# TABLE OF CONTENTS

## General Information
- Introduction........................................................................................................... 4
- Process Introduction................................................................................................. 5
- Updating your Profile............................................................................................... 7
- Email Preferences.................................................................................................. 11
- Assigning a Delegate (Proxy)................................................................................. 13
- Assigning a Travel Assistant.................................................................................. 15
- Mobile Registration................................................................................................ 17
- General-FAQs......................................................................................................... 19

## Concur Request
- Creating a Request................................................................................................. 23
- Requesting a Cash Advance.................................................................................... 28
- Adding Expenses.................................................................................................... 31
- Adding Segments..................................................................................................... 32
- Submitting your Report.......................................................................................... 37
- Viewing the Status of your Report.......................................................................... 38
- Request-FAQs.......................................................................................................... 39

## Concur Approvals
- Default (Supervisor) Approval............................................................................... 43
- International Approval.............................................................................................. 46
- Org (Department Budget) Approval......................................................................... 49
- Approvals-FAQs....................................................................................................... 51

## Concur Travel
- Booking a Flight....................................................................................................... 55
  - Booking for Myself............................................................................................... 56
  - Booking for another Employee........................................................................... 64
  - Booking for Guest or Student............................................................................. 66
- Reserving a Hotel...................................................................................................... 72
  - Booking for Myself............................................................................................... 72
  - Booking for another Employee........................................................................... 77
  - Booking for Guest or Student............................................................................. 78
- Reserving a Car......................................................................................................... 83
  - Booking for Myself............................................................................................... 83
  - Booking for another Employee........................................................................... 89
  - Booking for Guest or Student............................................................................. 89
- Changing or Cancelling a Trip................................................................................ 95
- Travel-FAQs........................................................................................................... 99

## Concur Expense
- Creating an Expense............................................................................................... 105
- Per Diem................................................................................................................ 106
Itineraries..........................................................................................................................110
Travel Expenses................................................................................................................112
Itemizations.......................................................................................................................117
Attaching Receipts............................................................................................................119
Cash Advance Returns....................................................................................................122
Submitting your Expense..............................................................................................127
Employee Reimbursements............................................................................................130
Expense-FAQs................................................................................................................139

Concur Mobile
Getting Started.................................................................................................................149
Booking a Flight..............................................................................................................152
Reserving a Hotel...........................................................................................................161
Reserving a Car..............................................................................................................166
Creating an Expense Report..........................................................................................171
Adding Corporate Card Charges..................................................................................174
Adding Out of Pocket Charges.......................................................................................178
Attaching Receipts and Submitting Reports.................................................................184
Concur Mobile-FAQs....................................................................................................191
GENERAL INFORMATION

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, 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. Please contact Kisha Reeves at 404-752-1928 or Tonya Marshall 404-752-1677 for additional assistance.
GENERAL INFORMATION

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.
GENERAL INFORMATION

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 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.
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

4. Click Add.

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.
6. 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.
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**

**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 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.
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 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. Concur also has guides on the website under Help.

<table>
<thead>
<tr>
<th>Business Policy &amp; Concur Process Assistance</th>
<th>Media Osayi</th>
<th>404-756-8948</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concur System Assistance</td>
<td>Takisha Reeves</td>
<td>404-752-1928</td>
</tr>
<tr>
<td>Concur Payment Assistance</td>
<td>Tonya Marshall</td>
<td>404-752-1677</td>
</tr>
<tr>
<td>Purchasing Card Assistance</td>
<td>Donna Florence</td>
<td>404-752-1660</td>
</tr>
<tr>
<td>Hotel Reservation Assistance</td>
<td>World Travel</td>
<td><a href="mailto:TeamB@worldtrav.com">TeamB@worldtrav.com</a>, or 877-778-7936</td>
</tr>
<tr>
<td>General Inquires</td>
<td>Concur Help Desk</td>
<td><a href="mailto:ConcurHelpDesk@msm.edu">ConcurHelpDesk@msm.edu</a></td>
</tr>
</tbody>
</table>
CONCURREQUEST
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 or www.travelocity.com to obtain the desired location and times for your itinerary.

