'Fund' (set to '(100004) Unrestricted MHC'), and 'Org' (set to '(610000) MHC Administration'). A 'Comment' text area is also visible.

3. Begin typing the city that you are traveling to in the **Destination City** section. Concur will populate cities matching what you have typed.

This screenshot shows the 'Destination City' field populated with 'miami'. A dropdown list of suggestions is displayed, including: Miami, Ohio; Miami, Florida; Miami, Oklahoma; Miami Springs, Florida; Miami Lakes, Florida; Miami-Coral Way Village, Florida; Miami Gardens, Florida; Miamisburg, Ohio; Miami Intl (Airport - MIA), Miami, Florida; Miami, Manitoba; Mpb Seaplane Base (Airport - MPB), Miami, New York; Tamiami (Airport - TMB), Miami, Virginia; Miami International (Airport - MIA), Miami, Florida; Intern. de Miami (Airport - MIA), Miami, Florida; Intern Miami (Airport - MIA), Miami, Florida; and All Countries. The 'Request/Trip Name' field remains 'Leadership Institute Conference'.

4. Use the calendar to select your **Trip Start Date**.

The screenshot shows the Concur Request form with the 'Trip Start Date' field set to 10/05/2015. A calendar pop-up is displayed for October 2015, with the 5th highlighted. The form includes fields for Request/Trip Name (Leadership Institute Conference), Destination City (Miami, Florida), Chart ((1) Morehouse School of Medicine), Fund ((100004) Unrestricted MHC), and Program ((90) Faculty Practice Plan). There is also a 'Cash Advance' section with fields for Amount and Comment.

5. Use the calendar to select your **Trip End Date**.

The screenshot shows the Concur Request form with the 'Trip End Date' field set to 10/09/2015. A calendar pop-up is displayed for October 2015, with the 9th highlighted. The form includes fields for Request/Trip Name (Leadership Institute Conference), Destination City (Miami, Florida), Chart ((1) Morehouse School of Medicine), Fund ((100004) Unrestricted MHC), Org ((610000) MHC Administration), and Request/Trip Purpose. There is also a 'Cash Advance' section with fields for Amount and Comment.

6. Select your **Request/Trip Purpose** from the drop down list
- If you select Conference Attendee, Conference Participant or Other, you will be expected to provide more details in the **Additional Information** section.

This screenshot shows a travel request form. The 'Request/Trip Purpose' dropdown menu is highlighted with a red circle. The form includes the following fields:

- Trip End Date: 10/09/2015
- Request/Trip Purpose: Conference Participant
- Trip Type: (empty dropdown)
- Program: (90) Faculty Practice Plan
- Activity: (empty dropdown)
- Project: (empty dropdown)

## 7. Select your **Trip Type**

- Please note: In addition to places outside U.S. Territory, MSM also considers Alaska and Hawaii as international travel. Please choose your Trip Type accordingly when traveling to these states.

This screenshot shows the same travel request form with the 'Trip Type' dropdown menu open. The 'Out-of-State' option is selected. The form includes the following fields:

- Request/Trip Purpose: Conference Participant
- Trip Type: Out-of-State
- Traveler Type: (empty dropdown)
- Activity: (empty dropdown)
- Additional Information: Leadership Institute

Buttons at the top right: Cancel, Save, Print / Email, Delete Request, Submit Request. Status: Not Submitted

## 8. Verify your connection to MSM by selecting **Travel Type**.

[Cancel](#)
[Save](#)
[Print / Email](#)
[Delete Request](#)
[Submit Request](#)

Status: Not Submitted

Trip Type: Out-of-State  
 Project:   
 Traveler Type: Faculty/Staff  
 Faculty/Staff  
 Group Travel  
 Guest  
 Student

## 9. Choose your **Chart**

- Please choose 1 for Morehouse School of Medicine
- Please choose 9 for Morehouse Healthcare

CONCUR Requests Expense App Center

Manage Requests New Request Quick Search

### Request

Request/Trip Name: Leadership Institute Conference

Destination City: Miami, Florida

Trip Start Date: 10/05/2015

Trip End Date: 10/09/2015

Chart: 1 Morehouse School of Medicine

Fund: 2 (100004) Unrestricted MHC

Org: 3 (610000) MHC Administration

Program: 4 (30) Fa

Type to search by: TEXT CODE

Code Text

Code: (1-100004-610000-90) Morehouse School of Medicine Unrestricted MHC MHC Administration Faculty Practice Plan

Code: (1-350074-310001-21) Morehouse School of Medicine Bma1 as a Central and Peripheral Neuroscience Institute Basic Research

Code: (1-309013-300001-21) Morehouse School of Medicine 22-Atlanta Center for Translational Cardiovascular Resch Inst-CVRI Basic Research

Code: (1-309011-300001-21) Morehouse School of Medicine 22-Atlanta Center for Translational Cardiovascular Resch Inst-CVRI Basic Research

Code: (1) Morehouse School of Medicine

Code: (9) MHC

Cash Advance Amount:  USD

Cash Advance Comment:

## 10. Choose your **Fund, Organization and Program (FOP)**

- You will not be required to choose your Account number. The correct account numbers are built into the Concur platform and will be allocated when you choose your Segments and Expenses.

## CONCUR REQUEST

---

### REQUESTING A CASH ADVANCE

#### Overview

Advances are available, only for that portion of the estimated cost not absorbed by third party sponsor or paid directly by the School to a vendor or organization. Since airfare and hotels will be paid for in advance using the MSM corporate travel card, employees will only receive advances for per diem. All other travel related expenses must be reimbursed in Concur Expense. Additional advances will not be issued to an employee until all outstanding advances have been reconciled. Our previous policy stated the individuals would receive \$60 per day for per diems. Effective October 5, 2015, Morehouse School of Medicine will be using USGSA rates for per diems. USGSA provides the actual per diem rates for the specific destination city. Please note that the traveler will only receive 75% of the per diem rate for the initial and final dates of travel. For example, if my trip begins on October 5<sup>th</sup> and ends on October 9<sup>th</sup>, I will receive full per diem rates for October 6<sup>th</sup>-8<sup>th</sup> but will only receive 75% of my per diem on October 5<sup>th</sup> and 9<sup>th</sup>.

#### Steps

1. Type your per diem estimate in the **Cash Advance** section of the request and type Per Diem in the **Cash Advance Comment** section.

Cash Advance

Cash Advance Amount

300.00

USD

▼

Cash Advance Comment

Per Diem

2. Click the **Expenses** tab.



Manage Requests   New Request   Quick Search

## Request

**Request/Trip Name:**  
**Additional Information:**

Request Header   **Segments**   Expenses   Approval Flow   Audit Trail

Request/Trip Name: Leadership Institute Conference   Destination City: Miami, Florida   Trip Start Date: 10/05/2015

Chart: (1) Morehouse School of Medicine   Fund: (100004) Unrestricted MHC   Org: (610000) MHC Administration

Comment

Cash Advance

Cash Advance Amount: 300.00   USC   Cash Advance Comment: Per Diem

### 3. Click **Meals Per Diem**.

Expense:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

02. Transportation	04. Meals & Entertainment	08. Other	09. Relocation
Car Rental Fuel	Group Meals/Entertainment <10 Attendees	Miscellaneous	Relocation Expenses
Charter /TransfersBus	Group Meals/Entertainment 10+ Attendees	Recruiting Expenses	<b>Meals Per Diem</b>
Other Ground Transportation		Seminar Registration/Fees	Mileage
Parking	06. Communications	Tips/Gratuities	
	Internet/Online Fees		

#### 4. Click Save

The screenshot shows the Concur Expense Request form. The fields are as follows:

Expense Type	Trip Start Date	Trip End Date	Report/Trip Purpose
Meals Per Diem	10/05/2015	10/09/2015	Conference Participant

Destination City	Trip Type	Description	Transaction Amount
Miami, Florida	Out-of-State		0.00 USD

Comment: [Empty text box]

At the bottom right, the **Save** button is circled in red, along with the **Allocate** and **Cancel** buttons.

- The USGSA rate will automatically be populated for you.

The screenshot shows the Concur Request 33EJ page. The header includes "Request 33EJ" and "Request/Trip Name: Leadership Institute Conference". The "Additional Information: Leadership Institute" is also displayed. The "Request Header" tab is selected, showing a table with the following data:

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00

The "Amount" and "Requested" columns are circled in red. At the bottom right, the "TOTAL AMOUNT" and "TOTAL REQUESTED" are both \$330.00.

## CONCUR REQUEST

### ADDING EXPENSES

In addition to per diem, Morehouse School of Medicine allows travelers to add the following expenses to a request:

- Car Rental Fuel
- Charter/Transfers Bus
- Other Ground Transportation
- Parking
- Groups Meals/Entertainment <10 Attendees
- Groups Meals/Entertainment 10+ Attendees
  - Note: In Concur Expense, the user will be required to provide the names of the attendees.
- Internet/Online Fees
- Miscellaneous
  - The user will be required to provide additional information for any miscellaneous expenses.
- Recruiting Expenses
- Seminars/Registration Fees
  - Conferences will still be paid by the Accounts Payable Department. In Concur Expense, the user should choose Paid by Company in the payment section.
- Tips/Gratuities
- Relocation Expenses
- Mileage

Expense:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

02. Transportation	04. Meals & Entertainment	08. Other	09. Relocation
Car Rental Fuel	Group Meals/Entertainment <10 Attendees	Miscellaneous	Relocation Expenses
Charter /Transfers Bus	Group Meals/Entertainment 10+ Attendees	Recruiting Expenses	Meals Per Diem
Other Ground Transportation		Seminar Registration/Fees	Mileage
Parking	06. Communications	Tips/Gratuities	
	Internet/Online Fees		

## CONCUR REQUEST

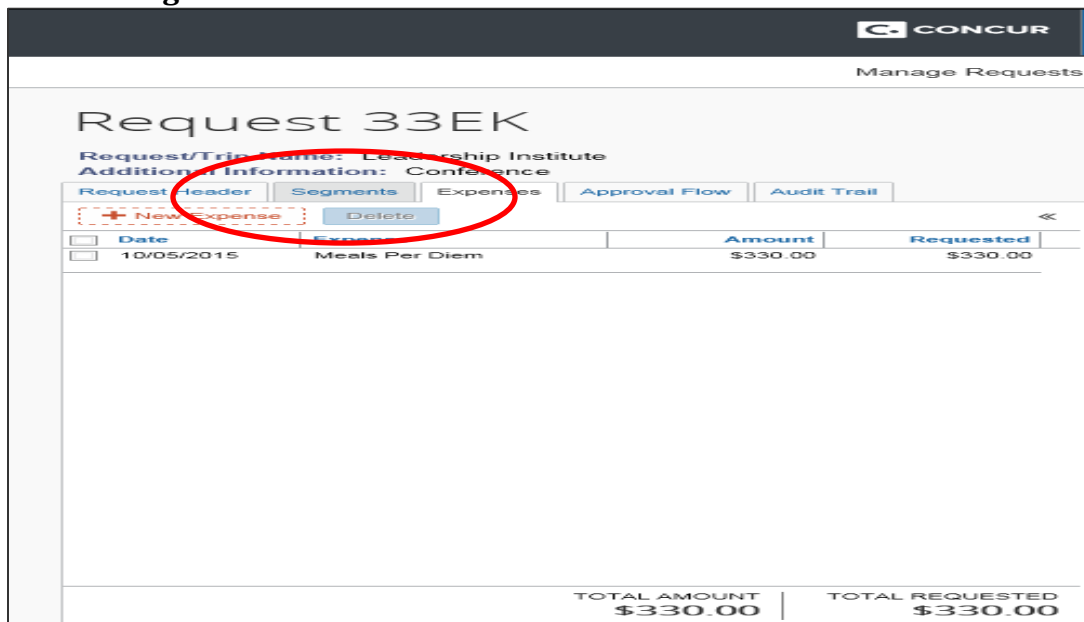
### ADDING SEGMENTS

#### Overview

Segments are travel related expenses that can be booked or reserved using Concur Travel: Airfare, Hotels, and Rental Cars.

#### Steps

1. Click the **Segments** tab.

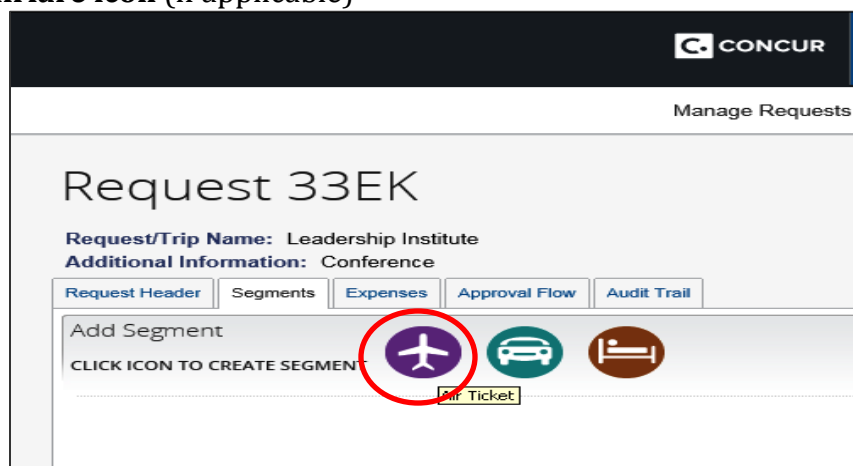


The screenshot shows the Concur Request 33EK interface. The 'Segments' tab is selected and highlighted with a red circle. The interface includes a 'Request Header' section with 'Request/Trip Name: Leadership Institute' and 'Additional Information: Conference'. Below this is a table with columns: Date, Expense, Amount, and Requested. The table contains one row: 10/05/2015, Meals Per Diem, \$330.00, \$330.00. At the bottom, there are two totals: TOTAL AMOUNT \$330.00 and TOTAL REQUESTED \$330.00.

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00

TOTAL AMOUNT: \$330.00 | TOTAL REQUESTED: \$330.00

2. Click the **airfare icon** (if applicable)



The screenshot shows the Concur Request 33EK interface. The 'Expenses' tab is selected. Below the tabs is an 'Add Segment' section with the text 'CLICK ICON TO CREATE SEGMENT'. There are three icons: an airplane (Airfare), a car (Rental Car), and a bed (Hotel). The airplane icon is highlighted with a red circle. Below the icons is a text input field labeled 'Air Ticket'.

Request 33EK

Request/Trip Name: Leadership Institute  
Additional Information: Conference

Request Header | Segments | Expenses | Approval Flow | Audit Trail

Add Segment

CLICK ICON TO CREATE SEGMENT

Air Ticket

3. Type the estimated amount of your airline ticket.
4. Choose the airport you're flying out of as well as the airport you're flying into.
5. The travel dates from the Request Header will automatically populate.
6. Click **Save** when you're done

The screenshot shows the 'Request 33EK' form in the Concur system. The top navigation bar includes 'CONCUR', 'Requests', 'Expense', and 'App Center'. The main header shows 'Manage Requests', 'New Request', and 'Quick Search'. The request details include 'Request/Trip Name: Leadership Institute' and 'Additional Information: Conference'. The status is 'Not Submitted' with an amount of '\$330.00'. The 'Air Ticket' segment is selected, showing 'Outbound' and 'Return' flights. The 'Outbound' flight is from 'Hartsfield Intl Arpt (ATL), Atlanta, GA, United States of Am' to 'Miami Area Airports (MIA), Miami, FL, United States of Am' on '10/05/2015' at '03:00 pm'. The 'Return' flight is on '10/09/2015' at '07:00 am'. The 'Save' button is circled in red.

7. Click the **Car Rental** icon (if applicable)
8. Your travel dates will automatically be populated
9. Type the estimated amount for your Car Rental.
10. Enter the city that you will pick up and drop off the car.
11. In the detail section, add the name of the company that you will be reserving the car with.
12. Click **Save** when you're done

The screenshot shows the 'Car Rental' segment in the Concur system. The 'Pick-up' location is 'Miami, Florida' on '10/05/2015' at 'Hertz'. The 'Drop-off' location is also 'Miami, Florida' on '10/09/2015' at 'Hertz'. The 'Save' button is visible at the bottom right.

13. Click the **Hotel icon** (if applicable)

- Registrations for combined Conference and Hotel reservations can be paid using the department's P-Card. This is a change from the former process of sending the payment request to the Accounts Payable department.

14. Your travel dates will automatically be populated.

15. Type the estimated amount of your Hotel.

16. Enter the city that your hotel is located in

17. In the detail section, add the name of the hotel

18. Click **Save** when you're done.

The screenshot displays the Concur web interface for a request titled "Request 33EJ". The header includes the Concur logo and navigation tabs for "Requests", "Expense", and "App Center". Below the header, there are links for "Manage Requests", "New Request", and "Quick Search". The main content area shows the request details, including the "Request/Trip Name: Leadership Institute Conference" and "Additional Information: Leadership Institute". There are tabs for "Request Header", "Segments", "Expenses", "Approval Flow", and "Audit Trail". The "Segments" tab is active, showing an "Add Segment" button and three icons: a plane, a car, and a hotel. Below the icons, there is a "Detail" field with the value "Hertz" and a "Comment" field. The "Hotel Reservation" section is expanded, showing a "Check-In" section with fields for "City" (Miami, Florida), "Date" (10/05/2015), and "At" (a dropdown menu). The "Check-Out" section has fields for "Date" (10/05/2015) and "At" (a dropdown menu). The "Amount" field is set to "250.00" and the "Currency" is "USD". There is also a "Comment" field at the bottom of the section.

19. If any of your segments will be paid for using multiple FOAP information, click **Allocate**.

[Attachments ▾](#)
[Print / Email ▾](#)
[Delete Request](#)
[Submit Request](#)

**Status: Not Submitted**  
**Amount: \$930.00**

[Allocate](#)
[Delete](#)
[Modify](#)

20. Click the items that need to be allocated the click **Allocate Selected Expenses**.

Allocations for Request : Leadership Institute Conference
✕

**Request List**

[Allocate Selected Expenses](#)
[Clear Selections](#)
[Summary](#)

<input type="checkbox"/>	Date ▾	Expense	Group	Amount
<input type="checkbox"/>	10/05/2015	Meals Per Diem		\$330.00
<input checked="" type="checkbox"/>	10/05/2015	Airfare		\$500.00
<input checked="" type="checkbox"/>	10/05/2015	Car Rental		\$100.00
<input checked="" type="checkbox"/>	10/05/2015	Hotel		\$250.00

**Allocations**

[Allocate By ▾](#) | 
 [Add New Allocation](#) | 
 [Delete Selected Allocations](#) | 
 [Favorites ▾](#) | 
 [Add to Favorites](#)

[Save](#)
[Cancel](#)

21. Add New Allocation

## Allocations for Request : Leadership Institute Conference

Request List

Allocate Selected Expenses Clear Selections Summary

Date	Expense	Group	Amount
10/05/2015	Meals Per Diem		\$330.00
10/05/2015	Airfare		\$500.00
10/05/2015	Car Rental		\$100.00
10/05/2015	Hotel		\$250.00

Allocations

Total:\$850.00 Allocated:\$850.00(100%) Remaining:\$0.00(0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage	Chart	Fund	Org	Program	Activity	Project	Code
50	(1) Morehouse...	(100004) Unre...	(610000) MHC...	(90) Faculty Pr...			(1) Morehouse ...
50	(1) Morehouse...	(100004) Unre...	(610000) MHC...	(90) Faculty Pr...			(1) Morehouse ...

Save Cancel

## 22. Modify the percentage and FOP information as needed

Allocations for Request : Leadership Institute Conference

Request List

Allocate Selected Expenses Clear Selections Summary

Date	Expense	Group	Amount
10/05/2015	Meals Per Diem		\$330.00
10/05/2015	Airfare		\$500.00
10/05/2015	Car Rental		\$100.00
10/05/2015	Hotel		\$250.00

Allocations

Total:\$850.00 Allocated:\$850.00(100%) Remaining:\$0.00(0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

Percentage	Chart	Fund	Org	Program	Activity	Project	Code
50	(1) Morehouse...	(100004) Unre...	(610000) MHC...	(90) Faculty Pr...			(1) Morehouse ...
50	(1) Morehouse...	(100004) Unre...	(610000) MHC...	(90) Faculty Pr...			(1) Morehouse ...

Type to search by: TEXT CODE

(Code) Text

- (100001) Unrestricted Fund
- (100003) Service Centers
- (100004) Unrestricted MHC
- (101010) Medical Student Tuition
- (102111) Biomedical Research-MS
- (102112) Biomedical Technology-MS
- (102113) Medical Science-MS
- (102120) Clinical Research
- (102130) Public Health Program
- (102410) Biomedical Science-PHD
- (103000) Indirect Cost Recovery Fund
- (110005) Grady Collections Medicine
- (115001) Grady Enhancements
- (120003) Phar-Analytical Chem Lab
- (120011) OSRA - Research Media
- (121002) Special Funds BS Micro/Biochem/
- (122003) Special Funds CS Ob/Gyn

Save Cancel

## 23. Click Save



## CONCUR REQUEST

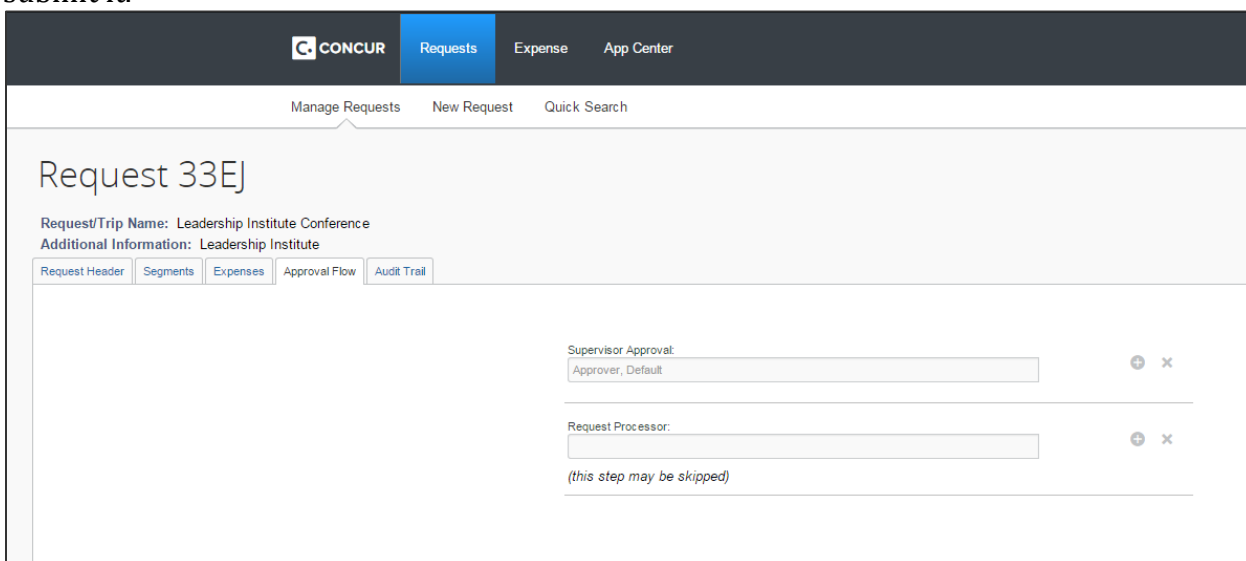
### SUBMITTING YOUR REPORT

#### Overview

You will need to submit your report for approval before you are allowed to book your travel. All requests are submitted to the traveler's Default Supervisor (Direct Supervisor list in Human Resources). If your travel is international, your request must also be approved by the President's Office before you can book your travel. After your report has passed through all the proper channels, you will receive an email stating that your Request has been approved. At this point, you will now be able to book your travel.

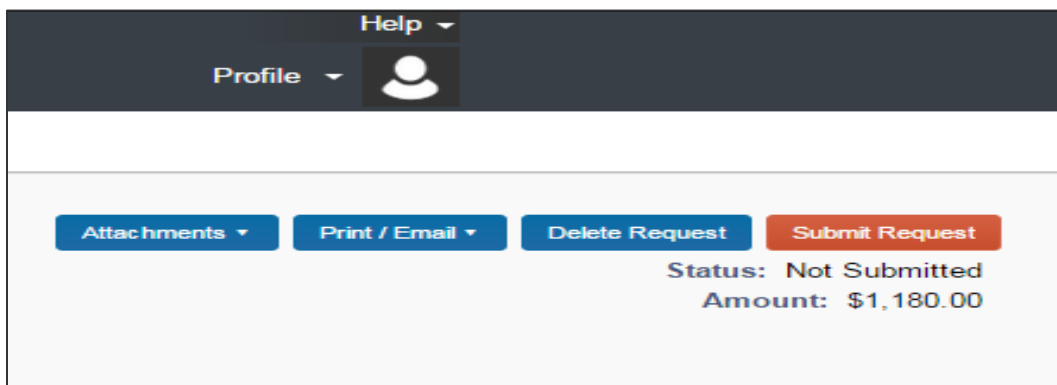
#### Steps

1. Click the **Approval Flow** tab to view where your report will be routed after you submit it.



The screenshot shows the Concur web interface. At the top, there's a dark navigation bar with 'CONCUR' logo and tabs for 'Requests', 'Expense', and 'App Center'. Below this is a lighter bar with 'Manage Requests', 'New Request', and 'Quick Search'. The main content area is titled 'Request 33EJ'. Below the title, it says 'Request/Trip Name: Leadership Institute Conference' and 'Additional Information: Leadership Institute'. There are five tabs: 'Request Header', 'Segments', 'Expenses', 'Approval Flow' (which is selected), and 'Audit Trail'. The 'Approval Flow' tab shows two input fields: 'Supervisor Approval:' with a dropdown menu showing 'Approver, Default', and 'Request Processor:' with a dropdown menu. Below these fields, it says '(this step may be skipped)'.

2. Hit **Submit Report**



The screenshot shows the bottom part of the Concur web interface. At the top, there's a dark navigation bar with 'Help' and 'Profile' dropdown menus. Below this is a lighter bar with four buttons: 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request' (which is highlighted in orange). Below the buttons, it says 'Status: Not Submitted' and 'Amount: \$1,180.00'.

## CONCUR REQUEST

---

### VIEWING THE STATUS OF YOUR REPORT

#### Steps

1. Click the Requests tab on your Concur homepage.
2. View the Status

The screenshot shows the Concur interface with the 'Requests' tab selected. Below the navigation bar, there are links for 'Manage Requests', 'New Request', and 'Quick Search'. The main heading is 'Active Requests (49)'. Below this is a 'View' dropdown menu. There are search filters for 'Request Name' and 'Begins With', followed by a 'Go' button. A table of requests is displayed below the filters. The first row of the table is circled in red, highlighting the status 'Pending Supervisor Approval - Approver, Default'.

<input type="checkbox"/>	Request Name	Request ID	Status
<input type="checkbox"/>	Leadership Institute Conference Leadership Institute	33EJ	Pending Supervisor Approval - Approver, Default
<input type="checkbox"/>	NIH Conference	33EC	Approved

## CONCUR REQUEST

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### FAQs

#### **Does my Department Administrator approve my travel?**

In Concur Request, your travel will be approved by your direct supervisor.

#### **Who is my direct supervisor?**

Your direct supervisor is the supervisor that is listed in Human Resources.

#### **What is considered international travel?**

Any land outside U.S. Territory is international travel. MSM also considers Alaska and Hawaii as international travel.

#### **Who approves international travel?**

All international travel will be routed to the President's Office.

#### **Can I request a cash advance for my hotel?**

If your hotel is attached to a conference registration, please use your department's P-Card to pay for both the Conference registration and the hotel reservation. Most hotels will accept the card on file for payment. If your hotel does not accept the card on file, please provide payment information and Hotel Confirmation to AP for payment via check.

#### **If my department doesn't have a P-Card, how can I request one?**

Please contact your Department Chair. Department Chair's make the decision on whether or not their department will have a P-Card?

#### **How will I know if my registration has been paid before I get to my conference?**

The Accounts Payable department will send you a copy of the checks as confirmation of payment.

#### **How will Conference fees be handled in Concur?**

Conferences will still be paid in advance through the accounts payable department. The traveler would still need to add the Conference Fees to their Request. In Concur Expense, the traveler would need to select the "Paid by Company" payment option.

### **What if my FOP info is not listed in Concur?**

If your FOP is not listed in Concur please provide the information to [concurhelpdesk@msm.edu](mailto:concurhelpdesk@msm.edu). A representative from the MSM Concur team will be able to assist you.

### **Why am I not allowed to select my account # in the Request Header?**

The account number is automatically populated in the back of the system based on the segments and expenses selected.

### **What if multiple departments are paying for my travel? How do I allocate the different FOPs?**

1. Click **Allocate**.
2. Click the items that need to be allocated
3. Click **Allocate Selected Expenses**
4. Click **Add New Allocation**.
5. Modify the percentage and FOP information as needed
6. Click Save.

### **Am I allowed to book travel without submitting a request first?**

No. All travel must be requested and approved before it can be booked.



# CONCUR APPROVALS

## CONCUR APPROVALS

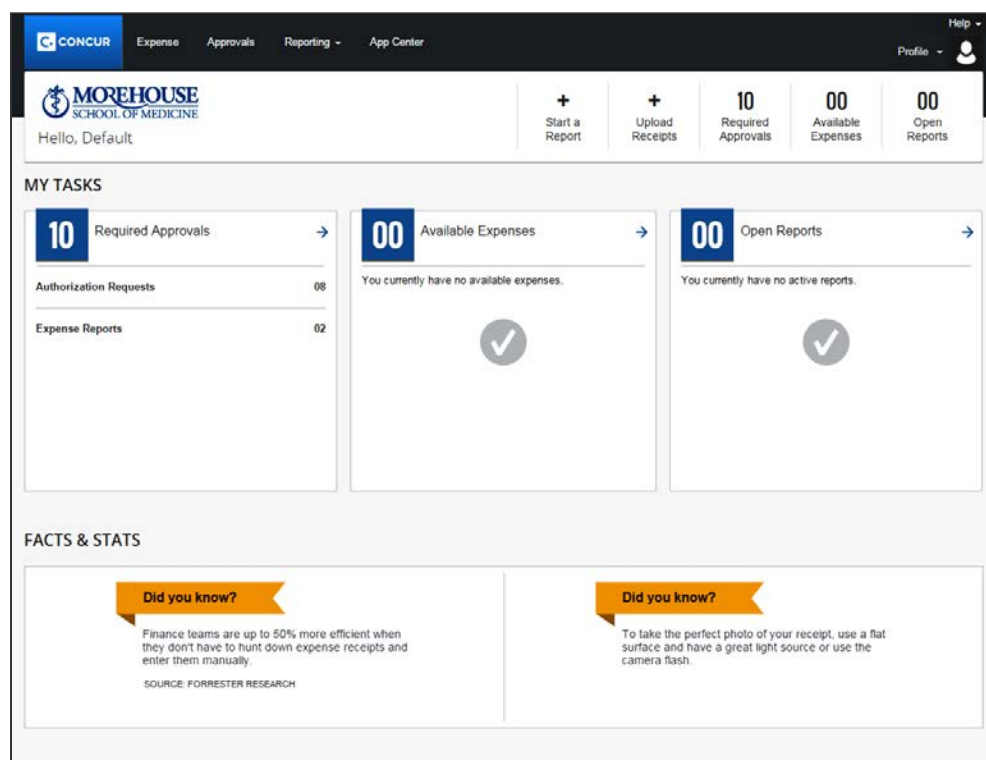
### DEFAULT (SUPERVISOR) APPROVER

#### Overview

In Concur Request, the Supervisors must approve the request to travel before the trip can be booked. In Concur Expense, the Supervisor will also be required to approve the actual expenses associated with the trip.

#### Steps

1. The Supervisor can log into Concur and click the **Required Approvals** tab under the **My Tasks** list.



- The Approvals will be split up by Requests and Expense Reports. Please approve the Requests first since the Traveler will not be able to book their travel until their Request is approved.

CONCUR Expense Approvals Reporting App Center Help

Profile

Approvals Home Requests Reports

## Approvals

08 Requests

02 Expense Reports

### Requests

Approve

Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
NIH Conference	33EA	Reeves, Talisha	10/16/2015 10/23/2015	09/10/2015	\$1,068.00
Leadership Institute Conference Leadership Institute	33EJ	Traveler1, Morehouse	10/05/2015 10/09/2015	09/15/2015	\$1,180.00
Dawn Test Segment Only	33EM	Traveler1, Morehouse	09/21/2015 09/23/2015	09/15/2015	\$600.00
aval intl with mixed exp type test	33ET	Traveler, Concur	09/16/2015 09/17/2015	09/15/2015	\$24.00
intl with mixed exp typ test	33EU	Traveler, Concur	09/16/2015 09/17/2015	09/15/2015	\$24.00
in state test	33EV	Traveler, Concur	09/16/2015 09/17/2015	09/15/2015	\$12.00
no chng intl exp type test	33EX	Traveler, Concur	09/16/2015 09/17/2015	09/15/2015	\$123.00
in state segment test	33EW	Traveler, Concur	09/15/2015 09/17/2015	09/15/2015	\$123.00

CONCUR

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Last logged in: 09/15/2015 12:33 PM

## 2. Click the trip that needs approval.

- All of the information related to the Request or Expense (Request Header, Segments, and Expense Summary) will be available for review.

CONCUR Expense Approvals Reporting App Center Help

Profile

Approvals Home Requests Reports

## Request 33EJ [Traveler1, Morehouse]

Request/Trip Name: Leadership Institute Conference  
Additional Information: Leadership Institute

Request Header Segments Expense Summary Approval Flow Audit Trail

Attachments Print / Email Send Back Request Approve Approve & Forward

Status: Pending Supervisor Approval  
Amount: \$1,180.00

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00
10/05/2015	Airfare	\$500.00	\$500.00
10/05/2015	Car Rental	\$100.00	\$100.00
10/05/2015	Hotel	\$250.00	\$250.00

TOTAL AMOUNT \$1,180.00 TOTAL REQUESTED \$1,180.00

Expense Type: Meals Per Diem Trip Start Date: 10/05/2015 Trip End Date: 10/09/2015

Request/Trip Purpose: Conference Participant Destination City: Miami, Florida Trip Type: Out of State

Description: Transaction Amount: 330.00 USD Comment:

Approved Amount: 330.00

Save Allocate Cancel



3. Please review to make sure the segments and expenses are business related and do not violate MSM Travel Policy.
- **Approve** or **Send Back the Request** based on the information.
  - If you'd like another employee to view the information as well, click **Approve and Forward**.

The screenshot displays the Concur Request 33E interface. At the top, a navigation bar includes 'CONCUR', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Approvals' tab is active. Below the navigation bar, the page title is 'Request 33E [Traveler, Morehouse]'. The status is 'Pending Supervisor Approval' with an amount of '\$1,180.00'. A red circle highlights the top right of the request details area, containing buttons for 'Attachments', 'Print / Email', 'Send Back Request', 'Approve', and 'Approve & Forward'. The main content area is divided into two sections. The left section shows a table of expenses with columns for Date, Expense, Amount, and Requested. The right section shows trip details including Expense Type, Trip Start Date, Trip End Date, Report/Trip Purpose, Destination City, Trip Type, Description, Transaction Amount, and Comment. At the bottom, there are buttons for 'Save', 'Allocate', and 'Cancel'.

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00
10/05/2015	Airfare	\$500.00	\$500.00
10/05/2015	Car Rental	\$100.00	\$100.00
10/05/2015	Hotel	\$250.00	\$250.00

Expense Type	Trip Start Date	Trip End Date
Meals Per Diem	10/05/2015	10/05/2015

Report/Trip Purpose	Destination City	Trip Type
Conference Participant	Miami, Florida	Out of State

Description	Transaction Amount	Comment
	330.00 USD	

TOTAL AMOUNT: \$1,180.00 | TOTAL REQUESTED: \$1,180.00

## CONCUR APPROVALS

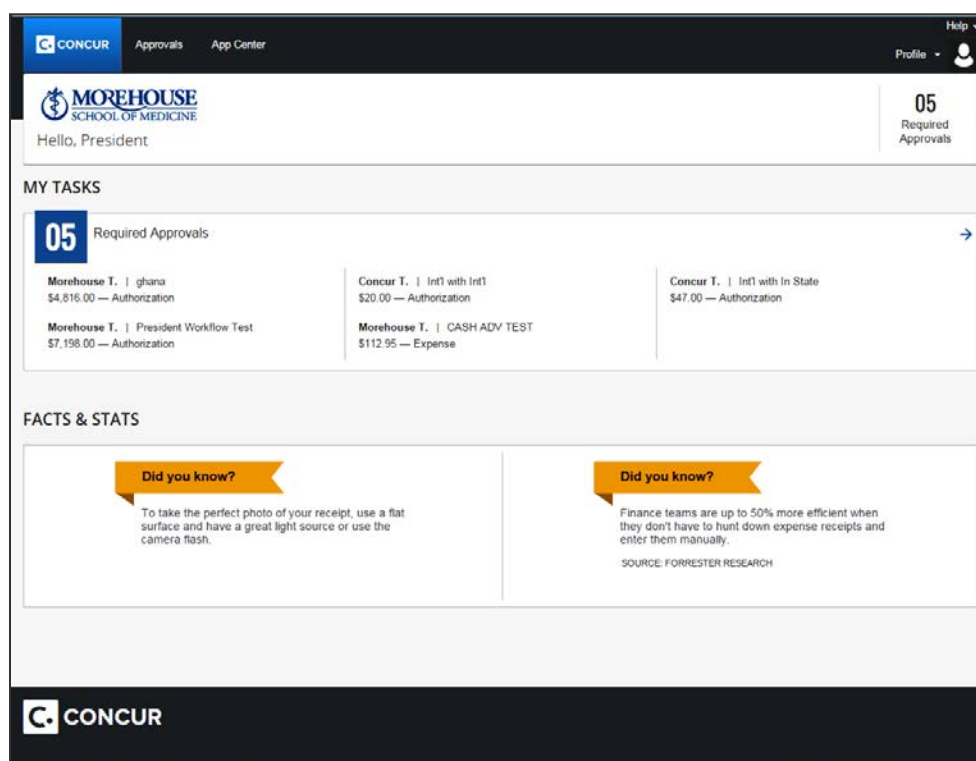
### INTERNATIONAL APPROVER

#### Overview

All international travel, including trips to Alaska and Hawaii, require an additional layer of approval. In addition to receiving Supervisor approval, these trips must also be approved by the President's Office in Concur Request before the travel can book their trip. In Concur Expense, the President's Office will need to approve the expense if the cost of the trip is 10% more of the amount requested amount.

#### Steps

4. Log into Concur
  - A list of trips requiring approval from the President's Office will be listed on the main Concur page



5. Click the **Required Approvals** tab.
  - Approvals will be split up by Requests and Expense Reports. Please approve the Requests first since the Traveler will not be able to book their travel until their Request is approved.

CONCUR

Approvals

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Requests

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Approvals

04 Requests

01 Expense Reports

Requests

Approve

Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
ghana	33DN	Traveler3, Morehouse	10/12/2015 10/15/2015	09/14/2015	\$4,816.00
Int'l with Int'l	33EE	Traveler, Concur	09/15/2015 09/16/2015	09/14/2015	\$20.00
Int'l with In State	33EF	Traveler, Concur	09/15/2015 09/16/2015	09/14/2015	\$47.00
President Workflow Test	33EH	Traveler3, Morehouse	09/15/2015 09/16/2015	09/14/2015	\$7,198.00

CONCUR

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Last logged in: 09/10/2015 10:40 PM

- Click the trip that needs approval.
  - All of the information related to the Request or Expense (Request Header, Segments, and Expense Summary) will be available for review.

CONCUR

Approvals

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Request 33EH (Traveler3)

Attachments

Print / Email

Send Back Request

Approve

Approve & Forward

Morehouse

Request/Trip Name: President Workflow Test

Status: Pending Office of the President Approval

Amount: \$7,198.00

Request Header

Segments

Expense Summary

Approval Flow

Audit Trail

Date	Expense	Amount	Requested
09/15/2015	Airfare	\$1,000.00	\$1,000.00
09/15/2015	Hotel	\$6,000.00	\$6,000.00
09/15/2015	Meals Per Diem	\$198.00	\$198.00
TOTAL AMOUNT		\$7,198.00	TOTAL REQUESTED \$7,198.00

Expense Type

Transaction Amount

Allocate

View segment detail

7. Please review to make sure the segments and expenses are business related and do not violate MSM Travel Policy.
- **Approve** or **Send Back the Request** based on the information.
  - If you'd like another employee to view the information as well, click **Approve and Forward**.

Request 33EH (Traveler3)

Morehouse

Request/Trip Name: President Workflow Test

Additional Information:

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense	Amount	Requested
09/15/2015	Airfare	\$1,000.00	\$1,000.00
09/15/2015	Hotel	\$6,000.00	\$6,000.00
09/15/2015	Meals Per Diem	\$198.00	\$198.00

TOTAL AMOUNT \$7,198.00 TOTAL REQUESTED \$7,198.00

Expense Type: Airfare Transaction Amount: 1,000.00 USD

Status: Pending Office of the President Approval Amount: \$7,198.00

Buttons: Attachments, Print / Email, Send Back Request, Approve, Approve & Forward

## CONCUR APPROVALS

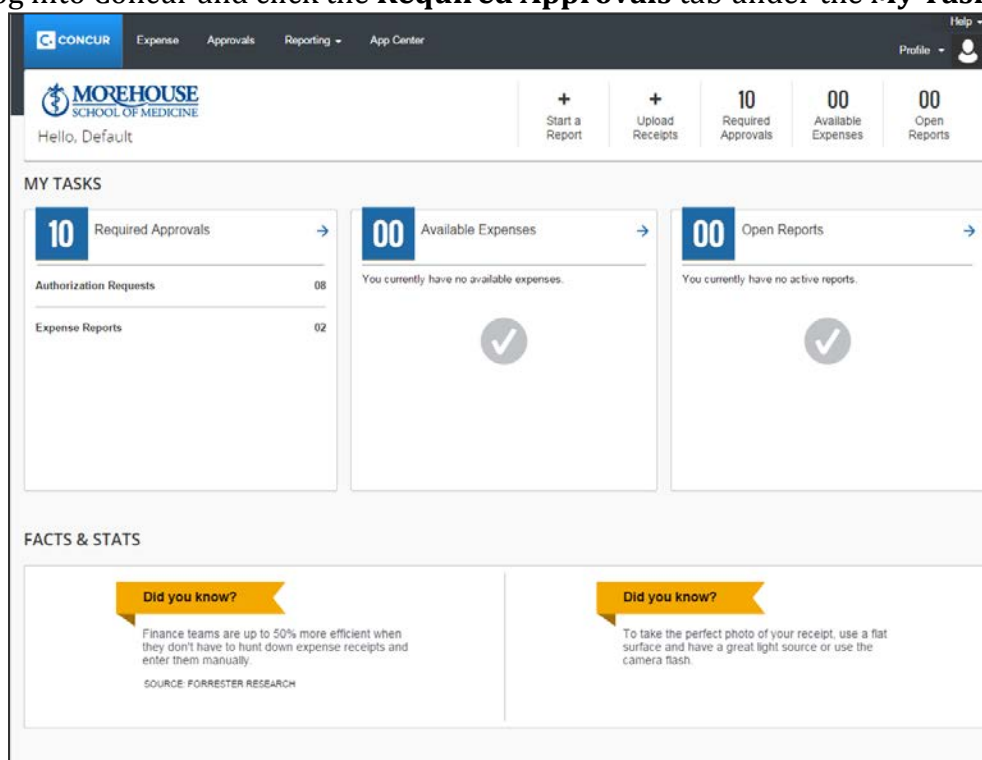
### ORG APPROVER

#### Overview

In Concur Expense, the department approver for the Org is required to check the budget of the FOP listed. They are also required to make sure all of the items listed in the trip are allowable and do not violate the MSM Travel Policy.

#### Steps

1. Log into Concur and click the **Required Approvals** tab under the **My Tasks** list.



2. Click the trip that needs approval.
  - a. All of the information related to the Expense (Request Header, Segments, and Expense Summary) will be available for review.

CONCUR Expense Approvals Reporting App Center

Approvals Home Requests Reports

## Request 33E [Traveler], Morehouse

Request/Trip Name: Leadership Institute Conference  
Additional Information: Leadership Institute

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00
10/05/2015	Airfare	\$500.00	\$500.00
10/05/2015	Car Rental	\$100.00	\$100.00
10/05/2015	Hotel	\$250.00	\$250.00

TOTAL AMOUNT \$1,180.00 TOTAL REQUESTED \$1,180.00

Expense Type: Meals Per Diem Trip Start Date: 10/05/2015 Trip End Date: 10/09/2015  
 Report/Trip Purpose: Conference Participant Destination City: Miami, Florida Trip Type: Out-of-State  
 Description: Transaction Amount: 330.00 USD Comment:  
 Approved Amount: 330.00

Attachments Print / Email Send Back Request Approve Approve & Forward

Status: Pending Supervisor Approval Amount: \$1,180.00

Save Allocate Cancel

3. Please review to make sure the segments and expenses are business related and do not violate MSM Travel Policy. Also, make sure all of the receipts are valid and check the budget for the FOP listed.
  - a. **Approve** or **Send Back the Request** based on the information.
  - b. If you'd like another employee to view the information as well, click **Approve and Forward**.

CONCUR Expense Approvals Reporting App Center

Approvals Home Requests Reports

## Request 33E [Traveler], Morehouse

Request/Trip Name: Leadership Institute Conference  
Additional Information: Leadership Institute

Request Header Segments Expense Summary Approval Flow Audit Trail

Date	Expense	Amount	Requested
10/05/2015	Meals Per Diem	\$330.00	\$330.00
10/05/2015	Airfare	\$500.00	\$500.00
10/05/2015	Car Rental	\$100.00	\$100.00
10/05/2015	Hotel	\$250.00	\$250.00

TOTAL AMOUNT \$1,180.00 TOTAL REQUESTED \$1,180.00

Expense Type: Meals Per Diem Trip Start Date: 10/05/2015 Trip End Date: 10/09/2015  
 Report/Trip Purpose: Conference Participant Destination City: Miami, Florida Trip Type: Out-of-State  
 Description: Transaction Amount: 330.00 USD Comment:  
 Approved Amount: 330.00

Attachments Print / Email Send Back Request Approve Approve & Forward

Status: Pending Supervisor Approval Amount: \$1,180.00

Save Allocate Cancel

### FAQs

#### What should I look for when approving?

When approving an Expense Report, it is very important to check that all required information is there in order for the reimbursement to be processed. By approving the Expense Report, you are approving all the expenses that the employee has sent in, so be sure that the Expense Report does not contain items that are not reimbursable by the University (see “**Expenses**” → “**What items are not reimbursable?**”). As a quick reference these are some things you should look at:

##### 1. Receipts

1. make sure the receipts are attached
2. missing receipt form is attached (if applicable)
3. all items are reimbursable
4. itemized receipt is attached (i.e. hotel, meals over \$75) and proof of payment
5. international per diem requests have the U.S. Department of State's Per Diem table indicating the rate being used.
6. itinerary/invoice or e-receipt showing proof of payment for airfare
7. car rental contract, itemized receipt and proof of payment is needed for rentals (rental insurance is not reimbursable)
8. MapQuest page or the Concur Google Map feature should be used to indicate miles traveled for reimbursement.

##### 2. Event dates

1. to be sure if an expense should be prepaid or not

##### 3. Cash Advances

1. make sure the cash advance was applied (if applicable)
2. if not all of the cash advance is used, make sure the rest has been returned through the Expense Report

#### How do I review and approve expense reports?

1. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.
2. On the **Expense Report** page, click the expense you want to view.
3. Click **Approve**.

#### How do I cancel a report I approved after I have already approved it?

Send an e-mail to [concurhelpdesk@msm.edu](mailto:concurhelpdesk@msm.edu) to request a cancellation of an expense report within the same day the expense was approved. It is important to do this immediately!

### **How do I send an expense report back to an employee?**

1. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.
2. Click **Send Back to Employee** page, add comments in the **Comment** box.
3. Click **OK**.

### **What happens if I don't approve an expense report?**

If you do not approve an expense for your employee, after one week the expense will be forwarded to your Approver.

### **How do I add an additional approver to review and approve the expense report?**

1. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.
2. Click **Approve & Forward**.
3. In the **Approval Flow** window, click the **Search Approvers By** dropdown arrow.
4. Select the desired search option from the dropdown list.
5. In the **User-Added Approver** field, type the search criteria.
6. From the list of options displayed by the search, select the appropriate approver.
7. Click **Approve**.

### **What if I submit my report and I'm the approver for the Org I choose? Am I allowed to approve my own report?**

There are internal controls that will prevent you from approving your own report. In the scenario mentioned above, your request will be sent to your Default Approver (Supervisor) in Concur Request. In Concur Expense, your report will skip the Org Approver step and will go straight to the Processor for review.





# CONCUR TRAVEL

## CONCUR TRAVEL

## BOOKING A FLIGHT

### Overview

After your request is approved, you will be able to book your travel.

### Steps

1. Click the **Travel** tab of your approved trip.

=

The screenshot shows the Concur Travel interface. The 'Travel' tab is selected in the top navigation bar. Below the navigation bar, there are tabs for 'Travel', 'Arrangers', 'Trip Library', 'Templates', and 'Tools'. The 'Travel' tab is active, showing a search bar for 'Air/Rail Search' with options for 'Round Trip', 'One Way', and 'Multi-Segment'. Below the search bar, there are fields for 'Departure City' and 'Arrival City', each with a 'Find an airport' link and a 'Select multiple airports' link. A 'Search' button is located below the search bar. To the right of the search bar, there is a 'Travel Alerts' section with a blue header. It contains two alerts: one about Triplt and another about e-receipts. Below the alerts, there are tabs for 'Company Notes', 'Upcoming Trips', and 'Trips Awaiting Approval'. The 'Upcoming Trips' tab is selected, showing the 'Morehouse School of Medicine' logo and contact information for MSM customer support. The contact information includes an email address 'concurhelpdesk@msm.edu' and a link to the 'Morehouse School of Medicine Travel Policy'. Below this, there is a 'Customer Support / Changes' section with a red warning message about World Travel agents. The 'World Travel Service' section provides contact information for the World Travel Service, including a phone number, office hours, and email address. The 'After Hours Emergency Assistance' section provides contact information for 24-hour emergency assistance, including a phone number and email address. At the bottom of the page, there is a 'Lost your receipt?' link.

