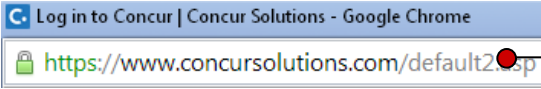


Getting Started Guide



Logging in to Concur T&E

Access Concur Travel & Expense




Navigate to:
<https://www.concursolutions.com>

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

Click **Login**.

Retrieve or Change a Password

 If you have forgotten your password, on the login page, click the **Forgot your password?** link.

As needed, you can also change your password by clicking **Change Password** in your Profile. To change your password in your Profile:

A password must be at least 6 characters. It can contain numbers (0-9), upper and lower case characters (A-Z, a-z), and symbols (such as ^%*@#). It cannot contain spaces. All fields are required.

Note: Passwords are case sensitive.

Enter and confirm your new password. (It must be at least 7 characters with at least one number and one letter.)

Password Hint (we will email this to you if you forget your password)

Enter a hint for the password.

Click **Submit**.

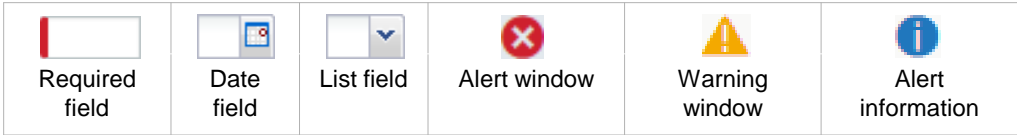
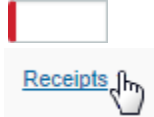
Use Common Fields



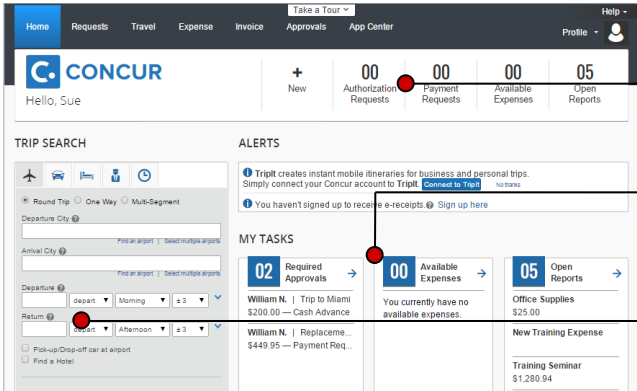
The QuickTask bar provides direct access to features. (e.g. *Create a new expense report.*)

A field preceded by a red line must be filled.

Highlighted text indicates a link or action.



The Home Page

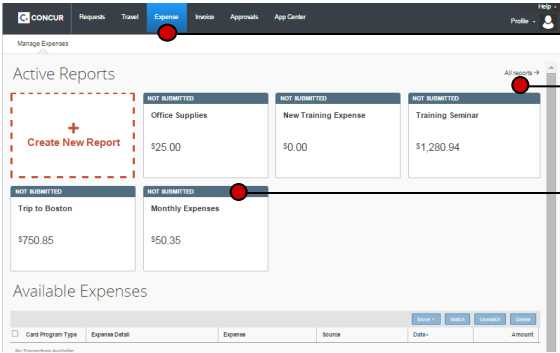


QuickTask bar for expenses, reports, requests, and actions.

Dashboard for expenses, approvals, etc.

Trip Search fields. (If Concur Travel is enabled.)

The Expense Report Page



Action buttons.

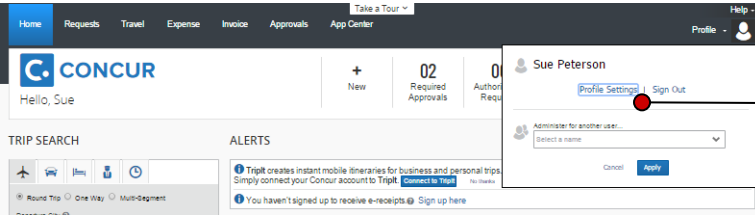
Click **All reports** to view all reports.

Expense report.

Updating Your Profile

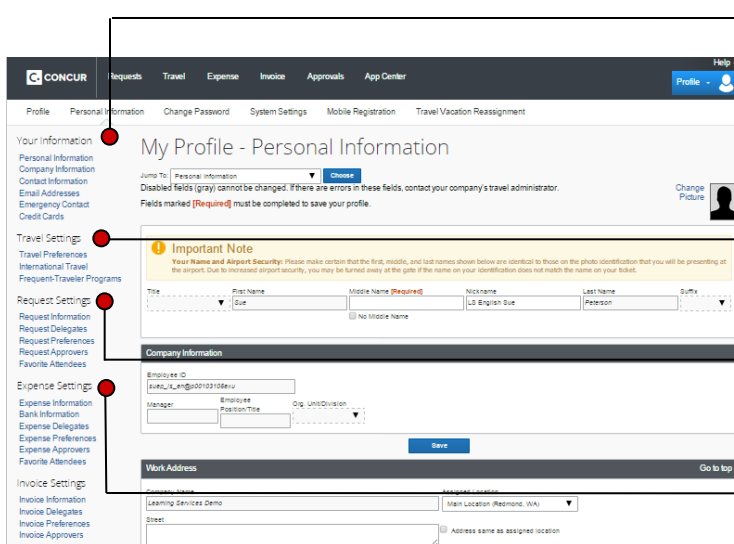
To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur Travel & Expense for the first time and update it whenever your information changes.