Steps

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

2. Type your Request/Trip Name
3. Begin typing the city that you are traveling to in the **Destination City** section. Concur will populate cities matching what you have typed.
4. Use the calendar to select your Trip Start Date.

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

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.
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.

8. Verify your connection to MSM by selecting **Travel Type**.
9. Choose your **Chart**
   - Please choose 1 for Morehouse School of Medicine
   - Please choose 9 for Morehouse Healthcare

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 5th and ends on October 9th, I will receive full per diem rates for October 6th-8th but will only receive 75% of my per diem on October 5th and 9th.

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.

2. Click the Expenses tab.
3. Click **Meals Per Diem**.
4. Click **Save**

- The USGSA rate will automatically be populated for you.
CONCUR REQUEST

ADDITION 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
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.

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

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.
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.

19. If any of your segments will be paid for using multiple FOAP information, click **Allocate**.
20. Click the items that need to be allocated the click **Allocate Selected Expenses**.

21. **Add New Allocation**
22. Modify the percentage and FOP information as needed

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.

2. Hit Submit Report
CONCUR REQUEST

VIEWING THE STATUS OF YOUR REPORT

Steps

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

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. 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.
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.
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**.
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.
6. 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.
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**.
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.
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 APPROVERS**

**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 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.
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.

2. Click **Book**
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 select Shop by Schedule tab, you will be able to select your outbound and
return flights separately options as well.

- 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.
To view more details for a particular flight, click **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.
3. When you have selected the best flight for your trip, click **Select**.

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

- From here, you can update your personal information, view the seat map, review the
price summary information, and select your payment method.

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. 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.

6. To continue with the reservation, click **Next**.
7. To complete the reservation, review your trip itinerary 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 do 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.

![Flight search interface](image)

• 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.

![Flight schedule interface](image)
• 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.

  
  • To view more details for a particular flight, click **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.

3. When you have selected the best flight for your trip, click Select.
• In the **Review and Reserve Flight** section, you can review your flight itinerary.

![Review and Reserve Flight](image)

• 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.
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 cumbered 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.

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

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

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

4. To continue with the reservation, click **Reserve Car and Continue.**
• On the Travel Details page, you can review your complete travel itinerary.

5. To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.
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.
• To hide the results matrix and view more of the car results list, click Hide Matrix.

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

- On the Travel Details page, you can review your complete travel itinerary.
- You will be asked to enter the **Guest or Student information** here.
5. To continue with the reservation, click **Next**. Then continue to follow the prompts until your reservation is confirmed.
CONCUR TRAVEL

CHANGING OR CANCELING 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.

6. To begin searching for new flights, click Search.

7. Select the radio buttons for the original flight segments that you want to change.
8. 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.
CONCUR TRAVEL

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 your 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?

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

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 you Concur Homepage.
2. Under the Upcoming Trips tab, click Expense.
3. Your Report Header will pop up. Click Next to continue.
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.

Steps

1. Populate your Per Diem Itinerary with Departure City, Arrival City, Dates and Times with your outbound information and click Save.
2. Your Departure city will be automatically populated for you. Please populate Dates, Time and Arrival city with your return information and click Save.

3. Click Next to review your Travel Allowances.
4. Click **Next** again to continue.
5. If any meal where provided during your travel, please place a check mark next to the day and the meal that was received.
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.
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.
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.
• All other Expense Types are listed in on the right side of the report.
  
  o Personal Car Mileage
  
• Steps
  
  • Update the **Transaction Date, To Location** and **From Location**.

• Click the **Mileage Calculator** to adjust your mileage
• Click **Add Mileage to Expense**
• Click **Save**
  
  o **Group Meals/Entertainment (>10 or 10+)**
    
    • **Steps**
    
    • **Attach Receipts** and update the **Vendor Name, City of Purchase and Amount**
    
    • Click **New Attendee**
- Add the **First** and **Last Name** of the User
• Click **Save and Add Another** (repeat these steps until you are finished adding all the attendees)
• Click **Save**.

  o Seminar Registration/Fees
  
  • Attach Receipts, update **Vendor Name** and update **Amount**.
  • Under Payment Type, choose **School Paid**.