2. Click **Book**

Test IE10	34KV	Approved - Pending Booking	12/13/2015	08/12/2015	\$100.00				Book
Testing Engrg Inventory	344E	Approved - Pending Booking	12/16/2015	08/13/2015	\$1,687.23	\$0.00	\$0.00	\$0.00	Book
test booking issue	391F	Approved - Pending Booking	09/03/2015	08/16/2015	\$1,687.23	\$0.00	\$0.00	\$0.00	Book
			09/03/2015						

Use the Flight ✈️ tab to book a flight by itself or with car rental and/or hotel reservations.

You can access the Flight ✈️ tab in these ways:

- On the Travel page: On the menu, click **Travel**, then select Booking for Myself or Book for a Guest (whichever applies)
- On the Concur home page: On the menu, the Concur logo, then select Booking for Myself or Book for a Guest (whichever applies).

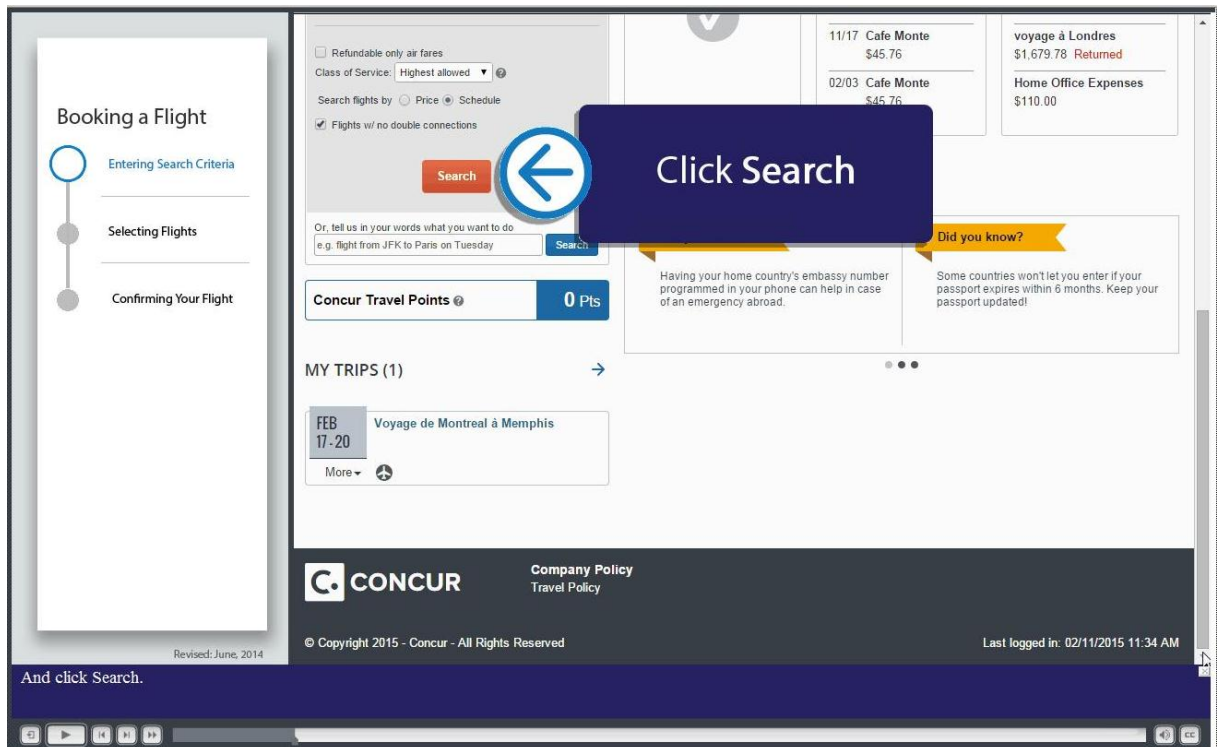
The Flight ✈️ tab is on the left side of the page.

## Steps: Booking a Flight for Myself

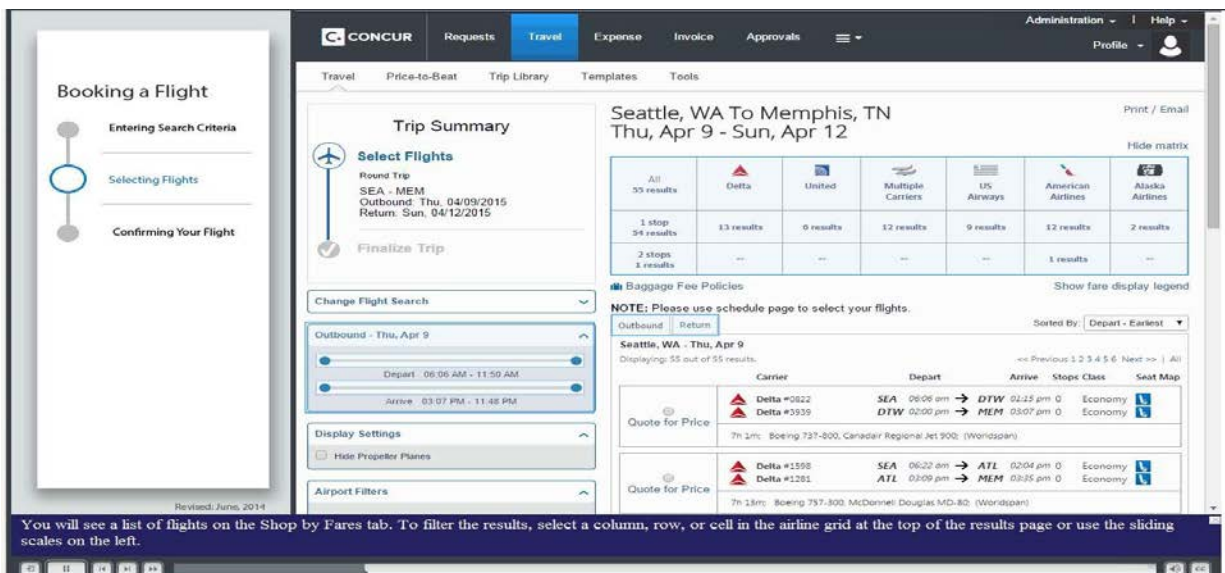
1. Make sure the **Booking for Myself** tab is selected.
  - Enter your search criteria, such as type of trip, departure city and date, and arrival city and date.



2. Click **Search**



- You will see a list of flights on the **Shop by Fares** tab. To filter the results, select a column, row, or cell in the airline grid at the top of the results page or use the sliding scales on the left.



- The **More Like This** link allows you to view separate outbound and return flight. If you the select **Shop by Schedule** tab, you will be able to select your outbound and

return flights separately options as well.

The screenshot shows a flight search interface. On the left, there are search filters for MEM - Memphis Intl - Memphis, TN, with departure on 04/09/2015 at 09:00 am and return on 04/12/2015 at 03:00 pm. The class of service is set to 'Highest allowed'. Below the filters is a 'Search' button. On the right, a flight summary for Delta is shown with a green 'Select' button. Below this, there are two tabs: 'Shop by Fares' and 'Shop by Schedule'. The 'Shop by Fares' tab is active, showing a list of flight options. The first option is from US Airways+ for \$518.70, with a green 'Select' button. The second option is from American Airlines for \$518.70, also with a green 'Select' button. The third option is from US Airways+ for \$518.70, with a red 'Select' button. The fourth option is from American Airlines for \$1,082.70, with a yellow 'Select' button. Each option includes details about the carrier, departure and arrival times, and stops.

- The **Select** button appears in green, yellow, or red.
  - Green indicates a preferred vendor or flight.
  - Yellow indicates a flight that is out of policy.
    - Note: You will have to provide an explanation on your expense report to explain this choice.
  - Red indicates an airline/flight that is prohibited.

Shop by Fares













Shop by Schedule

Sorted By: Price - Low to High

Expand All Details

Displaying: 158 out of 159 results.

<< Previous | Page: 1 of 16 | Next >> | All

Price	Carrier	Depart	Arrive	Stops	Duration
\$518.70	 US Airways†	SEA MEM	08:15 am 04:02 pm	→ MEM → SEA	06:37 pm 1 8h 22m 12:05 am 1 10h 3m
<div>Select ✓</div>					
+ 299 Pts + Operated by American Airlines					
Compare			More like this +		Show details ✓
\$518.70	 American Airlines	SEA MEM	08:15 am 04:02 pm	→ MEM → SEA	06:37 pm 1 8h 22m 12:05 am 1 10h 3m
<div>Select ✓</div>					
+ 299 Pts					
Compare			More like this +		Show details ✓
\$518.70	 US Airways American Airlines	SEA MEM	08:15 am 04:02 pm	→ MEM → SEA	06:37 pm 1 8h 22m 12:05 am 1 10h 3m
<div>Select ⚠</div>					
+ 299 Pts					
Compare			More like this +		Show details ✓
\$1,082.70	 American Airlines US Airways†	SEA MEM	08:15 am 04:02 pm	→ MEM → SEA	06:37 pm 1 8h 22m 12:05 am 1 10h 3m
<div>Select !</div>					
+ 299 Pts + Operated by American Airlines					
Compare			More like this +		Show details ✓

- To view more details for a particular flight, click **Show Details**.

MEM - Memphis Intl - Memphis, TN

Departure: 04/09/2015 dep 09:00 am ± 3

Return: 04/12/2015 dep 03:00 pm ± 3

Class of Service: Highest allowed

Search flights by: Price Schedule

Flights w/ no double connections

Search

Outbound - Thu, Apr 9

Depart: 08:05 AM - 11:48 AM

Arrive: 03:07 PM - 11:48 PM

Return - Sun, Apr 12

Depart: 12:00 PM - 04:40 PM

Arrive: 05:50 PM - 01:46 AM

Price: \$518.70 - \$987.20

Click Show Details

Price	Carrier	Depart	Arrive	Stops	Duration
\$518.70	US Airways*	SEA	MEM	06:37 pm	1 8h 22m
				12:05 am	1 10h 3m
				06:37 pm	1 8h 22m
				12:05 am	1 10h 3m
\$518.70	US Airways*	SEA	MEM	06:37 pm	1 8h 22m
	American Airlines	MEM	SEA	12:05 am	1 10h 3m
\$1,082.70	American Airlines	SEA	MEM	06:37 pm	1 8h 22m
	US Airways*	MEM	SEA	12:05 am	1 10h 3m

- In the flight details, you can view the flight information and fare rules, select a seat, and, if needed, add or choose a different frequent flyer program.
- Click the seat map icon to open a popup window that shows available seating for the flight.

Compare More like this Hide details

Outbound flight: Seattle, WA (SEA) - Memphis, TN (MEM) Thu, Apr 9

US Airways #0249	Seattle Tacoma Intl Ar... (SEA) Depart: Thursday, 08:15 am	Dallas Ft Worth Intl (DFW) Arrive: Thursday, 02:06 pm
Stops: 0 Duration: 3h 51m Economy: Q Boeing 737-800		
US Airways #5685	Dallas Ft Worth Intl (DFW) Depart: Thursday, 05:00 pm	Memphis Intl (MEM) Arrive: Thursday, 06:37 pm
Stops: 0 Duration: 1h 37m Economy: Q Canadair Regional Jet 900		

Return flight: Memphis, TN (MEM) - Seattle, WA (SEA) Sun, Apr 12

US Airways #1389	Memphis Intl (MEM) Depart: Sunday, 04:02 pm	Dallas Ft Worth Intl (DFW) Arrive: Sunday, 05:48 pm
Stops: 0 Duration: 1h 46m Economy: V McDonnell Douglas MD-80		
US Airways #2254 Operated by American Airlines	Dallas Ft Worth Intl (DFW) Depart: Sunday, 09:46 pm	Seattle Tacoma Intl Ar... (SEA) Arrive: Monday, 12:05 am
Stops: 0 Duration: 4h 19m Economy: V Boeing 737-800		

US Airways - (Worldspan)  
Fare Rules  
Ticket non-refundable - penalties may apply  
Change fee likely applies (plus fare difference, see fare rules)

Select + 299 Pts

Use my default credit card: 'Corporate Card'

Hide details



- When you have selected the best flight for your trip, click **Select**.

The screenshot shows the 'Booking a Flight' interface. On the left, a sidebar contains a progress indicator with three steps: 'Entering Search Criteria', 'Selecting Flights' (which is highlighted with a blue circle), and 'Confirming Your Flight'. The main area displays search results for a round trip from Seattle, WA (SEA) to Memphis, TN (MEM) on Thursday, April 9, and back on Sunday, April 12. The selected flight is US Airways #0249, departing at 08:15 am and arriving at 06:37 pm. A large blue button labeled 'Click Select' with a right-pointing arrow is overlaid on the bottom right of the flight details. The button also includes a small 'Select' icon and '+ 299 Pts'.

- In the **Review and Reserve Flight** section, you can review your flight itinerary.

The screenshot shows the 'Review and Reserve Flight' section of the Concur interface. The top navigation bar includes 'CONCUR', 'Requests', 'Travel' (highlighted), 'Expense', 'Invoice', 'Approvals', and 'Administration'. The left sidebar shows a 'Trip Summary' with 'Flights Selected' and 'Finalize Trip' options. The main area displays the 'REVIEW FLIGHTS' section, which includes the following flight details:

Outbound flight: Seattle, WA (SEA) - Memphis, TN (MEM) Thu, Apr 9		
US Airways #0249 Operated by American Airlines	Seattle Tacoma Intl Ar... (SEA) Depart: Thursday, 08:15 am	Dallas Ft Worth Intl (DFW) Arrive: Thursday, 02:06 pm
Stops: 0 Duration: 3h 51m Economy: Q Boeing 737-800		
US Airways #5685 Operated by American Airlines	Dallas Ft Worth Intl (DFW) Depart: Thursday, 05:00 pm	Memphis Intl (MEM) Arrive: Thursday, 06:37 pm
Stops: 0 Duration: 1h 37m Economy: Q Canadair Regional Jet 900		
Return flight: Memphis, TN (MEM) - Seattle, WA (SEA) Sun, Apr 12		
US Airways #1389 Operated by American Airlines	Memphis Intl (MEM) Depart: Sunday, 04:02 pm	Dallas Ft Worth Intl (DFW) Arrive: Sunday, 05:48 pm
Stops: 0 Duration: 1h 46m Economy: V McDonnell Douglas MD-80		
US Airways #2254 Operated by American Airlines	Dallas Ft Worth Intl (DFW) Depart: Sunday, 09:46 pm	Seattle Tacoma Intl Ar... (SEA) Arrive: Monday, 12:05 am
Stops: 0 Duration: 4h 19m Economy: V Boeing 737-800		

- From here, you can update your personal information, view the seat map, review the



price summary information, and select your payment method.

**Booking a Flight**

- Entering Search Criteria
- Selecting Flights
- Confirming Your Flight**

Revised: June, 2014

### ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct. [Edit](#) | [Review all](#)

**PRIMARY TRAVELER**

Name: William N Never Phone: 1 425 590 4567 [suep\\_ls\\_en@p00103105exu](#)

Frequent Flyer Programs [Add a Program](#)

For US Airways: No Program selected For American Airlines: No Program selected

### SEAT ASSIGNMENT

Seats will be automatically selected based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete. [View seatmap](#)

### REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$444.65	\$74.05	\$518.70
Total Estimated Cost : \$518.70 USD			
Total Due Now: \$518.70 USD			

### SELECT A METHOD OF PAYMENT

How would you like to pay?

Corporate Card (...0000) [Edit](#) | [Add credit card](#)

\* Indicates credit card is a company card

### ACCEPT FARE RULES AND RESTRICTIONS

4. Review and accept the airfare rules and restrictions. Click **Reserve Flight and Continue**.

How would you like to pay?

Corporate Card (...0000) [Edit](#) | [Add credit card](#)

\* Indicates credit card is a company card

### ACCEPT FARE RULES AND RESTRICTIONS

**This is a Non-Refundable Ticket**

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

Please review the rules and restrictions listed below.

**Click Reserve Flight and Continue**

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

[Back](#) [Reserve Flight and Continue](#)

**CONCUR** Company Policy Travel Policy

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Last logged in: 02/11/2015 11:34 AM

Click Reserve Flight and Continue.

- You will see your complete travel itinerary. From this page, you can also choose to

add a car or hotel to your itinerary.

- Note: If you selected the options to book a car and/or hotel on the initial search page, you would be prompted to select a car or hotel for your trip before you see the Travel Details.

5. To continue with the reservation, click **Next**.

The screenshot shows the Concur Travel interface. On the left, a sidebar titled 'Booking a Flight' has three steps: 'Entering Search Criteria', 'Selecting Flights', and 'Confirming Your Flight'. The 'Confirming Your Flight' step is highlighted with a blue circle. The main content area is titled 'Trip Booking Information'. It includes a 'Trip Summary' section with a 'Finalize Trip' button and a 'Trip Booking Information' section with fields for 'Trip Name' and 'Trip Description'. A large blue button labeled 'Click Next' is positioned on the right side of the page. Below the 'Click Next' button, there is a blue arrow pointing down. At the bottom of the page, there is a blue bar with the text 'To continue with the reservation, click Next.'

- On the Trip Booking Information page, notice that the Trip Name is based on your departure and arrival cities. You can edit the Trip Name, as needed. You can also provide a Trip Description.

This screenshot is similar to the previous one, showing the 'Trip Booking Information' page. The 'Trip Name' field is highlighted with a blue border. The 'Trip Description' field is also visible. The 'Click Next' button is not present in this version of the screenshot. The sidebar and 'Trip Summary' section are also visible.

6. To continue with the reservation, click **Next**.

**Booking a Flight**

- Entering Search Criteria
- Selecting Flights
- Confirming Your Flight**

**Trip Summary**

**Finalize Trip**

- ☒ Review Travel Details
- ☒ Enter Trip Information
- ☐ Submit Trip Confirmation

**Trip Booking Information**

The trip name and description are for your record keeping convenience.

**Trip Name**  
This will appear in your upcoming trip list.  
Trip from Seattle to Memphis

**Trip Description (optional)**  
Used to identify the trip purpose

Send a copy of the confirmation to:

Send my email confirmation as  
☒ HTML ☐ Plain-text

**Tript Privacy**

- ☒ Share trip destination and dates with your Tript Connections
- ☐ Make this trip private

Please enter information about this trip then press Next to finalize your reservation. At this point your reservation may be cancelled. Note: Any part of the trip that is instantaneous deposit required will not be cancelled.

Display Trip << Previous Next >> Cancel

Click Next

- To complete the reservation, review your trip itinerary and then click **Confirm Booking**.

**Booking a Flight**

- Entering Search Criteria
- Selecting Flights
- Confirming Your Flight**

**Flight Details**

**Departure:** 09:46 PM  
 Seat: No seat assignment  
 Dallas Ft Worth Intl (DFW)  
 Terminal: 0  
 Duration: 4 hours, 19 minutes  
 Nonstop

**Arrival:** 12:05 AM  
 Seattle Tacoma Intl Arpt (SEA)

**Additional Details**  
 Aircraft: Boeing 737-800  
 E-Ticket  
 Cabin: Economy (Y)

**Confirmation:** DCKB30  
 Status: Confirmed

**Total Estimated Cost**

Airfare quoted amount:	\$444.65 USD
Taxes and fees:	\$74.05 USD
<b>Total Estimated Cost:</b>	<b>\$518.70 USD</b>

**TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.**

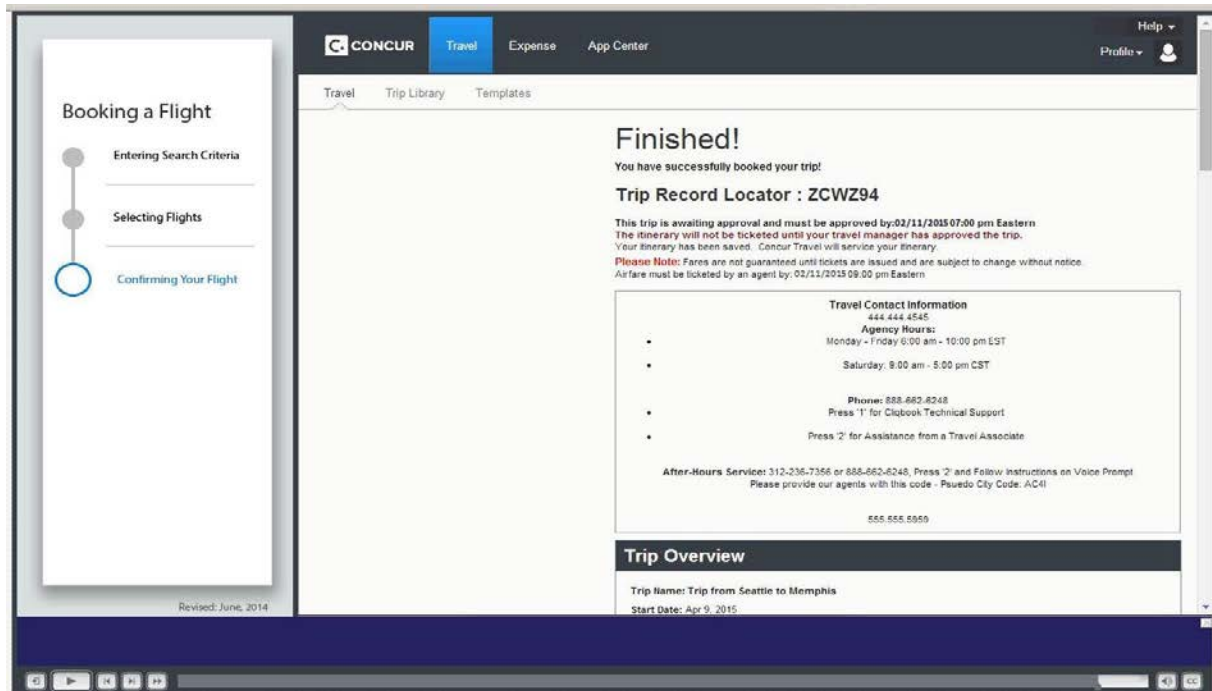
Click Confirm Booking>>

Confirm Booking>> Cancel

And then click Confirm Booking>>.

- The **Finished!** screen shows your confirmation number and information to contact

the travel agent.



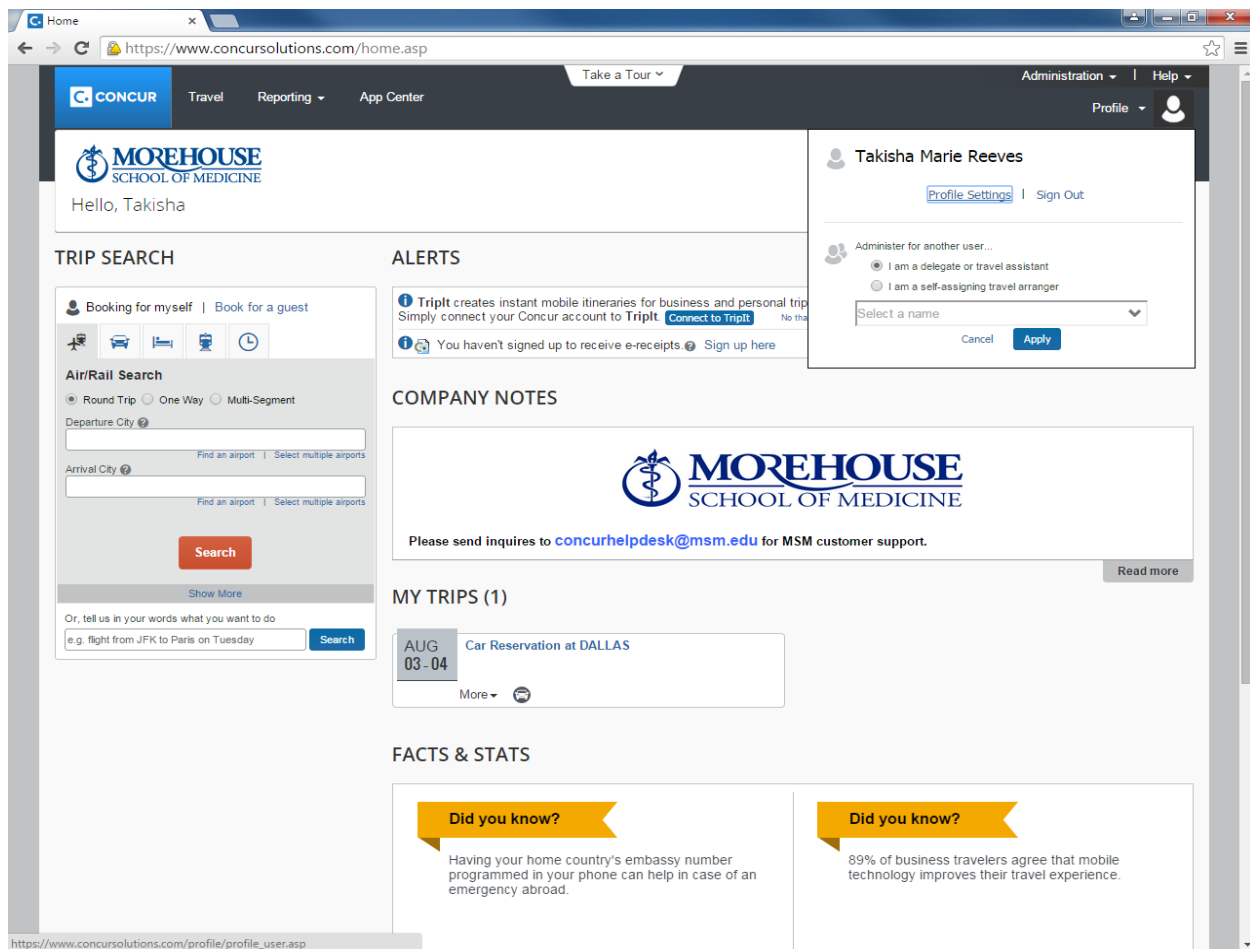
## Steps: Booking Airfare for another Employee

### Overview

In addition to booking for yourself, Concur also allows you to book for another employee. In order to book on behalf of another employee, the employee that plans to travel must first assign you as a **Travel Assistant**. The traveling employee can find instructions on how to this on pages 15-16 of the workbook. Once the traveler has assigned you as a Travel Assistant, complete the following steps:

### Steps

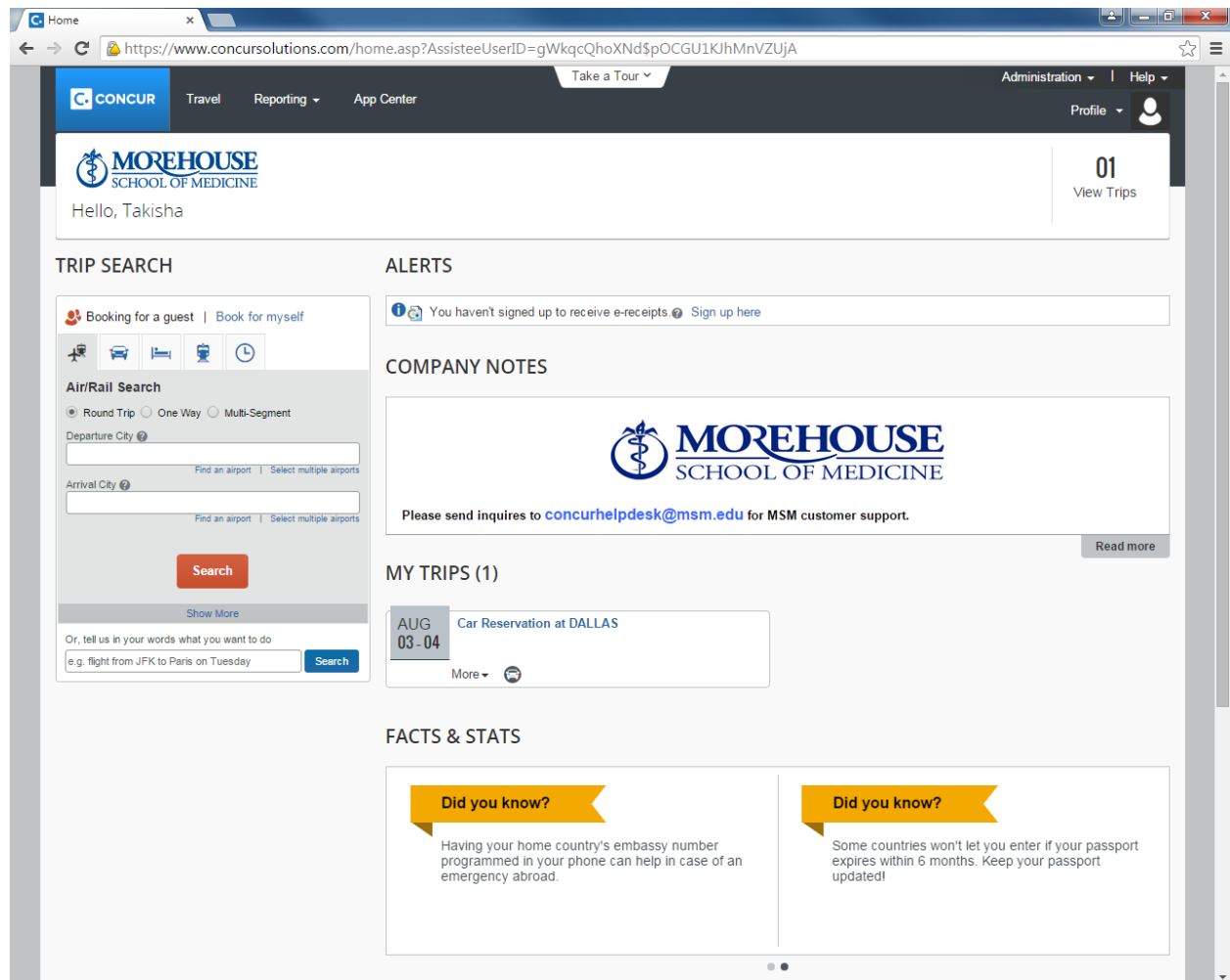
1. Click **Profile**
2. Under **Administer for Another User**, select the name of the employee that you'd like to book travel for.



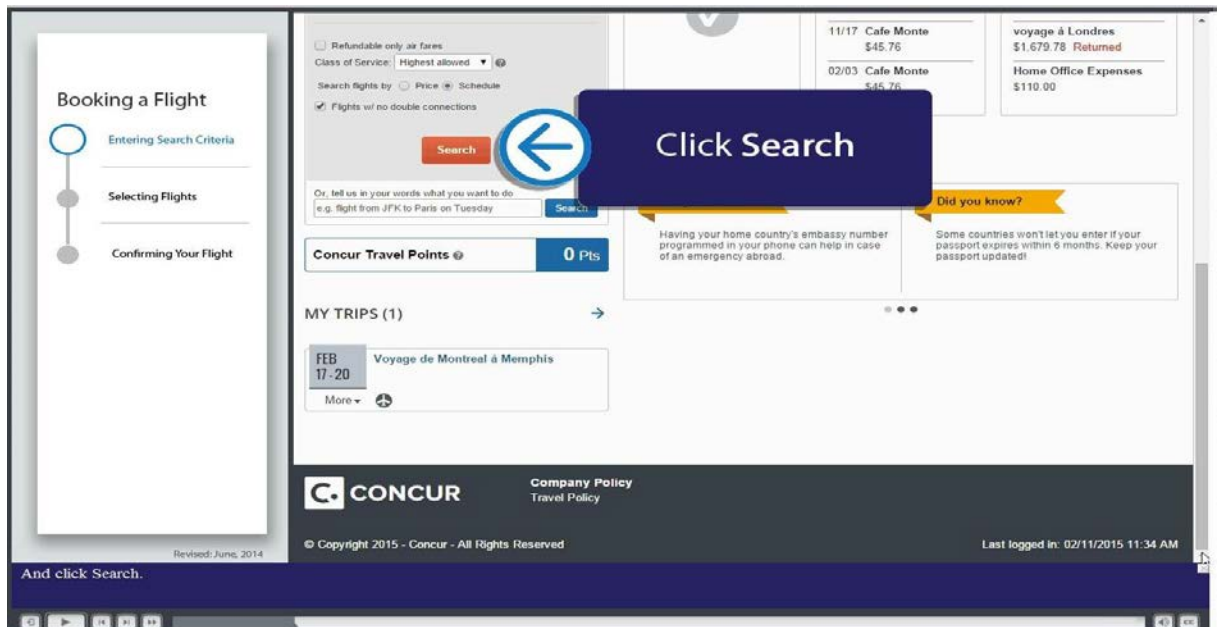
3. Enter your search criteria, such as type of trip, departure city and date, and arrival city and date.
4. **Follow steps 2-7** in the Booking a Flight for Myself section

## Steps: Booking a Flight for a Guest or Student

1. Make sure the **Booking for a Guest** tab is selected.
  - Enter your search criteria, such as type of trip, departure city and date, and arrival city and date.



## 2. Click Search



- You will see a list of flights on the **Shop by Fares** tab. To filter the results, select a column, row, or cell in the airline grid at the top of the results page or use the sliding scales on the left.

**Booking a Flight**

- Entering Search Criteria
- Selecting Flights
- Confirming Your Flight

**Trip Summary**

Seattle, WA To Memphis, TN  
Thu, Apr 9 - Sun, Apr 12

**Select Flights**

Round Trip  
SEA - MEM  
Outbound: Thu, 04/09/2015  
Return: Sun, 04/12/2015

**Finalize Trip**

Change Flight Search

Outbound - Thu, Apr 9

Depart: 06:06 AM - 11:50 AM  
Arrive: 03:07 PM - 11:48 PM

Display Settings  
Hide Propeller Planes

Airport Filters

**Baggage Fee Policies**

NOTE: Please use schedule page to select your flights.

Outbound | Return

Sorted By: Depart - Earliest

Seattle, WA - Thu, Apr 9  
Displaying: 33 out of 33 results.

Carrier	Depart	Arrive	Stops	Class	Seat Map
Delta #0022 Delta #2939	SEA 06:06 am → DTW 01:15 pm 0 DTW 02:00 pm → MEM 03:07 pm 0	Economy Economy			
Quote for Price	7h 1m; Boeing 737-800, Canadair Regional Jet 900 (Worlspan)				
Delta #1588 Delta #1261	SEA 06:22 am → ATL 02:04 pm 0 ATL 03:09 pm → MEM 03:35 pm 0	Economy Economy			
Quote for Price	7h 12m; Boeing 737-900, McDonnell Douglas MD-80 (Worlspan)				

You will see a list of flights on the Shop by Fares tab. To filter the results, select a column, row, or cell in the airline grid at the top of the results page or use the sliding scales on the left.

- The **More Like This** link allows you to view separate outbound and return flight. If you select **Shop by Schedule** tab, you will be able to select your outbound and return flights separately options as well.

MEM - Memphis Intl - Memphis, TN

Find an airport | Select multiple airports

Departure  
04/09/2015 dep 09:00 am ± 3

Return  
04/12/2015 dep 03:00 pm ± 3

☐ Refundable only air fares

Class of Service: Highest allowed

Search flights by ☐ Price ☒ Schedule

☒ Flights w/ no double connections

**Search**

Outbound - Thu, Apr 9

Depart: 06:05 AM - 11:48 AM  
Arrive: 03:07 PM - 11:48 PM

**Select** Delta MEM 12:00 pm → SEA 07:55 pm 1 9h 55m

Remove More like this Show details

Shop by Fares | Shop by Schedule

Sorted By: Price - Low to High

**Expand All Details**

Displaying: 158 out of 159 results.

Price	Carrier	Depart	Arrive	Stops	Duration
\$518.70 <b>Select</b>	US Airways† + 299 Pts + Operated by American Airlines	SEA MEM 08:15 am → 04:02 pm	MEM SEA 06:37 pm → 12:05 am	1	8h 22m 1 10h 3m
Compare		More like this  Show details			
\$518.70 <b>Select</b>	American Airlines	SEA MEM 08:15 am → 04:02 pm	MEM SEA 06:37 pm → 12:05 am	1	8h 22m 1 10h 3m
Compare		More like this  Show details			



- The **Select** button appears in green, yellow, or red.
  - Green indicates a preferred vendor or flight.
  - Yellow indicates a flight that is out of policy.
    - Note: You will have to provide an explanation on your expense report to explain this choice.
  - Red indicates an airline/flight that is prohibited.















Shop by Fares | Shop by Schedule

Sorted By: Price - Low to High

Expand All Details

Displaying: 158 out of 159 results.

<< Previous | Page: 1 of 16 | Next >> | All

Price	Carrier	Depart	Arrive	Stops	Duration
<b>\$518.70</b>	 US Airways†	SEA 08:15 am MEM 04:02 pm	→ MEM 06:37 pm → SEA 12:05 am	1	8h 22m
<b>Select</b> ✓				1	10h 3m
+ 299 Pts † Operated by American Airlines					
Compare			More like this +	Show details ✓	
<b>\$518.70</b>	 American Airlines	SEA 08:15 am MEM 04:02 pm	→ MEM 06:37 pm → SEA 12:05 am	1	8h 22m
<b>Select</b> ✓				1	10h 3m
+ 299 Pts					
Compare			More like this +	Show details ✓	
<b>\$518.70</b>	 US Airways  American Airlines	SEA 08:15 am MEM 04:02 pm	→ MEM 06:37 pm → SEA 12:05 am	1	8h 22m
<b>Select</b> ⚠				1	10h 3m
+ 299 Pts					
Compare			More like this +	Show details ✓	
<b>\$1,082.70</b>	 American Airlines  US Airways†	SEA 08:15 am MEM 04:02 pm	→ MEM 06:37 pm → SEA 12:05 am	1	8h 22m
<b>Select</b> ⚠				1	10h 3m
+ 299 Pts † Operated by American Airlines					
Compare			More like this +	Show details ✓	

- To view more details for a particular flight, click **Show Details**.

MEM - Memphis Intl - Memphis, TN

Find an airport | Select multiple airports

Departure: 04/09/2015 dep 09:00 am ± 3

Return: 04/12/2015 dep 03:00 pm ± 3

☐ Refundable only air fares

Class of Service: Highest allowed

Search flights by: ☐ Price ☒ Schedule

☒ Flights w/ no double connections

Search

Outbound - Thu, Apr 9

Depart: 06:05 AM - 11:46 AM

Arrive: 03:07 PM - 11:46 PM

Return - Sun, Apr 12

Depart: 12:00 PM - 04:40 PM

Arrive: 05:50 PM - 01:46 AM

Price

\$518.70 - \$987.20

Click Show Details

Remove

More like this

Show details

Shop by Fares | Shop by Schedule | Sorted By: Price - Low to High

Expand All Details

Displaying: 158 out of 159 results.

Price	Carrier	Depart	Arrive	Stops	Duration
\$518.70	US Airways†	SEA 08:15 am → MEM 06:37 pm	1	8h 22m	
<b>Select</b> ✓		MEM 04:02 pm → SEA 12:05 am	1	10h 3m	
+ 299 Pts † Operated by American Airlines					
Compare	WiFi	More like this	Show details		
\$518.70	American Airlines	SEA 08:15 am → MEM 06:37 pm	1	8h 22m	
<b>Select</b> ✓		MEM 04:02 pm → SEA 12:05 am	1	10h 3m	
+ 299 Pts					
Compare	WiFi	More like this	Show details		
\$518.70	US Airways American Airlines	SEA 08:15 am → MEM 06:37 pm	1	8h 22m	
<b>Select</b> ⚠		MEM 04:02 pm → SEA 12:05 am	1	10h 3m	
+ 299 Pts					
Compare	WiFi	More like this	Show details		
\$1,082.70	American Airlines US Airways†	SEA 08:15 am → MEM 06:37 pm	1	8h 22m	
<b>Select</b> ⚠		MEM 04:02 pm → SEA 12:05 am	1	10h 3m	
+ 299 Pts † Operated by American Airlines					
Compare	WiFi	More like this	Show details		



- In the flight details, you can view the flight information and fare rules, select a seat, and, if needed, add or choose a different frequent flyer program.
- Click the seat map icon to open a popup window that shows available seating for the flight.

Compare More like this Hide details

**Outbound flight:** Seattle, WA (SEA) - Memphis, TN (MEM) Thu, Apr 9

#0249	Seattle Tacoma Intl Ar... (SEA) Depart: Thursday, 08:15 am	Dallas Ft Worth Intl (DFW) Arrive: Thursday, 02:06 pm	
Stops: 0 Duration: 3h 51m Economy: Q Boeing 737-800			
#5685	Dallas Ft Worth Intl (DFW) Depart: Thursday, 05:00 pm	Memphis Intl (MEM) Arrive: Thursday, 06:37 pm	
Stops: 0 Duration: 1h 37m Economy: Q Canadair Regional Jet 900			

**Return flight:** Memphis, TN (MEM) - Seattle, WA (SEA) Sun, Apr 12

#1389	Memphis Intl (MEM) Depart: Sunday, 04:02 pm	Dallas Ft Worth Intl (DFW) Arrive: Sunday, 05:48 pm	
Stops: 0 Duration: 1h 46m Economy: V McDonnell Douglas MD-80			
#2254 Operated by American Airlines	Dallas Ft Worth Intl (DFW) Depart: Sunday, 09:46 pm	Seattle Tacoma Intl Ar... (SEA) Arrive: Monday, 12:05 am	
Stops: 0 Duration: 4h 19m Economy: V Boeing 737-800			

**US Airways - (Worldspan)**  
Fare Rules  
**Ticket non-refundable - penalties may apply**  
Change fee likely applies (plus fare difference, see fare rules)

☒ Use my default credit card: 'Corporate Card'

+ 299 Pts

3. When you have selected the best flight for your trip, click **Select**.

### Booking a Flight

- Entering Search Criteria
- Selecting Flights
- Confirming Your Flight

Class of Service: Highest allowed

Search flights by ☐ Price ☒ Schedule

☒ Flights w/ no double connections

**Outbound - Thu, Apr 9**

Depart: 06:05 AM - 11:48 AM

Arrive: 03:07 PM - 11:48 PM

**Return - Sun, Apr 12**

Depart: 12:00 PM - 04:40 PM

Arrive: 05:50 PM - 01:46 AM

**Price**

\$518.70 - \$987.20

**Display Settings**

☐ Hide Non-refundable Fares

☐ Hide Propeller Planes

☐ Depart/Return Same Airport Only

**Airport Filters**

Outbound:

Displaying: 158 out of 159 results Page: 1 of 16

Price	Carrier	Depart	Arrive	Stops	Duration
<b>\$518.70</b>	US Airways <sup>1</sup>	SEA MEM	MEM SEA	06:15 am 04:02 pm	06:37 pm 2:05 am
	+ 299 Pts				

Compare More like this Hide details

**Outbound flight:** Seattle, WA (SEA) - Memphis, TN (MEM) Thu, Apr 9

#0249	Seattle Tacoma Intl Ar... (SEA) Depart: Thursday, 08:15 am	Dallas Ft Worth Intl (DFW) Arrive: Thursday, 02:06 pm	
Stops: 0 Duration: 3h 51m Economy: Q Boeing 737-800			
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**Return flight:** Memphis, TN (MEM) - Seattle, WA (SEA) Sun, Apr 12

#1389	Memphis Intl (MEM) Depart: Sunday, 04:02 pm	Dallas Ft Worth Intl (DFW) Arrive: Sunday, 05:48 pm	
Stops: 0 Duration: 1h 46m Economy: V McDonnell Douglas MD-80			
#2254 Operated by American Airlines	Dallas Ft Worth Intl (DFW) Depart: Sunday, 09:46 pm	Seattle Tacoma Intl Ar... (SEA) Arrive: Monday, 12:05 am	
Stops: 0 Duration: 4h 19m Economy: V Boeing 737-800			

**Click Select**

+ 299 Pts

- In the **Review and Reserve Flight** section, you can review your flight itinerary.

**CONCUR** Requests **Travel** Expense Invoice Approvals Administration Help

Travel Price-to-Beat Trip Library Templates Tools

### Trip Summary

**Flights Selected**  
 Round Trip  
 SEA - MEM  
 Outbound: Thu, 04/09/2015  
 Return: Sun, 04/12/2015

**Finalize Trip**

## Review and Reserve Flight

### REVIEW FLIGHTS

**Outbound flight: Seattle, WA (SEA) - Memphis, TN (MEM) Thu, Apr 9**

<b>US Airways #0249</b> Operated by American Airlines	<b>Seattle Tacoma Intl Ar... (SEA)</b> Depart: Thursday, 08:15 am Stops: 0 Duration: 3h 51m Economy: Q Boeing 737-800	<b>Dallas Ft Worth Intl (DFW)</b> Arrive: Thursday, 02:06 pm
<b>US Airways #5685</b> Operated by American Airlines	<b>Dallas Ft Worth Intl (DFW)</b> Depart: Thursday, 05:00 pm Stops: 0 Duration: 1h 37m Economy: Q Canadair Regional Jet 900	<b>Memphis Intl (MEM)</b> Arrive: Thursday, 06:37 pm

**Return flight: Memphis, TN (MEM) - Seattle, WA (SEA) Sun, Apr 12**

<b>US Airways #1389</b> Operated by American Airlines	<b>Memphis Intl (MEM)</b> Depart: Sunday, 04:02 pm Stops: 0 Duration: 1h 46m Economy: V McDonnell Douglas MD-80	<b>Dallas Ft Worth Intl (DFW)</b> Arrive: Sunday, 05:48 pm
<b>US Airways #2254</b> Operated by American Airlines	<b>Dallas Ft Worth Intl (DFW)</b> Depart: Sunday, 09:46 pm Stops: 0 Duration: 4h 19m Economy: V Boeing 737-800	<b>Seattle Tacoma Intl Ar... (SEA)</b> Arrive: Monday, 12:05 am

- From here, you can update your personal information, view the seat map, review the price summary information, and select your payment method.
- You will also be asked **to enter the Guest information** in this section.

### ENTER TRAVELER INFORMATION

Enter the name of the guest traveler you're booking the trip for. The guest's trip will be subjected to the "Guest Class" policy, or in its absence, the policy which applies to you. Once the trip is booked, it will show up on your Travel home page and be assigned to your account. When you view the itinerary, you will see the traveler's name on the itinerary.

**Please make certain that the first and last names shown below are identical to those on the photo identification that the guest traveler will be presenting at the airport.** Due to increased airport security, the guest may be turned away at the gate if the name on their identification does not match the name on their ticket.

#### Guest Traveler

☒ Manual Entry ☐ Look up a previous guest by name:

Title  Legal First Name  Middle Name (on ID)  ☐ No Middle Name Legal Last Name

Gender  Date Of Birth

Known Traveler Number  DHS Redress No.

Phone  Email

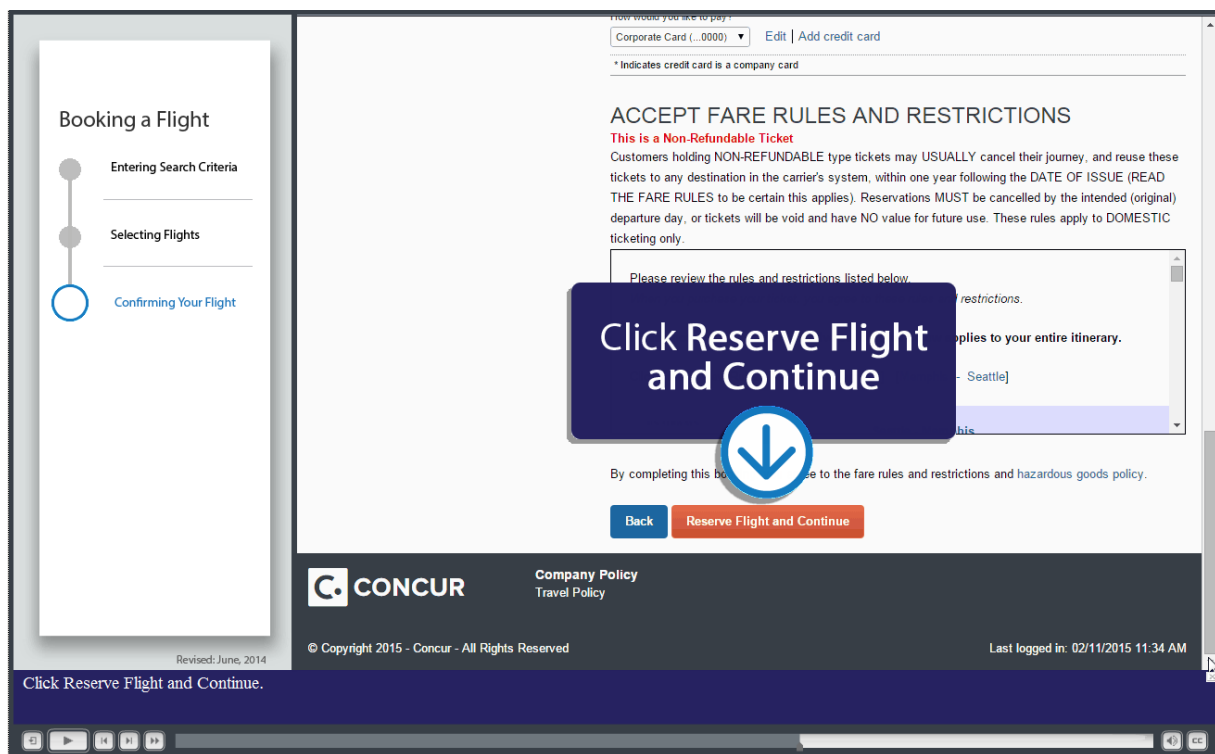
Frequent Flyer Programs [Add a Program](#)

For US Airways

### SEAT ASSIGNMENT

Seats will be automatically selected based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete. [View seatmap](#)

4. Review and accept the airfare rules and restrictions. Click **Reserve Flight and Continue**.



- You will see your complete travel itinerary. From this page, you can also choose to add a car or hotel to your itinerary.
  - Note: If you selected the options to book a car and/or hotel on the initial search page, you would be prompted to select a car or hotel for your trip before you see the Travel Details.

5. **Follow steps 5-7** in the Booking a Flight for Myself section

## CONCUR TRAVEL

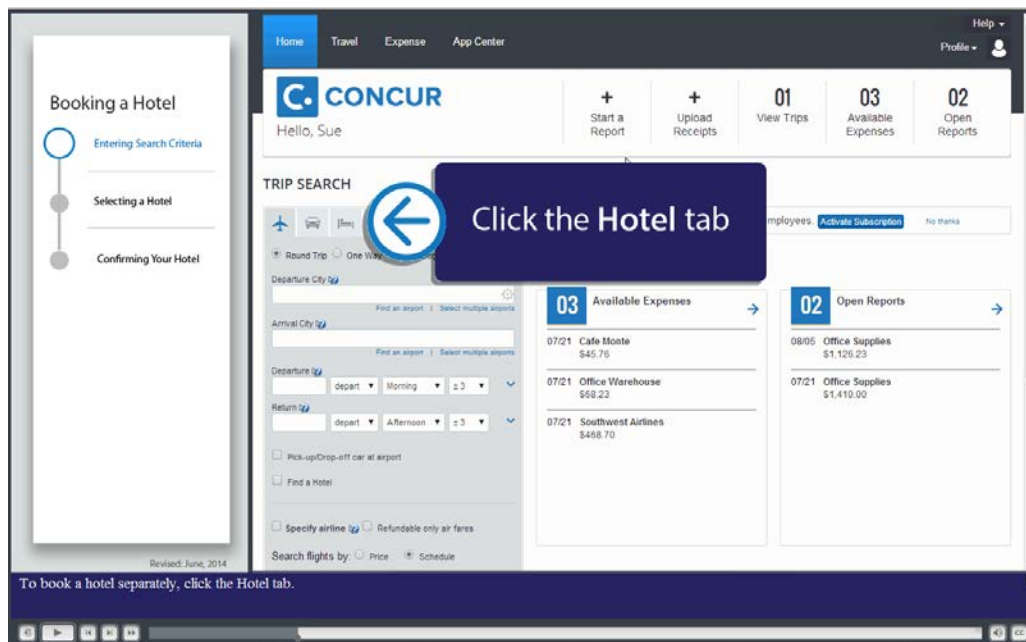
### RESERVING A HOTEL

#### Overview

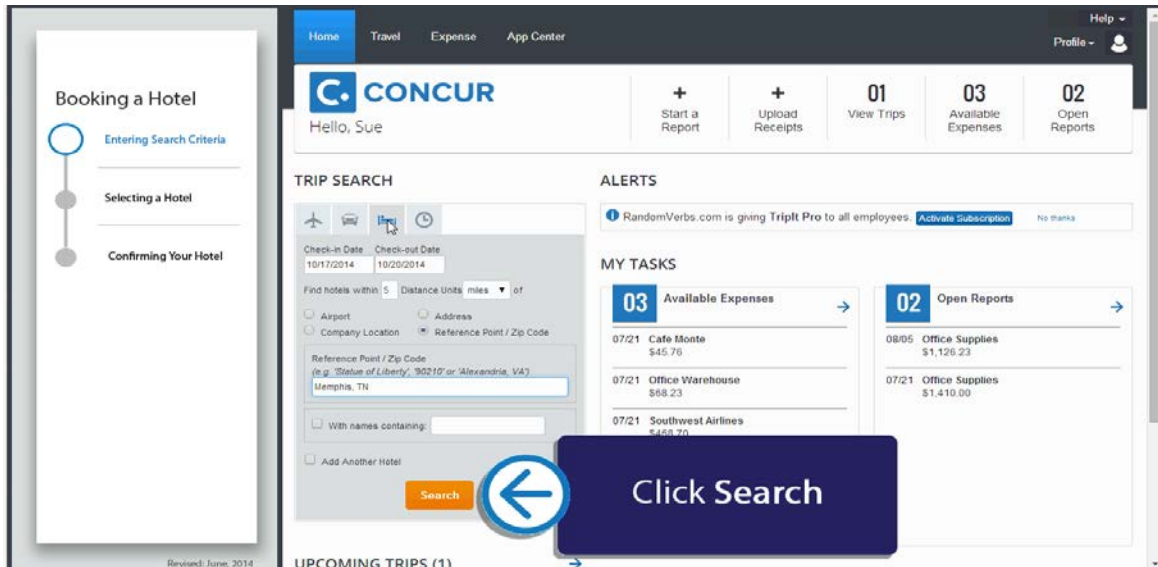
In this section you will learn how to book a hotel for yourself, another employee, a guest or a student. Once you decide which hotel you're are going to reserve, please call the hotel to ask if they can use card on file or if they need a physical card upon check out. If they can use card on file, MSM will pay for the hotel directly through the travel card place within your profile. If they need a physical card upon check out please use personal funds to pay for the hotel then request a reimbursement once you return from your trip.

#### Steps: Reserving a Hotel for Myself

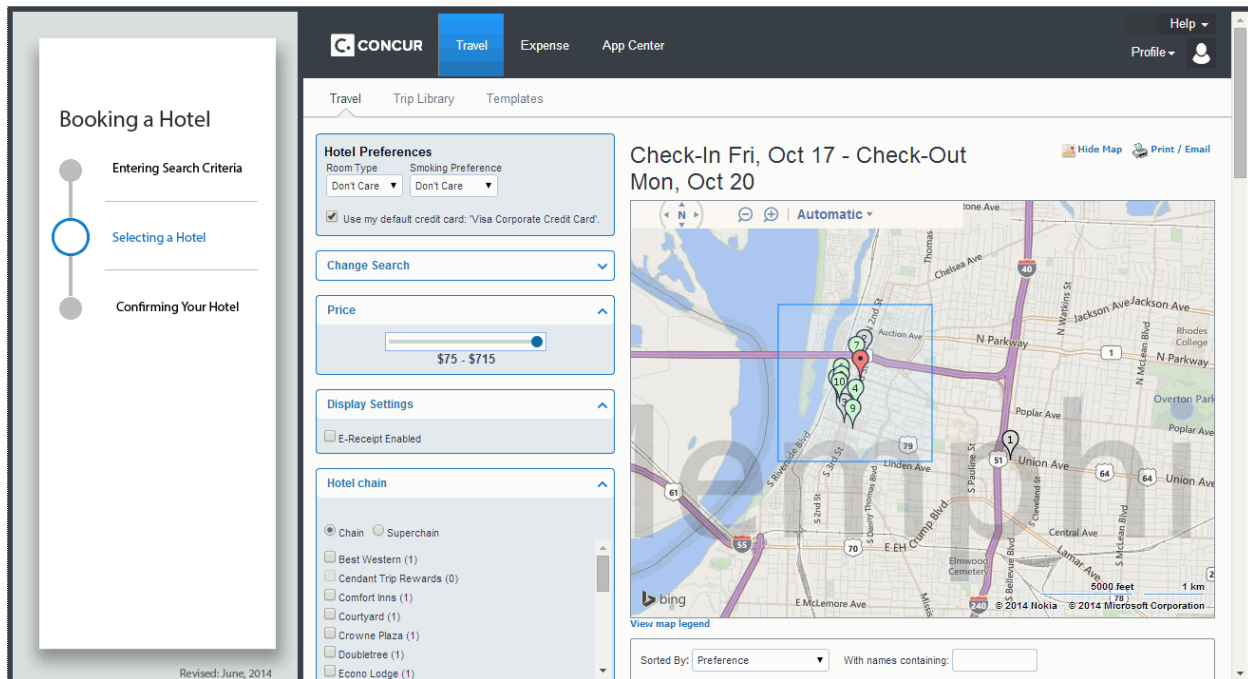
1. Click the Hotel  Icon then click the Book for Myself tab.



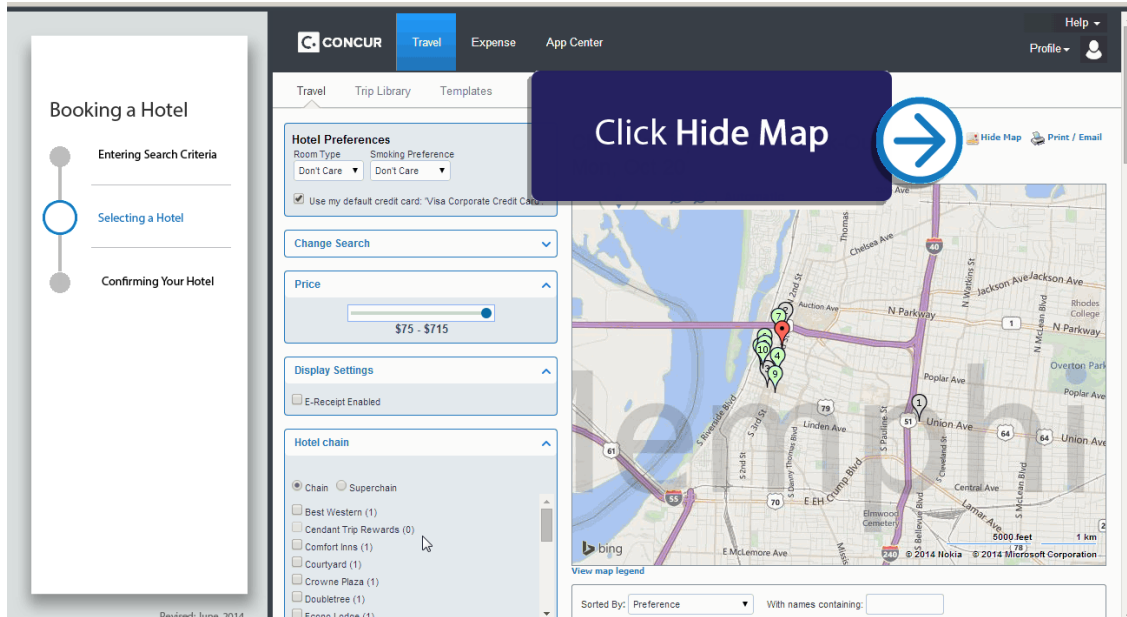
2. Enter the check-in and check-out dates (or click each field and use the calendar). Also choose your location, then click **Search**.



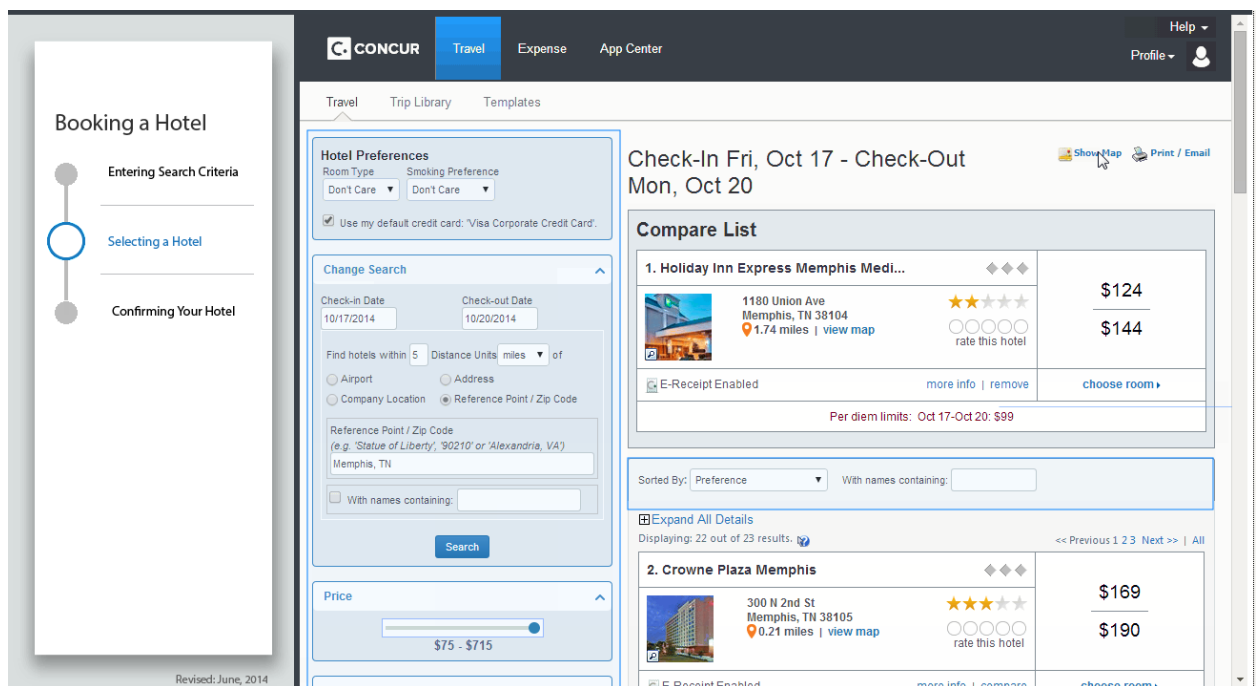
- On the hotel map, your search reference point is indicated by the red icon. The numbered icons are the first ten hotels located within the specified search radius.



- To hide the map , click **Hide Map**

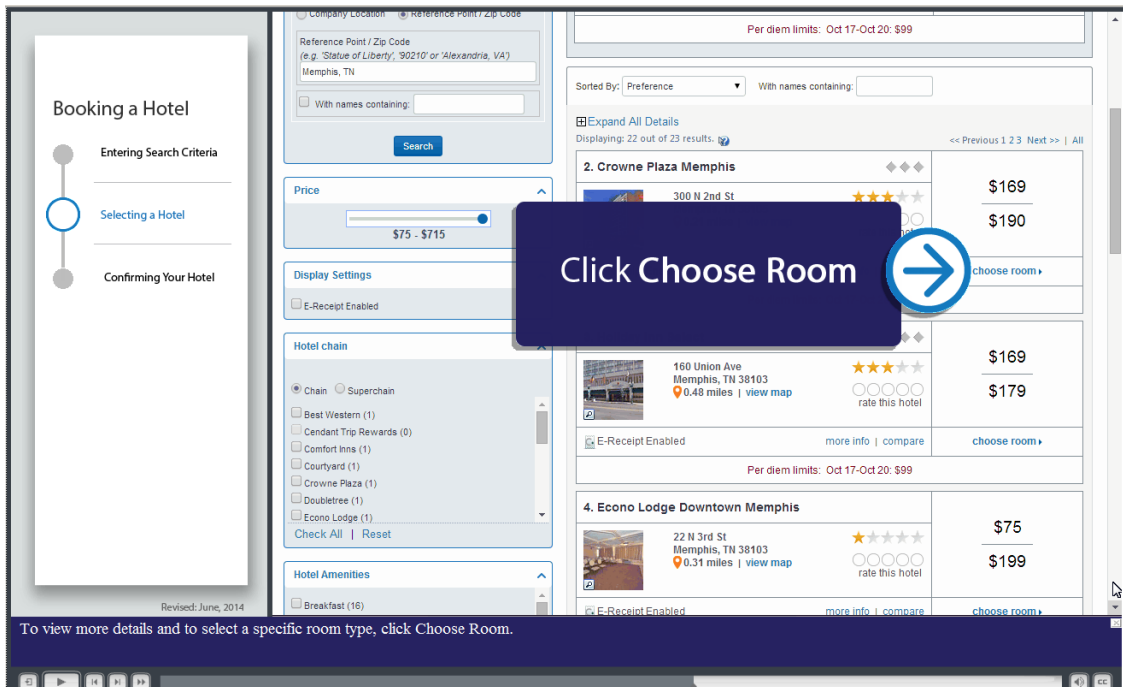


- Review the hotel search results. To filter the results, use the **Sorted by** and **With Names Containing** fields or use the options on the left.



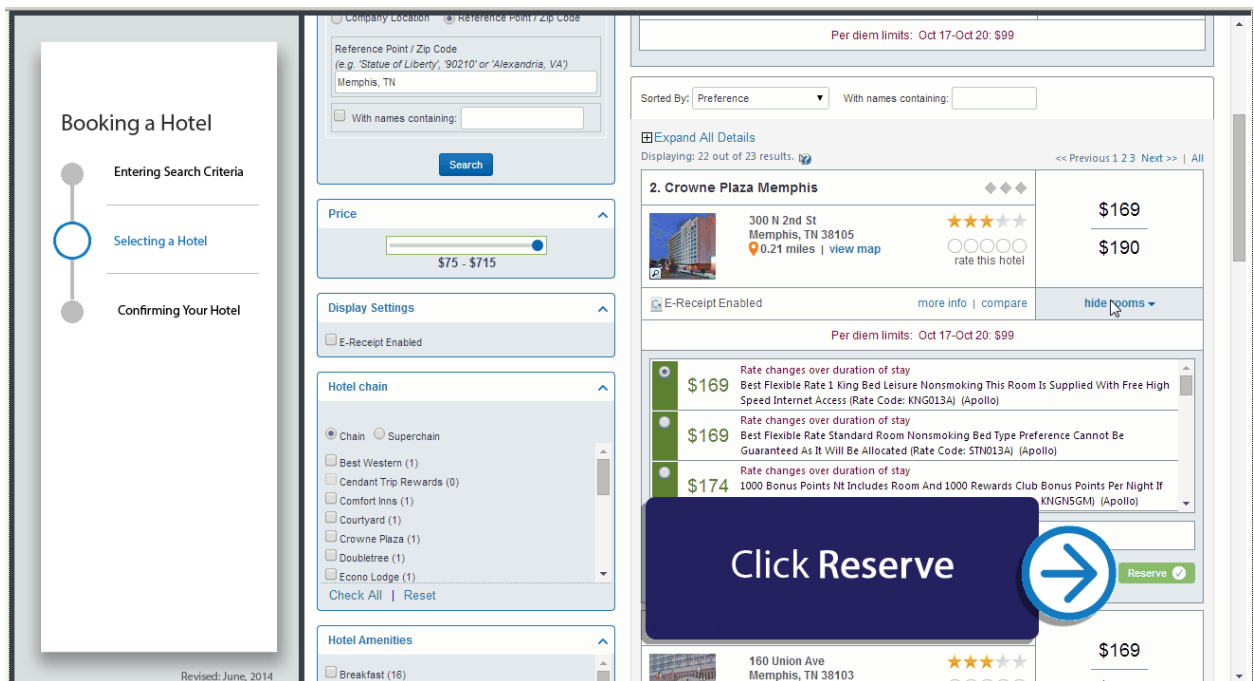
- To view more details and to select a specific room type, click **Choose Room**.





- You can view the hotel information, room rates, cancellation policy, and, if needed, add or choose a different hotel program.

4. To reserve a room, click **Reserve**.



- You will see your complete hotel itinerary and can review the details.

The screenshot shows the Concur Travel Details page. On the left, a sidebar titled "Booking a Hotel" has three steps: "Entering Search Criteria", "Selecting a Hotel", and "Confirming Your Hotel" (which is highlighted with a blue circle). The main content area is titled "Travel Details" and contains a "Trip Overview" section. This section lists trip information: Trip Name (Hotel Reservation at MEMPHIS, TN, USA), Start Date (Oct 17, 2014), End Date (Oct 20, 2014), Created date (Jul 21, 2014), Description (No Description Available), Comments to Agent (DEMO. TEST TRIP. DO NOT BOOK. DO NOT CANCEL UNTIL AFTER JUL 21 9PM), Agency Record Locator (KW91XO), Reservation for (Sue Peterson), and Total Estimated Cost (\$599.47 USD). To the right of the overview is an "Add to your Itinerary" section with buttons for Car and Hotel. Below the overview is a "Reservations" section for Friday, October 17, 2014, listing the Crowne Plaza Memphis with its address and phone number. It also shows the checking in time (Fri Oct 17 16:00) and the confirmation number (64346208) with a status of "Confirmed".

- To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.

This screenshot shows the "Total Estimated Cost" section of the Concur interface. It displays the hotel name, checking in and out times, room details, and the total estimated cost of \$599.47 USD. A large blue overlay with the text "Click Next>>" and a right-pointing arrow is positioned over the "Next >>" button. The "Next >>" button is located next to a "Cancel" button. The footer of the page includes the Concur logo, copyright information for 2014, and a link to the Travel Policy.



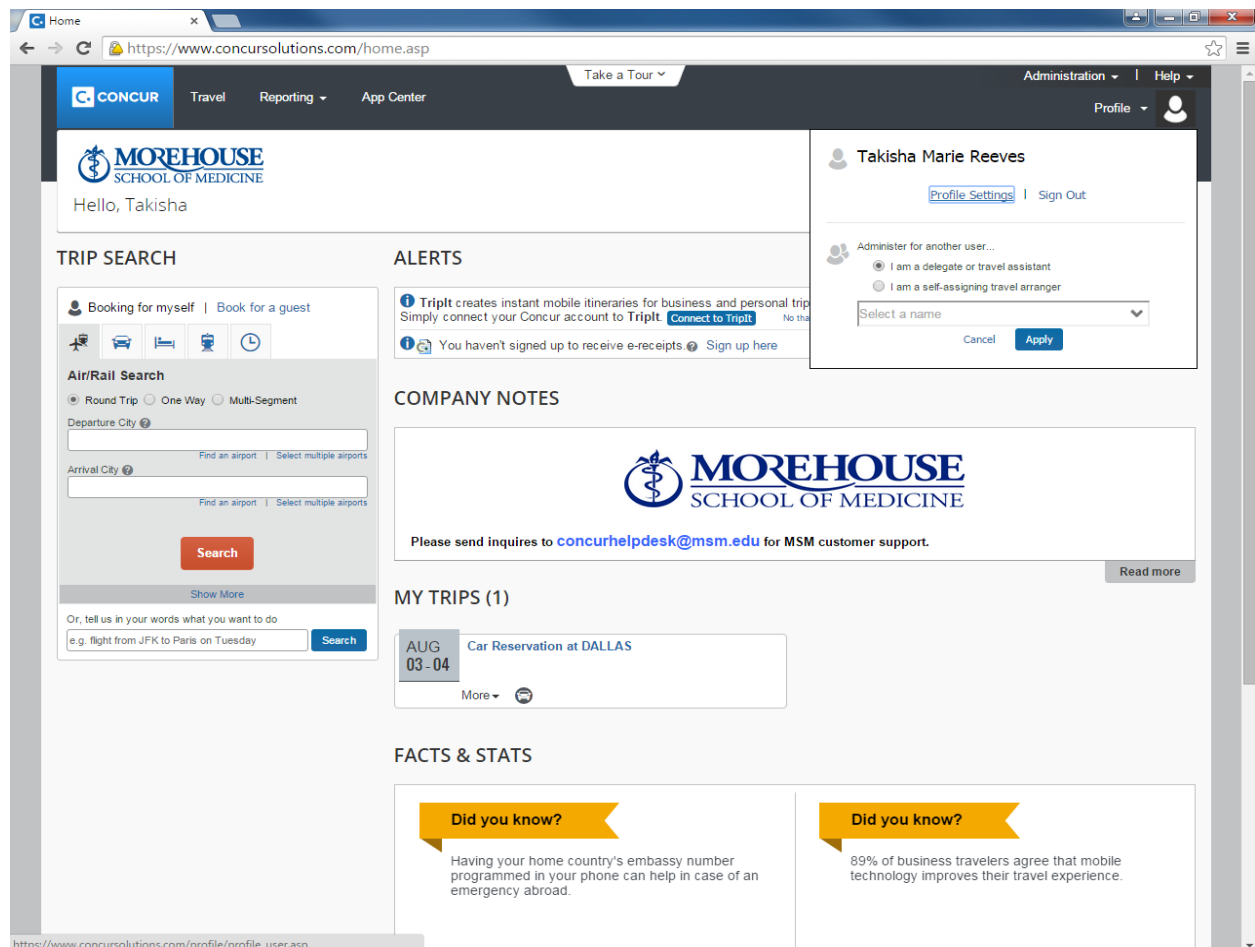
# Reserving a Hotel for another Employee

## Overview

In addition to booking for yourself, Concur also allows you to book for another employee. In order to book on behalf of another employee, the employee that plans to travel must first assign you as a **Travel Assistant**. Once the traveler has assigned you as a Travel Assistant, complete the following steps:

## Steps

1. Click **Profile**
2. Under **Administer for Another User**, select the name of the employee that you'd like to book travel for.




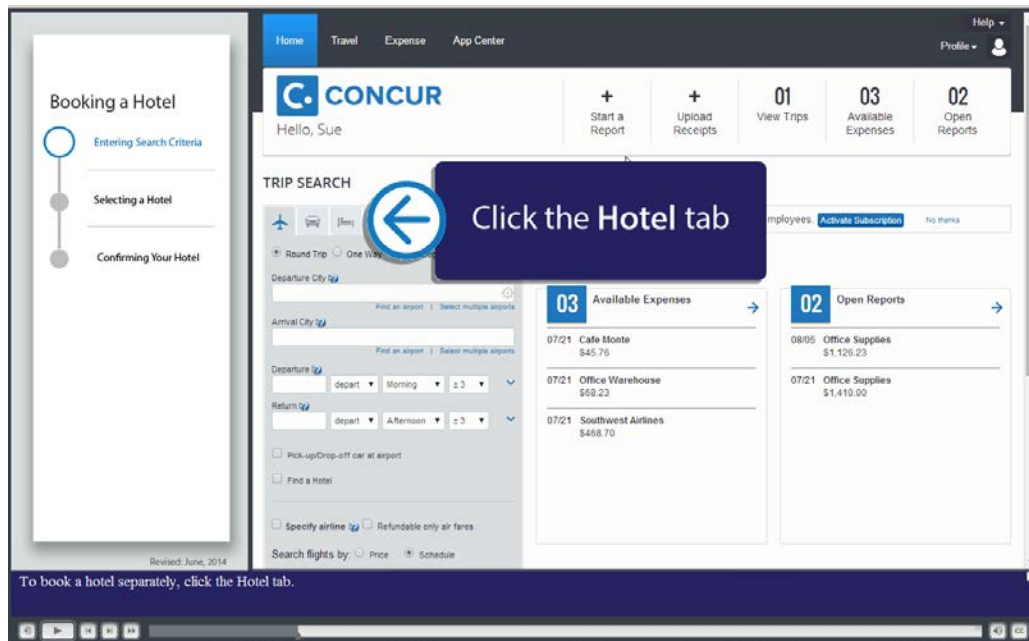
3. Click the Hotel  Icon.

4. Follow steps 2-5 in the Booking a Hotel for Myself section on

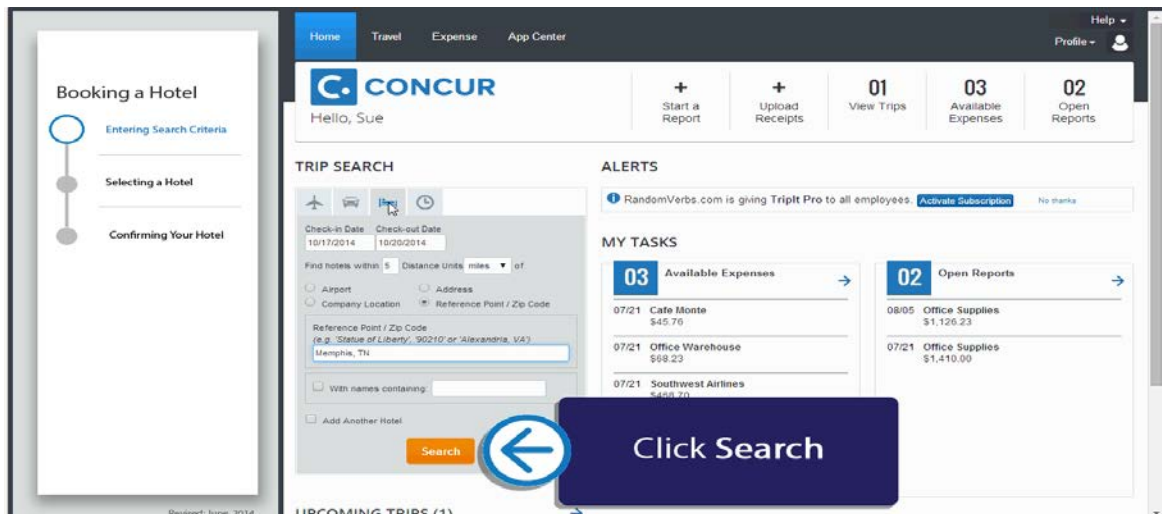
## Reserving a Hotel for a Guest or a Student

### Steps

1. Click the Hotel  Icon then click the Book for Myself tab.



2. Enter the check-in and check-out dates (or click each field and use the calendar). Also choose your location, then click **Search**.



- On the hotel map, your search reference point is indicated by the red icon. The

numbered icons are the first ten hotels located within the specified search radius.

Booking a Hotel

Entering Search Criteria

Selecting a Hotel

Confirming Your Hotel

Revised: June, 2014

CONCUR Travel Expense App Center

Travel Trip Library Templates

Hotel Preferences

Room Type: Don't Care Smoking Preference: Don't Care

☒ Use my default credit card: 'Visa Corporate Credit Card'

Change Search

Price

\$75 - \$715

Display Settings

☐ E-Receipt Enabled

Hotel chain

☒ Chain ☐ Superchain

- ☐ Best Western (1)
- ☐ Candiant Trip Rewards (0)
- ☐ Comfort Inns (1)
- ☐ Courtyard (1)
- ☐ Crowne Plaza (1)
- ☐ Doubletree (1)
- ☐ Econo Lodge (1)

Check-In Fri, Oct 17 - Check-Out Mon, Oct 20

Hide Map Print / Email

Map showing hotel locations (numbered 1-10) and surrounding streets.

Sorted By: Preference With names containing:

- To hide the map , click **Hide Map**

Click Hide Map

CONCUR Travel Expense App Center

Travel Trip Library Templates

Hotel Preferences

Room Type: Don't Care Smoking Preference: Don't Care

☒ Use my default credit card: 'Visa Corporate Credit Card'

Change Search

Price

\$75 - \$715

Display Settings

☐ E-Receipt Enabled

Hotel chain

☒ Chain ☐ Superchain

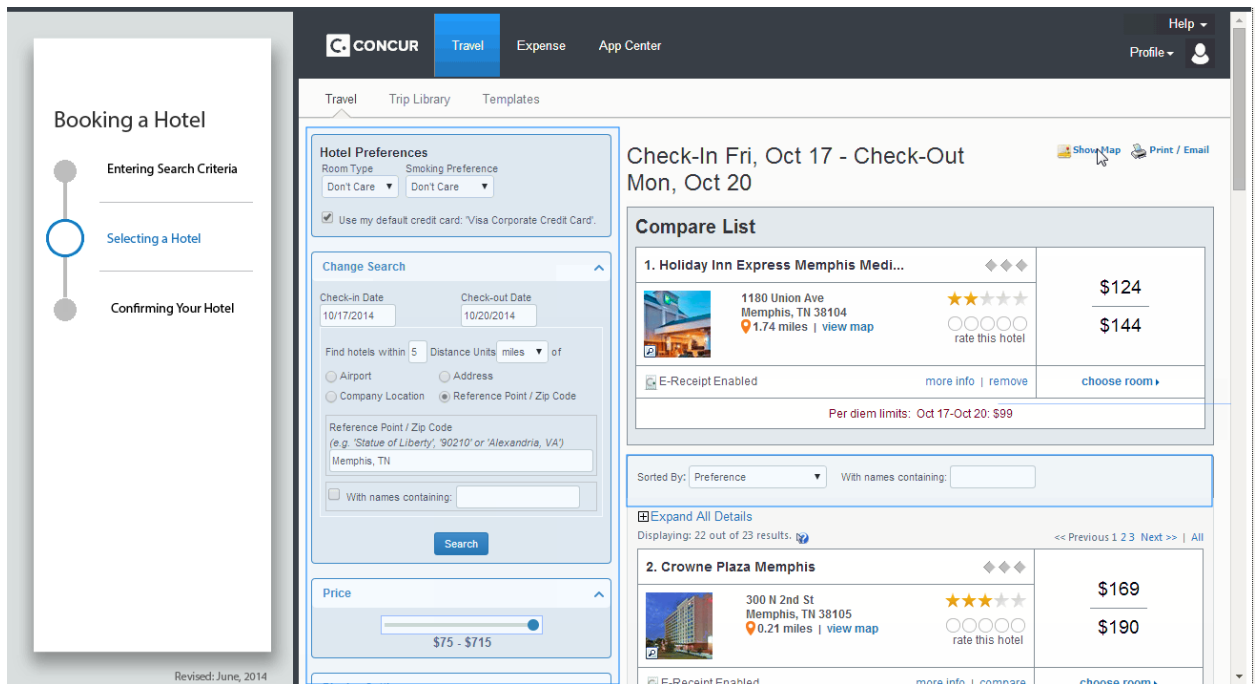
- ☐ Best Western (1)
- ☐ Candiant Trip Rewards (0)
- ☐ Comfort Inns (1)
- ☐ Courtyard (1)
- ☐ Crowne Plaza (1)
- ☐ Doubletree (1)
- ☐ Econo Lodge (1)

Map showing hotel locations (numbered 1-10) and surrounding streets.

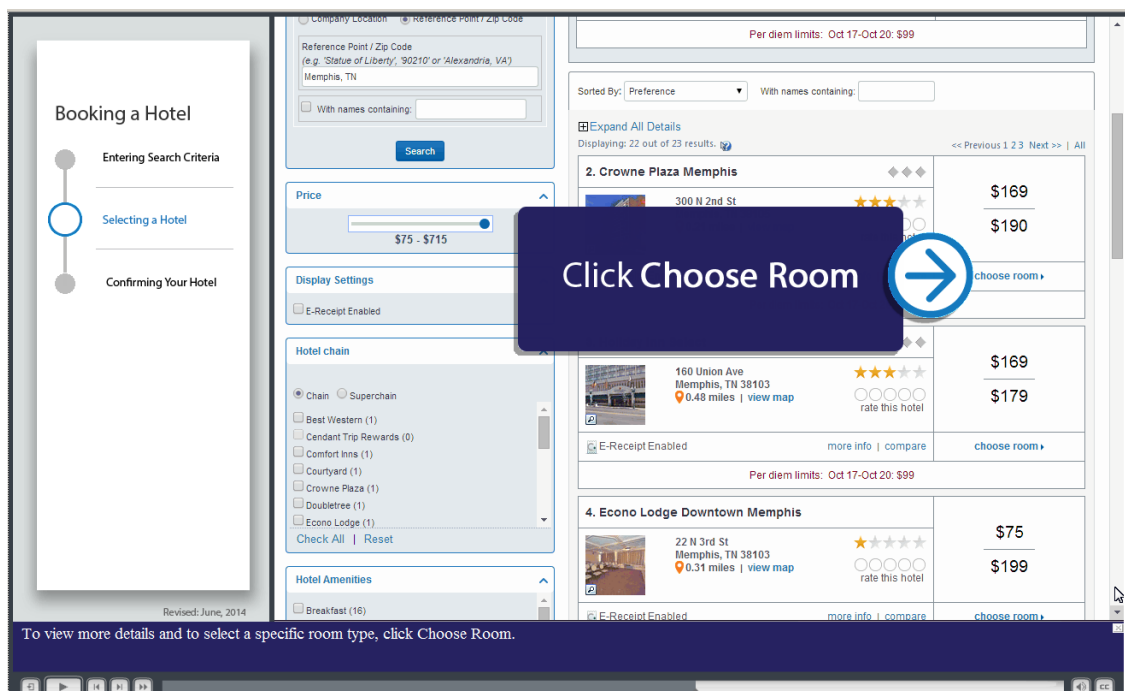
Sorted By: Preference With names containing:

- Review the hotel search results. To filter the results, use the **Sorted by** and **With**

Names Containing fields or use the options on the left.



3. To view more details and to select a specific room type, click **Choose Room**.



- You can view the hotel information, room rates, cancellation policy, and, if needed,

add or choose a different hotel program.

4. To reserve a room, click **Reserve**.

The screenshot shows the 'Booking a Hotel' interface. On the left, a sidebar contains a progress indicator with three steps: 'Entering Search Criteria', 'Selecting a Hotel' (highlighted with a blue circle), and 'Confirming Your Hotel'. The main content area includes a search bar with 'Reference Point / Zip Code' set to 'Memphis, TN' and a 'Search' button. Below the search bar are filters for 'Price' (\$75 - \$715), 'Display Settings' (E-Receipt Enabled), 'Hotel chain' (Chain selected, with options like Best Western, Crowne Plaza, etc.), and 'Hotel Amenities' (Breakfast). The hotel list displays '2. Crowne Plaza Memphis' with a price of \$169. A large blue callout box with a white arrow and the text 'Click Reserve' points to the 'Reserve' button. The bottom right corner shows the 'Reserve' button with a checkmark.

- You will see your complete hotel itinerary and can review the details.
- You will be asked to **enter the Guest or Student Information** during this step.

The screenshot shows the 'Travel Details' interface. The top navigation bar includes 'CONCUR', 'Travel' (highlighted), 'Expense', and 'App Center'. The left sidebar has a progress indicator with three steps: 'Entering Search Criteria', 'Selecting a Hotel', and 'Confirming Your Hotel' (highlighted with a blue circle). The main content area is titled 'Travel Details' and includes a 'Trip Overview' section with fields for 'Trip Name', 'Start Date', 'End Date', 'Created', 'Description', 'Comments to Agent', 'Agency Record Locator', 'Reservation for', and 'Total Estimated Cost'. Below this is a 'Reservations' section for 'Friday, October 17, 2014', showing a reservation for 'Crowne Plaza Memphis' with a price of \$169. A large blue callout box with a white arrow and the text 'Click Reserve' points to the 'Reserve' button. The bottom right corner shows the 'Reserve' button with a checkmark.

5. To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.

The screenshot displays the 'Booking a Hotel' process in the Concur system. On the left, a vertical progress bar indicates three steps: 'Entering Search Criteria', 'Selecting a Hotel', and 'Confirming Your Hotel', with the third step being the active one. The main content area shows reservation details for a stay from Friday, October 17 to Monday, October 20. The confirmation number is 64346208, and the status is 'Confirmed'. The total estimated cost is \$599.47 USD. A large blue callout box with the text 'Click Next>>' and a right-pointing arrow is overlaid on the bottom right of the reservation details. Below the callout, the 'Next >>' button is visible. The footer includes the Concur logo, copyright information for 2014, and a link to the Travel Policy.

**Booking a Hotel**

- Entering Search Criteria
- Selecting a Hotel
- Confirming Your Hotel**

901-525-1800

**Checking In: Fri Oct 17**  
16:00  
Room 1, Days 3, Guests 1

**Confirmation: 64346208**  
Status: **Confirmed**  
Rate Code: KNG013A

**Checking Out: Mon Oct 20**  
11:00

**Additional Information**  
Daily rate: \$189.00 USD  
Total rate: \$599.47 USD

**Room Details**  
Room Description: King bed(s)

**Cancellation Policy**  
Cancellation Fees may apply

**Total Estimated Cost**

Hotel:	\$599.47 USD
<b>Total Estimated Cost:</b>	<b>\$599.47 USD</b>

**Click Next>>**

**Next >>** **Cancel**

**CONCUR**  
© Copyright 2014 Concur / All Rights Reserved  
Travel Policy

Revised: June, 2014


## CONCUR TRAVEL

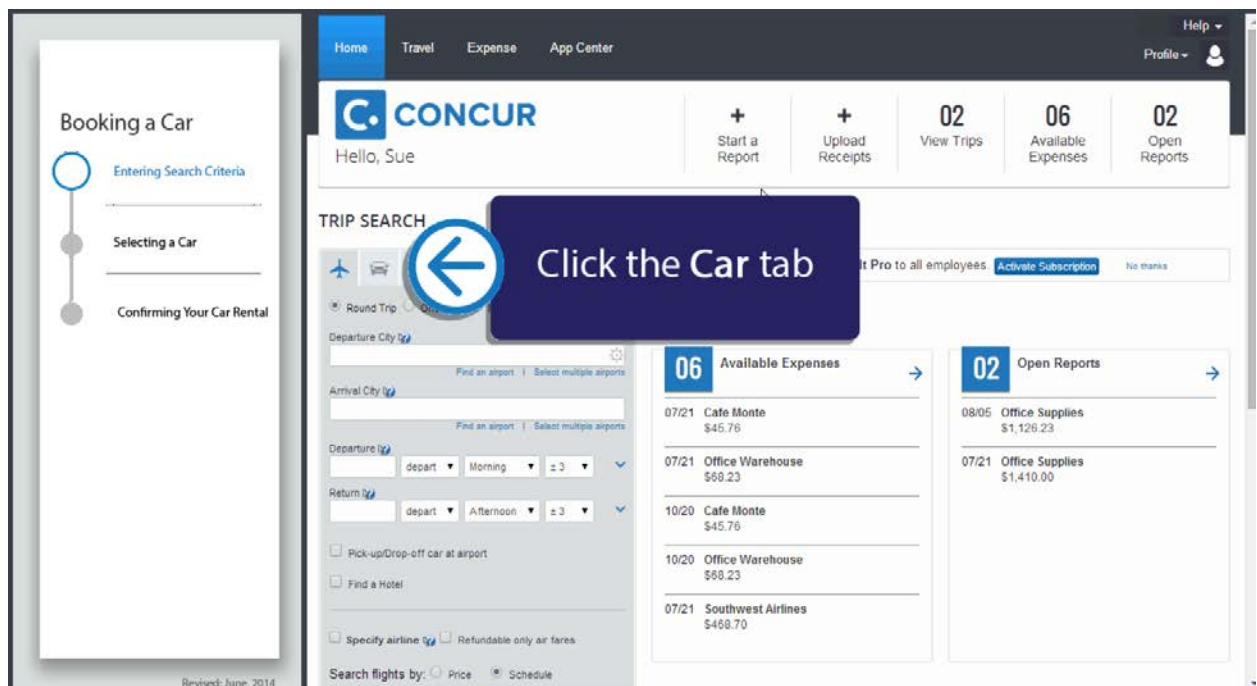
### RESERVING A RENTAL CAR

#### Overview

In this section you will learn how to reserve a rental car for yourself, another employee, a guest or a student.

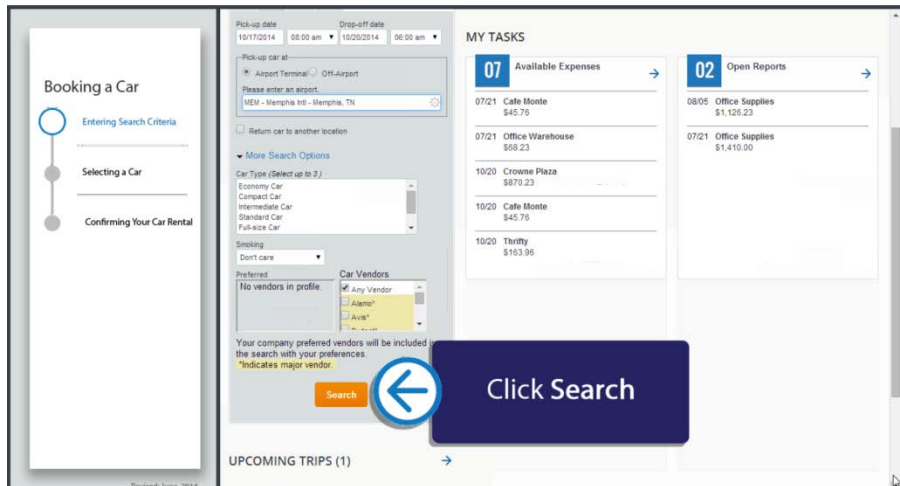
#### Steps: Reserving a car for Myself

1. Click the Car  icon then click the Book for Myself tab

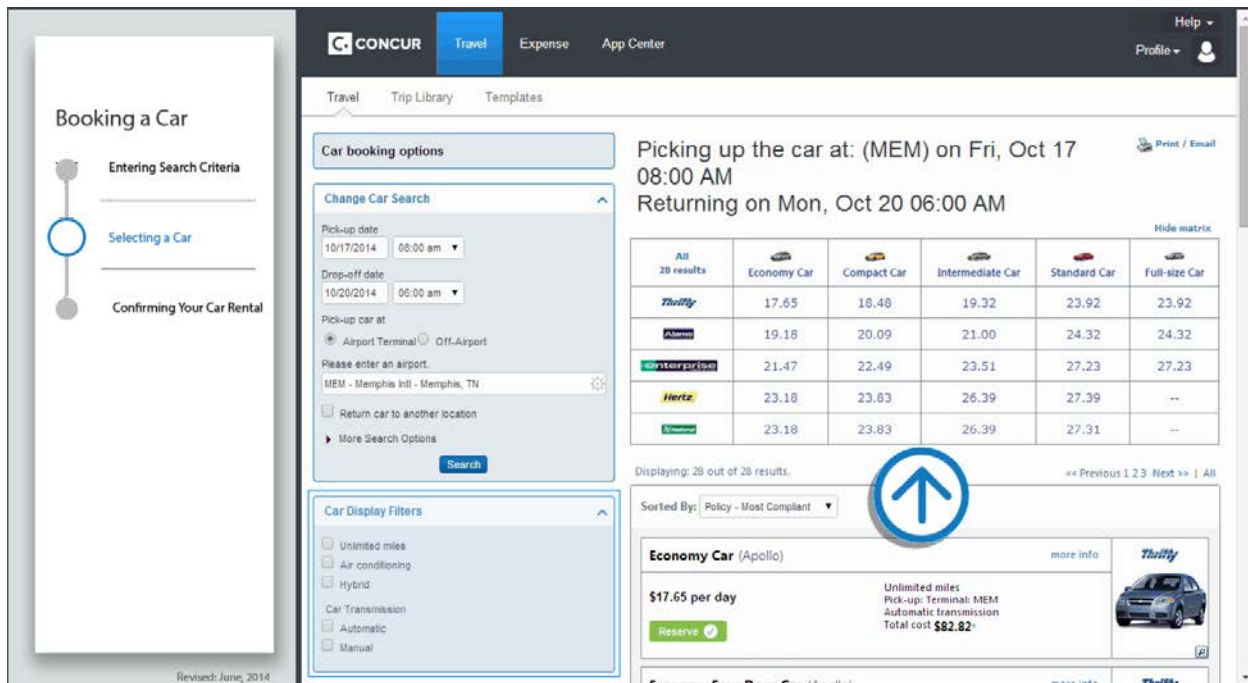


2. Enter your search criteria, such as pick-up and drop-off dates, location and other search options and then click **Search**.





- Review the car search results. To filter the results, select a column, row, or cell in the grid at the top of the results page or use the options on the left.



- To hide the results matrix and view more of the car results list, click Hide Matrix.



**Booking a Car**

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental

**Car booking options**

**Change Car Search**

Pick-up date: 10/17/2014 08:00 am

Drop-off date: 10/20/2014 06:00 am

Pick-up car at: ☒ Airport Terminal ☐ Off-Airport

Please enter an airport: MEM - Memphis Intl - Memphis, TN

☐ Return car to another location

[More Search Options](#)

[Search](#)

**Car Display Filters**

☐ Unlimited miles

☐ Air conditioning

☐ Hybrid

Car Transmission

☐ Automatic

☐ Manual

Picking up the car at: (MEM) on Fri, Oct 17 08:00 AM

Returning on Mon, Oct 20 06:00 AM

Displaying 28 out of 28 results.

Sorted By: Policy - Most Compliant

**Economy Car (Apollo)** [more info](#)

**\$17.65 per day**

Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$82.82**

[Reserve](#)

**Economy Four Door Car (Apollo)** [more info](#)

**\$17.65 per day**

Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$82.82**

[Reserve](#)

**Compact Four Door Car (Apollo)** [more info](#)

**\$18.48 per day**

Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$85.98**

[Reserve](#)

- Use the More info link to view more information about a rental car.

**Booking a Car**

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental

**Car booking options**

**Change Car Search**

Pick-up date: 10/17/2014 08:00 am

Drop-off date: 10/20/2014 06:00 am

Pick-up car at: ☒ Airport Terminal ☐ Off-Airport

Please enter an airport: MEM - Memphis Intl - Memphis, TN

☐ Return car to another location

[More Search Options](#)

[Search](#)

**Car Display Filters**

☐ Unlimited miles

☐ Air conditioning

☐ Hybrid

Car Transmission

☐ Automatic

☐ Manual

Picking up the car at: (MEM) on Fri, Oct 17 08:00 AM

Returning on Mon, Oct 20 06:00 AM

Displaying 28 out of 28 results.