  ![Image of the Concur Request, Travel and Expense interface showing how to attach receipts and update vendor name, amount, transaction date, city of purchase, and payment type for various expenses such as Car Rental, Fuel, Charter/Transfers Bus, Parking, Internet/Online Fees, Recruiting Expenses, Tips/Gratuities, and Relocation Expenses.]

  • **Click Save**

  • **Attach Receipts** and update the **Transaction Date**, **City of Purchase** and **Amount** for the items listed below:
    o Car Rental
    o Charter/Transfers Bus
    o Other Ground Transportation
    o Parking
    o Internet/Online Fees
    o Recruiting Expenses
    o Tips/Gratuities
    o Relocation Expenses

  • **Attach Receipts** and update the **Transaction Date**, **City of Purchase**, **Amount** and **Additional Info** for the items listed below:
    o Miscellaneous
    o Personal/ Non Reimbursable
Concur Request, Travel and Expense

ITEMIZATIONS

Overview

The hotel charges must be itemized.

Steps

1. Click Itemize at the end bottom of the page

2. Enter Check In Date, verify the Check Out Date, and update the Room Rate.
3. Click **Save Itemizations** and all of the itemized entries will be shown on the left hand side.
CONCUR EXPENSE

ATTACHING RECEIPTS

Steps

1. Click **Attach Receipts**

2. Click **Browse**
3. Find the Receipt you are looking for and click Open.
4. Click **Attach**.

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

2. Attach your receipt then update the **Transaction Date, City of Purchase** and **Amount**.
3. Click **Save**
4. Click **Details**

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

![Cash Advances Table]

7. **Click Cash Advance Return**

![Cash Advance Return Option]
8. Update the amount of money you used on your trip.

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.
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.
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

If you try to Submit the report without clearing the exceptions first, you will receive an error message.
Once all of the Exceptions have been cleared, you will be able to **Submit Report**.

You will be able to print a copy of your report during the **Final Review**.
Click **Accept and Submit**

![Expense Report](image)

**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
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**

2. Under **Policy**, select **Travel and Expense Policy**
3. For **Report/Trip Name** section, add the reason why you are requesting a reimbursement.

4. For Trip Start Date and Trip End Date, select the time frame in which you purchase items on behalf of MSM.
5. In the **Report/ Trip Purpose** section, choose **Other** then provide details in the **Additional Information** section.

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

7. For **Traveler Type**, choose **Faculty/Staff**.
8. Choose your **Chart**
   1. Please choose 1 for Morehouse School of Medicine
   2. Please choose 9 for Morehouse Healthcare
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.

![Concur Platform](image)

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

12. Click **New Expense**, then click **Miscellaneous**.
13. Update the **Transaction Date**, **Vendor Name**, **City of Purchase** and **Amount**.

14. **Attach Receipts**

15. Click **Save**
16. Click **Submit Report**

17. Read the Final Review, click **Accept & Submit**.
18. The reimbursable amount will be shown in the **Amount Due Employee** section of the **Successfully Submitted Report**.

![Report Successfully Submitted](image)

<table>
<thead>
<tr>
<th>Report Total</th>
<th>$50.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Personal Amount</td>
<td>$0.00</td>
</tr>
<tr>
<td>Amount Claimed</td>
<td>$50.00</td>
</tr>
<tr>
<td>Amount Rejected</td>
<td>$0.00</td>
</tr>
<tr>
<td>Company Disbursements</td>
<td></td>
</tr>
<tr>
<td>Amount Due Employee</td>
<td>$50.00</td>
</tr>
<tr>
<td>Total Paid By Company</td>
<td>$50.00</td>
</tr>
<tr>
<td>Employee Disbursements</td>
<td></td>
</tr>
<tr>
<td>Amount Owed Company</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Owed By Employee</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
CONCUR EXPENSE

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.

**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) 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

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.


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.

On the Concur application home screen, you can view your current travel and expense highlights.
CONCUR MOBILE

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 your 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

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

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.
The car reservation is now added to your trip.
CONCUR MOBILE

EXPENSE-CREATING AN EXPENSE REPORT

Steps:

1. Select **Expenses**

2. Press **Add to Report**

You can create expense reports by:

1. Selecting expenses, and then creating an expense report for those expenses.
2. Creating a new expense report, and then adding expenses to it later.

In this demonstration, you will see how to use both methods.
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
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 it 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
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.