Sorted By: Policy - Most Compliant

**Economy Car (Apollo)** [more info](#)

**\$17.65 per day**

Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$82.82**

[Reserve](#)

**Economy Four Door Car (Apollo)** [more info](#)

**\$17.65 per day**

Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$82.82**

[Reserve](#)

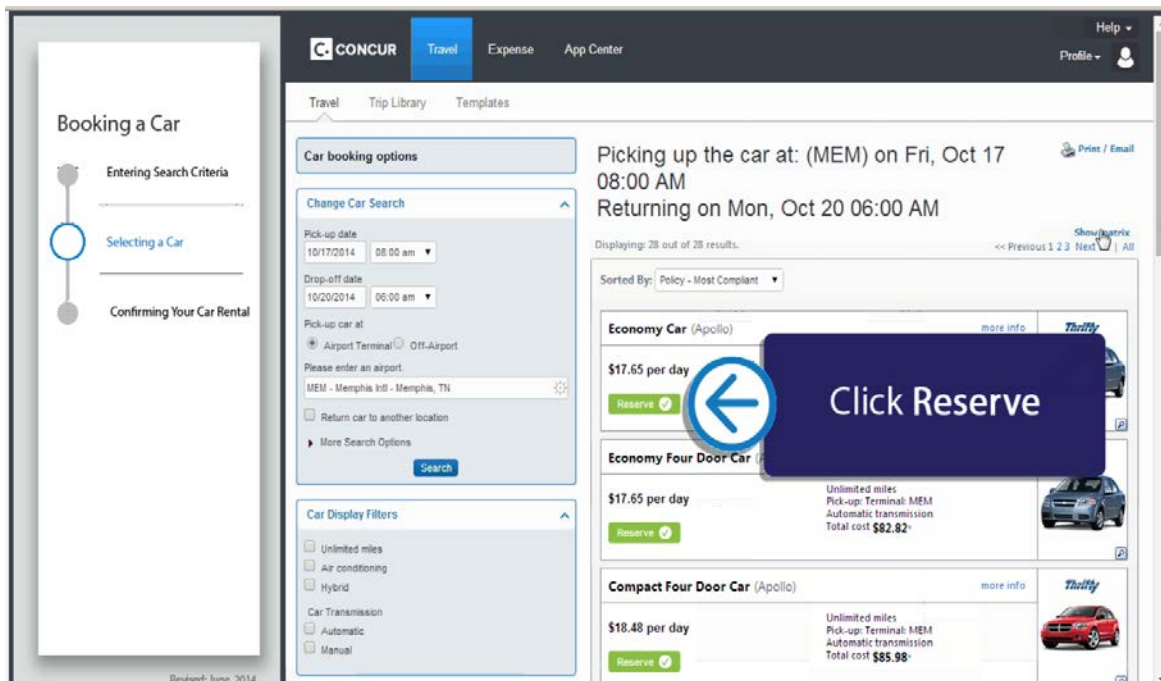
**Compact Four Door Car (Apollo)** [more info](#)

**\$18.48 per day**

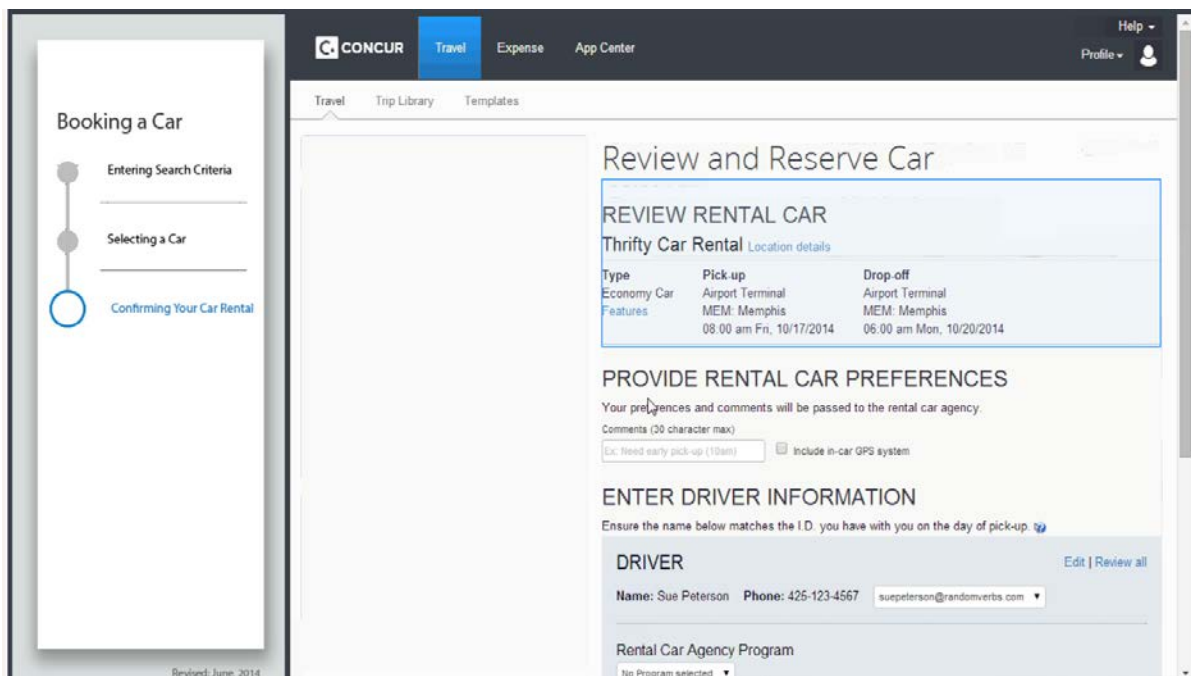
Unlimited miles  
Pick-up: Terminal: MEM  
Automatic transmission  
Total cost **\$85.98**

[Reserve](#)

3. To reserve a car, click **Reserve**.



- You will see your complete car rental itinerary and can add other information for the car rental, including car preferences and driver information.



- To continue with the reservation, click **Reserve Car and Continue**.

**Booking a Car**

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental**

**PROVIDE RENTAL CAR PREFERENCES**  
Your preferences and comments will be passed to the rental car agency.  
Comments (30 character max)  
[Ex: Need early pick-up (10am)] ☐ Include in-car GPS system

**ENTER DRIVER INFORMATION**  
Ensure the name below matches the I.D. you have with you on the day of pick-up. [Edit](#) | [Review all](#)

**DRIVER**

[Edit](#) | [Review all](#)

[@randomverbs.com](#)

**Click Reserve Car and Continue**

[Reserve Car and Continue](#)

**CONCUR** Company Policy Travel Policy  
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- On the Travel Details page, you can review your complete travel itinerary.

**CONCUR** Travel Expense App Center Help  
Profile

Travel Trip Library Templates

**Booking a Car**

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental**

**Travel Details**

**Trip Overview**

I want to... [Print Itinerary](#) [E-mail Itinerary](#)

Trip Name: Car Reservation at MEMPHIS [Edit](#)  
Start Date: Oct 17, 2014  
End Date: Oct 20, 2014  
Created: Jul 22, 2014, Sue Peterson (Modified: Jul 22, 2014)  
Description: (No Description Available) [Edit](#)  
Comments to Agent: DEMO. TEST TRIP. DO NOT BOOK. DO NOT CANCEL UNTIL AFTER JUL 22 3PM  
Agency Record Locator: MZD45G  
Reservation for: Sue Peterson  
Total Estimated Cost: \$82.82 USD [Details](#)

**Add to your Itinerary**

[Car](#) [Hotel](#)

**Reservations**

**Friday, October 17, 2014**

**Thrifty Car Rental at Memphis US (MEM)** [Change](#) | [Cancel](#)  
Pick-up at: Memphis US (MEM)

**Pick Up: 08:00 AM Fri Oct 17**  
Pick-up at: [Memphis US \(MEM\)](#)  
Number of Cars: 1

**Confirmation: G30C62**  
Status: Confirmed  
Rate Code: RDUE3

**Return: 06:00 AM Mon Oct 20**

Revised: June, 2014

- To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.

### Booking a Car

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental**

#### Thrifty Car Rental at: Memphis US (MEM)

[Change](#) | [Cancel](#)

Pick-up at: Memphis US (MEM)

**Pick Up: 08:00 AM** Fri Oct 17  
 Pick-up at: [Memphis US \(MEM\)](#)  
 Number of Cars: 1

**Confirmation: G30C6Z**  
 Status: Confirmed  
 Rate Code: RDUE3

**Return: 06:00 AM** Mon Oct 20  
 Returning to: [Memphis US \(MEM\)](#)

**Additional Details**  
 Rate: \$17.65 USD, unlimited miles  
 Total rate: \$82.82 USD

**Rental Details**  
 Economy / Car / Automatic transmission / Air conditioning

[Add to your Itinerary](#)

#### Total Estimated Cost

Car:	\$82.82 USD
<b>Total Estimated Cost:</b>	<b>\$82.82 USD</b>

the trip that is instant

**Click Next>>**

[Next >>](#) [Cancel](#)

**CONCUR** Company Travel Policy

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Revised: June, 2014

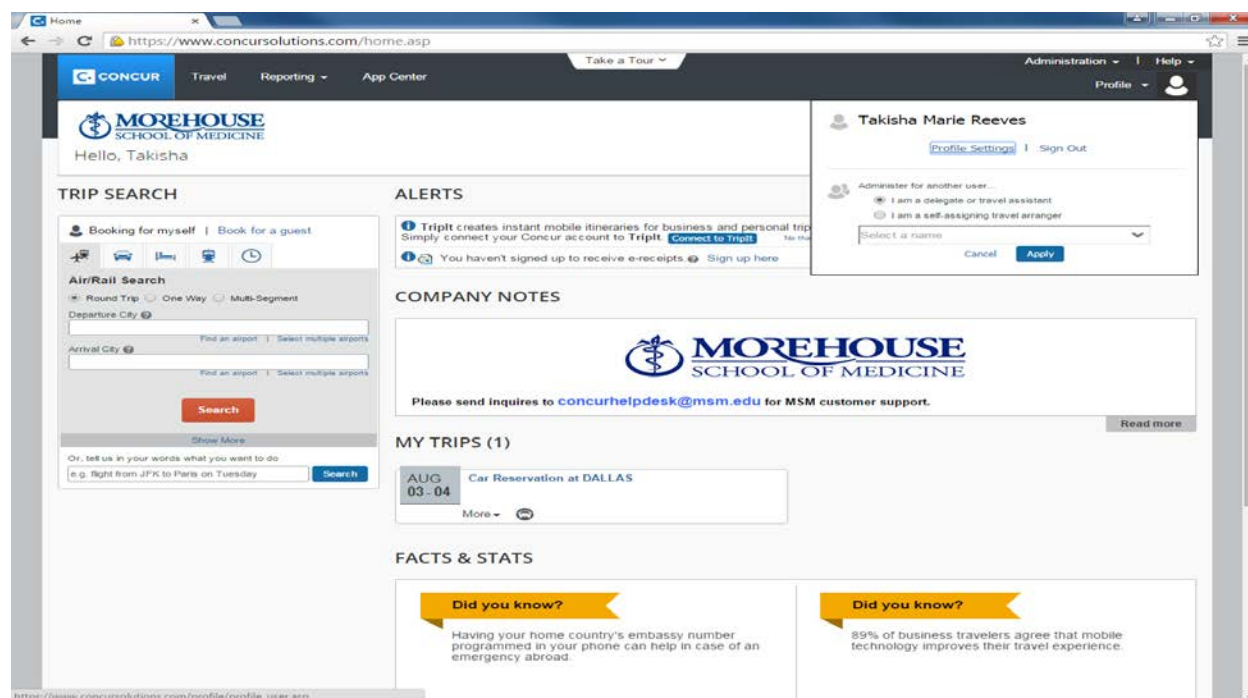
## RESERVING A RENTAL CAR FOR ANOTHER EMPLOYEE

### Overview

In order to book on behalf of another employee, the employee that plans to travel must first assign you as a **Travel Assistant**. Once the traveler has assigned you as a Travel Assistant, complete the following steps:

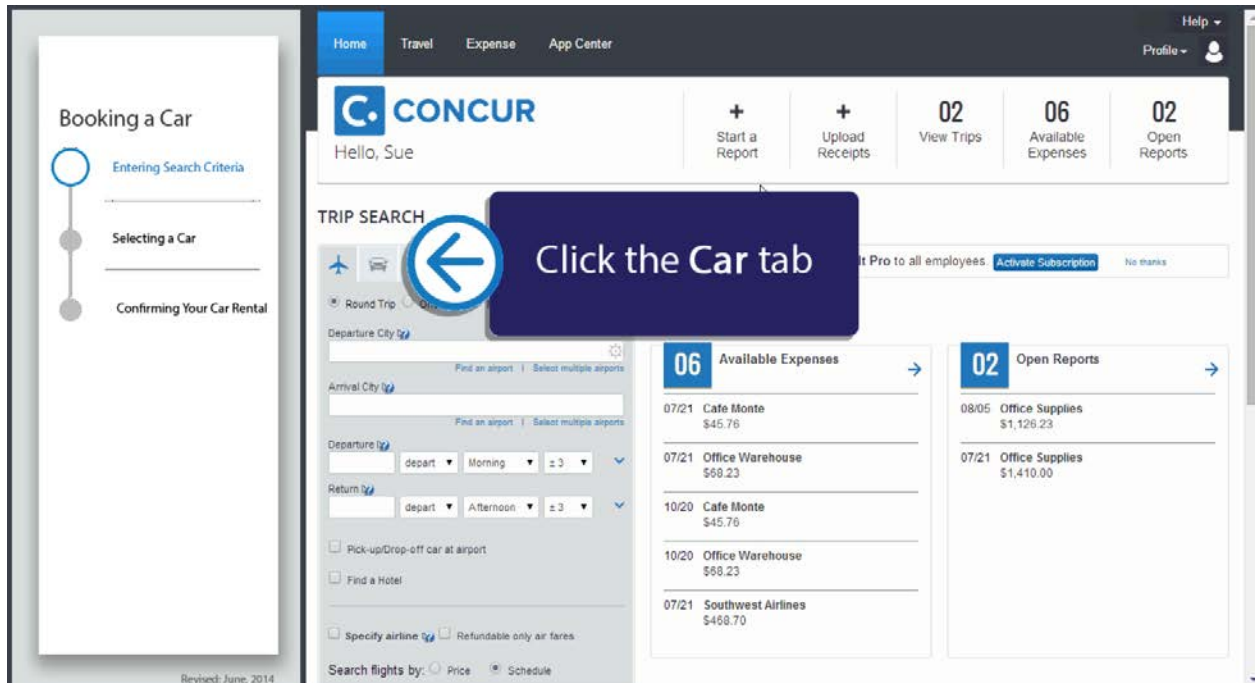
### Steps

1. Click **Profile**
2. Under **Administer for Another User**, select the name of the employee that you'd like to book travel for.
3. Click the Car 🚗 icon
4. Repeat steps 2-5 in the Reserving a Rental Car for Myself section

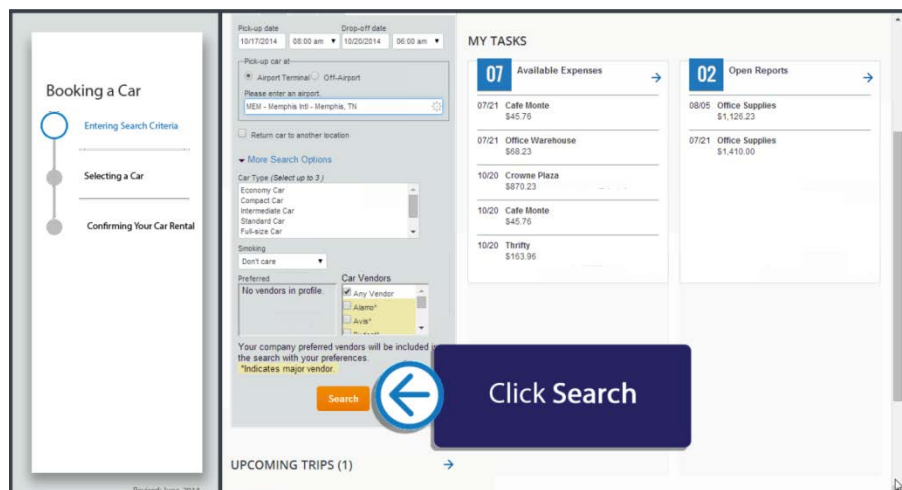


## RESERVING A RENTAL CAR FOR A GUEST OR A STUDENT

1. Click the Car 🚗 icon then click the **Book for a Guest** tab



2. Enter your search criteria, such as pick-up and drop-off dates, location and other search options and then click **Search**.



- Review the car search results. To filter the results, select a column, row, or cell in the grid at the top of the results page or use the options on the left.



**Booking a Car**

- Entering Search Criteria
- Selecting a Car**
- Confirming Your Car Rental

**Car booking options**

**Change Car Search**

Pick-up date: 10/17/2014 08:00 am  
 Drop-off date: 10/20/2014 06:00 am  
 Pick-up car at: Airport Terminal (selected) Off-Airport  
 Please enter an airport: MEM - Memphis Intl - Memphis, TN  
☐ Return car to another location  
[More Search Options](#) [Search](#)

**Car Display Filters**

- ☐ Unlimited miles
- ☐ Air conditioning
- ☐ Hybrid
- Car Transmission: ☐ Automatic ☐ Manual

Picking up the car at: (MEM) on Fri, Oct 17 08:00 AM  
 Returning on Mon, Oct 20 06:00 AM

Print / Email

All 28 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car
Thrifty	17.65	18.48	19.32	23.92	23.92
Alamo	19.18	20.09	21.00	24.32	24.32
Enterprise	21.47	22.49	23.51	27.23	27.23
Hertz	23.18	23.83	26.39	27.39	...
Enterprise	23.18	23.83	26.39	27.31	...

Displaying: 28 out of 28 results. << Previous 1 2 3 Next >> | All

Sorted By: Policy - Most Compliant

**Economy Car (Apollo)** [more info](#)

**\$17.65 per day**

Unlimited miles  
 Pick-up Terminal: MEM  
 Automatic transmission  
 Total cost **\$82.82**

[Reserve](#)

- To hide the results matrix and view more of the car results list, click Hide Matrix.

**Booking a Car**

- Entering Search Criteria
- Selecting a Car**
- Confirming Your Car Rental

**Car booking options**

**Change Car Search**

Pick-up date: 10/17/2014 08:00 am  
 Drop-off date: 10/20/2014 06:00 am  
 Pick-up car at: Airport Terminal (selected) Off-Airport  
 Please enter an airport: MEM - Memphis Intl - Memphis, TN  
☐ Return car to another location  
[More Search Options](#) [Search](#)

**Car Display Filters**

- ☐ Unlimited miles
- ☐ Air conditioning
- ☐ Hybrid
- Car Transmission: ☐ Automatic ☐ Manual

Picking up the car at: (MEM) on Fri, Oct 17 08:00 AM  
 Returning on Mon, Oct 20 06:00 AM

Print / Email

All 28 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car
Thrifty	17.65	18.48	19.32	23.92	23.92
Alamo	19.18	20.09	21.00	24.32	24.32
Enterprise	21.47	22.49	23.51	27.23	27.23
Hertz	23.18	23.83	26.39	27.39	...
Enterprise	23.18	23.83	26.39	27.31	...

Displaying: 28 out of 28 results. << Previous 1 2 3 Next >> | All

Sorted By: Policy - Most Compliant

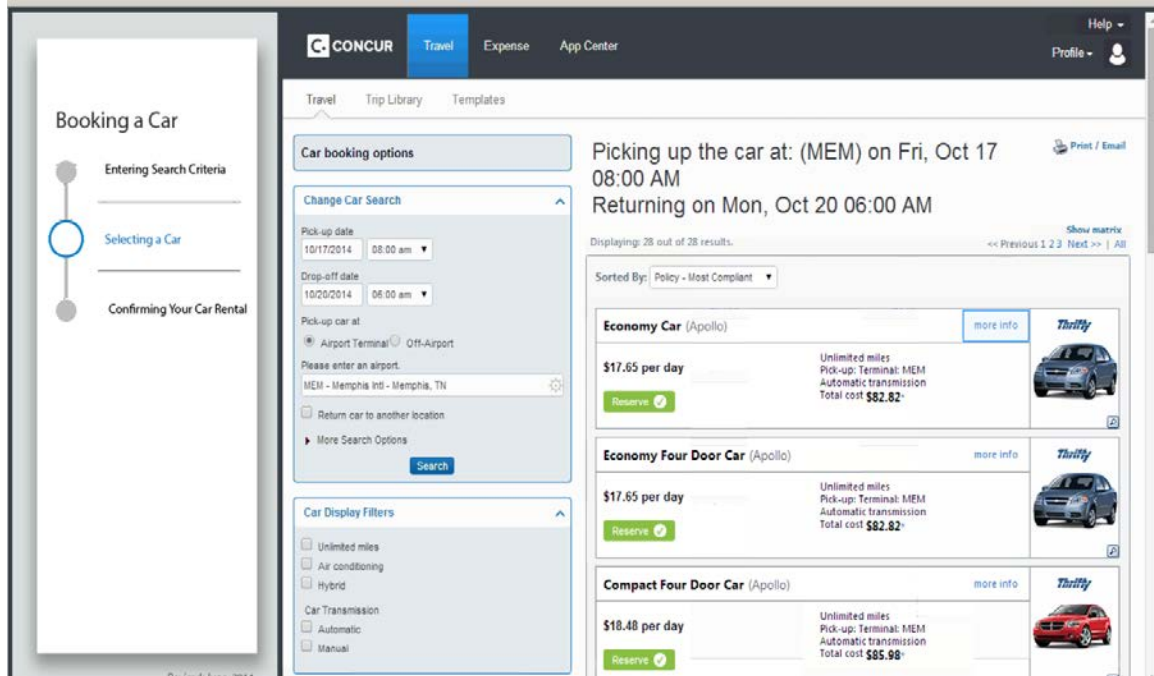
**Economy Car (Apollo)** [more info](#)

**\$17.65 per day**

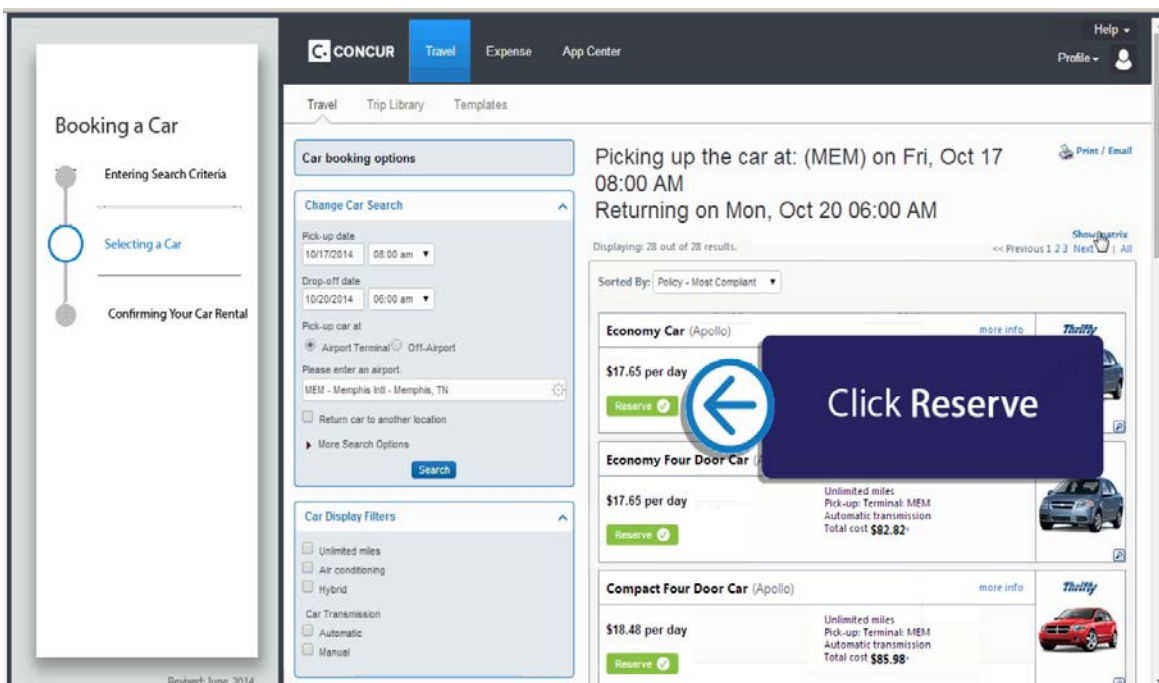
Unlimited miles  
 Pick-up Terminal: MEM  
 Automatic transmission  
 Total cost **\$82.82**

[Reserve](#)

- Use the More info link to view more information about a rental car.



3. To reserve a car, click **Reserve**.



- You will see your complete car rental itinerary and can add other information for the car rental, including car preferences and driver information.



Booking a Car

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental

Revised: June, 2014

CONCUR Travel Expense App Center

Travel Trip Library Templates

## Review and Reserve Car

### REVIEW RENTAL CAR

Thrifty Car Rental [Location details](#)

Type	Pick up	Drop off
Economy Car	Airport Terminal	Airport Terminal
Features	MEM: Memphis	MEM: Memphis
	08:00 am Fri, 10/17/2014	06:00 am Mon, 10/20/2014

### PROVIDE RENTAL CAR PREFERENCES

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

Ex: Need early pick-up (10am) ☐ Include in-car GPS system

### ENTER DRIVER INFORMATION

Ensure the name below matches the I.D. you have with you on the day of pick-up.

#### DRIVER

Name: Sue Peterson Phone: 425-123-4567  suepeterson@randomverbs.com [Edit](#) [Review all](#)

#### Rental Car Agency Program

No Program selected

4. To continue with the reservation, click **Reserve Car and Continue**.

Booking a Car

- Entering Search Criteria
- Selecting a Car
- Confirming Your Car Rental

PROVIDE RENTAL CAR PREFERENCES

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

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#### DRIVER

Name: Sue Peterson Phone: 425-123-4567  suepeterson@randomverbs.com [Edit](#) [Review all](#)

#### Rental Car Agency Program

No Program selected

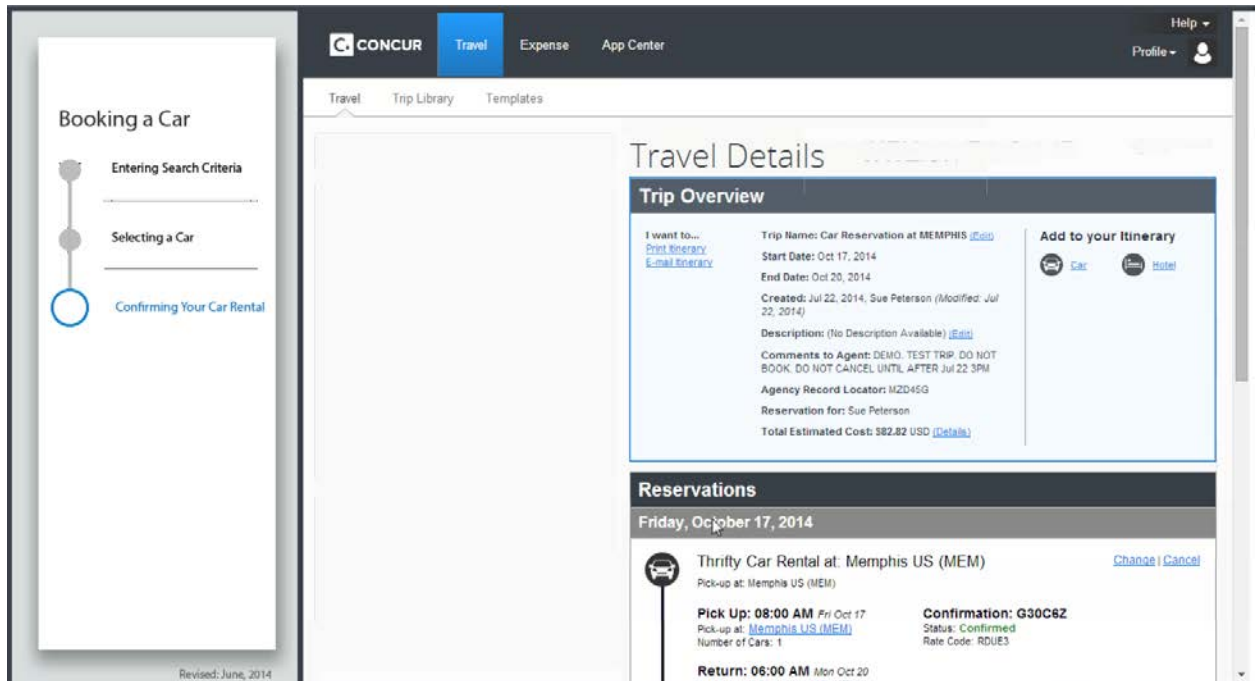
**Click Reserve Car and Continue**

[Reserve Car and Continue](#)

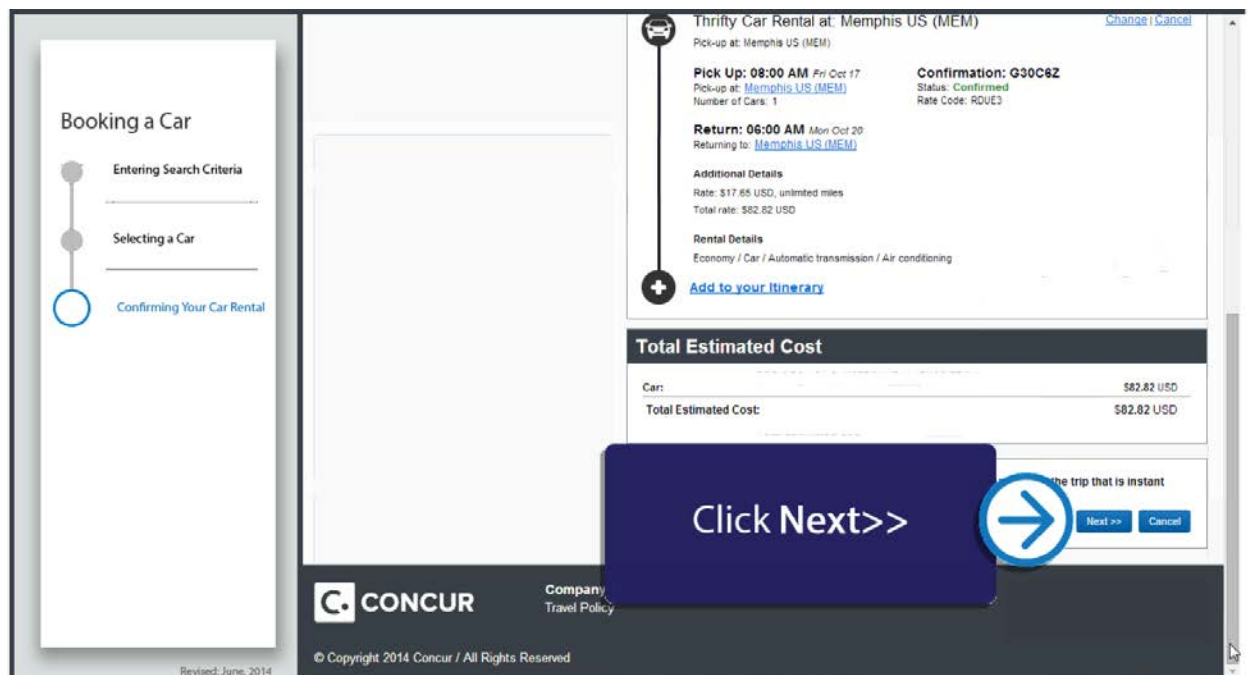
CONCUR Company Policy Travel Policy

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- On the Travel Details page, you can review your complete travel itinerary.
- You will be asked to **enter the Guest or Student information** here.



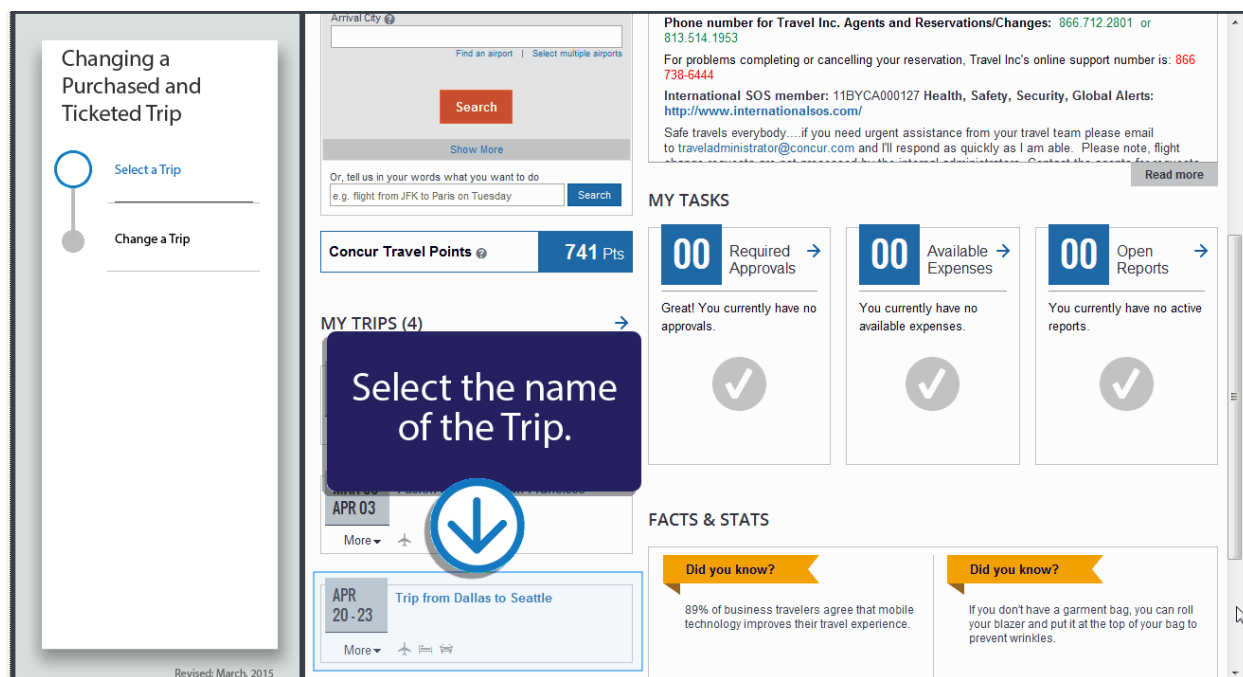
- To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.



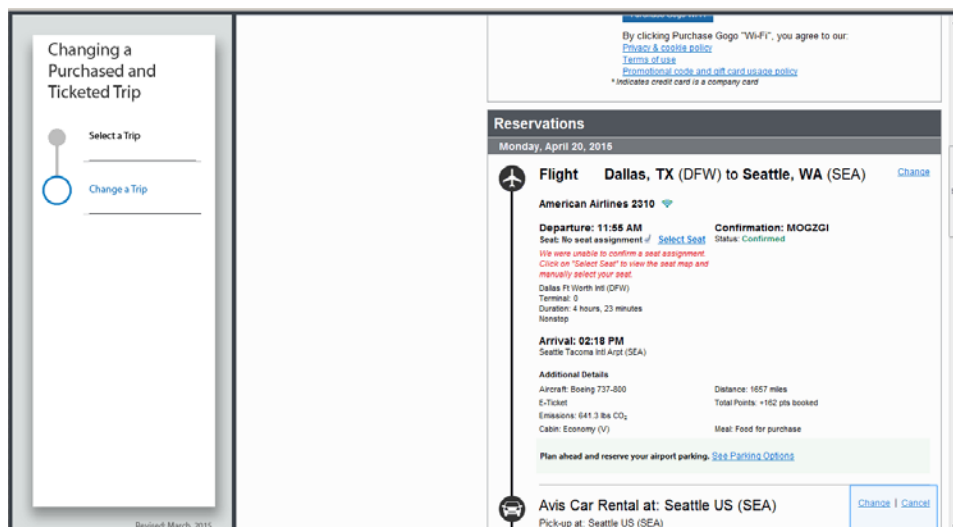
## CONCUR TRAVEL

### CHANGING OR CANCELLING A TRIP

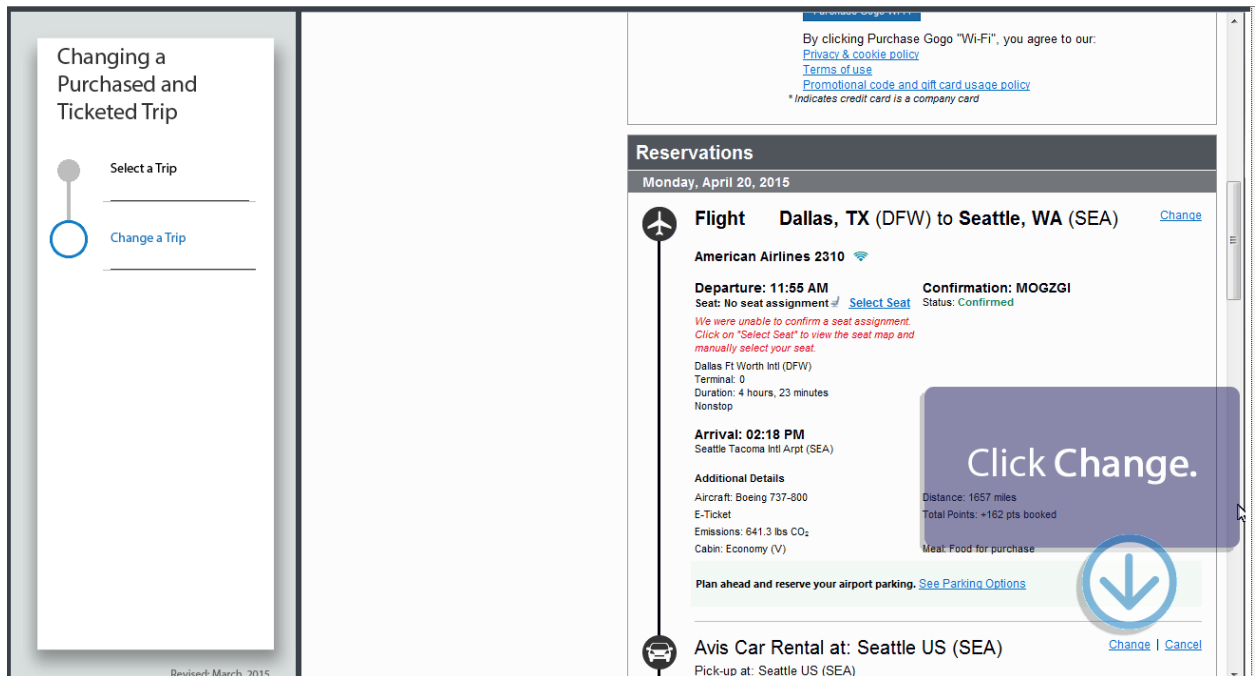
1. To change an existing trip, scroll down to view your trips on the My Concur Page.
2. To cancel or change a trip, select the name of the trip.



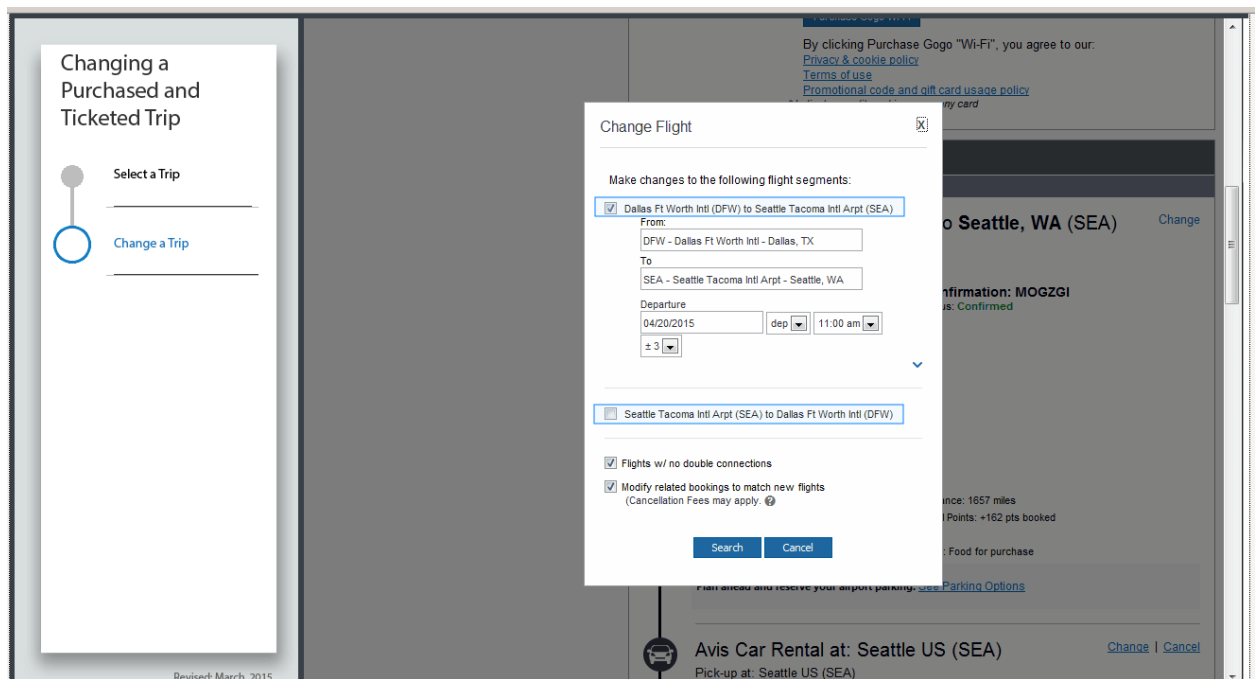
3. Scroll down to view your itinerary.



4. To cancel the entire trip, click **Cancel**. To change a trip, click **Change**.



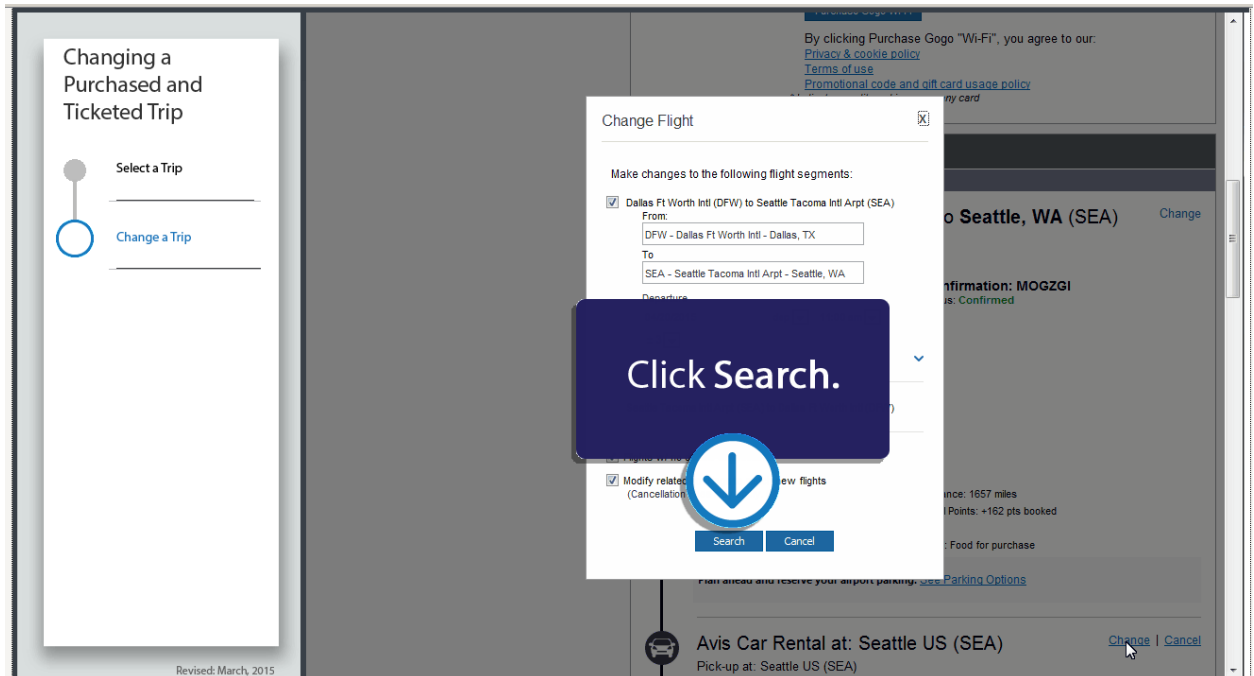
5. In the Change Flight window, you can change either leg of a flight by selecting the appropriate check box.



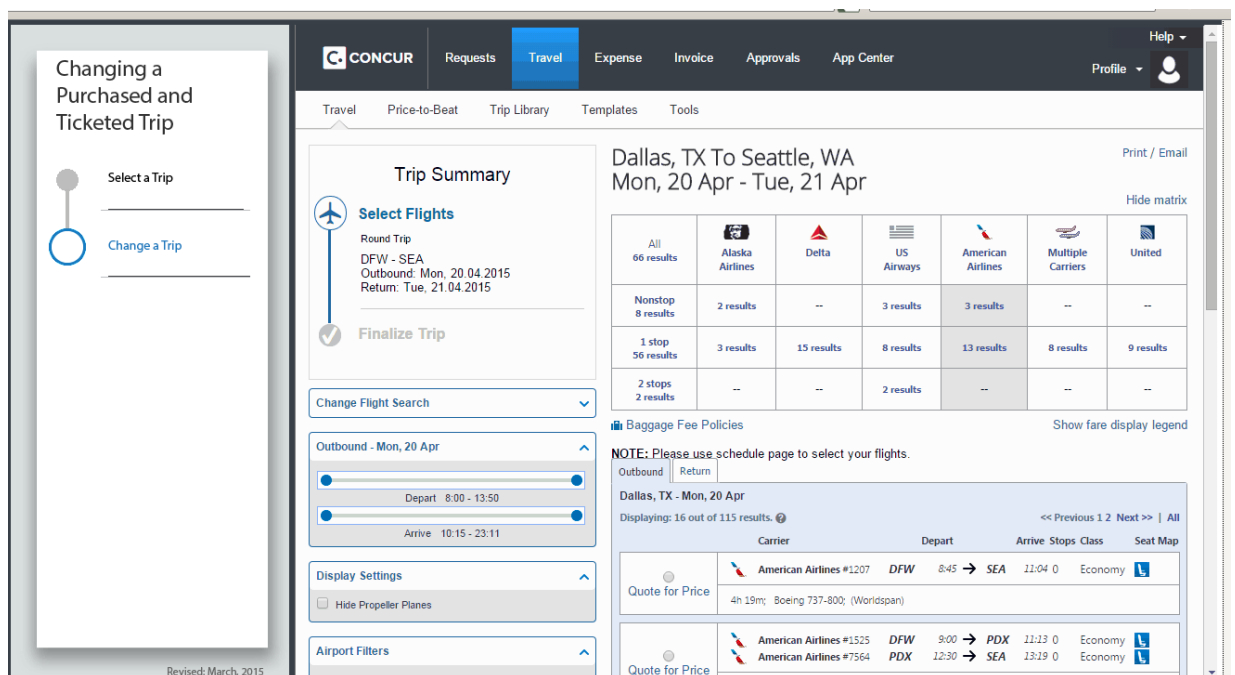
- You can also cancel or change any related bookings, such as hotel or car rental.
- Note: Concur Travel will automatically extend any car or hotel reservations

to match the days of the flight change.

- To begin searching for new flights, click Search.



- Select the radio buttons for the original flight segments that you want to change.
- Make the necessary changes to the legs of your flight.



9. After you make the changes you will be able to see the original airfare, new airfare, the airfare difference, exchange fee, and the total cost of the exchange.
10. Once you have reviewed the new information, purchase your new flights.

### FAQs

#### **Why should I use Concur Travel & Expense instead of calling the agent directly?**

Concur allows you to efficiently make plans after viewing your travel options. In addition, you have access to Internet fares. Concur provides a list of all your travel plans and is a direct source for travel alerts. Concur also has some vendors that are selected for e-receipts. This will make your process of completing an expense report more efficient because the information will be transferred as an expense for you. Also, World Travel will charge MSM an additional fee if you call and book your travel directly with an agent. However, you will not be charged an additional fee if you call World Travel to help you reserve your hotel with a special conference rate.

#### **Are there fees associated with calling World Travel?**

Travelers are never charged a fee for calling in to ask a question or ask for assistance with a car/hotel reservation. Agent booking fees are charged is when a ticket has been issued by an agent. Agent Assist Fees are also charged any time a traveler leaves a request or note in the Comments to Agent Box of the travel system.

#### **Can I request Comfort Seating?**

All employees are required to fly coach class on domestic flights. On international flights lasting eight hours or longer, employees may chose seating in business class.

Booking through Concur's Travel Platform – Calling the Agent to book any aspect of travel has a fee of \$20.00 also the visa credit card security code is needed for booking premium which is not allowed

#### **What is the difference between booking a flight with Concur Travel & Expense and purchasing an Internet fare from a vendor's website?**

Concur provides access to both agency and Internet fares. The difference between the two fares is where it is fulfilled and who provides the customer support. With an agency purchase, you have the full support of your agent in making changes. Your

ticket is purchased through your agency.

If you select an Internet fare, you buy the ticket directly from the supplier or airline's fulfillment agency. These fares may have special rules that apply and you must contact the airline directly to request a change.

### **Can I use my Frequent Flier account number when booking a flight?**

Yes. You can enter travel programs in your Concur Profile, under **Travel Settings**. When you travel using the travel programs designated in your profile, credit will be applied to those programs.

### **Can I use a hotel membership number when reserving a hotel room?**

Yes. You can enter travel programs in your Concur Profile, under **Travel Settings**. When you travel using the travel programs designated in your profile, credit will be applied to those programs.

### **Do I have to use my personal credit card for reservations?**

When you reserve airfare, hotel, and car rental reservations, the MSM credit card number is used to purchase your reservations.

### **How is ticket fulfillment handled?**

When you use Concur Travel & Expense to reserve your company's agency fares, your agency will handle fulfillment/ticketing in the same manner as a phone reservation. Electronic tickets are issued unless otherwise requested.

### **How do I reserve a car or hotel?**

If you specified that you need a car on the **Flight** tab when you reserved your flight, you will see the car and hotel search results. You can then reserve your car and hotel based on those results.

If you want to reserve a car or hotel without making air travel reservations, click the **Car** or **Hotel** tabs in the **Trip Search** area. From there you can select the



appropriate city and then search for a car or hotel.

### **How do I schedule a multi-leg flight?**

To schedule a multi-leg flight:

1. On the **Travel** page, click the **Flight** tab .
2. Click **Multi-segment** additional departure.
3. Enter you departure and arrival information for each segment and then click **Search**.

### **Can I add a car or hotel to an airline reservation after it is booked?**

Yes, you can make changes before your ticket is issued. To add or modify your trip, click the name of the trip on the **Upcoming Trips** section of My Concur and then click **Change Trip**.

### **How do I change my reservation after it has been booked?**

To make changes to your seat assignment or add a hotel or car reservation to a trip, click the trip name in the Upcoming Trips area of My Concur.

To change an Internet ticket, contact the airline customer service. Your agency or company will not be able to assist with changes to Internet tickets.

### **What happens if I do not comply with company policy?**

When you go outside of company policy, Concur Travel & Expense notifies you by showing the fare with a yellow tab. When you select a yellow tab, Concur will prompt you to enter an explanation as to why you chose a fare that did not comply with your company's policy

### Why does the “Reserve” button appear in more than one color?

If the “Reserve” button color is...	Then the fare is...
<i>Green</i>	Within company policy compliance
<i>Yellow</i>	Outside of company policy compliance. You are required to enter additional information on this choice.
<i>Red</i>	Outside of company policy compliance. You are not allowed to make this reservation.

### How can I view the itinerary for flights that I have already booked?

On the **My Concur** page, review the **Upcoming Trips** section. For more detailed information, click the appropriate trip name in the **Trip Name/Description** column and then click **View Itinerary**.

### When do I load/attach my itinerary?

You will load your itinerary to the travel report you are submitting *after* you have completed your trip. *Do not* attach the itinerary if submitting a travel report for prepayments before your trip has been completed.

### What type of confirmation do I need at the airport?

You should bring a printed copy of your email itinerary with ticket number information or the paper ticket (whichever is acceptable by the airline) and a government approved identification document such as a driver’s license, passport, VISA, etc.



# CONCUR EXPENSE

## CONCUR EXPENSE

### CREATING AN EXPENSE

#### Overview

All travelers will be required to reconcile their travel through an expense report within 10 business days of their return. If your report is not expensed within the time frame mentioned above, you and your supervisor will receive a reminder email. If you owe money to MSM, please provide a check to the cashier. MSM will reimburse employees on a bi-monthly basis. Payments are typically made via direct deposit or check on non-payroll weeks.

#### Steps

1. Click the **Travel** tab on your Concur Homepage.
2. Under the **Upcoming Trips** tab, click **Expense**.

The screenshot shows the Concur Travel tab interface. The 'Travel' tab is selected, and the 'Upcoming Trips' sub-tab is active. A table lists upcoming trips, with the first entry 'Trip from Atlanta to Cleveland (IPAGAI) MSM Travel Integration Demo' highlighted. In the 'Action' column for this trip, the 'Expense' button is circled in red. Other buttons like 'Cancel Trip' are also visible. The top navigation bar includes 'CONCUR', 'Travel', and 'Expense' tabs. The left sidebar shows 'Air Search' and 'Air/Rail Search' options.

3. Your Report Header will pop up. Click **Next** to continue.

The screenshot shows the 'Create a New Expense Report' form. The 'Report Header' section includes fields for 'Travel & Expense Policy', 'Report Type', 'Trip Start Date', 'Trip End Date', 'Report Trip Purpose & Q', 'Client', 'Fund', 'Org', 'Program', and 'Activity'. Below this is a 'Requests' table with columns for 'Request Name', 'Request ID', 'Cancelled', 'Request Total', 'Amount Approved', and 'Amount Remaining'. The first row shows a request for 'TRAVEL #13' with a total of \$336.00 and an approved amount of \$336.00. The bottom right corner has a 'Next' button.

## CONCUR EXPENSE

### PER DIEM

#### Overview

If you requested a cash advance for per diem, please select **Yes** in the Travel Allowances section. If not, click No and you will be routed to your Expense Report.

A dialog box titled "Travel Allowances" with a close button (X) in the top right corner. Below the title bar, there is a question mark icon followed by the text "Will this expense report include Meal Per Diem?". At the bottom right, there are two buttons: "Yes" and "No".

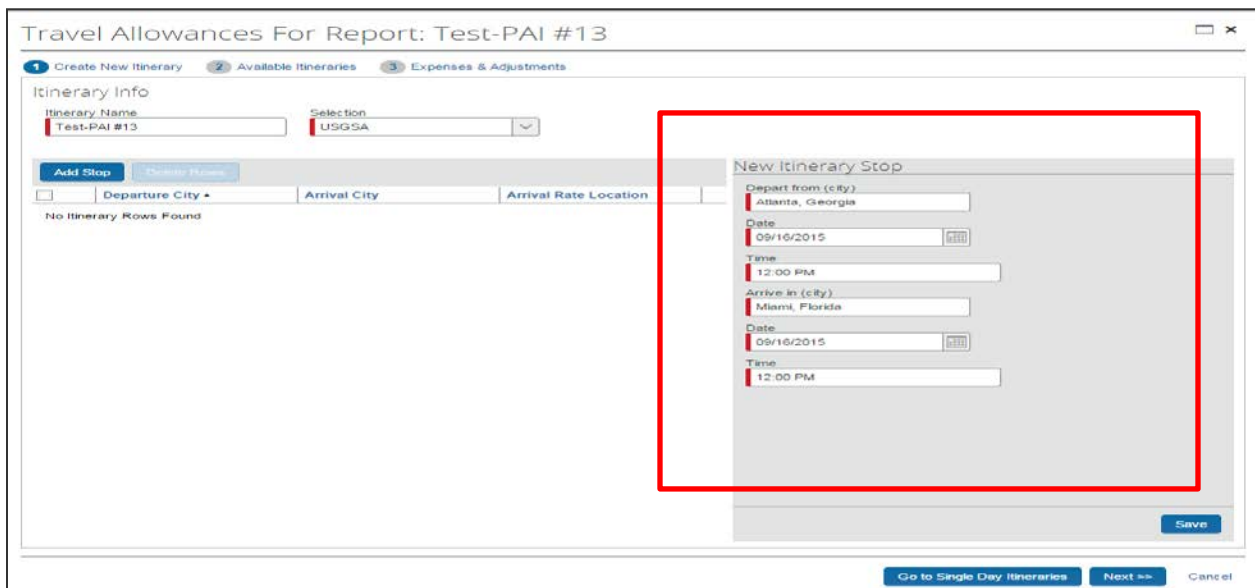
Travel Allowances

Will this expense report include Meal Per Diem?

Yes No

#### Steps

1. Populate your Per Diem Itinerary with Departure City, Arrival City, Dates and Times with your outbound information and click **Save**.

A screenshot of the "Travel Allowances For Report: Test-PAI #13" application window. The window has a tabbed interface with three tabs: "1 Create New Itinerary", "2 Available Itineraries", and "3 Expenses & Adjustments". The "Create New Itinerary" tab is active. It contains a form with "Itinerary Name" (Test-PAI #13) and "Selection" (USGSA). Below this is a table with columns "Departure City", "Arrival City", and "Arrival Rate Location". A "New Itinerary Stop" modal window is open, showing fields for "Depart from (city)" (Atlanta, Georgia), "Date" (09/10/2015), "Time" (12:00 PM), "Arrive in (city)" (Miami, Florida), "Date" (09/16/2015), and "Time" (12:00 PM). A red rectangle highlights the "New Itinerary Stop" modal. At the bottom of the modal is a "Save" button. At the bottom of the main window are buttons for "Go to Single Day Itineraries", "Next", and "Cancel".

Travel Allowances For Report: Test-PAI #13

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Test-PAI #13 Selection: USGSA

Add Stop Delete Rows

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Depart from (city): Atlanta, Georgia

Date: 09/10/2015

Time: 12:00 PM

Arrive in (city): Miami, Florida

Date: 09/16/2015

Time: 12:00 PM

Save

Go to Single Day Itineraries Next Cancel

2. Your Departure city will be automatically populated for you. Please populate Dates, Time and Arrival city with your return information and click **Save**.

Travel Allowances For Report: Test-PAI #13

1 Edit Itinerary

2 Available Itineraries

3 Expenses & Adjustments

Itinerary Info

Itinerary Name

Test-PAI #13

Selection

USGSA

Add Stop

Delete Rows

<input type="checkbox"/>	Departure City ▲	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Atlanta, Georgia 09/16/2015 12:00 PM	Miami, Florida 09/16/2015 12:00 PM	MIAMI-DADE COUNTY, US...

New Itinerary Stop

Depart from (city)

Miami, Florida

Date

09/23/2015

Time

12:00 PM

Arrive in (city)

Atlanta, Georgia

Date

09/23/2015

Time

12:00 PM

Save

Go to Single Day Itineraries

Next >>

Cancel

3. Click **Next** to review your Travel Allowances.

Travel Allowances For Report: Test-PAI #13

1 Create New Itinerary
2 Available Itineraries
3 Expenses & Adjustments

Assigned Itineraries

Assign
Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Test-PAI #13				
Atlanta, Georgia	09/16/2015 12:00 PM	Miami, Florida	09/16/2015 12:00 PM	MIAMI-DADE COUNTY, US-FL,...
Miami, Florida	09/23/2015 12:00 PM	Atlanta, Georgia	09/23/2015 12:00 PM	FULTON COUNTY, US-GA, US

Available Itineraries

Current Itineraries
Delete
Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous
Next >>

- Click **Next** again to continue.
- If any meal where provided during your travel, please place a check mark next to the day and the meal that was received.



Travel Allowances For Report: Test-PAI #13

1 Create New Itinerary

2 Available Itineraries

3 Expenses & Adjustments

Show dates from  to

Exclude   All <input type="checkbox"/>	Date/Location	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/16/2015 Miami, Florida	\$49.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.50
<input type="checkbox"/>	09/17/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/18/2015 Miami, Florida	\$66.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$50.00
<input type="checkbox"/>	09/19/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/20/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/21/2015 Miami, Florida	\$66.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$66.00
<input type="checkbox"/>	09/22/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/23/2015 Miami, Florida	\$49.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$49.50

6. When you have selected all of your provided meals, your new allowances will show up on the right hand side. Click **Create Expenses** to continue.

Travel Allowances For Report: Test-PAI #13

1 Create New Itinerary

2 Available Itineraries

3 Expenses & Adjustments

Show dates from  to

Exclude   All <input type="checkbox"/>	Date/Location	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/16/2015 Miami, Florida	\$49.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$38.50
<input type="checkbox"/>	09/17/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/18/2015 Miami, Florida	\$66.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$50.00
<input type="checkbox"/>	09/19/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/20/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/21/2015 Miami, Florida	\$66.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$66.00
<input type="checkbox"/>	09/22/2015 Miami, Florida	\$66.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	09/23/2015 Miami, Florida	\$49.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$49.50

## CONCUR EXPENSE

### ITINERARIES

#### Overview

An expense report can be associated with one or more itineraries. For example, the company may not allow users to submit expense reports more than once a week. Yet sometimes a user may have two short trips (itineraries) in the same week. In this case, two itineraries may be associated with one expense report. However, multiple itineraries can be assigned to the same report **only** if the itineraries are based on the same travel allowance configuration.

Trip Name/Description	Status	Start Date	End Date	Action
Trip from Atlanta to Cleveland (IPAGAI) MSM Travel Integration Demo	Needs Expense Report Ticketed	01/01/2016	01/12/2016	<a href="#">Cancel Trip</a>   <a href="#">Expense</a>

Departure City	Arrival City	Arrival Rate Location
Atlanta, Georgia 01/01/2016 10:50 AM	Cleveland, Ohio 01/01/2016 05:10 PM	CUYAHOGA COUNTY, US-...
Cleveland, Ohio 01/12/2016 06:45 AM	Atlanta, Georgia 01/12/2016 09:43 AM	FULTON COUNTY, US-GA,...

Travel Allowances For Report: Trip to Paris

Edit Itinerary

Available Itineraries

Expenses & Adjustments

Itinerary Info

Itinerary Name

Trip to Paris

Add Stop

Delete Rows

Import Itinerary

	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Seattle, Washington	Paris, FRANCE	PARIS, FRANCE
<input type="checkbox"/>	11/16/2015 01:00 PM	11/17/2015 08:00 AM	
<input checked="" type="checkbox"/>	Paris, FRANCE	Seattle, Washington	KING COUNTY, US-WA, US
	11/23/2015 09:00 AM	11/23/2015 06:00 PM	

Edit Itinerary Stop

Depart from (city)

Paris, FRANCE

Date

11/23/2015

Time

Select trips and charges to use to create this itinerary

	Description	Start Date	End Date
<input type="checkbox"/>			
<input type="checkbox"/>	+ Trip from Seattle to Chicago (QK1QGO)	11/16/2015 10:15...	11/20/2015 07:20...

Import

Cancel

Go to Single Day Itineraries

Next >>

Done

## CONCUR EXPENSE

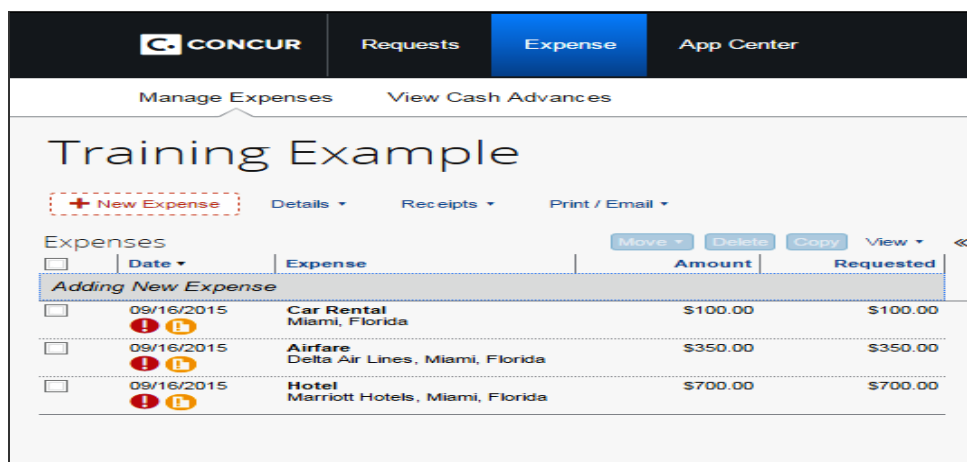
### TRAVEL EXPENSES

#### Overview

When you select the Expense button from the Travel tab, all of your travel segments (airfare, hotel, and car) will flow over to your expense report. If you choose to expense your trip any other way, the information will not flow over and you will need to manually add the segments. You will need to manually add all your other expenses to your report.

#### Steps

- All of the items booked through Concur Travel will be listed on the left hand side.
  - Hotel
    - Please view steps for **Itemizations** and **Attaching Receipts**
    - In addition to itemizing and attaching receipts, you must also update the **Transaction Date, Vendor, City of Purchase** and **Amount** information.
  - Airfare
    - Please view steps for Attaching Receipts.
    - In addition to attaching receipts, you must also update the **Transaction Date, Vendor, City of Purchase** and **Amount** information.
  - Car
    - Please view steps for Attaching Receipts.
    - In addition to attaching receipts, you must also update the **Transaction Date, Vendor, City of Purchase** and **Amount** information.



The screenshot displays the Concur Expense report interface. At the top, there is a navigation bar with 'CONCUR', 'Requests', 'Expense' (highlighted), and 'App Center'. Below this, there are tabs for 'Manage Expenses' and 'View Cash Advances'. The main heading is 'Training Example'. Below the heading, there are links for '+ New Expense', 'Details', 'Receipts', and 'Print / Email'. A table titled 'Expenses' is shown with columns for 'Date', 'Expense', 'Amount', and 'Requested'. The table contains three rows of expense items, each with a checkbox, a date, a description, and amounts. The first row is 'Car Rental' for \$100.00, the second is 'Airfare' for \$350.00, and the third is 'Hotel' for \$700.00. Each row has a red exclamation mark icon next to the date.

	Date	Expense	Amount	Requested
<input type="checkbox"/>	09/16/2015	Car Rental Miami, Florida	\$100.00	\$100.00
<input type="checkbox"/>	09/16/2015	Airfare Delta Air Lines, Miami, Florida	\$350.00	\$350.00
<input type="checkbox"/>	09/16/2015	Hotel Marriott Hotels, Miami, Florida	\$700.00	\$700.00

- All other Expense Types are listed in on the right side of the report.
  - Personal Car Mileage
    - Steps
      - Update the **Transaction Date, To Location** and **From Location**.

The screenshot shows the Concur Expense report interface. At the top, there's a navigation bar with 'CONCUR', 'Requests', 'Expense' (selected), and 'App Center'. Below this, there's a 'Training Example' title and buttons for 'Delete Report' and 'Submit Report'. A 'New Expense' button is also visible.

The main content area is divided into two sections. The left section, titled 'Exceptions', contains a table with the following data:

Expense	Date	Amount	Exception
Car Rental	09/16/2015	\$100.00	MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.
Car Rental	09/16/2015	\$100.00	Provide additional information about why the Air, Car, and/or Hotel expense was paid with cash before proceeding.
Car Rental	09/16/2015	\$100.00	Missing required field: Vendor.

The right section, titled 'Expenses', contains a table with the following data:

Date	Expense	Amount	Requested
09/24/2015	Personal Car Mileage	\$380.08	\$380.08
09/16/2015	Car Rental Miami, Florida	\$100.00	\$100.00
09/16/2015	Airfare Delta Air Lines, Miami, Florida	\$350.00	\$350.00
09/16/2015	Hotel Marriott Hotels, Miami, Florida	\$700.00	\$700.00

Below the table, there's a summary: TOTAL AMOUNT \$1,530.08 and TOTAL REQUESTED \$1,530.08.

The right side of the interface shows a detailed view of the 'Personal Car Mileage' expense. It includes fields for 'Expense Type' (Personal Car Mileage), 'Transaction Date' (09/24/2015), 'Report/Trip Purpose' (Student Recruiting), 'Trip Type' (Out-of-State), 'Purpose of the Trip' (Conference), 'From Location' (Atlanta, GA, USA), 'To Location' (Miami, FL, USA), 'Payment Type' (Cash), 'Distance : Amount' (861 : 380.08), and 'USD'. There's also a 'Mileage Calculator' button.

- Click the **Mileage Calculator** to adjust your mileage

The screenshot shows the Concur Mileage Calculator interface. The map displays a route from Atlanta, GA to Miami, FL. The distance is 661.1 miles. The 'Add Mileage to Expense' button is circled in red.

**Waypoints:**

- Atlanta, GA, USA
- Miami, FL, USA

**Directions:**

Suggested routes:

- I-75 S and Florida's Turnpike 663 mi - about 9 hours 13 mins
- I-95 S 713 mi - about 10 hours 5 mins

**Directions:**

218 Capitol Ave SW, Atlanta, GA 30334, USA

663 mi - about 9 hours 13 mins

1. Head north on Capitol Ave SW toward Martin Luther King Jr Dr SW 207 ft
2. Turn left onto Martin Luther King Jr Dr SW 436 ft
3. Turn left onto Washington St SW 0.5 mi
4. Continue onto Pulliam St SW 0.3 mi
5. Take the ramp on the left onto I-75 S/I-85 S 3.4 mi
6. Keep left to continue on I-75 S 4.5 mi
7. Keep left to stay on I-75 S 60.3 mi
8. Keep right at the fork to continue on I-475 S, follow signs for Bypass to I-75 South Valdosta 15.6 mi
9. Keep left and merge onto I-75 S 301 mi

**TOTAL PERSONAL:** 0.0 MI  
**TOTAL BUSINESS:** 661.1 MI

**Buttons:** Add Mileage to Expense, Cancel

- Click **Add Mileage to Expense**
- Click **Save**

#### ○ Group Meals/Entertainment (>10 or 10+)

- Steps
  - **Attach Receipts** and update the **Vendor Name, City of Purchase and Amount**
  - Click **New Attendee**

[Requests](#)
[Expense](#)
[App Center](#)

[Help](#)
[Profile](#)

[Manage Expenses](#)
[View Cash Advances](#)

## Training Example

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

[+ New Expense](#)
[Details](#)
[Receipts](#)
[Print / Email](#)

Hide Exceptions

Expense	Date	Amount	Exception
Car Rental	09/16/2015	\$100.00	⚠ MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.
Car Rental	09/16/2015	\$100.00	❗ Provide additional information about why the Air, Car, and/or Hotel expense was paid with cash before proceeding.
Car Rental	09/16/2015	\$100.00	❗ Missing required field: Vendor.

Expenses

☐

Date

Expense

Amount

Requested

Adding New Expense

<input type="checkbox"/>	09/24/2015	Personal Car Mileage	\$380.08	\$380.08
<input type="checkbox"/>	09/16/2015	Car Rental Miami, Florida	\$100.00	\$100.00
<input type="checkbox"/>	09/16/2015	Airfare Delta Air Lines, Miami, Florida	\$350.00	\$350.00
<input type="checkbox"/>	09/16/2015	Hotel Marriott Hotels, Miami, Florida	\$700.00	\$700.00

TOTAL AMOUNT

\$1,530.08

TOTAL REQUESTED

\$1,530.08

New Expense

Expense Type

Group Meals/Entertainment

Transaction Date

09/24/2015

Report/Trip Purpose

Student Recruiting

Trip Type

Out-of-State

Additional Information

Enter Vendor Name

City of Purchase

Payment Type

Cash

Amount

USD

Comment

Attendees

Attendees: 0

Attendee Total: \$0.00

Remaining: \$0.00

New Attendee

Advanced Search

Favorites

Search Recently Used

Remove

Create Group

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Co...	Attendee Type	Amount
--------------------------	---------------	----------------	-------------------	---------------	--------

Save

Itemize

Allocate

Attach Receipt

Cancel

- Add the **First** and **Last Name** of the User

Add Attendee

Attendee Type

Alumni

Last Name

Doe

First Name

Jane

Save & Add Another

Save

Cancel

- Click **Save and Add Another** (repeat these steps until you are finished adding all the attendees)
- Click **Save**.

- Seminar Registration/Fees

- Steps

- **Attach Receipts** , update **Vendor Name** and update **Amount**.
- Under Payment Type, choose **School Paid**.

The screenshot displays the 'Expenses' management interface. On the left, a table lists existing expenses with columns for Date, Expense, Amount, and Requested. The total amount and requested amount are both \$1,580.08. On the right, the 'New Expense' form is open. A red circle highlights the 'Payment Type' dropdown menu, which is currently set to 'Cash'. Other fields in the form include 'Expense Type' (Seminar Registration/Fees), 'Transaction Date' (09/16/2015), 'Report/Trip Purpose' (Student Recruiting), 'Trip Type' (Out-of-State), 'City of Purchase' (Miami, Florida), 'Amount' (250.00), and 'USD' as the currency. The 'School Paid' option is visible under the 'Payment Type' dropdown.

- Click **Save**

- **Attach Receipts** and update the **Transaction Date, City of Purchase and Amount** for the items listed below:
  - Car Rental Fuel
  - Charter/Transfers Bus
  - Other Ground Transportation
  - Parking
  - Internet/Online Fees
  - Recruiting Expenses
  - Tips/Gratuities
  - Relocation Expenses
- **Attach Receipts** and update the **Transaction Date, City of Purchase , Amount and Additional Info** for the items listed below:
  - Miscellaneous
  - Personal/ Non Reimbursable



## CONCUR EXPENSE

---

### ITEMIZATIONS

#### Overview

The hotel charges must be itemized.

#### Steps

1. Click Itemize at the end bottom of the page

Expense | Nightly Lodging Expenses | Available Receipts

Expense Type Hotel	Transaction Date 09/16/2015	Report/Trip Purpose Student Recruiting
Trip Type Out-of-State	Additional Information	Vendor Marriott Hotels
City of Purchase Miami, Florida	Payment Type Cash	Amount 700.00 USD
Comment		

Itemize | Allocate | Attach Receipt | Cancel

2. Enter **Check In Date**, verify the **Check Out Date**, and update the **Room Rate**.

Expense Nightly Lodging Expenses Available Receipts

Check-in Date 09/16/2015 Check-out Date 09/23/2015 Number of Nights 7

**Recurring Charges (each night)**

Room Rate 100.00 Room Tax

Other Room Tax 1 Other Room Tax 2

☒ Room rate and taxes will be shown as a single expense

**Additional Charges (each night)**

Expense Choose an expense type Amount

Expense Choose an expense type Amount

Save Itemizations Cancel

- Click **Save Itemizations** and all of the itemized entries will be shown on the left hand side.

Expenses

Date ▾

Expense

Move ▾

Delete

Copy

View ▾

«

Amount

Requested

Adding New Expense

09/16/2015

Car Rental  
Miami, Florida

\$100.00

\$100.00

09/16/2015

Airfare  
Delta Air Lines, Miami, Florida

\$350.00

\$350.00

▾

09/16/2015

Hotel  
Marriott Hotels, Miami, Florida

\$700.00

\$700.00

09/16/2015

Hotel

\$100.00

\$100.00

09/17/2015

Hotel

\$100.00

\$100.00

09/18/2015

Hotel

\$100.00

\$100.00

09/19/2015

Hotel

\$100.00

\$100.00

09/20/2015

Hotel

\$100.00

\$100.00

09/21/2015

Hotel

\$100.00

\$100.00

09/22/2015

Hotel

\$100.00

\$100.00

TOTAL AMOUNT

\$1,150.00

TOTAL REQUESTED

\$1,150.00

## CONCUR EXPENSE

---

### ATTACHING RECEIPTS

#### Steps

1. Click **Attach Receipts**

=

The screenshot displays the 'Expense' form in the Concur system. The form is titled 'Expense' and has a tab labeled 'Available Receipts' in the top right corner. The form contains several fields for entering expense details:

- Expense Type:** A dropdown menu with 'Airfare' selected.
- Transaction Date:** A date field with '09/16/2015' entered and a calendar icon.
- Report/Trip Purpose:** A dropdown menu with 'Student Recruiting' selected.
- Trip Type:** A dropdown menu with 'Out-of-State' selected.
- Additional Information:** A text input field.
- Ticket Number:** A text input field.
- Vendor:** A dropdown menu with 'Delta Air Lines' selected.
- City of Purchase:** A text input field with 'Miami, Florida' entered.
- Payment Type:** A dropdown menu with 'Cash' selected.
- Amount:** A text input field with '350.00' entered and a 'USD' dropdown menu.
- Comment:** A text input field.

At the bottom of the form, there are five buttons: 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'. The 'Attach Receipt' button is circled in red, indicating it is the next step in the process.

2. Click **Browse**

# Attach Receipt

Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.  
No Receipt? Create a missing Receipt Affidavit [here](#).

File Selected for uploading:

Browse...

Attach


No file selected

Or choose an image from your Available Receipts.

Available Receipts

Attach

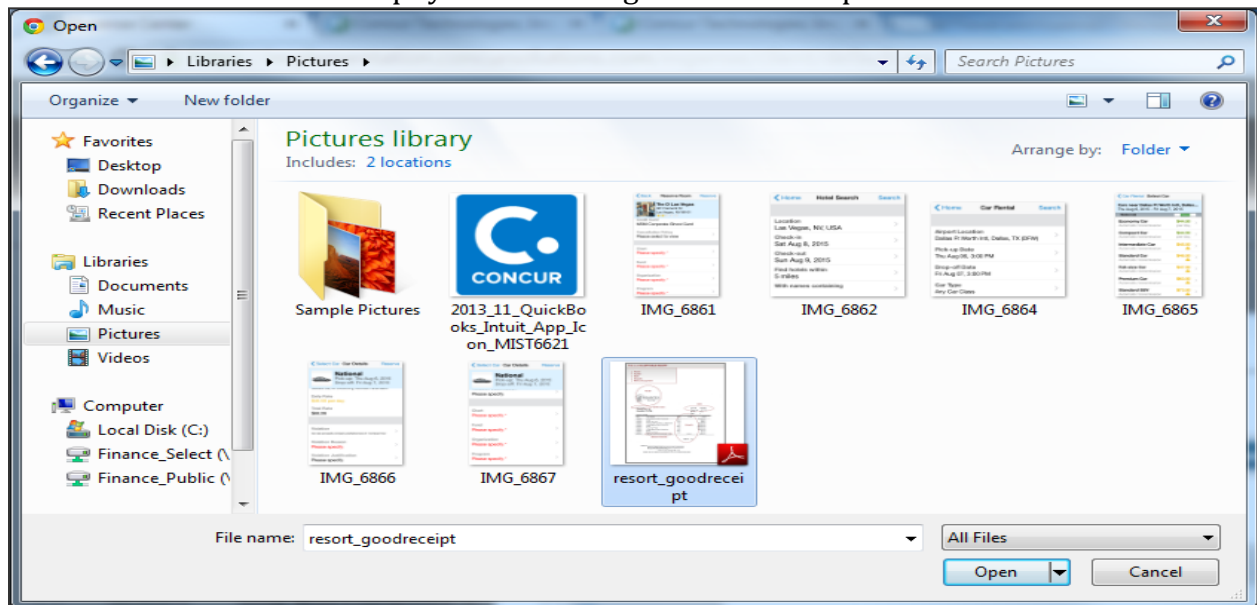
☐



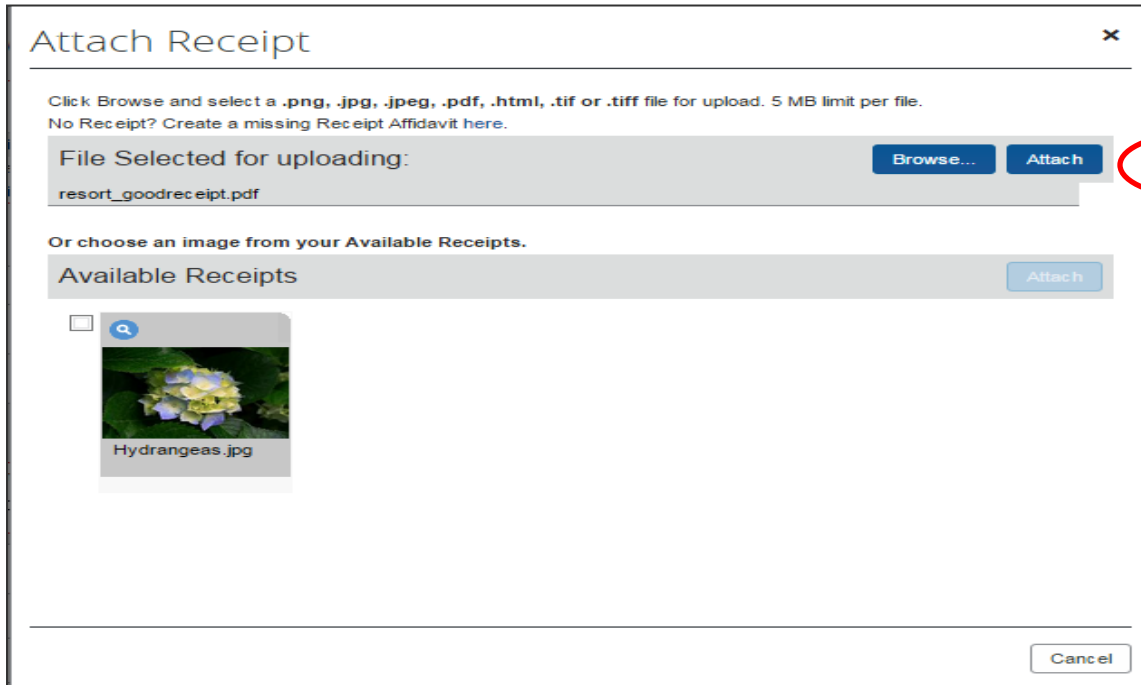
Hydrangeas.jpg

Cancel

3. Find the Receipt you are looking for and click Open.

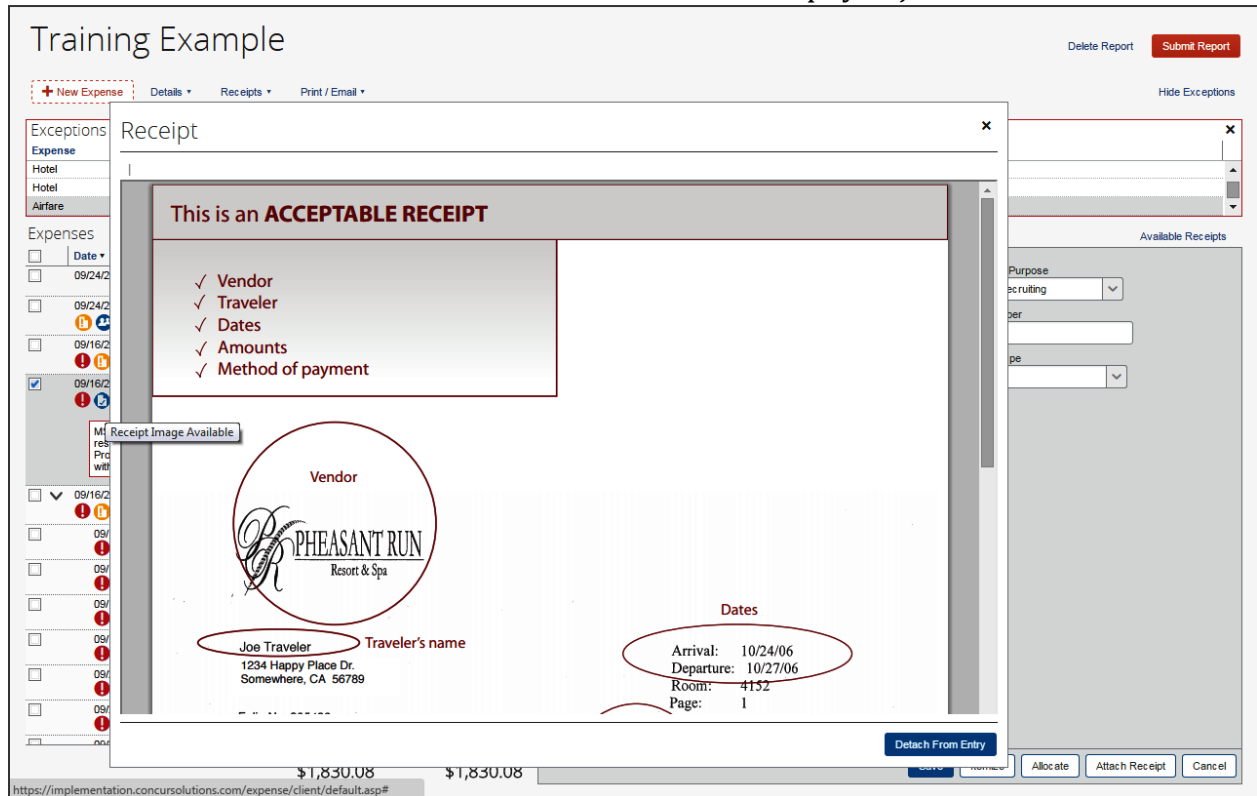


4. Click **Attach**.



The 'Attach Receipt' dialog box has a title bar with a close button. Below the title bar, it contains instructions: 'Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.' and a link 'No Receipt? Create a missing Receipt Affidavit here.' Below this is a section 'File Selected for uploading:' with a text box containing 'resort\_goodreceipt.pdf' and two buttons: 'Browse...' and 'Attach'. The 'Attach' button is circled in red. Below this is a section 'Or choose an image from your Available Receipts.' with a button 'Attach'. Underneath is a list of 'Available Receipts' with a search icon and a thumbnail of a hydrangea flower labeled 'Hydrangeas.jpg'. At the bottom right is a 'Cancel' button.

5. Hover over the blue section to view the receipt you just attached.



The 'Training Example' interface shows a receipt for 'PHEASANT RUN Resort & Spa'. The receipt is titled 'This is an ACCEPTABLE RECEIPT' and lists several criteria: 'Vendor', 'Traveler', 'Dates', 'Amounts', and 'Method of payment', all marked with checkmarks. The receipt details include the vendor logo, the traveler's name 'Joe Traveler', and the dates 'Arrival: 10/24/06' and 'Departure: 10/27/06'. The receipt is circled in red. The interface also includes a sidebar with 'Exceptions' and 'Expenses' sections, a 'Receipt Image Available' tooltip, and a 'Detach From Entry' button. The bottom of the interface shows a URL and a total amount of '\$1,830.08'.

## CONCUR EXPENSE

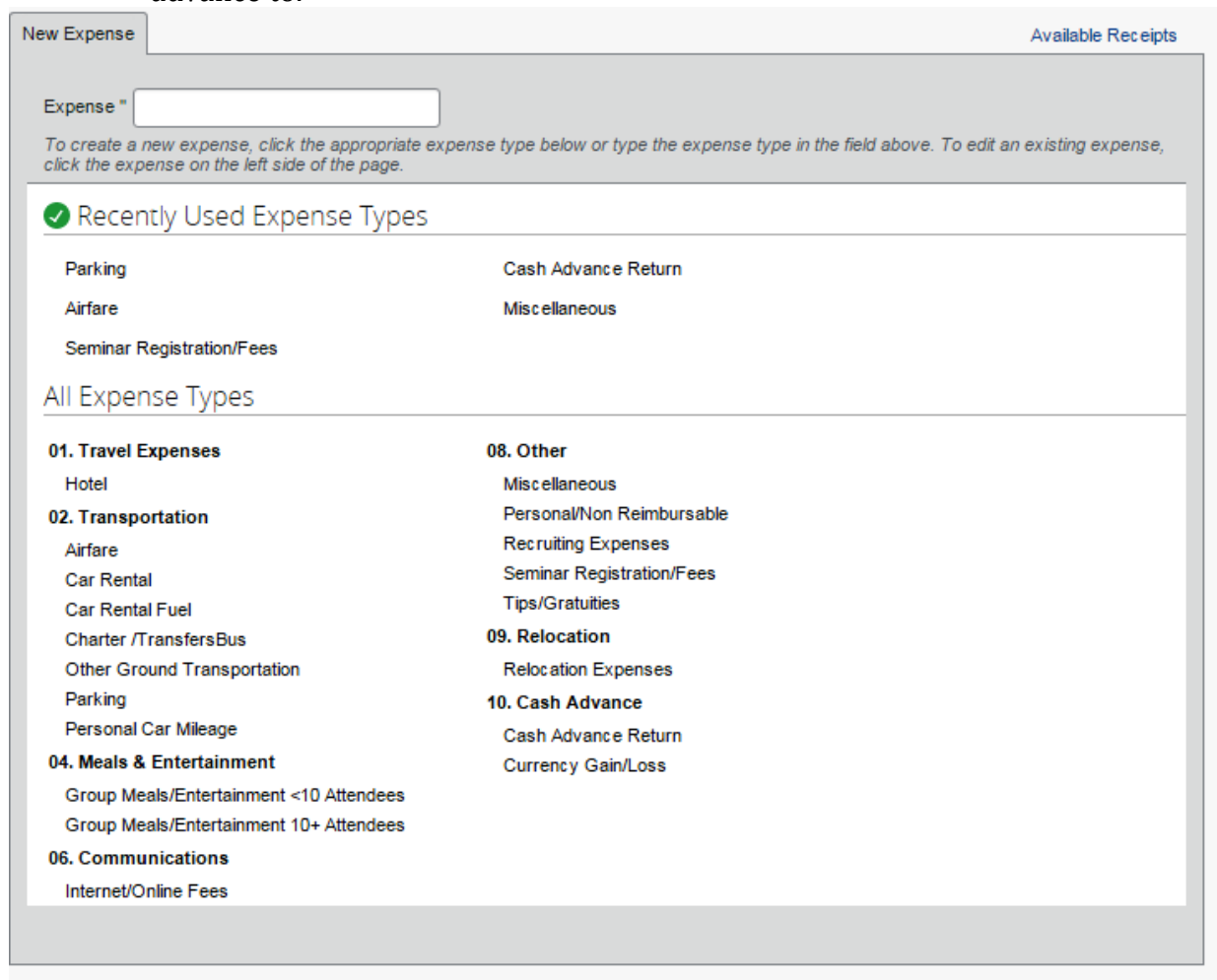
### CASH ADVANCE RETURN

#### Overview

All employees are required to reconcile their travel after they return from their trip. Employees that received a Cash Advance must also reconcile their cash advance and pay any overages to the MSM Finance department.

#### Steps


1. Under **All Expense Types**, choose the expense you'd like to apply your cash advance to.



New Expense Available Receipts

Expense

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

 Recently Used Expense Types

Parking	Cash Advance Return
Airfare	Miscellaneous
Seminar Registration/Fees	

All Expense Types

<b>01. Travel Expenses</b>	<b>08. Other</b>
Hotel	Miscellaneous
<b>02. Transportation</b>	Personal/Non Reimbursable
Airfare	Recruiting Expenses
Car Rental	Seminar Registration/Fees
Car Rental Fuel	Tips/Gratuities
Charter /TransfersBus	<b>09. Relocation</b>
Other Ground Transportation	Relocation Expenses
Parking	<b>10. Cash Advance</b>
Personal Car Mileage	Cash Advance Return
<b>04. Meals &amp; Entertainment</b>	Currency Gain/Loss
Group Meals/Entertainment <10 Attendees	
Group Meals/Entertainment 10+ Attendees	
<b>06. Communications</b>	
Internet/Online Fees	

2. Attach your receipt then update the **Transaction Date, City of Purchase and Amount.**

3. Click **Save**
4. Click **Details**

**CASH ADVANCE**

Manage Expenses View Transactions View Cash Advances

+ New Expense Import Expenses **Details** Receipts Print / Email

Exceptions

Expense	Date	Amount
Cash Advance ...	09/18/2015	\$20.00

Expenses

Date	Expense
09/18/2015	Cash Advance Return
09/18/2015	Parking Washington, District

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Cash Advances**
  - Available
  - Assigned
- Allocations
  - Allocations
- Travel Allowances
  - New Itinerary
  - Available Itineraries
  - Expenses & Adjustments

Expense Type: Cash Advance Return Date: 09/18/2015 Trip Type: In-State

Description: Amount: 20.00 USD

Cash Advances Assigned to Report

Cash Advance ...	Foreign Amount	Exchange Rate	Amount	Balance	Amount Used in Report
WASHINGTON ...	\$50.00	1.00000000	\$50.00	\$10.00	\$40.00

OUTSTANDING ADVANCE: \$10.00 TOTAL AMOUNT: \$40.00 TOTAL REQUESTED: \$20.00

Save Allocate Attach Receipt Cancel

5. Click **Available Cash Advances**

**CASH ADVANCE**

Manage Expenses View Transactions View Cash Advances

+ New Expense Import Expenses **Details** Receipts Print / Email

Exceptions

Expense	Date	Amount
Cash Advance ...	09/18/2015	\$20.00

Expenses

Date	Expense
09/18/2015	Cash Advance Return
09/18/2015	Parking Washington, District

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Cash Advances**
  - Available
  - Assigned
- Allocations
  - Allocations
- Travel Allowances
  - New Itinerary
  - Available Itineraries
  - Expenses & Adjustments

6. **Select the Cash Advance that applies to your report then click **Assign Cash Advance to Report**.**

## Cash Advances

Cash Advance ...	Date Issued	Foreign Amount	Exchange Rate	Amount	Balance
<input type="checkbox"/> conference-USD	08/25/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> Trip to Twinsbur...	08/25/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input checked="" type="checkbox"/> DETROIT-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> WASHINGTON ...	08/19/2015	\$50.00	1.00000000	\$50.00	\$50.00
<input type="checkbox"/> AKRON-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> VEGAS-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> NEW YORK-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> NEW ORLEANS...	08/19/2015	\$120.00	1.00000000	\$120.00	\$120.00
<input type="checkbox"/> GHANA-USD	08/19/2015	\$297.00	1.00000000	\$297.00	\$297.00
<input type="checkbox"/> ABRF-USD	08/19/2015	\$800.00	1.00000000	\$800.00	\$800.00
<input type="checkbox"/> MEXICO-USD	08/19/2015	\$472.00	1.00000000	\$472.00	\$472.00
<input type="checkbox"/> TOLEDO-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> CANADA-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> PHOENIX-USD	08/19/2015	\$280.00	1.00000000	\$280.00	\$280.00

Assign Cash Advance to Report
Cancel

7. Click **Cash Advance Return**

New Expense

Available Receipts

Expense \*

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

☒ Recently Used Expense Types

Parking

Airfare

Seminar Registration/Fees

Cash Advance Return

Miscellaneous

All Expense Types

01. Travel Expenses

Hotel

02. Transportation

Airfare

Car Rental

Car Rental Fuel

Charter /TransfersBus

Other Ground Transportation

Parking

Personal Car Mileage

04. Meals & Entertainment

Group Meals/Entertainment <10 Attendees

Group Meals/Entertainment 10+ Attendees

06. Communications

Internet/Online Fees

08. Other

Miscellaneous

Personal/Non Reimbursable

Recruiting Expenses

Seminar Registration/Fees

Tips/Gratuities

09. Relocation

Relocation Expenses

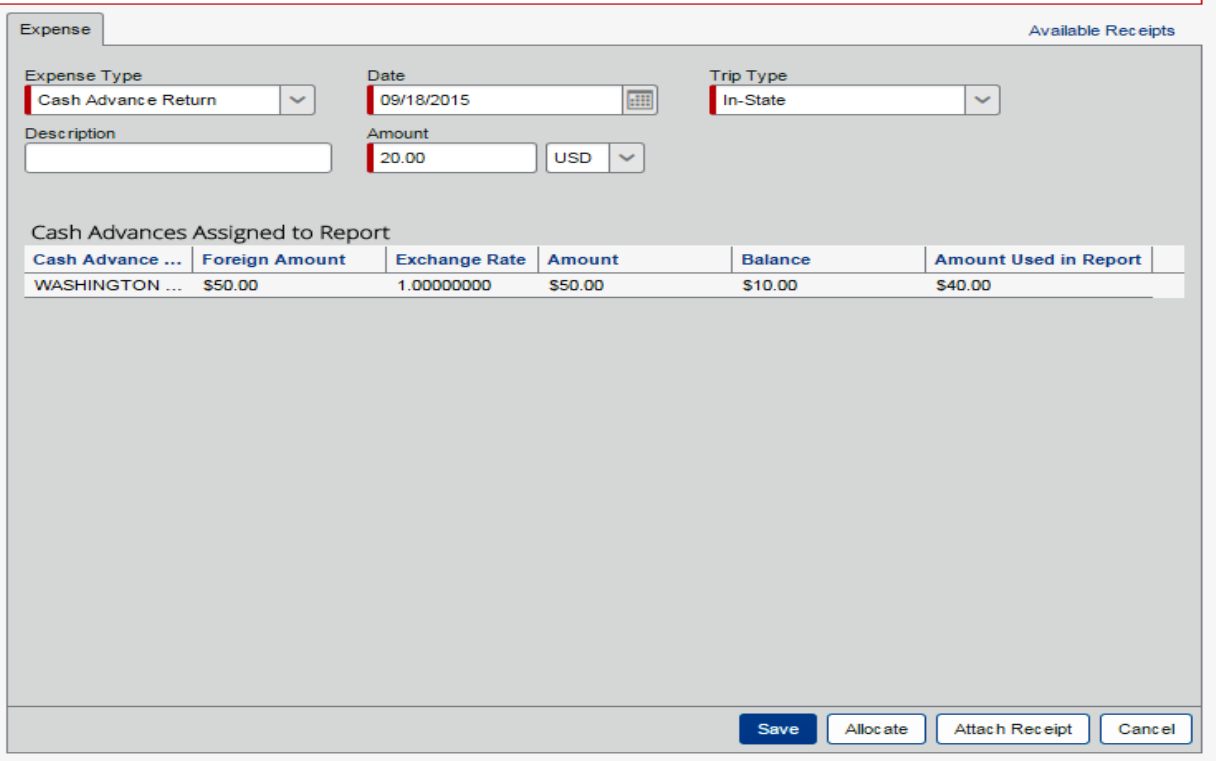
10. Cash Advance

Cash Advance Return

Currency Gain/Loss



8. Update the amount of money you used on your trip.



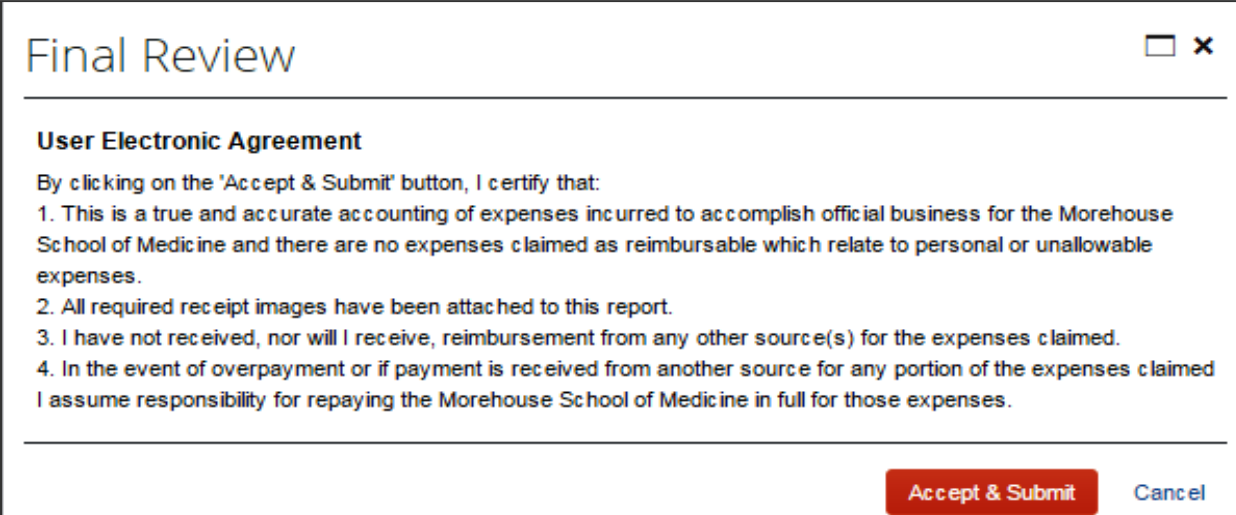
The screenshot shows an 'Expense' form with the following fields: Expense Type (Cash Advance Return), Date (09/18/2015), Trip Type (In-State), Description, Amount (20.00), and Currency (USD). Below these fields is a table titled 'Cash Advances Assigned to Report' with columns: Cash Advance, Foreign Amount, Exchange Rate, Amount, Balance, and Amount Used in Report. The table contains one row for 'WASHINGTON ...' with values: \$50.00, 1.00000000, \$50.00, \$10.00, and \$40.00. At the bottom right are buttons for Save, Allocate, Attach Receipt, and Cancel.

Cash Advance ...	Foreign Amount	Exchange Rate	Amount	Balance	Amount Used in Report
WASHINGTON ...	\$50.00	1.00000000	\$50.00	\$10.00	\$40.00

9. **Attach Receipts (upload supporting documentation that you paid money back to MSM)** then click **Save**.

- The bottom of the report will show you the amount of the outstanding advance.

10. Click **Submit Report**. The Final Review box will pop up. Read the comments then click **Accept & Submit**.



The screenshot shows a 'Final Review' dialog box with a title bar containing a close button. The main content area is titled 'User Electronic Agreement' and contains the following text: 'By clicking on the 'Accept & Submit' button, I certify that:'. Below this are four numbered items: 1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Morehouse School of Medicine and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses. 2. All required receipt images have been attached to this report. 3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed. 4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Morehouse School of Medicine in full for those expenses. At the bottom right are buttons for 'Accept & Submit' and 'Cancel'.

11. If you try to submit your report without clearing the advance you'll receive an error message. You will need to fully pay the amount and apply the full Cash Advance before you submit your report.

- **Note: You will not be able to submit any other Travel through Concur until your Cash Advance has been cleared.**

## Approval Flow for Report: CASH ADVANCE ×

This report could not be submitted. Cash Advances must be entirely utilized or returned. Please enter a Cash Advance Return on this report to return the remaining balance.

Cost Object Approval:

+ ×

Accounting Review:

+ ×

Submit Report

Cancel

## CONCUR EXPENSE

### SUBMITTING REPORTS

You must clear up any Exceptions before you are able to successfully submit your report.

Common Exceptions include:

- Not using Concur to book/ reserve Airfare, Hotel, Car
- Creating an Expense without a Request
- Missing receipts
- Missing itemizations
- Itemizations that don't match the total expense
- Missing "Additional Information" for Conferences
- Dates in Expense don't match the dates in Request Header
- Not applying your Cash Advance

The screenshot displays the Concur Expense report interface. A red oval highlights the 'Exceptions' table at the top, which lists three items: Airfare, Hotel, and Hotel, all with a warning icon and the message 'MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.' Below this is the 'Expenses' table, which lists various travel-related expenses with columns for Date, Expense, Amount, and Requested. A red box highlights a specific expense entry for a hotel stay on 09/10/2015, which also has a warning icon and the same MSM policy message. To the right of the tables is a form for 'Itemization' with fields for Expense Type, Transaction Date, Report/Trip Purpose, Trip Type, Vendor, City of Purchase, Payment Type, Amount, and Additional Information. At the bottom, there are buttons for 'Save', 'Allocate', and 'Cancel', and a summary of the total amount and total requested.

Expense	Date	Amount	Exception
Airfare	09/16/2015	\$350.00	MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.
Hotel	09/10/2015	\$100.00	MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.
Hotel	09/10/2015	\$100.00	MSM policy requires the use of the Concur booking system for Air, Car, and Hotel reservations.

Expense	Date	Expense	Amount	Requested
<input type="checkbox"/>	09/04/2015	Personal Car Mileage	\$380.08	\$380.08
<input type="checkbox"/>	09/04/2015	Group Meals/Entertainment <1 Wendy's, Miami, Florida	\$50.00	\$50.00
<input type="checkbox"/>	09/16/2015	Car Rental Dollar, Miami, Florida	\$100.00	\$100.00
<input type="checkbox"/>	09/16/2015	Airfare Delta Air Lines, Miami, Florida	\$350.00	\$350.00
<input type="checkbox"/>	09/16/2015	Seminar Registration/Fees MM Conference, Miami, Florida	\$250.00	\$250.00
<input checked="" type="checkbox"/>	09/10/2015	Hotel Marriott Hotels, Miami, Florida	\$500.00	\$500.00
<input type="checkbox"/>	09/10/2015	Hotel	\$100.00	\$100.00
<input type="checkbox"/>	09/10/2015	Hotel	\$100.00	\$100.00
<input type="checkbox"/>	09/10/2015	Hotel	\$100.00	\$100.00
<input type="checkbox"/>	09/10/2015	Hotel	\$100.00	\$100.00
<input checked="" type="checkbox"/>	09/10/2015	Hotel	\$100.00	\$100.00

TOTAL AMOUNT: \$1,630.08 | TOTAL REQUESTED: \$1,630.08

Itemization Form Fields:

- Expense Type: Hotel
- Transaction Date: 09/10/2015
- Report/Trip Purpose: Student Recruiting
- Trip Type: Out-of-State
- Vendor: Marriott Hotels
- City of Purchase: Miami, Florida
- Payment Type: Cash
- Amount: 100.00 USD
- Additional Information: cash
- Comment:

Buttons: Save, Allocate, Cancel

If you try to Submit the report without clearing the exceptions first, you will receive an error message.

Report Submit Status

!

This report has one or more exceptions. Resolve the exceptions before submitting the report.

OK

Once all of the Exceptions have been cleared, you will be able to **Submit Report**.

Delete Report

Submit Report

Hide Exceptions

You will be able to print a copy of your report during the **Final Review**

Final Review

User Electronic Agreement

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

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Morehouse School of Medicine and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Morehouse School of Medicine in full for those expenses.

Reminder: Receipts Required!

According to company policy, you must provide receipts for the expenses listed below.

You may attach scanned images to individual expenses or to the report. To view the receipts that are already associated with this report, click **View Receipts**. If you need to fax or attach more, click **Print Fax Cover Page** or

Print \*MSM-Detailed Report with Summary Data

Attach Receipt Images

View Receipts

Expense	Date	Amount
Hotel Marriott Hotels, Miami, Florida	09/10/2015	\$500.00
Car Rental Dollar, Miami, Florida	09/16/2015	\$100.00
Seminar Registration/Fees MM Conference, Miami, Florida	09/16/2015	\$250.00
Group Meals/Entertainment <10 Attendees Wendy's, Miami, Florida	09/24/2015	\$50.00

Accept & Submit

Cancel

Click **Accept and Submit**

Report Successfully Submitted

Training Example

Approver: Osayi, Mediatrix

Expense Report

Report Total :

\$1,630.08

Less Personal Amount :

\$0.00

Amount Claimed :

\$1,630.08

Amount Rejected :

\$0.00

Company Disbursements

Amount Due Employee :

\$1,630.08

Total Paid By Company :

\$1,630.08

Employee Disbursements

Amount Owed Company :

\$0.00

Total Owed By Employee :

\$0.00

Close

## CONCUR EXPENSE

### EMPLOYEE REIMBURSEMENT

#### Overview

Employees can be reimbursed for all allowable business expenses that cannot be placed on the department's P-Card.

#### Steps

##### 1. Click **New**, then click **Start a Report**

The screenshot shows the Concur Expense interface for Morehouse School of Medicine. The top navigation bar includes 'CONCUR', 'Requests', 'Expense', and 'App Center'. The user's profile is 'Hello, Morehouse'. The dashboard features a 'New' button with a dropdown menu containing 'Start a Request', 'Start a Report', and 'Upload Receipts'. There are four summary cards: '71 Authorization Requests', '587 Available Expenses', '10 Open Reports', and '29 Cash Advances'. The 'MY TASKS' section contains three main cards: '99+ Open Requests' (with sub-cards for 'Authorization Requests' and 'Cash Advances'), '99+ Available Expenses' (listing transactions like 'ISLAND AIRLINES', 'Nurseries', 'INTERHOTEL CEDOK', 'Thrifty', and 'Sheraton'), and '10 Open Reports' (listing reports like 'Dawn Test', 'Office Supplies', 'Test Cash and Credit Card Transa', and 'GERMANY'). The 'FACTS & STATS' section at the bottom has two 'Did you know?' tips: one about manual receipt entry and another about receipt photography.

##### 2. Under **Policy**, select **Travel and Expense Policy**

## Create a New Expense Report

Report Header

Policy: **\*Travel & Expense Policy** (circled in red)

Report/Trip Name:

Trip Start Date:

Trip End Date:

Report/Trip Purpose:

Traveler Type:

Chart:

Fund:

Org:

Program:

Activity:

Additional Information:

Report Key:

Comment:

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<div>Add Remove</div>					

- For **Report/Trip Name** section, add the reason why you are requesting a reimbursement.

## Create a New Expense Report

Report Header

Policy:

Report/Trip Name: **White Coat Ceremony** (circled in red)

Trip Start Date:

Trip End Date:

Report/Trip Purpose:

Traveler Type:

Chart:

Fund:

Org:

Program:

Activity:

Additional Information:

Report Key:

Comment:

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<div>Add Remove</div>					

- For Trip Start Date and Trip End Date, select the time frame in which you purchase items on behalf of MSM.

## Create a New Expense Report

Report Header

Trip Start Date:

Trip End Date:

Report/Trip Purpose:

Org:

Program:

Activity:

Comment:

5. In the **Report/ Trip Purpose** section, choose **Other** then provide details in the **Additional Information** section.

The screenshot shows the 'Create a New Expense Report' form. The 'Report Header' section includes fields for Policy, Report/Trip Name, Trip Start Date, Trip End Date, and Report/Trip Purpose. The 'Report/Trip Purpose' dropdown is circled in red and set to 'Other'. Below this, there are fields for Trip Type, Traveler Type, Chart, Fund, Org, Program, and Activity. The 'Additional Information' section, which includes a text area for 'Additional Items for White Coat Ceremony', is also circled in red. There is also a 'Report Key' field and a 'Comment' text area.

6. For trip type, choose **In State**.

This screenshot shows the same 'Create a New Expense Report' form in a web browser. The 'Report/Trip Purpose' dropdown is still set to 'Other'. The 'Additional Information' section contains the text 'Additional Items for White Coat Ceremony'. At the bottom of the form, there is a 'Requests' section with a table. The table has columns for 'Request Name', 'Request ID', 'Cancelled', 'Request Total', 'Amount Approved', and 'Amount Remaining'. There are 'Add' and 'Remove' buttons to the right of the table. At the bottom right of the form, there are 'Next >>' and 'Cancel' buttons.

7. For **Traveler Type**, choose **Faculty/Staff**.



# Create a New Expense Report

Report Header

Policy *Travel & Expense Policy	Report/Trip Name White Coat Ceremony	Trip Start Date 09/24/2015
Trip Type In-State	Traveler Type Faculty/Staff	
Chart [Empty]	Group Travel	
Additional Information Additional Items for White Coat Ceremony	Guest	
	Student	

8. Choose your **Chart**
1. Please choose 1 for Morehouse School of Medicine
  2. Please choose 9 for Morehouse Healthcare

CONCUR Requests Expense App Center

Manage Expenses View Transactions View Cash Advances

## Create a New Expense Report

Report Header

Policy *Travel & Expense Policy	Report/Trip Name White Coat Ceremony	Trip Start Date 09/24/2015
Trip Type In-State	Traveler Type Faculty/Staff	
Chart 1 Morehouse School of Medicine	Fund 2	Org 3

Type to search by:

(1-430200-340002-23) Clinical Research  
(1-100001-100002-60) Institutional Support  
(1) Morehouse School of Medicine  
(9) MHC

Cancelled

9. Choose your **Fund, Organization and Program (FOP)** then click **Next**. You will not be required to choose your Account number. The correct account numbers are built into the Concur platform and will be allocated when you choose your Segments and Expenses.

Report Header

Policy *Travel & Expense Policy	Report/Trip Name White Coat Ceremony	Trip Start Date 09/24/2015	Trip End Date 09/24/2015
Trip Type In-State	Traveler Type Faculty/Staff		
Chart (1) Morehouse School of Mec	Fund (430200) ACTSI-TL	Org (340002) CRC II	Program (23) Clinical Research
Additional Information Additional Items for White Coat Ceremony	Report Key	Comment	

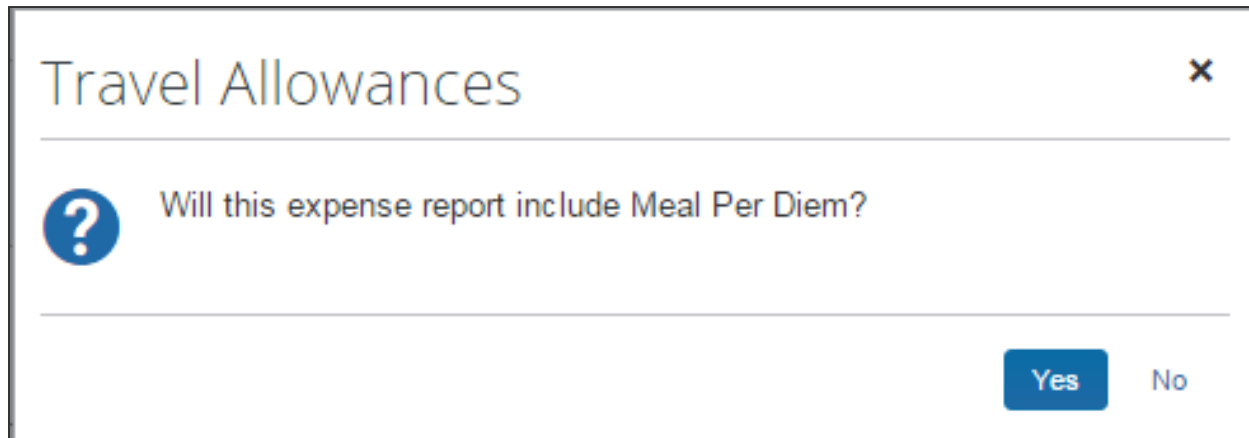
10. Concur will ask you if you are attaching a Cash Advance for to your reimbursement. The answer is no so click **Next** to proceed to the next page.

Cash Advances

Cash Advance ...	Date Issued	Foreign Amount	Exchange Rate	Amount	Balance
<input type="checkbox"/> conference-USD	08/25/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> Trip to Twinsbur...	08/25/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> DETROIT-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> MIAMI-USD	08/19/2015	\$198.00	1.00000000	\$198.00	\$198.00
<input type="checkbox"/> WASHINGTON ...	08/19/2015	\$50.00	1.00000000	\$50.00	\$50.00
<input type="checkbox"/> AKRON-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> VEGAS-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> NEW YORK-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> NEW ORLEANS...	08/19/2015	\$120.00	1.00000000	\$120.00	\$120.00
<input type="checkbox"/> GHANA-USD	08/19/2015	\$297.00	1.00000000	\$297.00	\$297.00
<input type="checkbox"/> ABRF-USD	08/19/2015	\$800.00	1.00000000	\$800.00	\$800.00
<input type="checkbox"/> MEXICO-USD	08/19/2015	\$472.00	1.00000000	\$472.00	\$472.00
<input type="checkbox"/> TOLEDO-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00
<input type="checkbox"/> CANADA-USD	08/19/2015	\$100.00	1.00000000	\$100.00	\$100.00

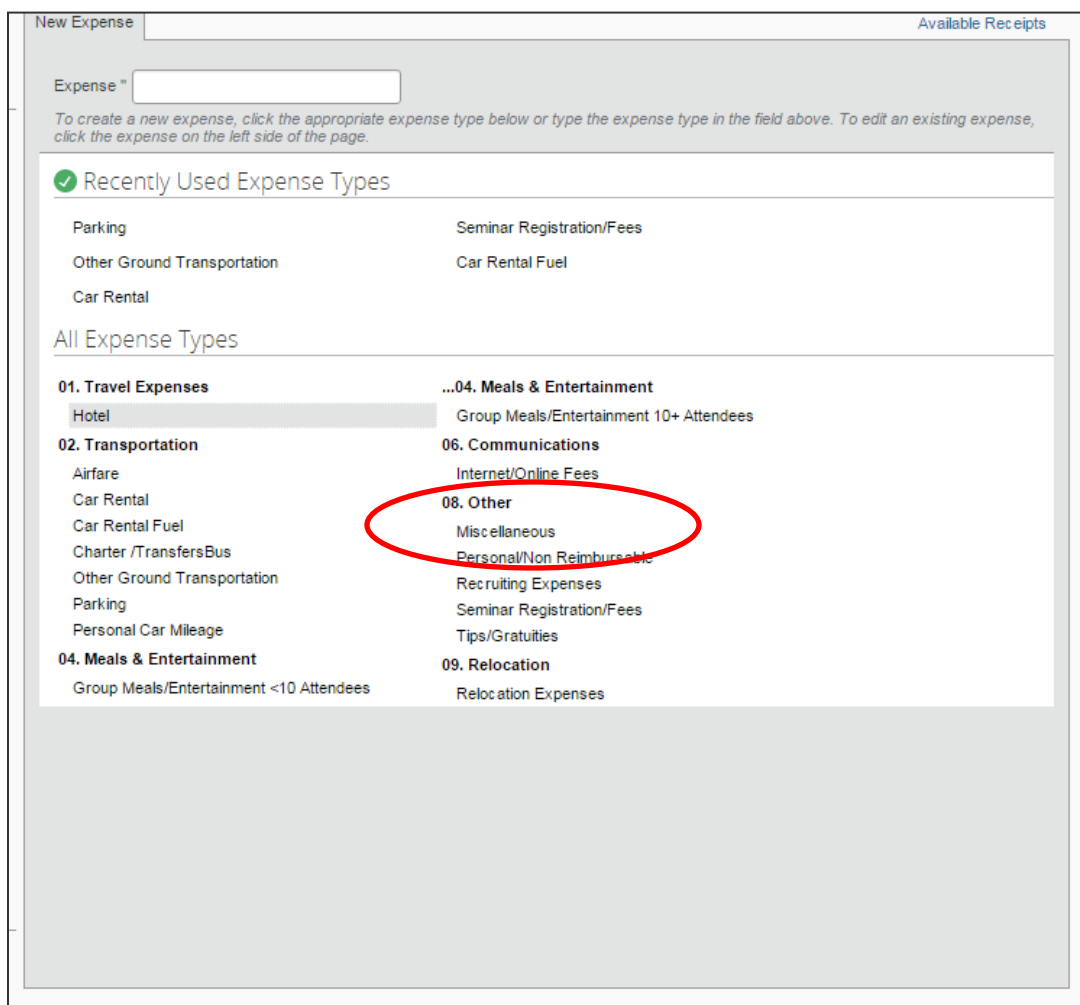
Assign Cash Advance to Report    Next >>

11. Concur will ask if you there is per diem in your reimbursement. Click **No** to continue.



A dialog box titled "Travel Allowances" with a close button (X) in the top right corner. Below the title bar, there is a question mark icon followed by the text "Will this expense report include Meal Per Diem?". At the bottom right, there are two buttons: "Yes" and "No".

12. Click **New Expense**, then click **Miscellaneous**.



The "New Expense" screen shows a form for creating a new expense. At the top, there is a tab labeled "New Expense" and a link for "Available Receipts". Below this is a text input field for "Expense #" and a note: "To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page." The main content area is divided into two sections: "Recently Used Expense Types" and "All Expense Types". The "Recently Used Expense Types" section lists: Parking, Other Ground Transportation, Car Rental, Seminar Registration/Fees, and Car Rental Fuel. The "All Expense Types" section is organized into categories: 01. Travel Expenses (Hotel), 02. Transportation (Airfare, Car Rental, Car Rental Fuel, Charter /TransfersBus, Other Ground Transportation, Parking, Personal Car Mileage), 04. Meals & Entertainment (Group Meals/Entertainment <10 Attendees), ...04. Meals & Entertainment (Group Meals/Entertainment 10+ Attendees), 06. Communications (Internet/Online Fees), 08. Other (Miscellaneous, Personal/Non Reimbursable), 09. Relocation (Relocation Expenses), and Recruiting Expenses. The "08. Other" category is circled in red, and the "Miscellaneous" option is highlighted.

13. Update the **Transaction Date, Vendor Name, City of Purchase** and **Amount**.

The 'New Expense' form is displayed with the following fields and values:

- Expense Type:** Miscellaneous
- Transaction Date:** 09/24/2015
- Report/Trip Purpose:** Other
- Trip Type:** In-State
- Additional Information:** Additional Items for White Coat Cern
- Enter Vendor Name:** Party City
- City of Purchase:** Atlanta, Georgia
- Payment Type:** Cash
- Amount:** 50.00 USD
- Comment:** Balloons

14. **Attach Receipts**

The 'Attach Receipt' dialog is shown over the 'White Coat Ceremony' expense entry. It provides options to upload a new file or select from available receipts.

**File Selected for uploading:** Browse... Attach

No file selected

Or choose an image from your Available Receipts.

**Available Receipts:** Attach

- 2013\_10\_22\_Coni
- 2013\_10\_22\_Coni
- 2013\_10\_22\_Coni
- 2013\_10\_22\_Coni
- 2013\_10\_22\_Coni

Cancel

15. Click **Save**

New Expense
Receipt Image
Available Receipts

Expense Type  
Miscellaneous
Transaction Date  
09/24/2015
Report/Trip Purpose  
Other

Trip Type  
In-State
Additional Information  
Additional Items for White Coat Cern
Enter Vendor Name  
Party City

City of Purchase  
Atlanta, Georgia
Payment Type  
Cash
Amount  
50.00 USD

Comment  
Balloons

Save
Itemize
Allocate
Attach Receipt
Cancel

16. Click **Submit Report**

17. Read the Final Review, click **Accept & Submit**.

Final Review

**User Electronic Agreement**  
By clicking on the 'Accept & Submit' button, I certify that:  
1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Morehouse School of Medicine and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.  
2. All required receipt images have been attached to this report.  
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.  
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Morehouse School of Medicine in full for those expenses.

Accept & Submit
Cancel

18. The reimbursable amount will be shown in the **Amount Due Employee** section of the **Successfully Submitted Report**.

Report Successfully Submitted

White Coat Ceremony  
Approver: Approver, Default

Expense Report

Report Total :  
Less Personal Amount :

\$50.00  
\$0.00

Amount Claimed :  
Amount Rejected :

\$50.00  
\$0.00

Company Disbursements

Amount Due Employee :  
Total Paid By Company :

\$50.00  
\$50.00

Employee Disbursements

Amount Owed Company :  
Total Owed By Employee :

\$0.00  
\$0.00

Close

### FAQs

#### What steps are involved in completing an Expense Report?

1. Create an Expense Report
2. The Approver is notified by email message and will review the Expense Report. He/she then approves or rejects the Report. If rejected, the Report will be sent back to the submitter with a request for changes to be made or additional requirements.
3. The approved Expense Report will be sent to the Concur Expense Processor for reviewing. If any errors are identified, the report will be sent back to the submitter to correct and resubmit to the approver.

#### On an Expense Report, what is the Transaction Date?

The transaction date is the date when a service occurred or when an item was purchased.

#### If the system is all electronic, how do I submit receipts?

You will “attach” receipts electronically to your expense report by either faxing them to a dedicated fax line directly into Concur, or by uploading scanned images of the receipts directly to the Concur system. The receipts are immediately viewable in the system upon fax/upload.

Concur also has mobile phone applications that allow you to take a picture of your receipt and then upload directly to the system.

#### How do I scan a receipt in?

1. When in the **Expense Report**, click on the **Receipts** drop down button, which is on the right hand side of the screen below the **Submit Report** button.
2. Click on **Attach Receipt Images**.
3. Click **Browse** and navigate to the folder with your image and select the file.
4. Select the file and click **Attach**.
5. Repeat steps 2 and 3 until all the files you want to upload are listed (the limit is 10) then click **Done**.

### **What if I lost my receipt?**

MSM requires receipts for all items except per diem. If you do not have a receipt you will not be reimbursed.

### **What should I do with my original receipts after they have been faxed or scanned to Concur?**

Approvers should confirm that a readable image is available within the University's Travel and Expense System. Original receipts should be retained by the traveler for auditing purposes.

### **What are eReceipts in Concur?**

eReceipts are electronic itemized receipts that can be accepted in lieu of a scanned or attached receipt file. Employees are able to receive eReceipts for transactions from vendors who have an eReceipt agreement with Concur.

Enabling eReceipts can potentially save time in expense report preparation. Employees must individually enable eReceipts in Concur. The itemized details of the eReceipt are visible to the employee, their delegate, approvers, and auditors, and are permanently recorded with their expense reports.

### **How can I prevent my business Expense Report from being delayed and/or rejected?**

In order to prevent your report from being delayed and/or rejected, be sure to submit all the required materials with your report.

1. Provide a receipt/proof of payment for all travel related expense.
2. For mileage reimbursements (business travel and relocation) use auto-calculation feature in Concur.
3. For **relocation** mileage reimbursements be sure to attach the **MapQuest directions report** as your receipt. Relocation mileage rate for reimbursement is not the same as the business mileage rate.



4. For International Per Diem (for both lodging and meal expenses), be sure to attach the **U.S. Department of State Per Diem table** (<http://aoprals.state.gov>) and clearly indicate the location/rates you are using.

### **What items are non-reimbursable?**

- First class travel, or other seating above the coach level
  - Except as stated in section VIIA for International Travel)
- Purchase of flight insurance
- Personal entertainment
- Personal purchase of goods and services
- Airline clubs
- Rental car mileage for personal use
- Rental of luxury or sports car models
- Haircuts
- Child care
- Pet care
- MSM parking permits
- Traffic fines
- Hotel laundry service
- Hotel valet service
- Excessive personal phone calls
- Hotel amenities (in-room movies, exercise facilities)
- Travel expenses of spouse or other non-business related travelers
- Costs incurred by failure to cancel reservations (hotel or transportation)
- Credit card late fees

### **Can I prepare expense reports on behalf of another colleague?**

Yes. If you are a “Delegate” in another employee’s workflow, you will have the ability to prepare reports for that employee, and the cardholder must submit the report for approval.

### **How do I request a cash advance?**

1. Go to **Expense** then **New Expense Report**
2. From the resulting links, select New Cash Advance
3. Next, provide a name for your request and the select the dollar amount. In the comment area, be sure to add a description such as the name or the date of the event.
4. Click **Submit**.

**Important Note:** when you have an outstanding Cash Advance you will not be able to submit any Expense Reports until the Cash Advance has been applied.

### **How do I apply a cash advance to an expense?**

1. Select the Expense Report you would like to apply it to or create a new Expense Report for expenses that are related to the same cash advance.
2. Once you have filled out the related expenses, go to **Details** which will bring you to a drag-down menu.
3. The drag-down menu will have a section for Cash Advances. Click on **Cash Available**.
4. From the Cash Available box, checkmark the Cash Advances that you wish to apply for the Expense Report. Click **Apply**.
5. To make sure the Cash Advance was selected, go back to **Details** and find the drag-down menu again.
6. Click on **Cash Assigned**. This will inform you what Cash Advance has been applied to the Expense Report you are working on.

### **Is there a certain timeline for cash advances and reconciliation?**

Cash advances can be requested no greater than 30 days prior to the date in which the advance is needed. You must submit an expense report for the entire cash advance amount taken within 10 days of issuance. Any unused portions of the advance must be returned to MSM.

### **Can cash advances be direct deposited to my bank account?**

Yes – if you have a Direct Deposit Form on file with Accounts Payable, the funds approved from each cash advance requests will be directly deposited into your account. If you need a Direct Deposit Form, please contact [ConcurHelpDesk@msm.edu](mailto:ConcurHelpDesk@msm.edu).

### **How do I allocate an expense to multiple charging organizations?**

1. Complete all expenses as usual.
2. Select the expense you wish to allocate from the **Expense List**.
3. In the lower right-hand corner of the window, 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 and then select the department.
7. Click **Add New Allocation**, and then repeat steps 5-6 for each new allocation.
8. Click **Save**, and then click **OK**.
9. In the **Allocate Report** window, click **Done**.

### **How do I break out (itemize) a hotel charge into parts?**

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 select the appropriate expense from the dropdown list.
4. Complete all required and optional fields as directed.
5. Click **Save**.
6. Repeat steps 3-5 until the **Remaining Amount** equals \$0.00

### **How do I create a business Expense Report for a “Business Meal” with attendees for a group of less than 10?**

1. When in the Expense Report, click **New Expense**
2. Select **Business Meal (attendees)** as the expense type.
3. Fill in the **required fields**.
4. Select **New Attendee** to add an attendee
5. Fill in the **required fields**. Click **Save & Add Another** if you have more attendees and then repeat steps 2&5. If no more attendees, click **Save**.

### **How do I create a business Expense Report for a “Business Meal” for a group with more than 10 people?**

Under Concur, a group of 10 or more can qualify to be classified under “**Group Attendees**”. To do this:

1. When in the Business Meal Expense Report, select **Add Attendee** or **Edit Attendee Details**.
2. Go to the **Attendee Type** drag down menu. Select **Group Attendee**.

3. Type the **Group Description** and enter the **Number of Attendees**.

4. Click **Save**.

### What is the reimbursable amount for a Per Diem (Domestic) Meal expense?

Travelers will be provided a per diem rate for travel in accordance with the United States General Service Administration (USGSA) rate tables. Please visit [www.gsa.gov](http://www.gsa.gov) for additional information. Travelers will not be reimbursed for meal offered by the Conference.

### How do I get reimbursed for Relocation Expenses?

A **Relocation Expense Form** must be filled out and attached to your Expense Report on Concur along with your itemized receipts for moving expenses.

To prevent your expense report from being rejected or sent back here are some guidelines for relocation reimbursements:

- Hotel reimbursement is **one night only in each location**.
- Qualified travel expenses:
  - Travel by personal vehicle with reimbursement for actual expenses (i.e. gas and oil for the vehicle used) or the pre-established IRS relocation mileage rate and for any tolls or parking associated with the travel.
  - Travel by rental car between the former home and the new home.
  - Travel by common carrier (i.e. airplane, train) with reasonable transportation from the former home to the airport or other station and from the airport or other station to the new home.
- (In-transit) storage reimbursement must be **less than 30 days**.
- All moving expenses **receipts must be faxed or scanned** to your Concur business Expense Report.

### What are some examples of non-qualifying relocation expenses?

Examples of non-qualifying relocation expenses include, but are not limited to the following:

- Pre-move house hunting
- Payments to non-professional movers (i.e. friends or family members) who **assist** with a move
- Storage (excluding 30 days in transit)
- Meals and food expenses during travel and after arrival
- Vehicle rental after the first day of arriving at new location
- Travel expenses incurred during additional trips from the former home to the new home.

### What receipt do I need to submit for relocation mileage reimbursement?

Submit a print out of the MapQuest ([www.mapquest.com](http://www.mapquest.com)) directions for the mileage you are requesting to be reimbursed for. Attach the receipt to the related Expense Report by either scan or fax.

### Can I edit a report before submitting?

You can edit a report in several ways. You can modify:

- A Report Entry by opening the report, selecting the individual entry you want to change, and then modifying the entry.
- The Report date, Expense Type, and all other information pertaining to the report.

When you are finished modifying the report, click the **Save & Go to Expense List** link. Click **Submit**.

### How can I edit a submitted report?

Reports that have been submitted or reports that have an **Approved and In Accounting Review** status cannot be edited. If you have discovered an error that needs to be corrected, notify your approver immediately. Your approver can then send back the report for correction. You can revise and resubmit the report by requesting **Resubmit** status from your approver.

### How can I find the status of an expense report?

There are three areas that you can view the status of an expense report:

- On the Concur Central page, under **My Updates** heading, you can view

any status changes to your reports.

- On the Concur Central page click **Edit & View Expense Reports** to view a list of all your reports and the current status of each report.
- If you have e-mail notification set up, the status of the expense report is displayed in an email message.

### **How long does it take to be reimbursed after an expense report has been approved?**

If your Expense Report follows all the audit guidelines and is not missing any required paper work, it will take **3-5 business days** for Concur to review expense report.

Employee payments will be made every other week (typically on non-payroll weeks).

### **What does “Extracted for Payment” mean?**

This means that the expense report has been approved by Concur and the file is sent to Accounts Payable for processing. Payment will be made by direct deposit or physical check.

### **Who is my expense Approver in Concur?**

Your department will determine who the appropriate default approver is for your expense reports, as part of their readiness in moving to Concur.

### **What happens when my Approver goes on leave?**

An Approver can delegate to another Concur Approver to approve expense reports on his/her behalf while he/she is on leave.



# CONCUR MOBILE



## CONCUR MOBILE

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### GETTING STARTING

#### OVERVIEW

By syncing your Concur account to your smart phone, you will be able to go to Concur Mobile to book travel and manage your itineraries. The examples in this workbook will be from the iPhone perspective.

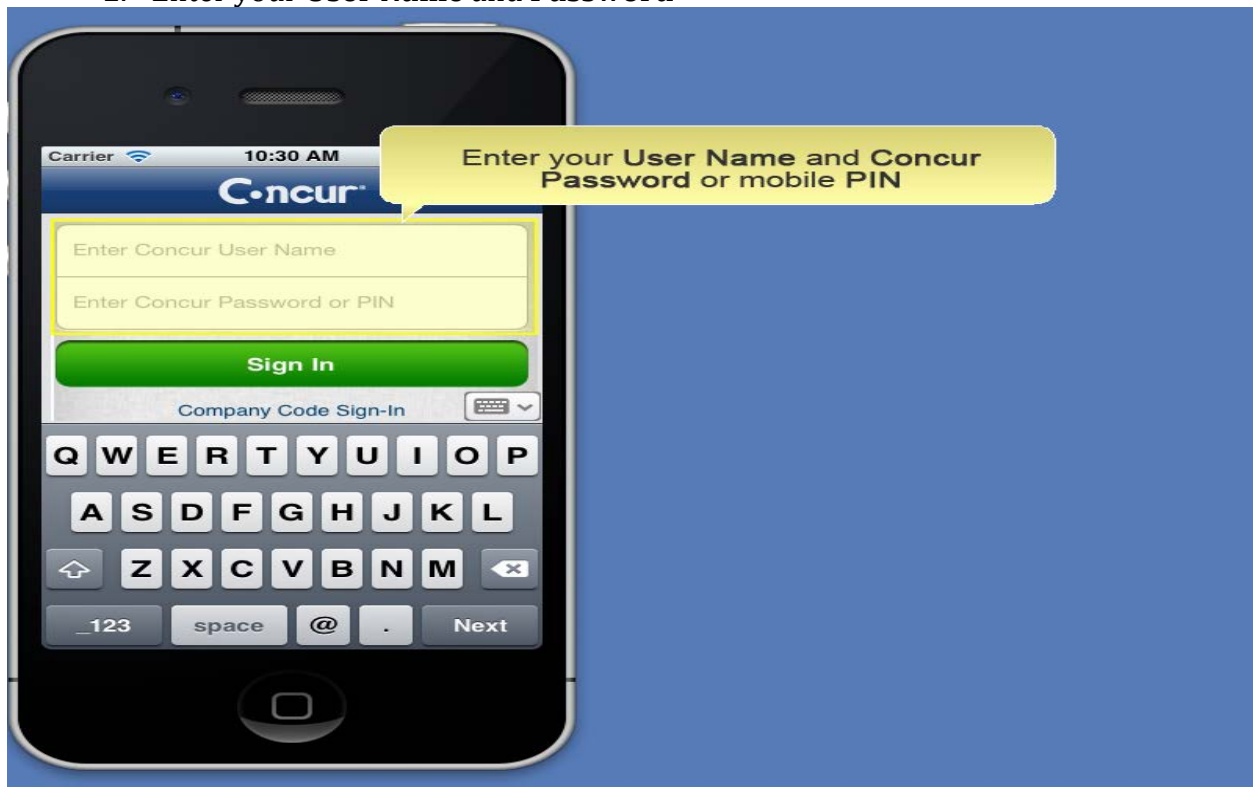
Please visit [https://implementation.concursolutions.com/expense/client/view\\_training.asp](https://implementation.concursolutions.com/expense/client/view_training.asp) for video demonstration of the Concur Mobile app using Blackberry and Android.

#### Steps

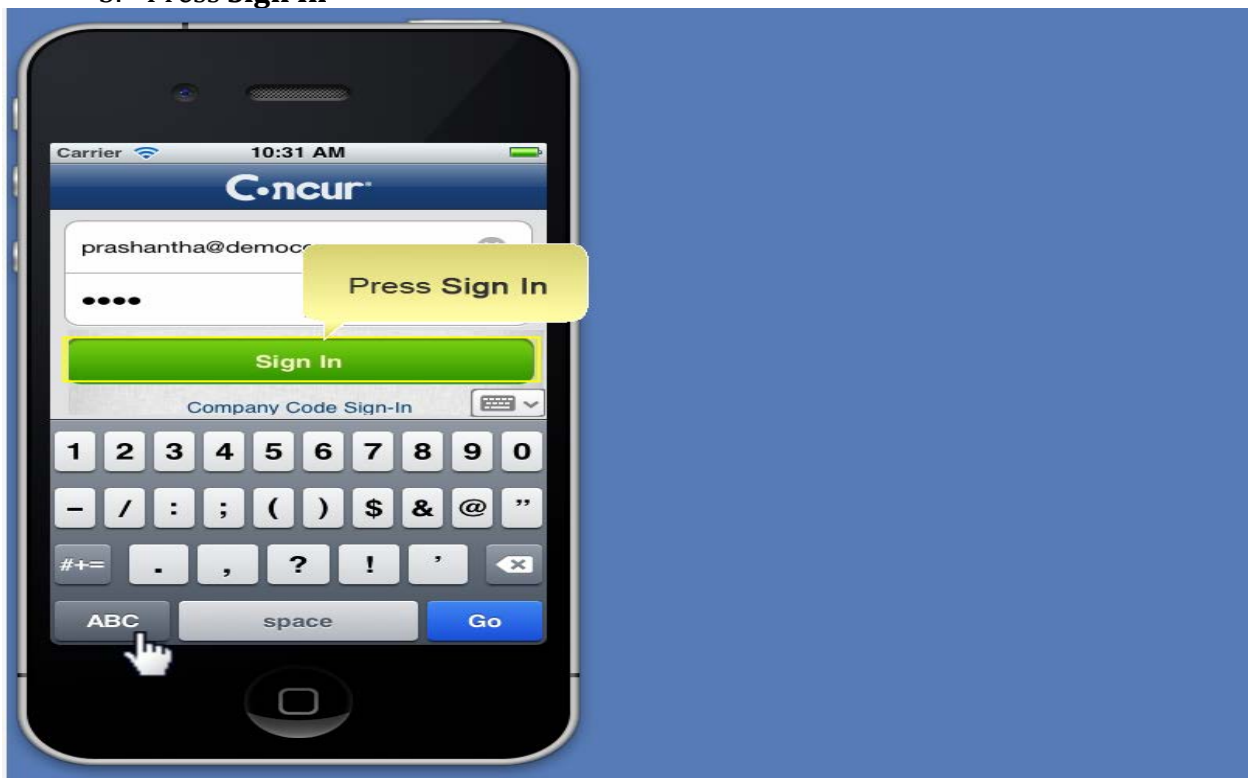
1. Click the **Concur App**



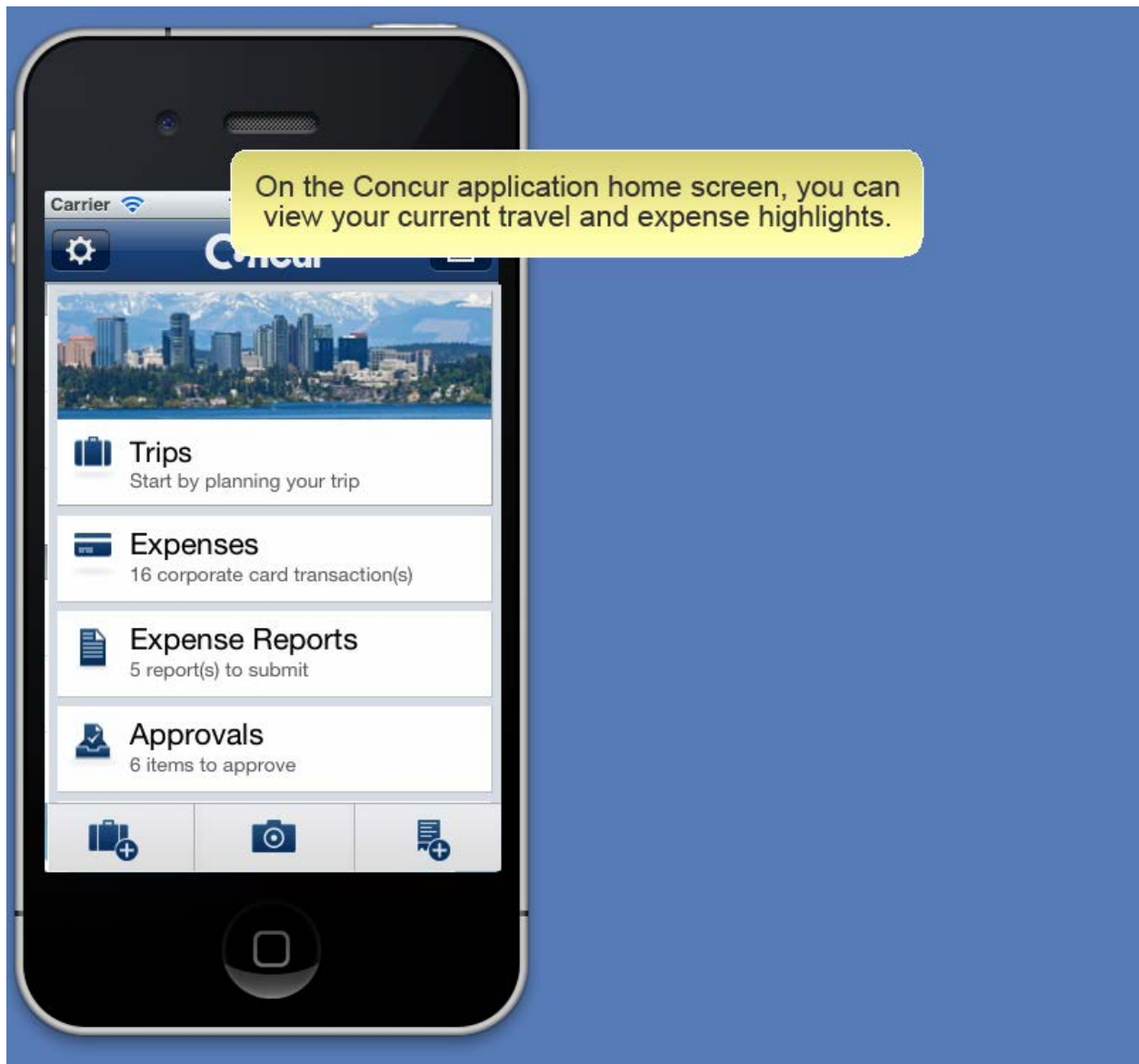
## 2. Enter your **User Name** and **Password**



## 3. Press **Sign In**



4. You will be able to view your Travel and Expenses from the Home Screen



## CONCUR MOBILE

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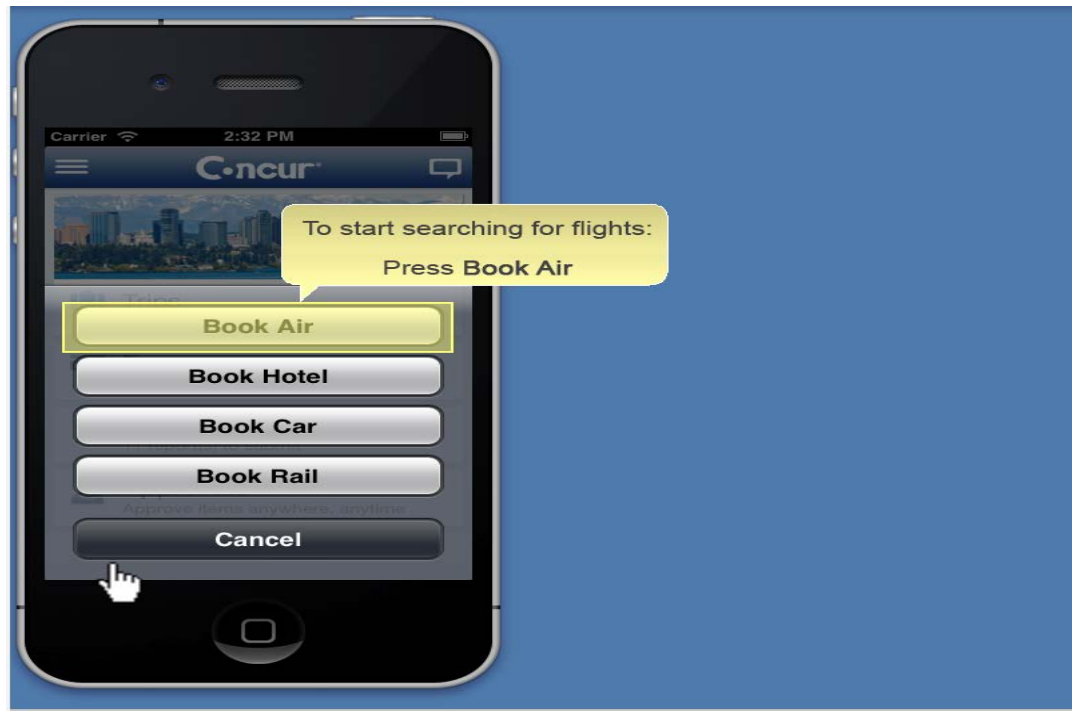
### TRAVEL- BOOKING AIRFARE

#### STEPS

1. Press the **Book Travel** icon



2. Press **Book Air**



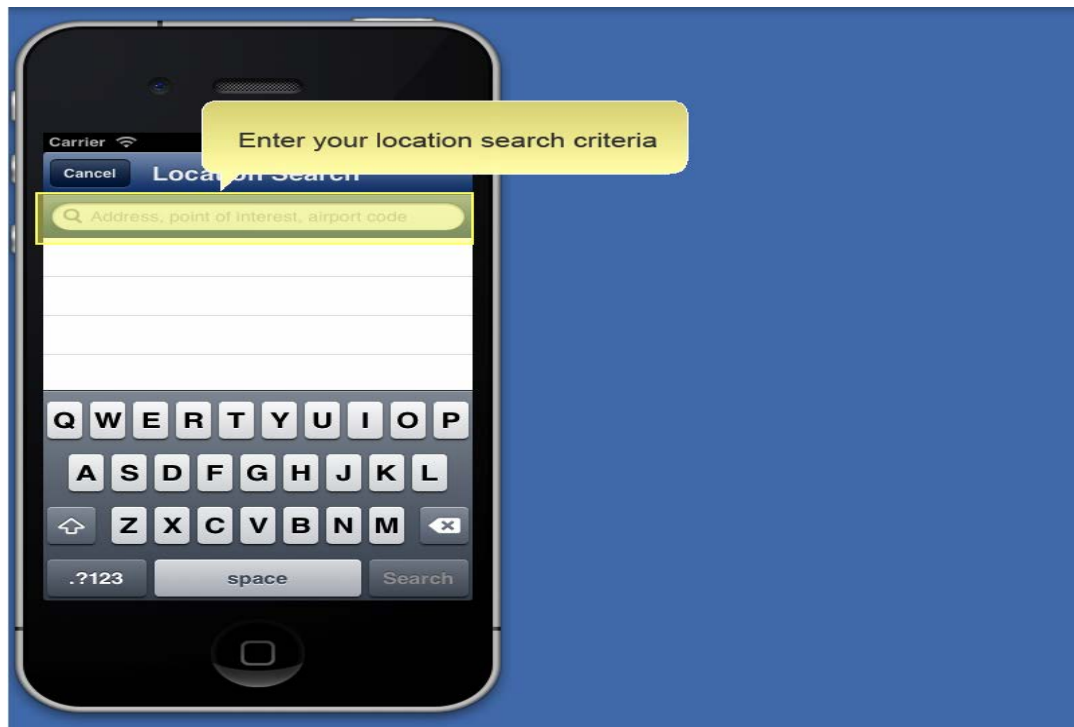
3. Your home airport will populate in the **Departure City**.



4. Press **Arrival City**



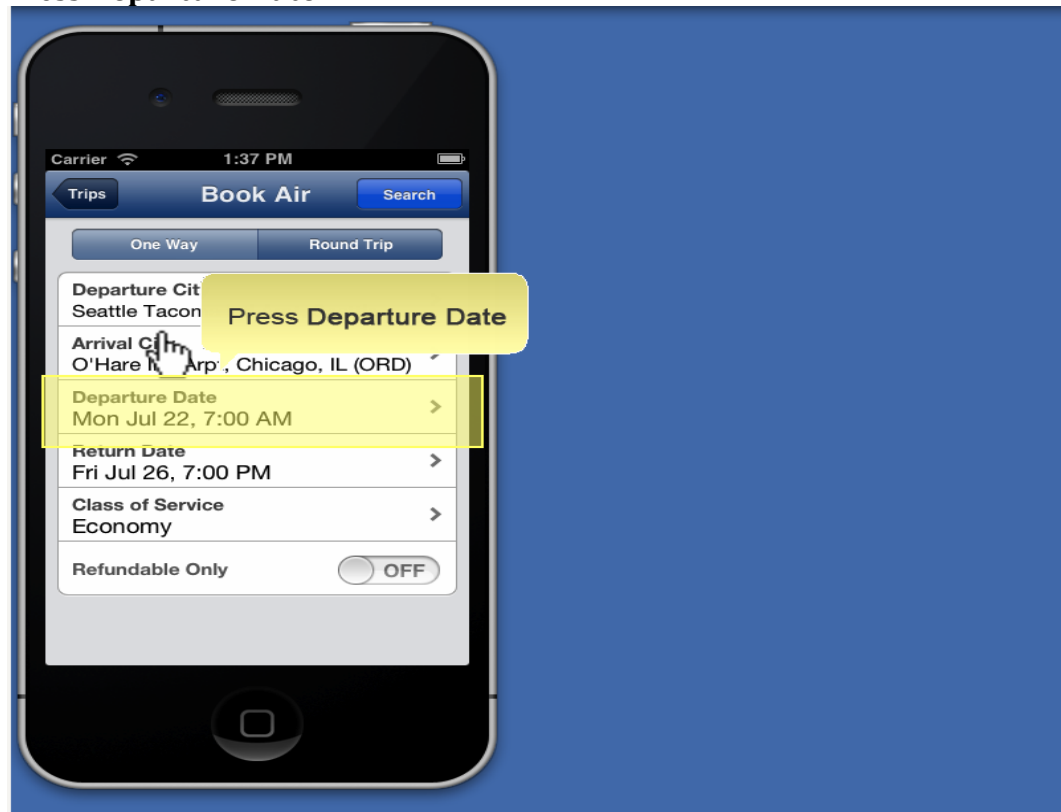
5. Enter you location criteria



6. Select your location



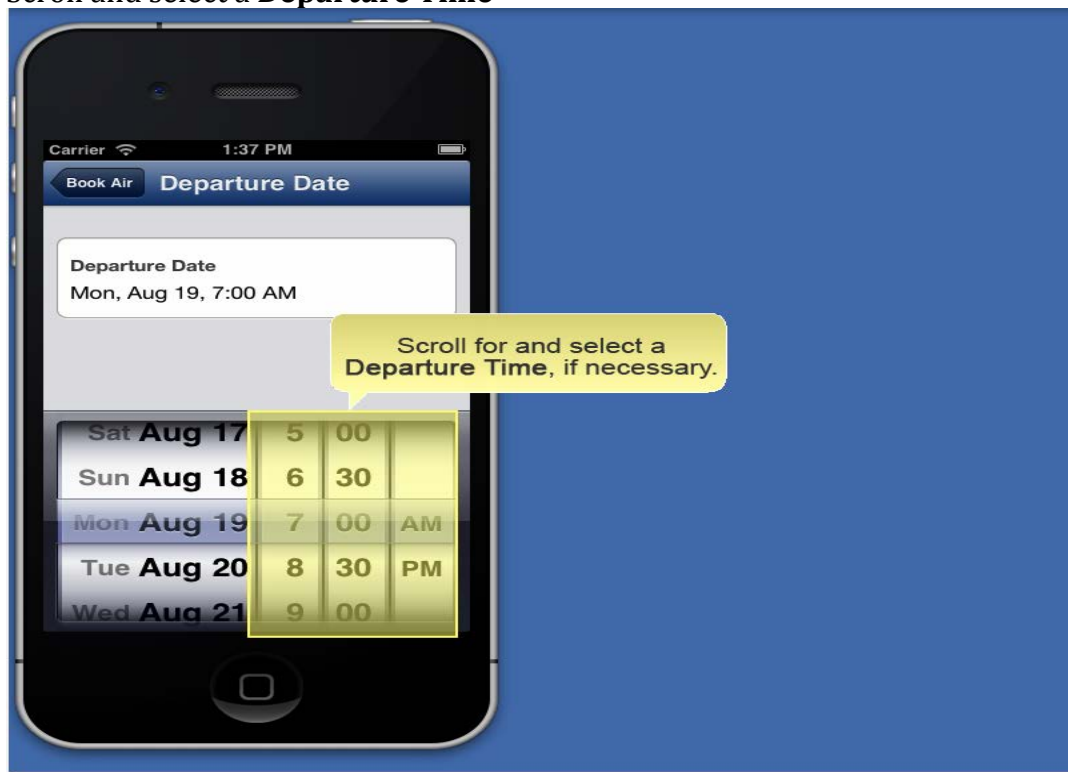
7. Press **Departure Date**



8. Scroll and select a **Departure Date**

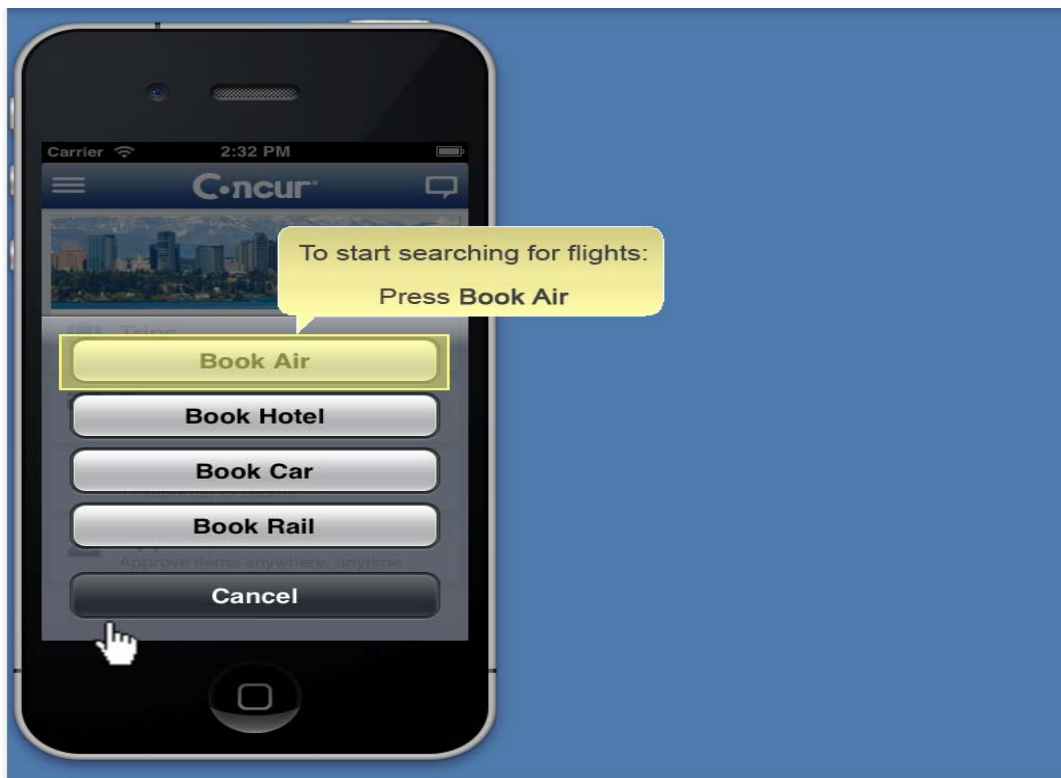


9. Scroll and select a **Departure Time**

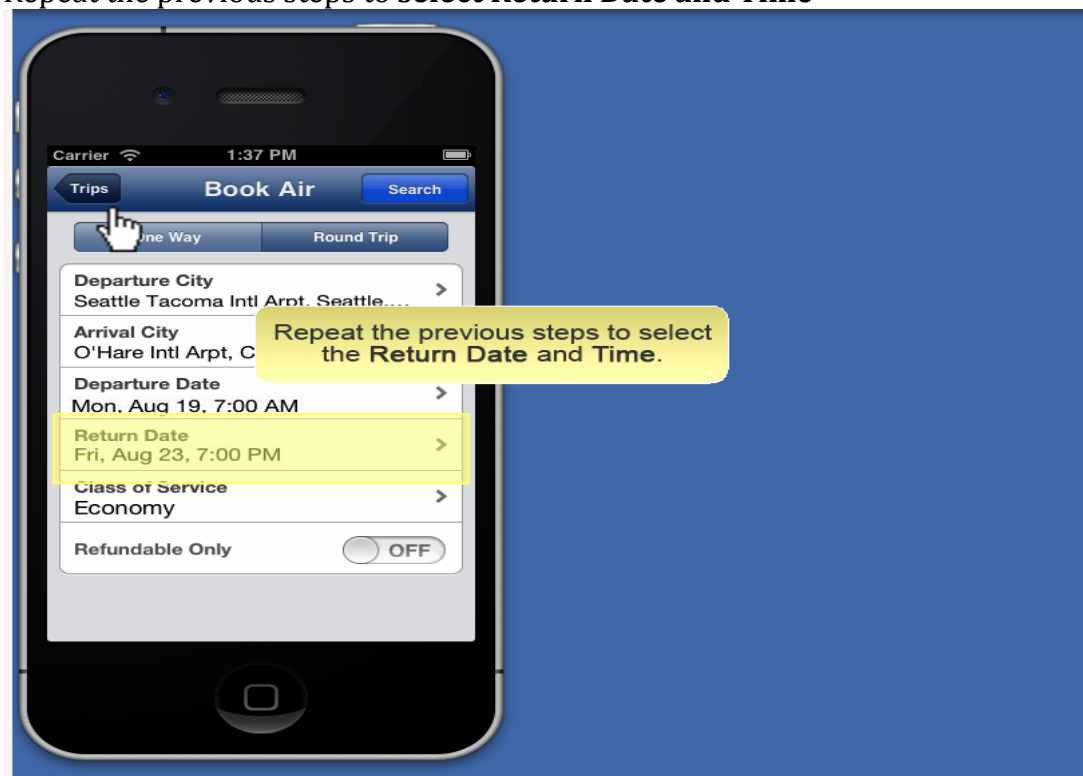




10. Press **Book Air**



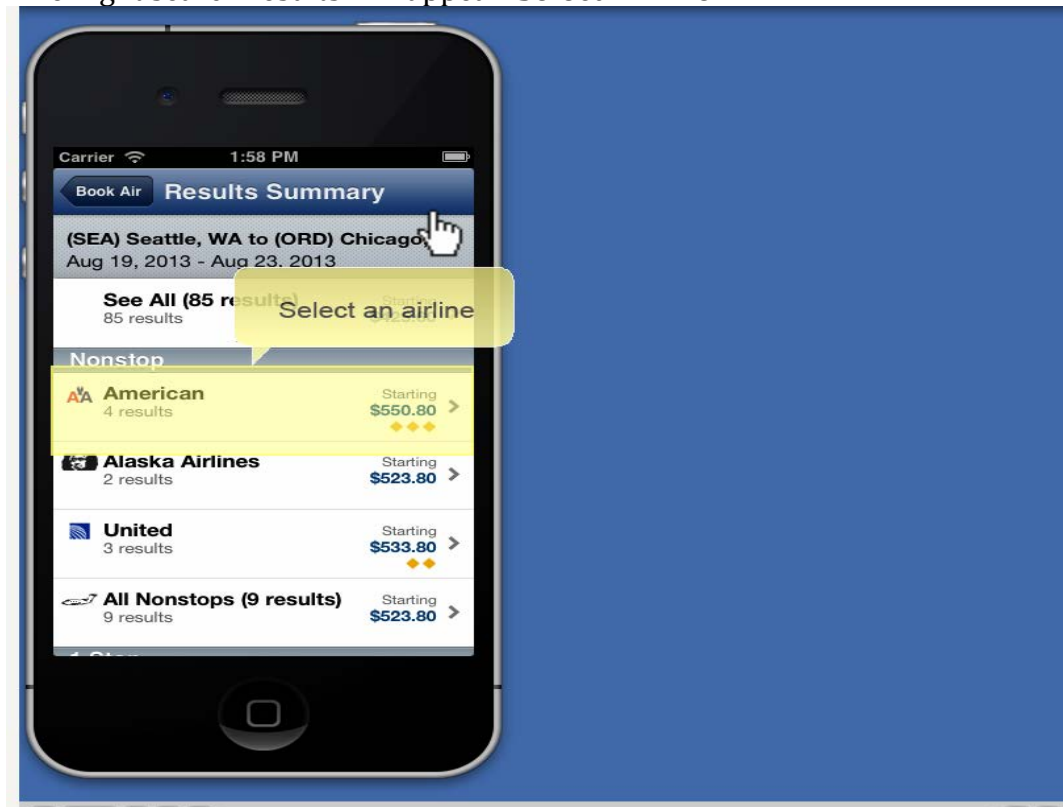
11. Repeat the previous steps to **select Return Date and Time**



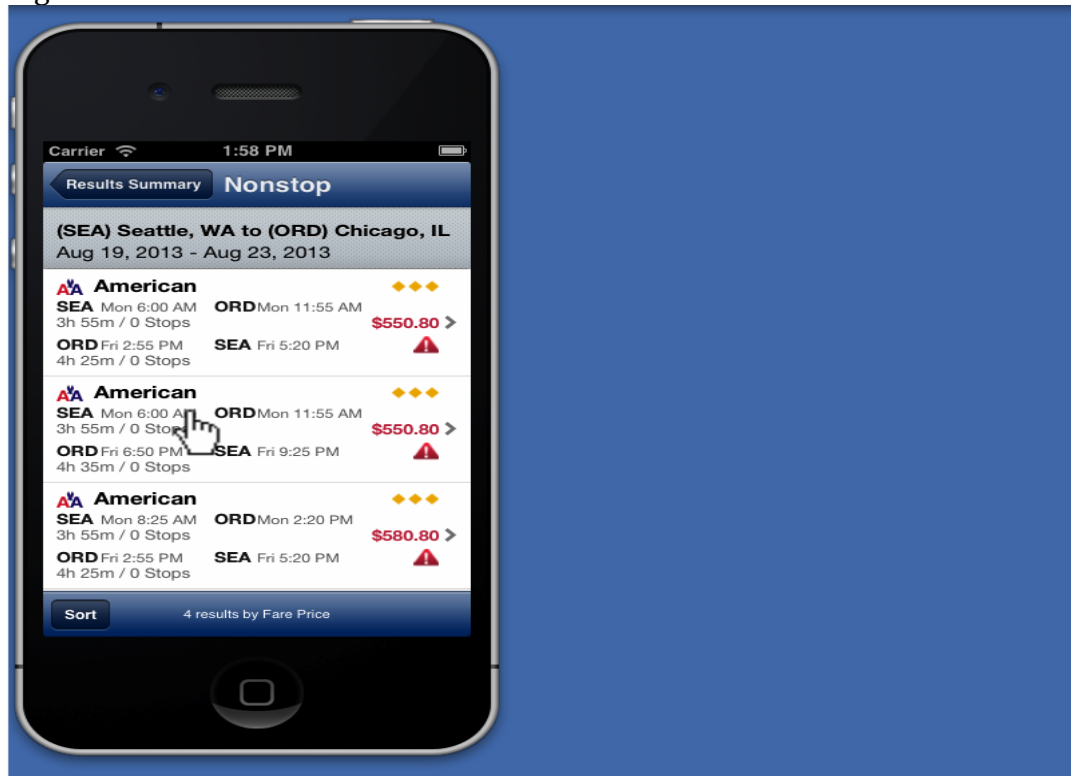
12. Press **Search**



13. The flight search results will appear. **Select Airline**



14. You will see a list of flight options for the selected airline. Select your preferred flight



15. You will see the details for the selected flight. Press **Reserve**.



16. Press **OK** to confirm.



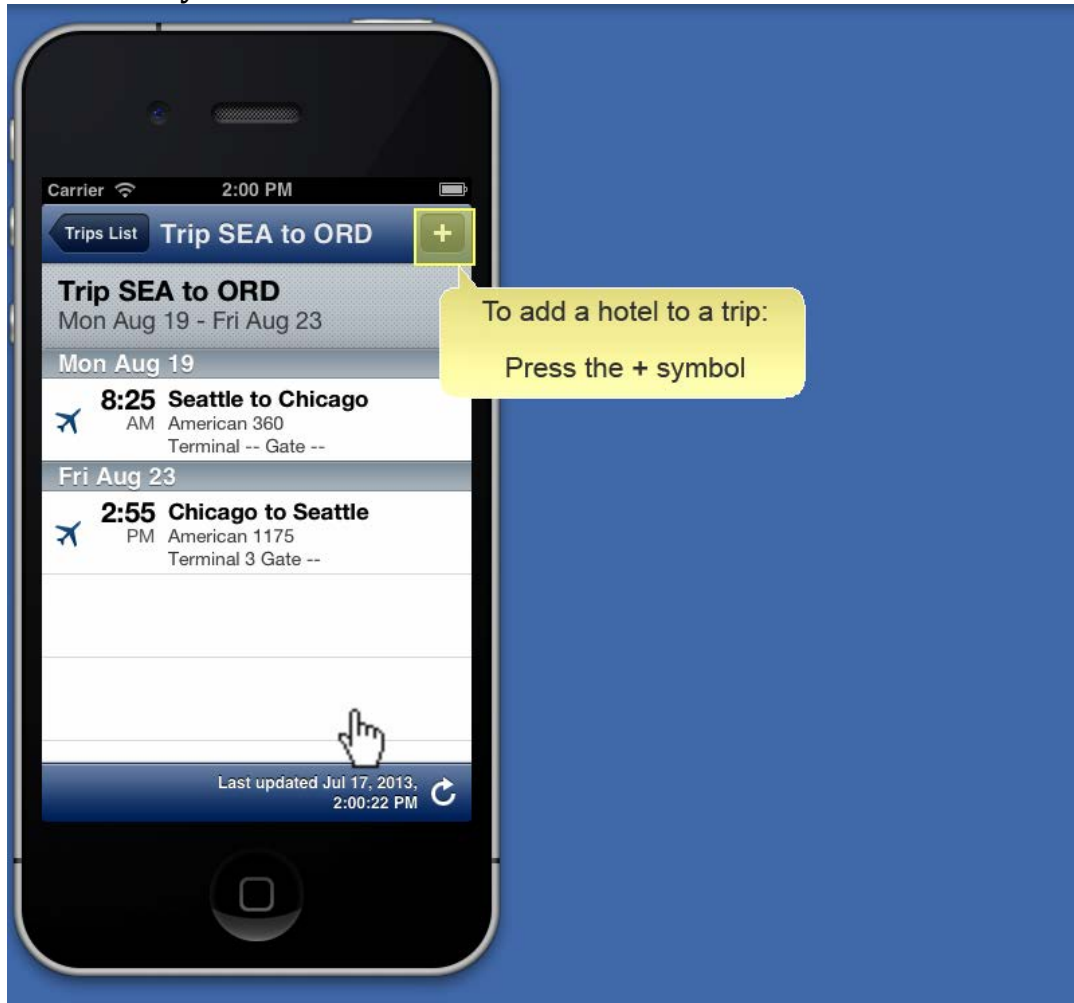
## CONCUR MOBILE

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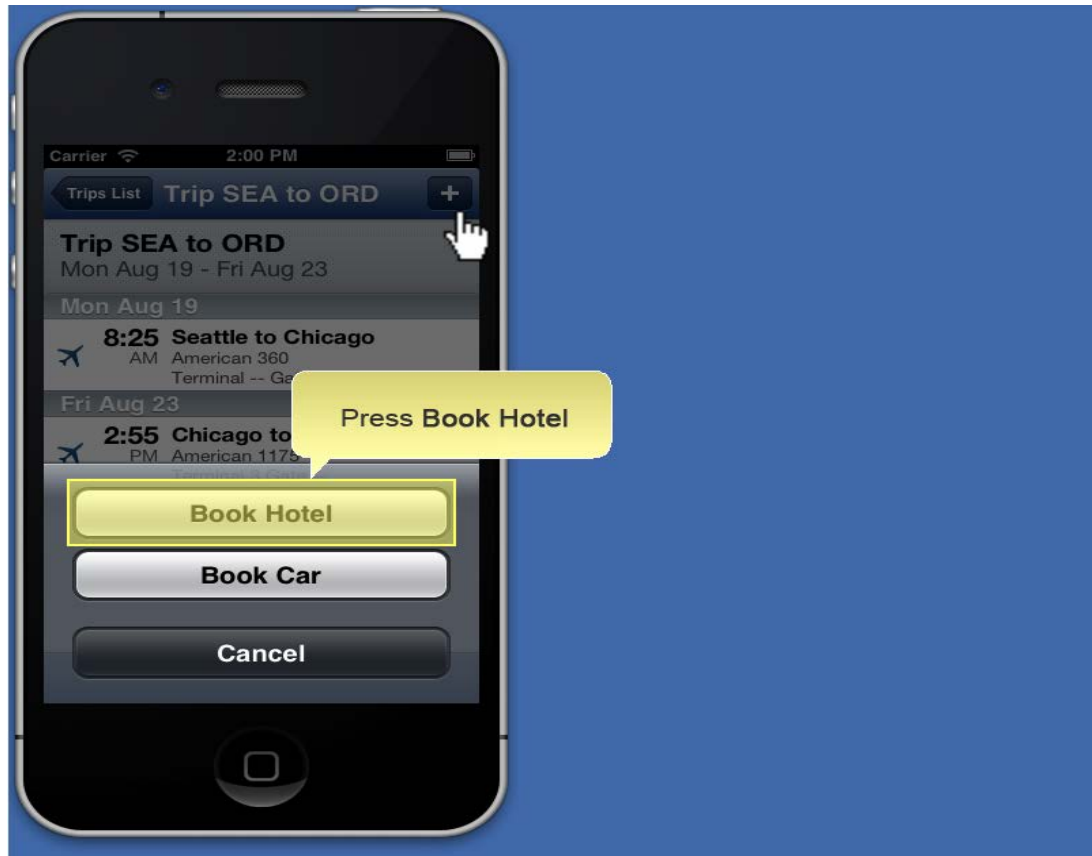
### TRAVEL- RESERVING HOTELS

#### STEPS

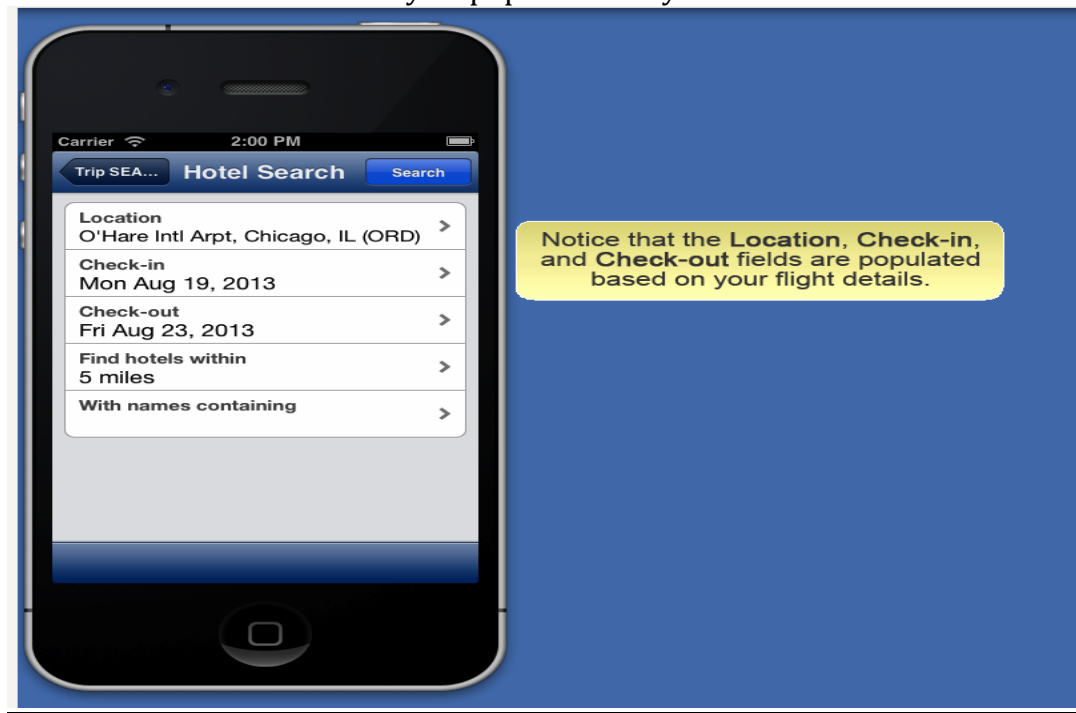
1. Press the **+** symbol



2. Press **Book Hotel**



3. If you add a hotel to your flight itinerary the Location, Check In and Check Out information will automatically be populated for you



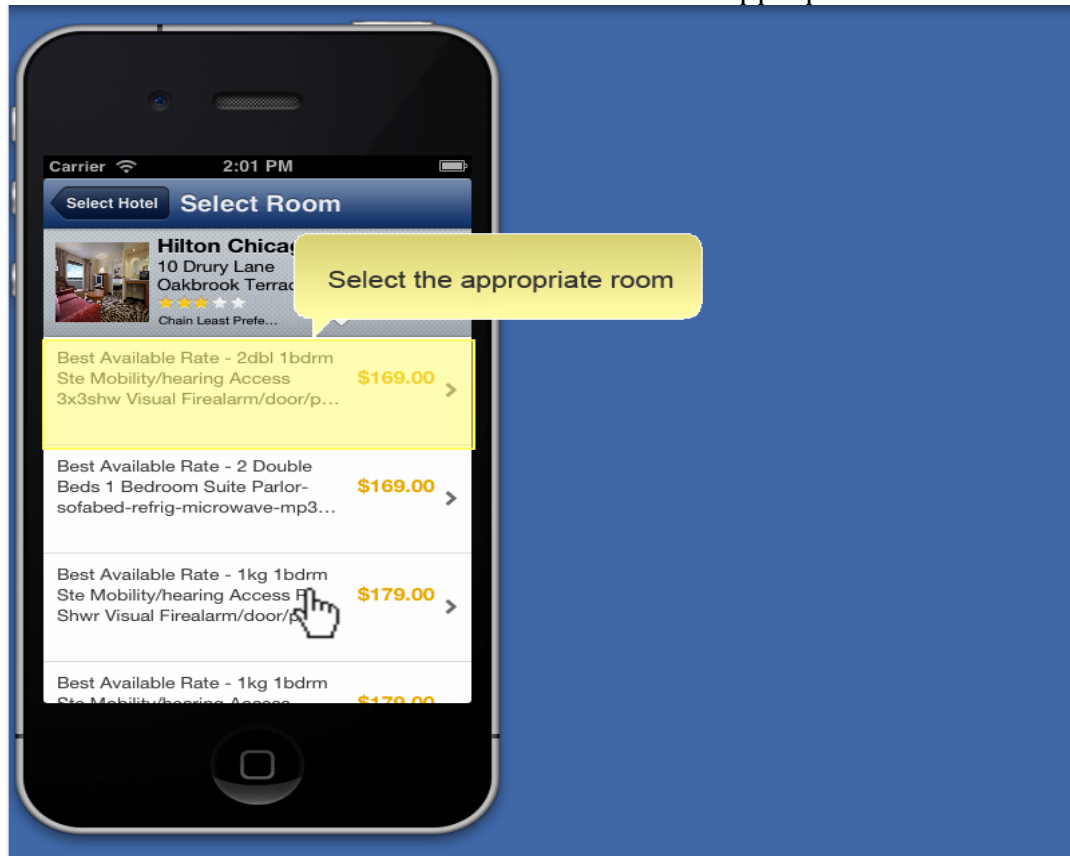
4. Press **Search**



5. Your search results will be shown on your screen. Select the appropriate Hotel.



6. You will see the different room selections. Select the appropriate Room

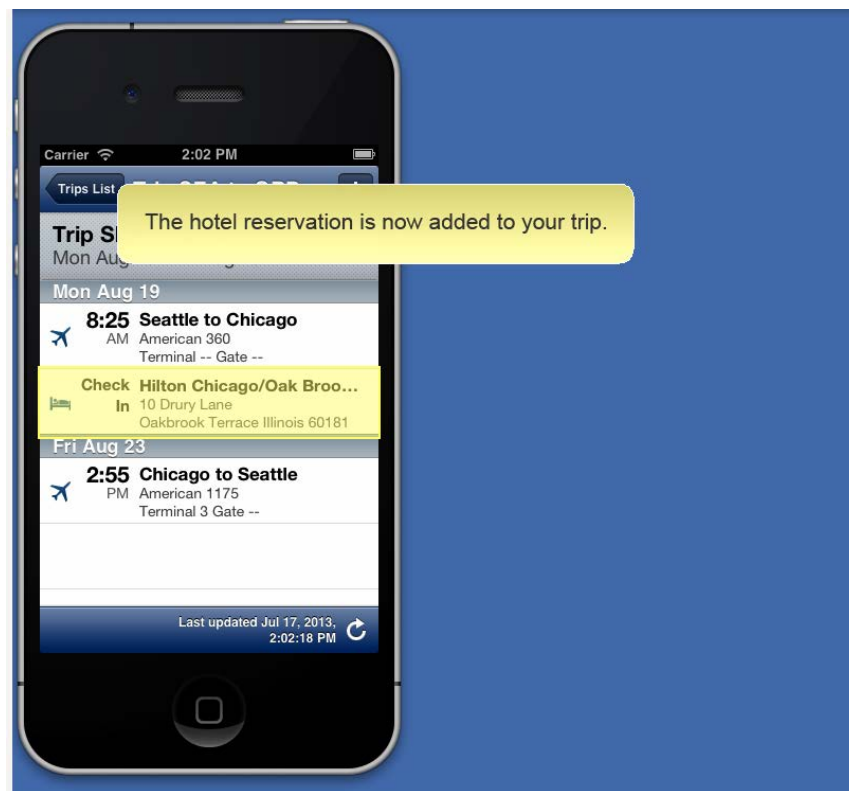
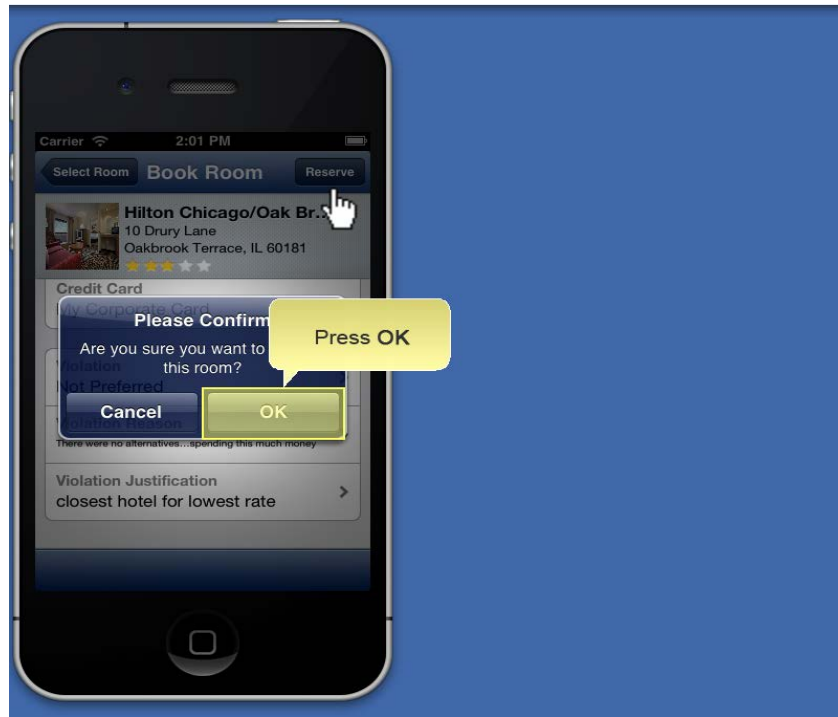


7. Press **Reserve**





8. Press OK and your hotel reservation will be added to your trip.



## CONCUR MOBILE

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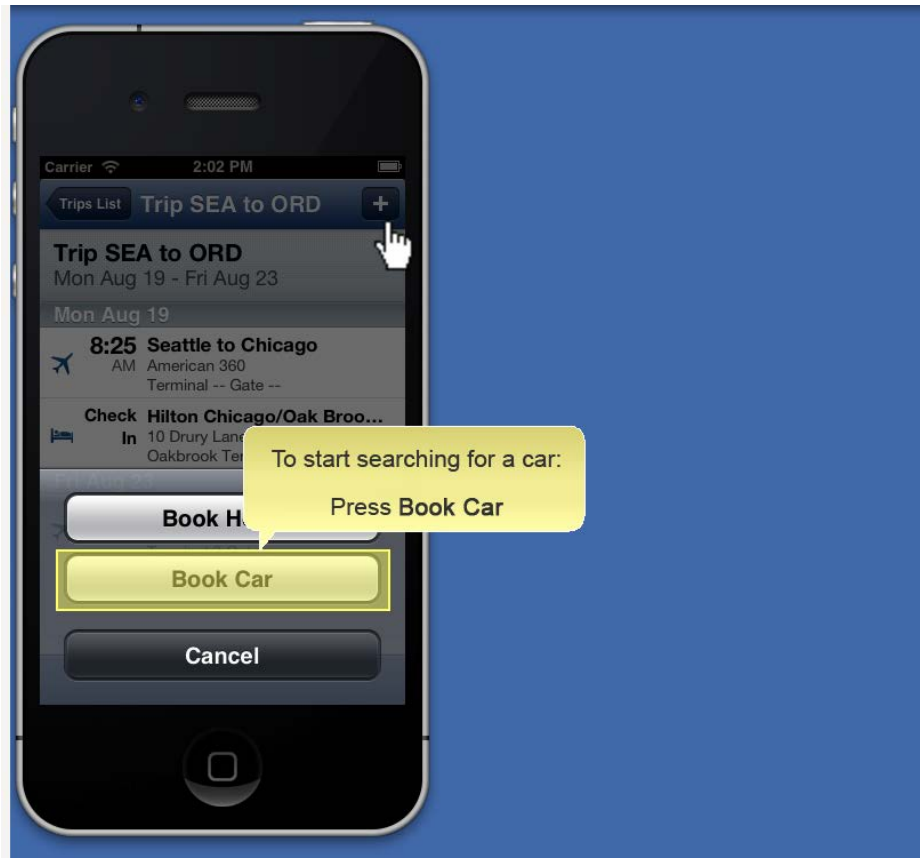
### TRAVEL- RESERVING CARS

#### STEPS

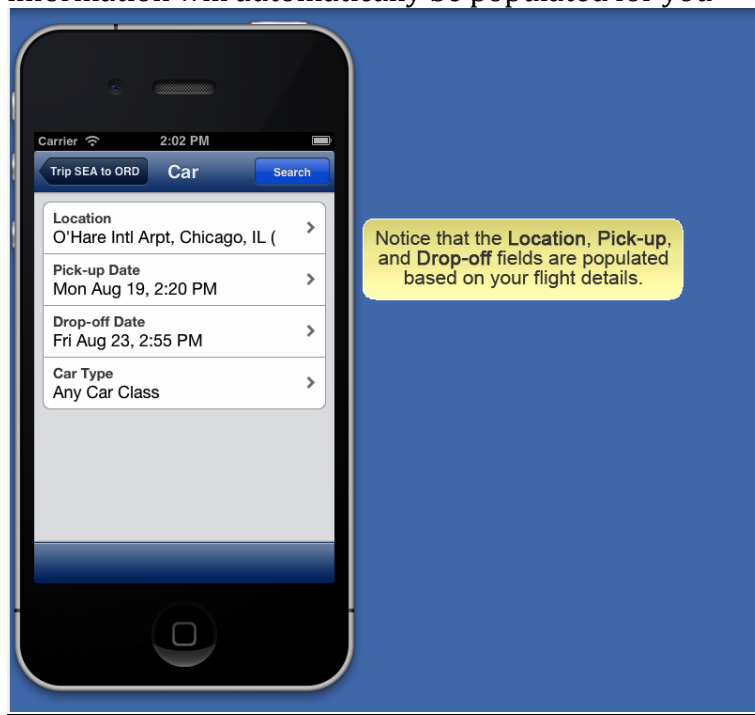
1. Press the **+** symbol



2. Press **Book Car**



3. If you add a car to your flight itinerary the Location, Pick Up and Drop Off information will automatically be populated for you



4. Press **Search**



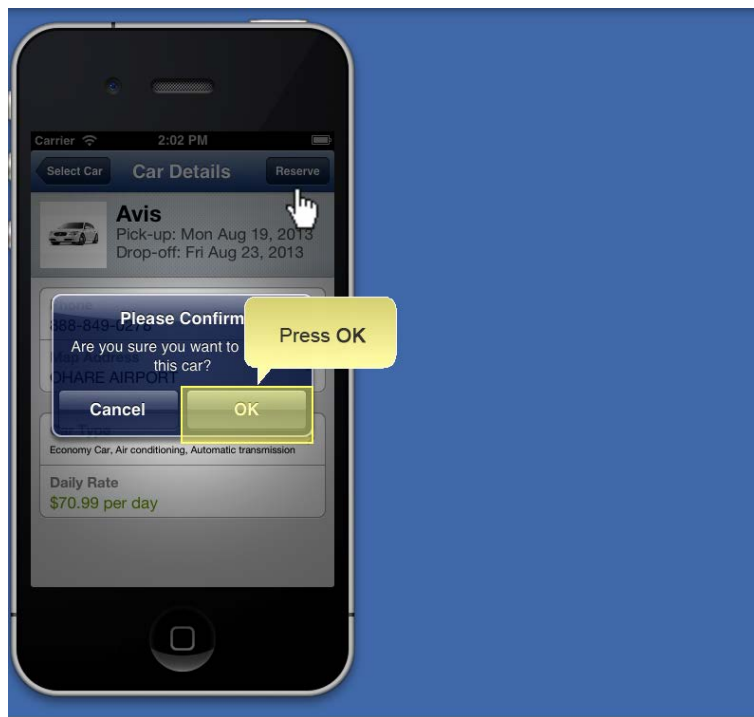
5. Your search results will be shown on your screen. Select the appropriate car.



## 6. Press **Reserve**



## 7. Press OK and your car reservation will be added to your trip.





## CONCUR MOBILE

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### EXPENSE-CREATING AN EXPENSE REPORT

#### Steps:

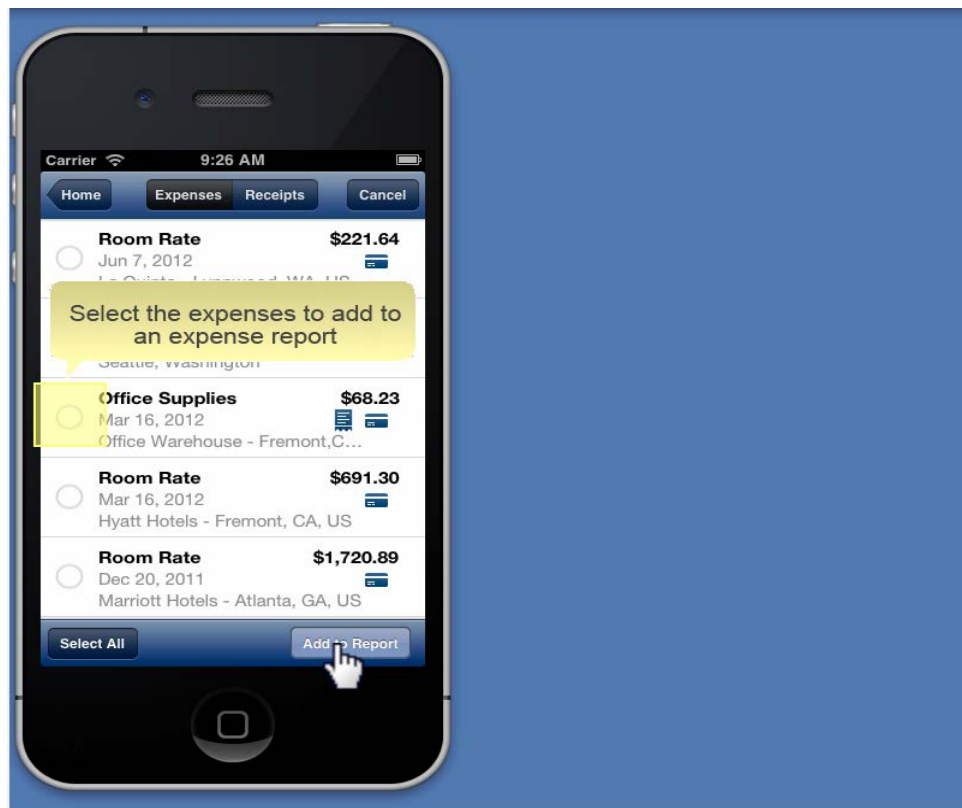
1. Select **Expenses**



2. Press **Add to Report**



### 3. Choose your expenses





#### 4. Click Add to Report



## Steps: Adding Corporate Card Charges to an Expense Report

### 1. Press **Expenses**



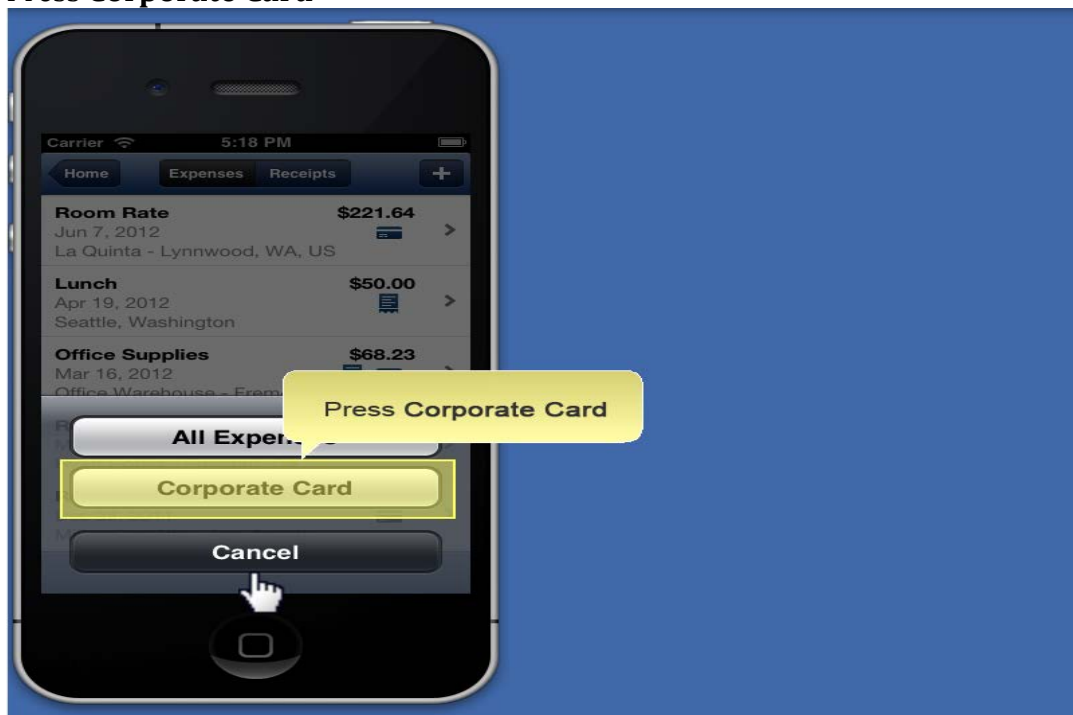
### 2. You will see a list of unassigned expense



3. Press **Action**, to see a list of only the corporate card transactions



4. Press **Corporate Card**





5. Select the expense you want to add

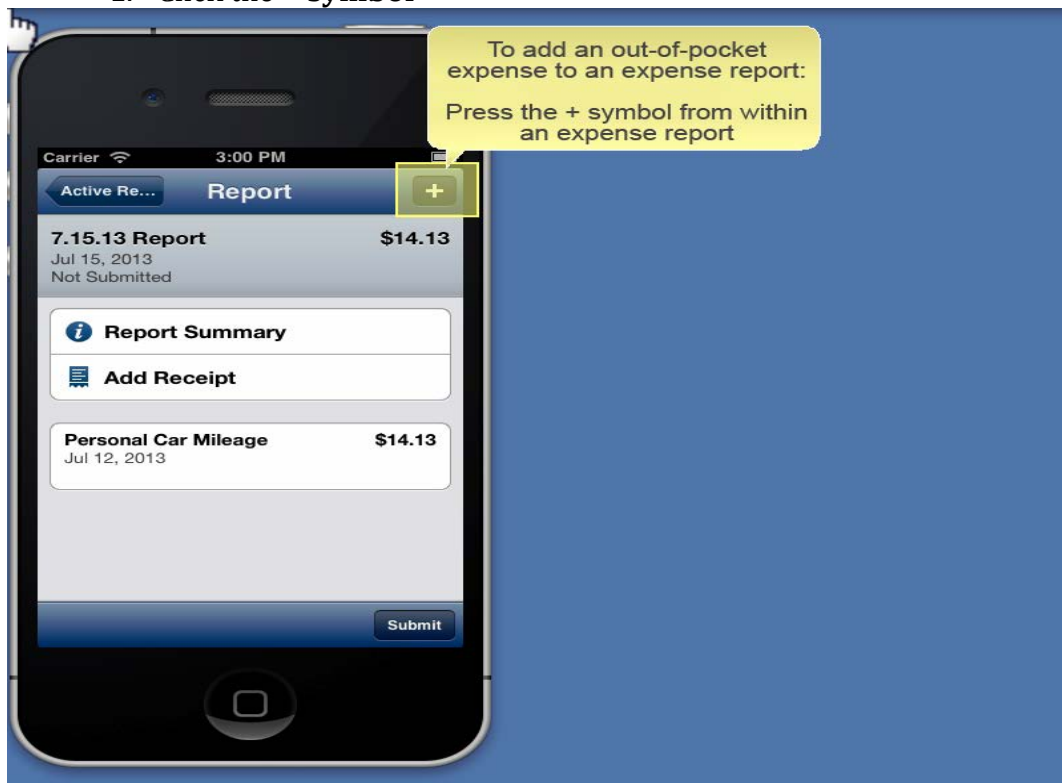


## 6. Click **Add to Report**



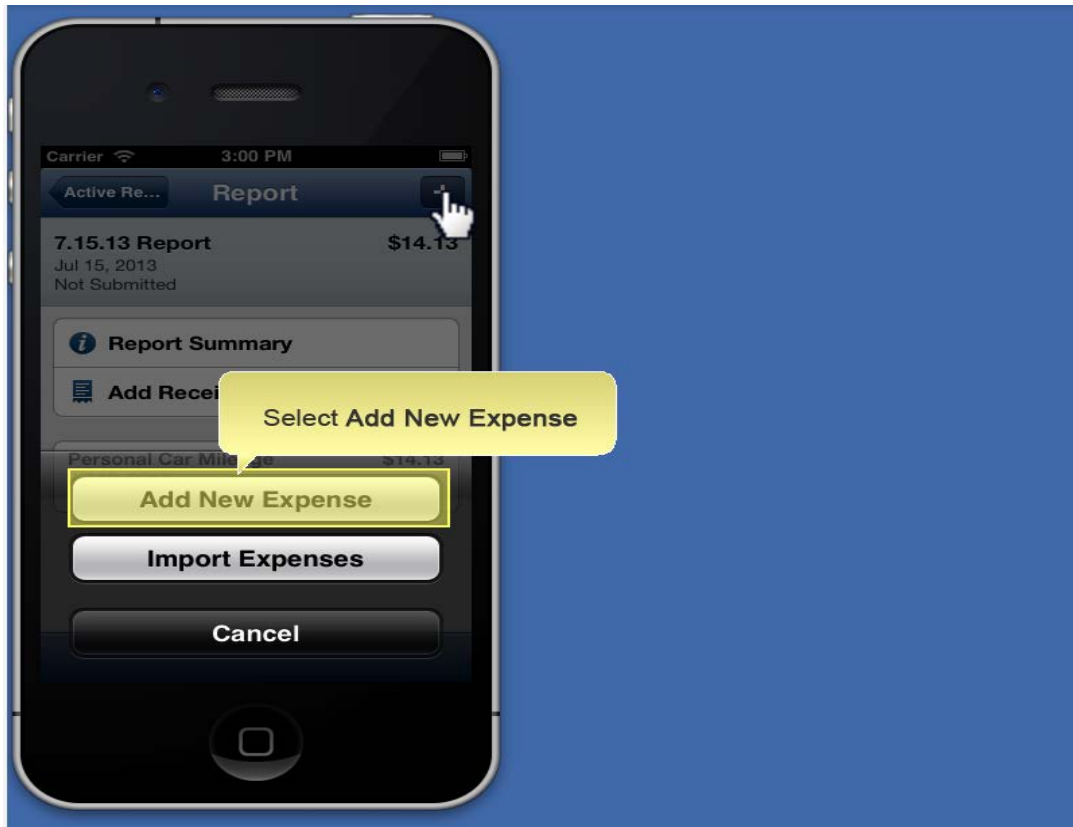
## Steps: Adding Out of Pocket Expenses to an Expense Report

### 1. Click the + symbol

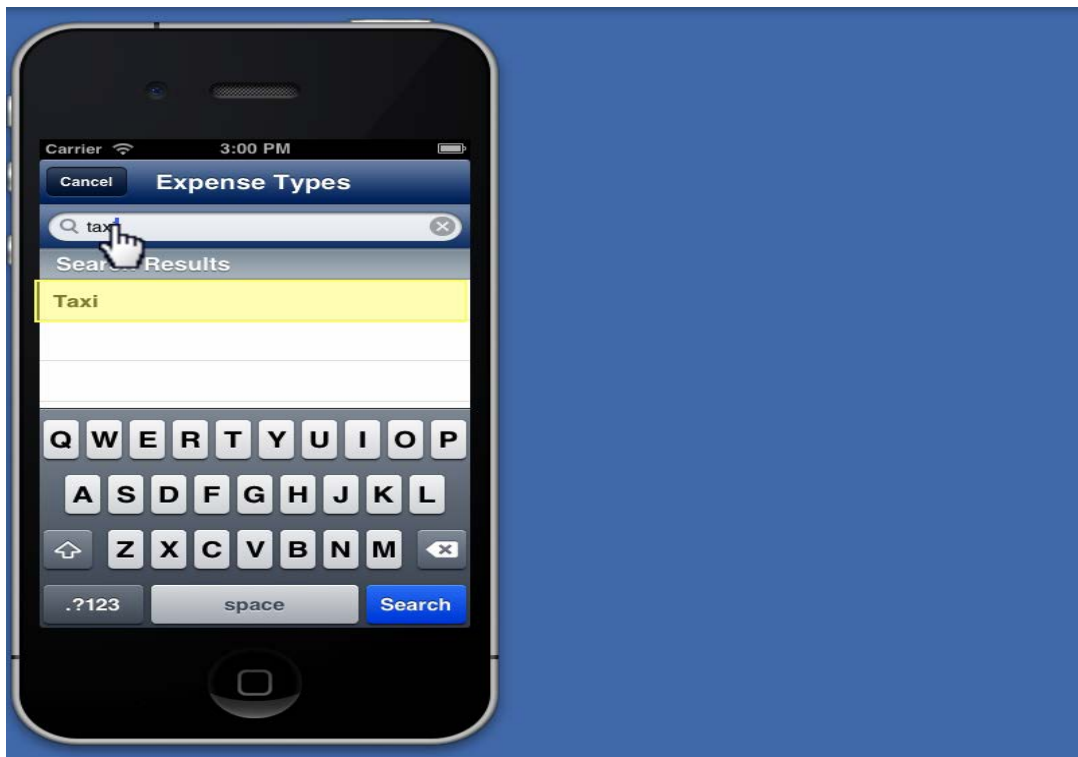


### 2. Select Add New Expense

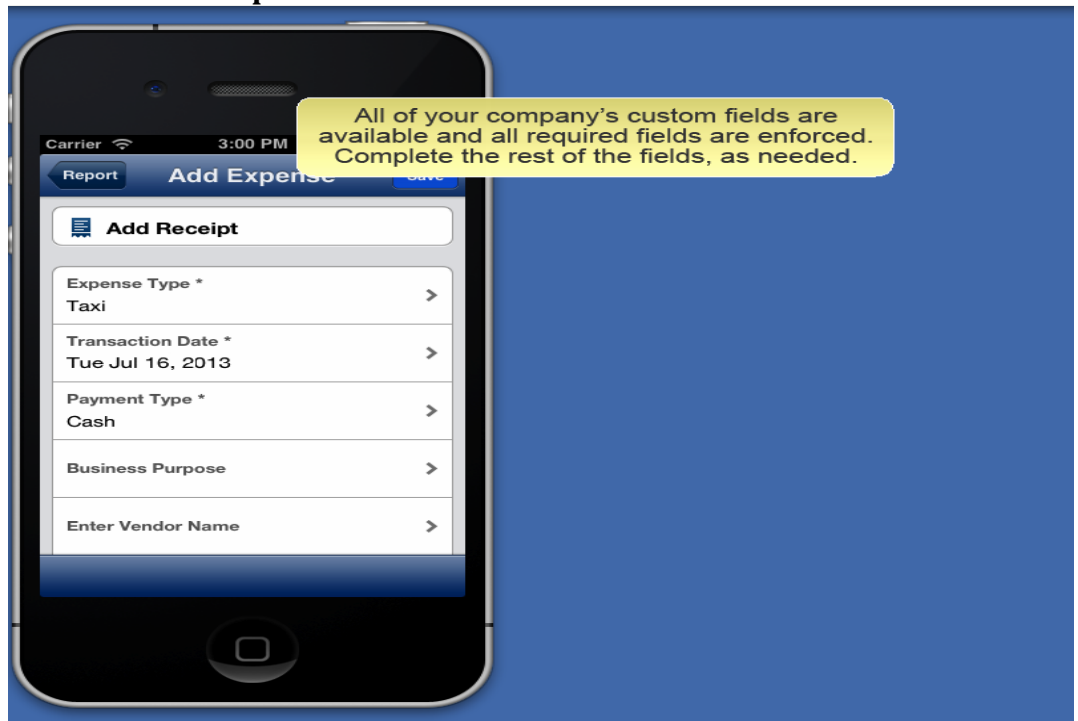




### 3. Type in the **Expense Type**



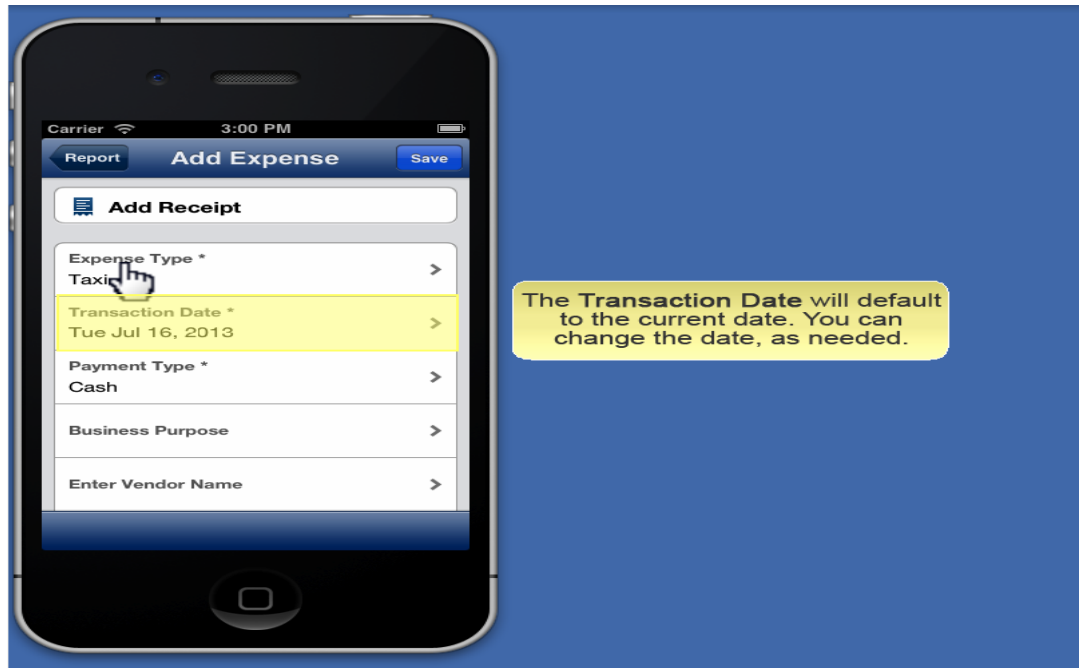
4. Click **Add a Receipt**



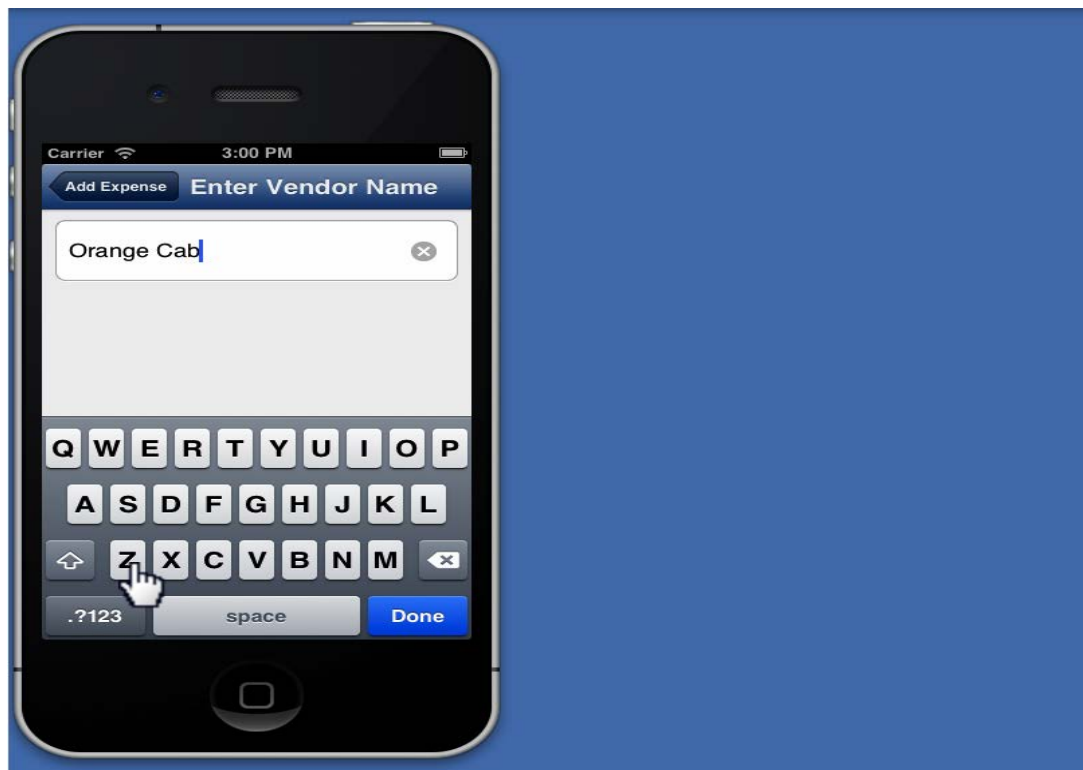
5. Change the **Transaction Date** if necessary



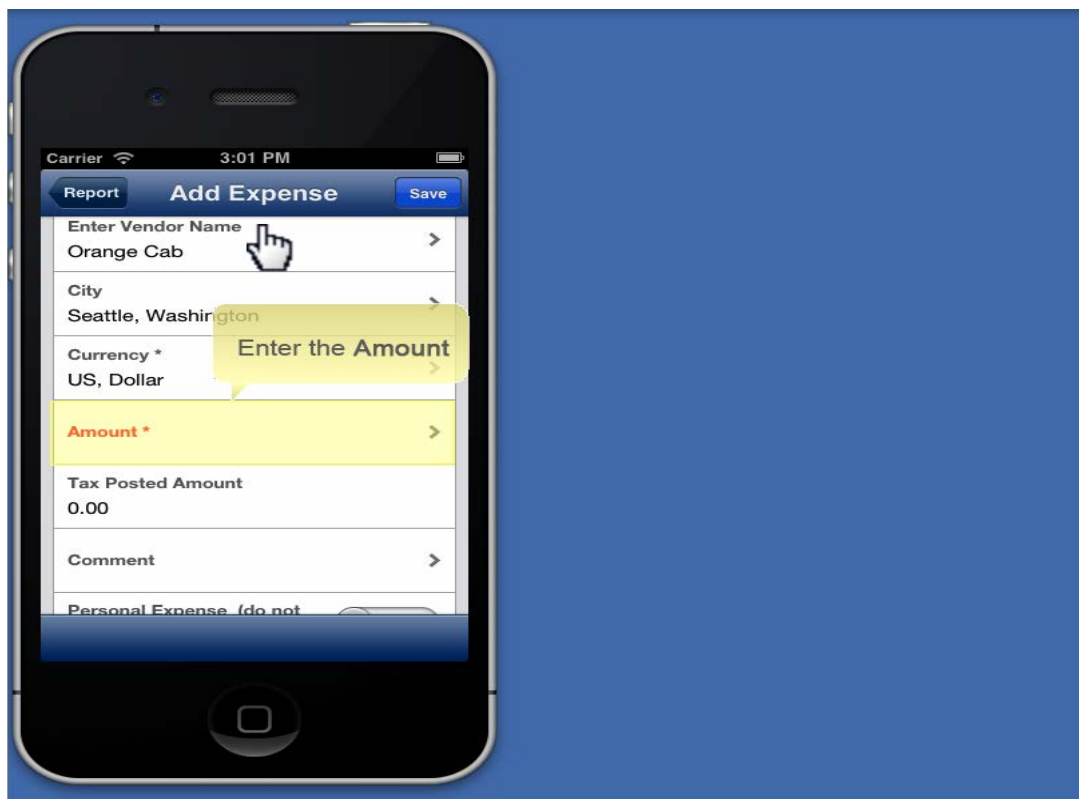




6. Enter **Vendor Name**



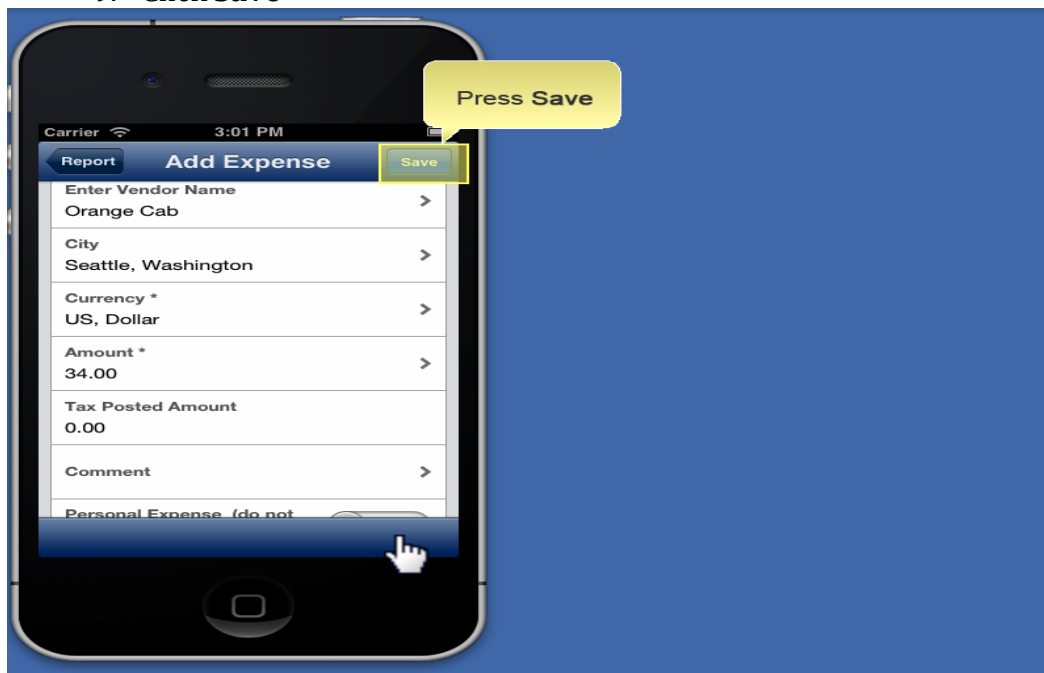
7. Enter the **Amount**



8. Your **Expense** will be added to your report



9. Click **Save**

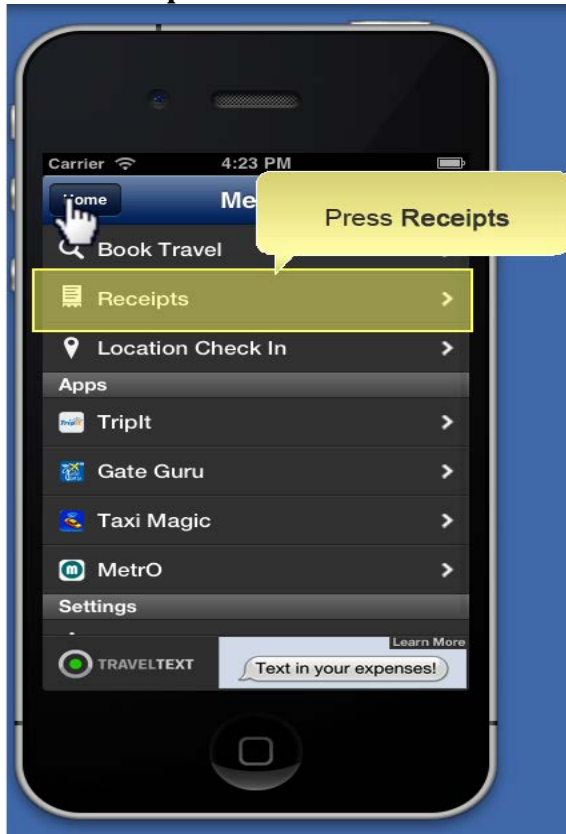


## Steps: Attaching Receipts and Submitting an Expense Report

1. Press **Menu**



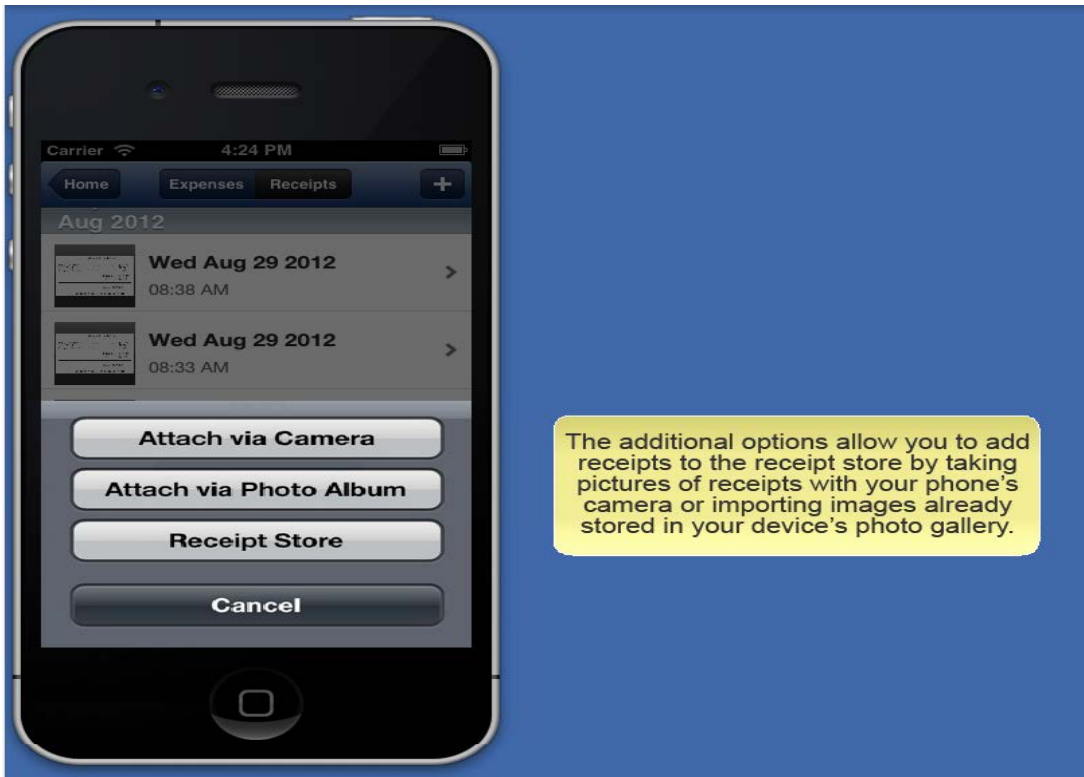
2. Press **Receipts**



3. Press the **+** symbol



4. Press **Attach via Camera** to take a picture of a receipt and upload it to your receipt store. Press **Attach via Photo Album** to upload a picture of a receipt that you already have a picture of. This receipt will now be in your receipt store



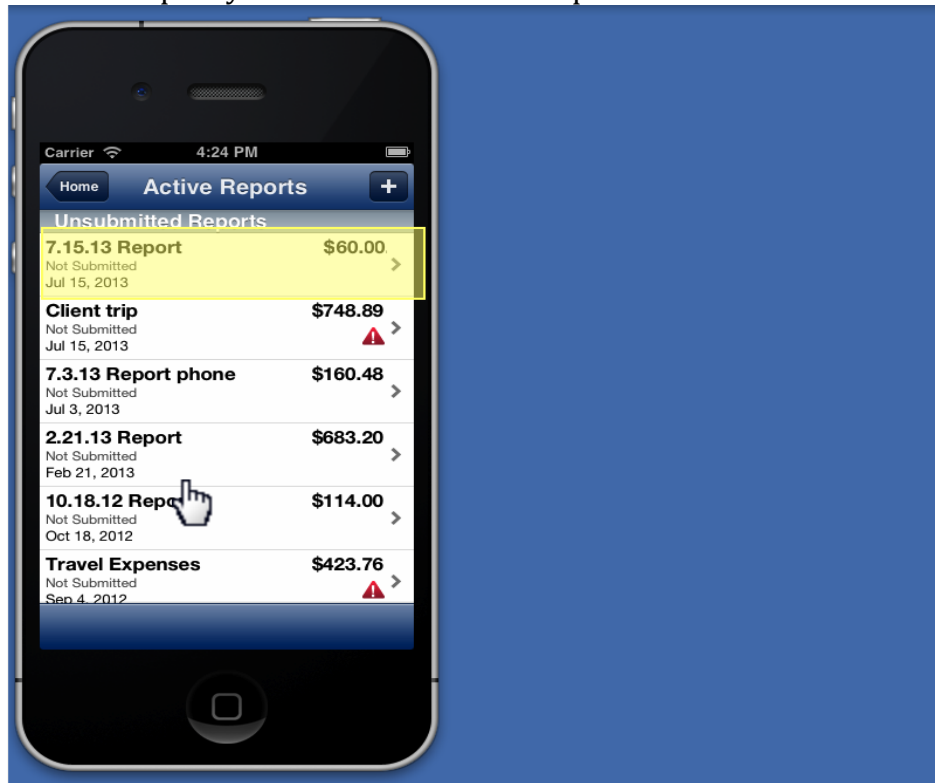
5. Click **Home**



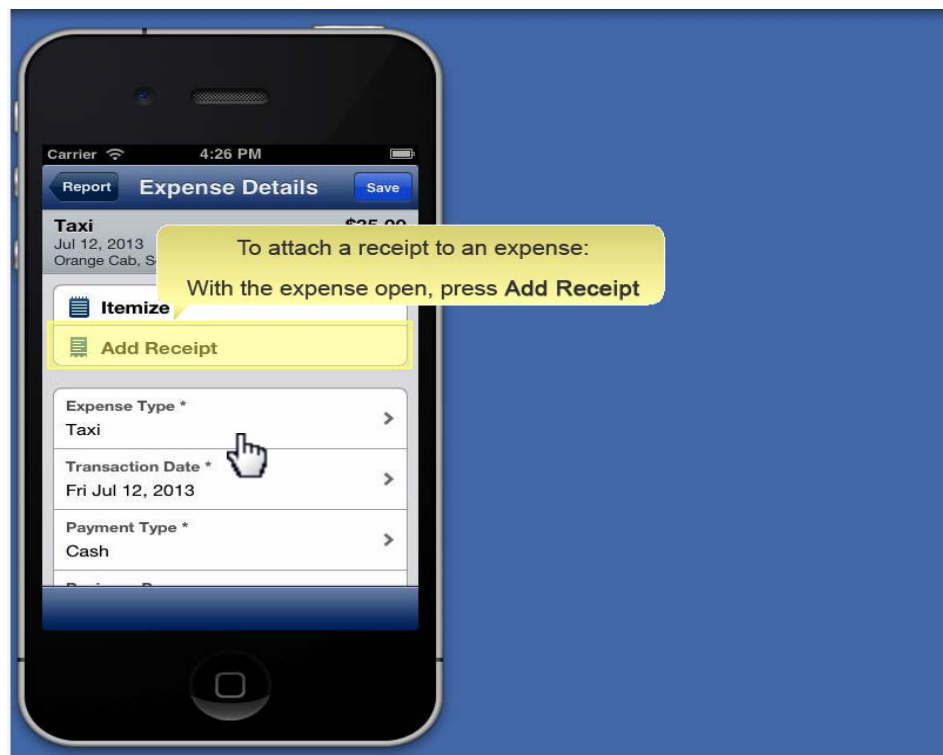
6. Click **Expense Reports**

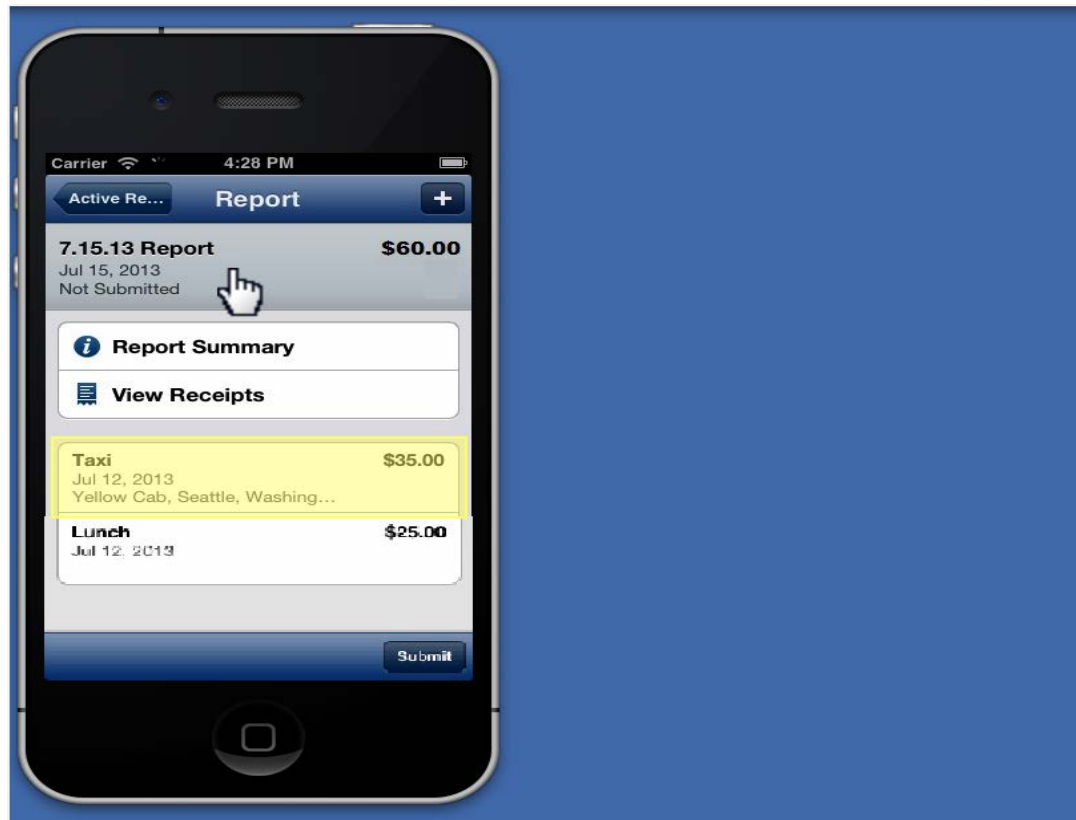


7. Click the report you want to add the receipt to

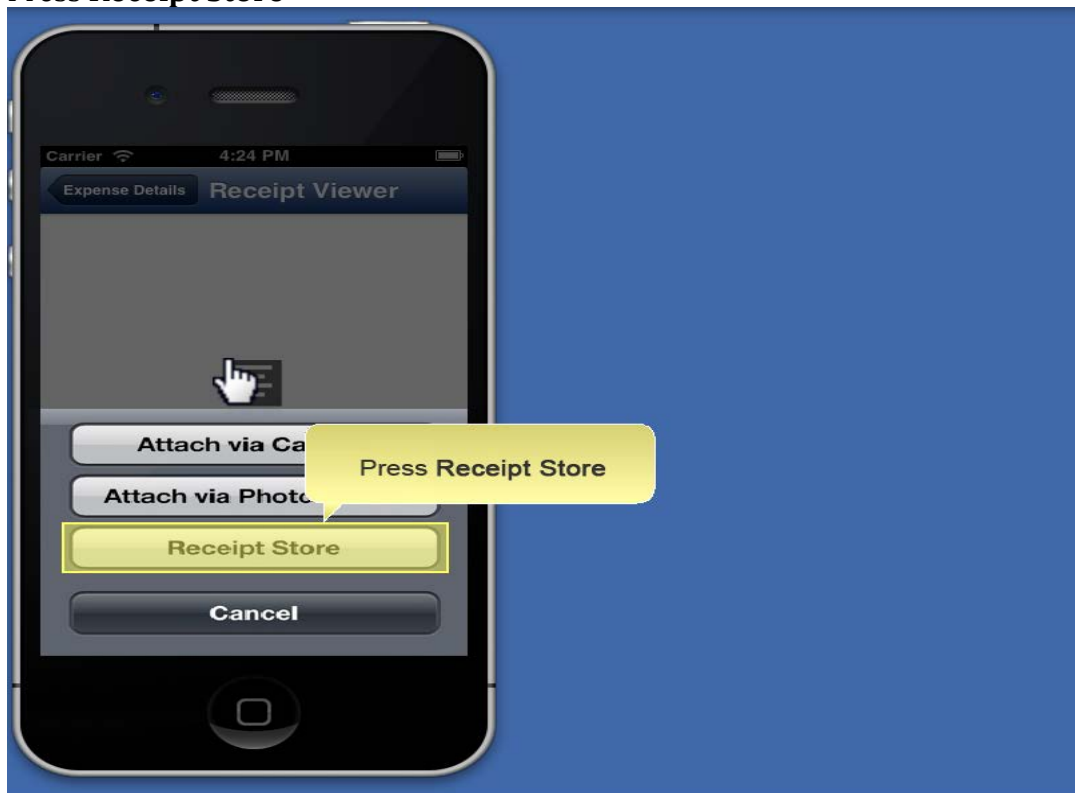


8. Click the item you have the receipt for then click **Add Receipt**.



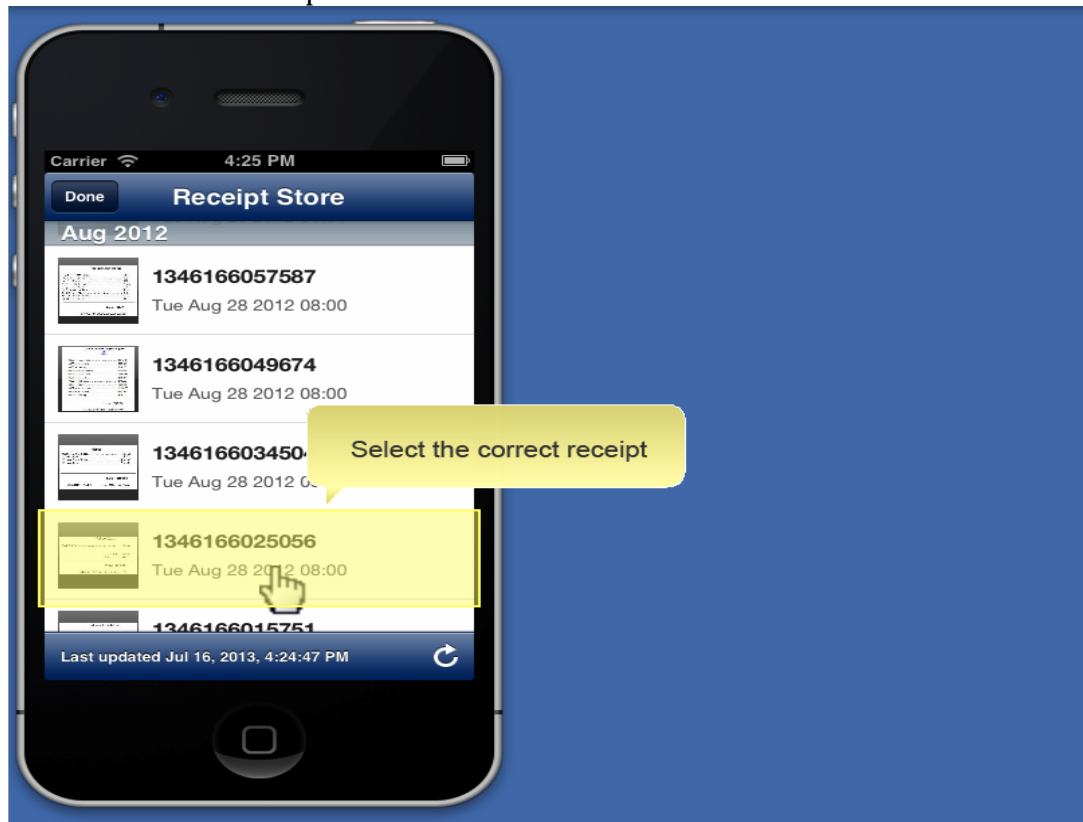


9. Press **Receipt Store**

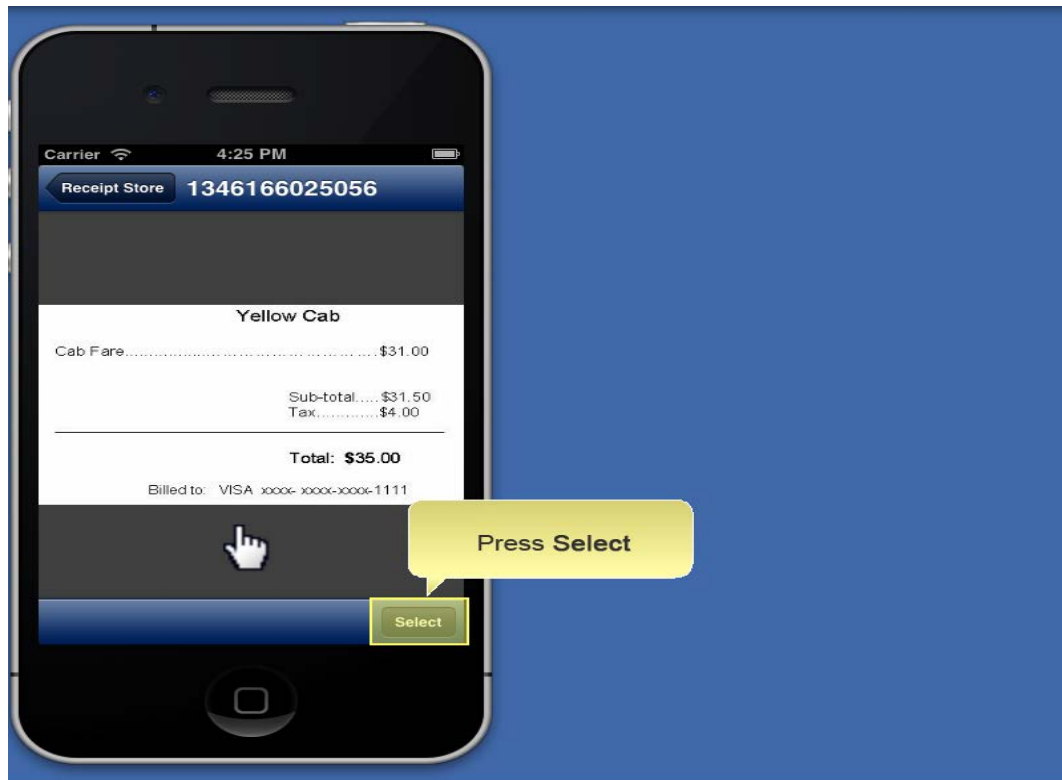




10. Click the correct receipt



11. Click **Select**



## 12. Click **Report**



## 13. Click submit



### FAQs

#### **How is Concur for Mobile useful?**

Concur for Mobile is a natural extension of Concur's full-featured, web-based service Travel & Expense – which integrates travel and expense processes. With the mobile app, travelers can manage trips and expenses as well as book taxis, hotels, rail, and rental cars – all from a mobile device. The solution allows business travelers to access important travel and expense information when it isn't easy to use a laptop that's connected to the Internet, such as in the back of a cab or in a meeting. With the mobile app, travelers can take advantage of a variety of features to manage these tasks. Managers can review employees' expense reports, invoices (for clients who use Concur Invoice), trips, and requests (for clients who use Concur Request) in detail, allowing them to approve or reject reports/requests/trips wherever they may be traveling.

#### **Does the mobile app offer the same functionality as Concur's full-featured, web-based service?**

This app is a mobile companion to Travel & Expense – offering the flexibility to perform tasks from a mobile device. While it complements Concur's end-to-end solution functionality, it contains functionality that is suited to a positive mobile experience.

#### **Why would a traveler need to manage travel, expenses, and payment requests using their mobile devices?**

Business travelers can manage their itineraries and expense transactions in a timely manner and within company policies. Managers can review employees' expense reports, trips, and requests (for clients who use Concur Request) in detail, allowing them to approve or reject reports wherever they may be traveling. With the convenience of Concur Invoice approvals on mobile devices, invoice cycle time is reduced, which reduces the risk of late payment fees and provides the opportunity to take advantage of early-pay discounts.

#### **How does Concur for Mobile differ from competitive offerings?**

Concur for Mobile encompasses travel features (like booking hotels and transportation) and expense features – to provide a comprehensive mobile solution

for the business traveler. The mobile app makes the mobile worker more efficient and productive.

**Is the mobile app available only to customers of Travel & Expense or can others, for example, stand-alone Travel customers, use it?**

The mobile app is available to any client using Concur's integrated Travel & Expense.

In addition:

- Stand-alone Travel users can access the Travel-related features.
- Stand-alone Expense users can access the Expense-related features. These users can also search for, book, and cancel taxi and dining (depending on the device).  
NOTE: Concur for Mobile is not available to clients using Concur's on premise stand-alone solution.
- Stand-alone Invoice approvers can review, approve, or reject payment requests as well as search for, book, and cancel taxi and dining (depending on the device).
- If the company uses Concur Request, request approvers can review and approve requests.
- If the company uses Concur's Locate & Alert service, all devices can be used by travelers to check-in and request assistance from their companies. Over time, additional features will be added.
- Partner Travel Management Companies (TMCs) can send trip information to Concur using Web Services, enabling TMC customers – who are not Concur customers – to view itineraries on Concur for Mobile.
- For clients who use Travel and an expense solution other than Concur's expense service – the Travel-related features of the mobile app are available; the Expense-related features are not.
- TripLink users can also access their travel itineraries using a mobile device.

**How does this mobile app differ from the mobile offering Concur announced in 2002?**

Our previous mobile product allowed users to work offline in a disconnected laptop version and then synchronize the data while online. This version of Concur for Mobile allows users to access their expense and travel information using a mobile

device.

### **Can a client make the mobile app available to only certain users?**

No. Concur for Mobile is available for all of a client's users, based on general user roles – not a mobile user role:

- Users with the Travel Wizard User role can access the Travel-related features.
- Users with the Expense User role can access the Expense-related features.
- Users with the Expense Approver role can review and approve expense reports.
- Users with the Payment Approver role can access the Invoice-related features (if available on the device)
- Users with the Request Approver role can review and approve requests (if available on the device).

### **In which countries/languages is Concur for Mobile supported?**

Concur for Mobile is available worldwide and supports U.S. English, U.K. English, Canadian French, French, German, Italian, Spanish, Japanese, Chinese, Brazilian Portuguese, Dutch, Latin American Spanish, Russian, and Swedish.

### **Which mobile devices can be used with the mobile app?**

Currently, the app can be used with the BlackBerry, Android, Windows Phone, iPad, iPod touch, and iPhone – though features differ by device. On the Windows Phone, the features are currently limited to viewing trip information (car, air, hotel, rail, etc.), approving trips, creating mobile expenses, and capturing receipt images. Users can check with their Concur administrators about the appropriate operating systems for each device. Clients can also access the supported configuration information located on Concur Support Portal.

### **Must the mobile user have access to the Internet?**

Yes. Internet access is required to get started the first time.

### **If a mobile user has a mobile device but not a data plan, can he/she use the mobile app?**

Yes. Users can connect over Wi-Fi.

**Can one person use multiple devices for Concur for Mobile?**

Yes. The same login can be used on multiple devices.

**Can one mobile device be used for multiple people?**

Yes. Multiple users can use the same device.

**Is there a fee for the mobile app?**

No. There is no additional charge to install or use the mobile app.

**If service is lost, will the device save the activity/expenses that have already been created?**

Yes.

**How does Concur ensure that personal information remains secure?**

Concur for Mobile is designed to conduct transactions without transmitting sensitive credit card or other personal data. Clients' credit card information stays in Concur's secure data center only – not on the mobile device. Using established technologies and practices, Concur ensures that our clients' information is safe and protected and that our services are available and perform properly, whether clients use Concur's web-based service or the mobile app. Deployment, Installation, Configuration, and Logins/Mobile-Only Passwords

**How is the mobile app activated?**

Concur automatically activates the mobile app for all clients.

**Do clients need a project team to deploy the app?**

No. Concur for Mobile is activated for all users and will not require additional resources from the client's side.

**How does a user install Concur for Mobile?**

Users can access the app in these ways:

- On the Mobile Registration page (Profile > Mobile Registration in the web version of Concur), the user can:
  - ◆ Request that an email is sent to his/her device, where the user opens the email and follows the instructions. – or –
  - ◆ Obtain the link using the

appropriate (BlackBerry, App Store, Android, or Windows Phone) icon.

- On the mobile device, the user can go to appropriate store (BlackBerry App World, App Store, Google Play, or Windows Phone Store) and search for Concur. In addition, companies using BlackBerry Enterprise Servers can also push it to its users.

**The question above describes the individual installation emails. Is there a way to send these emails to a group of users?**

Yes. The admin can select one or more Concur users and email them the Concur for Mobile instructions. This email is the same as the one that can be generated by the user on the Mobile Registration page. The admin uses Administration > Company Admin > Send Mobile Instructions (left menu).

**How does a user log in to the app?**

The user can simply sign in with his/her email address (as shown in the user's Concur profile) or Concur username. Concur for Mobile then determines the company's logon method and directs the user to the proper sign-in page. First-time users then enter their web password (if they know it) or tap Forgot Password? A user can create (and change at any time) the mobile-only password using Profile > Mobile Registration in the web version of Concur. The user clicks Forgot Mobile PIN in the left-side menu to reset the existing mobile-only password. Concur sends a reset link to the registered email address of the user. The email contains a unique reset link that allows the user reset the password.

**What is the average time to get up and running on the mobile app?**

A user can complete the mobile-only password creation process and access the app in about five minutes.

**How does a user re-set his/her mobile-only password?**

Users can reset the mobile-only password on the Mobile Registration page (Profile > Forgot Mobile Password (PIN)) in the web version of Concur.

**What should a Concur for Mobile user do if his/her mobile device is lost or stolen?**

If the user logs in to the mobile app using his/her web login, then the user should immediately change that password. If the user logs in to the mobile app using a mobile-only password, the user should access Profile > Mobile Registration (in the web version of Concur) and change his/her mobile-only password. Minimal information is stored locally on the mobile device, for example, information entered

off-line is stored until the app reconnects to the Internet and syncs with Concur. Credit card information is never stored on the mobile device. As an added precaution after losing a device, the company's mobile administrator may remotely wipe data from device through the User Administration tool. If the administrator selects the Remote wipe mobile device check box for the user, the next time a user logs into the mobile app (either through manual login or auto-login), all mobile data will be cleared from the device. NOTE: The "wipe" process does not remove the mobile app from the device. Expenses and Expense Reports

### **Which functions can a user perform with regards to managing their expenses and reports?**

A user can add, view, and edit expenses and expense reports (including report status and expense details); create mobile "quick" expenses (for items such as meals) as well as edit or delete them; take a picture of the associated receipt; create new expense reports; attach downloaded credit card transactions and mobile "quick" expenses to an expense report; and submit reports.

### **How much information can be edited by the user?**

iPhone/iPad/iPod touch, Android, and BlackBerry users can edit report header fields and most expense fields after the expense is attached to a report. When using lists, the same list data is available on the mobile device as is available in the web version of Expense.

### **Can a user itemize an expense using the mobile app?**

iPhone/iPad/iPod touch, Android, and BlackBerry users can itemize an expense (after the expense is added to a report), if allowed in the client configuration.

### **Can a user remove itemizations from an expense?**

Yes. Itemizations can be removed via the mobile device.

iPhone/iPad: The user:

- Opens the expense and the list of itemizations.
- Swipes across the desired itemization. A red Delete button appears.
- Selects Delete. Android: The user:
- Opens the expense and the list of itemizations.



- Long presses on the desired itemization. A menu appears.
- Selects Remove from Report on the menu.

BlackBerry: The user:

- Opens the expense and the list of itemizations.
- Highlights the desired itemization.
- Selects the Remove Itemization option on the menu. –

### **Can a user add attendees using the mobile app?**

iPhone/iPad/iPod touch, Android, and BlackBerry users can add attendees to an expense after the expense is added to a report.

The user can:

- Search the user's contact list on the mobile device
- Search for attendees in the user's favorites attendee list
- Search for attendees in all company attendee lists
- Search an external source (if this feature is available on the web version or Expense)
- Add the attendee manually

### **Can users enter personal car mileage?**

iPhone/iPad/iPod touch, Android, and BlackBerry users can add fixed-rate and variable-rate mileage expenses, if allowed in the client configuration.

Can a user delete expenses using a mobile device?

That depends.

- Deleting an expense from the expense list: The expense list contains mobile expenses (expense created on the mobile device) and card transactions.
  - ◆ A user can delete a mobile expense.
  - ◆ In some cases, the user must access the web version of Concur to delete card transactions - assuming the user's company allows the user to do so

. • Deleting an expense from an expense report: A report may contain all kinds of expenses.

- ◆ If the user deletes a mobile expense or a card transaction from an expense report, it is not really deleted; it is moved back to the pool of expenses on the Expenses screen (the expense list).
- ◆ If the user deletes any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

### **How does a user delete a mobile expense?**

A mobile expense (an expense created on the mobile device) can be deleted only on the mobile device itself from the Expenses screen (the expense list). Once deleted from the mobile device, it will no longer appear online or be available for import into an expense report. If a user deletes an expense in the web version of Concur and that expense was originally a mobile expense – that expense is not deleted from the system – instead, it moves back to the "pool" of mobile expense on the user's device. The user must then delete it using the mobile device.

### **Can my delegate manage my expenses and reports via the mobile app?**

The mobile app does not support delegates or proxies.

### **Do all expenses entered on the mobile device appear with the purple smartphone icon when viewed in the web version of Expense?**

No. Only mobile expense will have the icon. Expenses added to an open report will not have the icon. Mobile expenses usually contain minimal information; the icon could remind the user to add any missing information.

### **Do expense types have to be mapped for the mobile app?**

Are there defined expense types in the mobile app that need to be mapped to the client's configuration? No. By default, the expense types used for the mobile app are the same as the expense types used in the web version of Concur. However, the full list of expense types may be cumbersome so the client may want to shorten the list for mobile users. To do so, the client contacts Concur Client Support for assistance.

### **Does everything in a client's configuration appear on the mobile device (for example, vendor lists or attendee lists)?**

Lists are generally available but some parts of the configuration (such as travel allowances) are not currently available in the mobile app. The user enters that

information once the mobile expenses are imported into an expense report in the web version of Concur.

**Can a user capture an image of the receipt and attach the image to the expense?**

Yes. All receipt images, captured by the mobile device's camera, will upload into Travel & Expense immediately or the next time the mobile app connects to the Internet. Once the digital image is imported into an expense report, the receipt image is treated like other receipt images and can be viewed (in a PDF viewer) by the user, approver, and processor.

**Do you need to allow access to your device camera?**

The permission to allow Concur to access the device camera should automatically be set on install. If you see a black/blank screen when attempting to capture a receipt image, the permission might not have been set. To resolve, go into the device settings, select Concur, and manually grant the permission to camera.

**What functionality is available for Expense managers with regards to expense report approval?**

Approvers can view employee expense reports including expense detail, report header information, receipt images, attendees, itemizations, and exceptions. Managers can approve or reject the entire expense report from their mobile device. (Just like the web version, managers must enter a comment when rejecting a report.) Managers cannot, however, adjust expense amounts. That task must be done using the web version of Concur. (This is assuming that the company's configuration allows approvers to adjust amounts).

**Can a user change his/her itinerary?**

Yes. A user can change his/her itinerary such as add or cancel dining (depending on the device), hotels, taxis, or rental cars. Flight information cannot be changed using the mobile app.

**Can a user manage his/her hotel reservations?**

Yes. The user can book hotel from the mobile device home screen or from an existing itinerary.

**If a user books a hotel room after business hours but the user's manager is not**

**available to approve the reservation, will the reservation be confirmed?**

MSM employees are not allowed to book a hotel without manager approval.

**Can a user manage his/her ground transportation?**

Yes. A user can book ground transportation by renting a car or booking a local taxi. The user receives a car confirmation and an updated itinerary (if applicable).

**What about public transportation?**

On the iPhone/iPad/iPod touch and BlackBerry, users can locate public transportation using the mobile device. The first step is to download the MetrO app, using the link provided on the mobile device. The user selects the desired city and then enters the criteria. Public transportation options are provided.

**How does a user rent a car?**

The user can rent a car from the home screen or from an existing itinerary. Either way, the search results provide a list of available cars, rates, images, and vendor phone numbers.

**How does a user reserve a taxi?**

The first step is to download the Taxi Magic (RideCharge) app, using the link provided on the mobile device. The user enters the search criteria and selects the appropriate ride. If the user has set up his/her Taxi Magic account in the web version of Concur, the taxi reservation will appear on both the web version and mobile under Trips.

**What functionality is available for travel managers (trip approvers) with regards to trip approval?**

Travel managers can approve trips.

**Do mobile bookings that require manager approval trigger the approval email?**

Just like the web version of Concur, the trip is flagged for approval, it is placed in the approval queue, and the manager is sent an approval email.

**What corporate card information is stored on the Mobile device?**

The only piece of card information that is held on the mobile device is the name the user has set up for the corporate card (in Profile in the web version of Concur) and

the last 4 digits. The full card number is never displayed on the device.

**If the company uses a ghost card, can the user use it for the mobile app?**

Yes. It will be presented to the user as a form of payment. The user can use it or any other card that is listed in his/her profile. NOTE: A ghost card is a specific type of company credit card.

**If a company uses only ghost cards for booking travel, can a user book travel if only a ghost card is available?**

Yes.

**Can the approver do anything else?**

The approver can also use the mobile device to search for, book, and cancel taxi and dining on the device. Requests (Concur Request)

**Which Request features are available using Concur for Mobile?**

A request approver can use Concur for Mobile to view header, segment, and expected expense information as well as images. The approver can then approve the request or send it back to the request user. Additional features will be added over time