Access your profile page



Access via **Profile > Profile Settings.**

Complete your profile information



Your Information (validate personal information such as name, address, phone, and emergency contact, etc.)

Travel Settings (enter air, hotel, and car travel preferences, enter frequent flyer programs, enter TSA passport information, add/remove travel assistant, add/remove credit cards.)

Request Settings (select request information, add/remove delegates, enter email settings select approvers, add/remove attendees.)

Expense Settings (enter expense preferences, add bank information, enter expense delegates and approvers, add company card information, etc.)

Using Concur Travel

Enter Search Criteria

TRIP SEARCH

✈️ 🚗 🏠 🕒

Round Trip One Way Multi-Segment

Departure City

Find an airport | Select multiple airports

Arrival City

Find an airport | Select multiple airports

Departure depart Morning ±3

Return depart Afternoon ±3

Pick-up/Drop-off car at airport
 Find a Hotel

Specify airline
 Refundable only air fares

Class of Service: Highest allowed

Search flights by Price Schedule

Online booking available for **Flights** (One Way or Return), **Hotel** and **Car Rental**.

Enter the arrival and departure cities.

Enter the date and time of departure and return.

Click **Search** to retrieve the search results.

Select Quote Price

Trip Summary

Select Flights

Round Trip
SEA - WAS
Outbound: Mon, 11/17/2014
Return: Fri, 11/21/2014

Finalize Trip

Change Flight Search

Return - Fri, Nov 21

Depart: 12:55 PM - 04:56 PM

Arrive: 05:20 PM - 09:57 PM

Display Settings

Price / Email

Seattle, WA To Washington, DC
Mon, Nov 17 - Fri, Nov 21

Baggage Fee Policies

Chosen Carriers

Outbound

Carrier	Flight	Origin	Destination	Depart	Arrive	Stops	Class	SeatType
United	10712	SEA	ORD	06:00 pm	11:08 pm	0	Economy	
United	11614	ORD	DCA	01:05 pm	03:55 pm	0	Economy	

Quote for Price

6 hours 15 minutes, Airbus Industrie A320 300/200, Airbus Industrie A320, (Wallopat)

Remove

NOTE: Please use schedule page to select your flights.

Washington, DC - Fri, Nov 21

Displaying 60 out of 60 results.

Carrier	Flight	Origin	Destination	Depart	Arrive	Stops	Class	SeatType
US Airways	11517	DCA	DFW	12:30 pm	02:45 pm	0	Economy	
US Airways	11514	DFW	SEA	03:05 pm	05:55 pm	0	Economy	

Quote for Price

6 hours 25 minutes, Boeing 737 800, (Wallopat)

Remove

Select **Quote for Price** to add to the **Chosen Carriers** list.

Trip Summary

Select Flights

Round Trip
SEA - WAS
Outbound: Mon, 11/17/2014
Return: Fri, 11/21/2014

Finalize Trip

Change Flight Search

Return - Fri, Nov 21

Depart: 12:55 PM - 04:56 PM

Arrive: 05:20 PM - 09:57 PM

Display Settings

Price / Email

Seattle, WA To Washington, DC
Mon, Nov 17 - Fri, Nov 21

Baggage Fee Policies

Chosen Carriers

Outbound

Carrier	Flight	Origin	Destination	Depart	Arrive	Stops	Class	SeatType
United	10712	SEA	ORD	06:00 pm	11:08 pm	0	Economy	
United	11614	ORD	DCA	01:05 pm	03:55 pm	0	Economy	

Quote for Price

6 hours 15 minutes, Airbus Industrie A320 300/200, Airbus Industrie A320, (Wallopat)

Remove

Return

Carrier	Flight	Origin	Destination	Depart	Arrive	Stops	Class	SeatType
US Airways	11517	DCA	DFW	12:30 pm	02:45 pm	0	Economy	
US Airways	11514	DFW	SEA	03:05 pm	05:55 pm	0	Economy	

Quote for Price

6 hours 25 minutes, Boeing 737 800, (Wallopat)

Remove

Click the **Price these options** button to view fares.

Using Concur Travel

Select Trip Fare

Trip Summary
Route To: SEA-VWS
Outbound: Mon, 11/10/2014
Return: Fri, 11/14/2014

Select Flights
All 139 results
1 step 347.20
2 steps 312.20

Price to Beat \$847

Airline	Price	Duration
American Airlines	347.20	3:55:20
Delta	312.20	3:47:00
JetBlue	347.20	3:47:00
United	400.20	3:47:00

Complete List

Carrier	Depart	Arrive	Stops	Duration
United	SEA 06:00 pm	DCA 05:55 pm	1	8h 55m
United	SEA 12:51 pm	SEA 05:23 pm	0	5h 32m
American Airlines	SEA 07:00 pm	BWI 05:47 pm	1	7h 47m
American Airlines	DCA 02:00 pm	SEA 11:00 pm	1	7h

Select the desired trip.

For details on pricing conditions, click **Show Details**.

Narrow the results, if necessary, by using the available filters.

Review and Reserve Flight

Trip Summary
Route To: SEA-VWS
Outbound: Mon, 11/10/2014
Return: Fri, 11/12/2014

REVIEW FLIGHTS

Outbound Flight: Seattle, WA (SEA) - Baltimore, MD (BWI) - Mon, Nov 17

U.S. Airways #2751	Seattle Tacoma Int'l Ar. (SEA)	Philadelphia Int'l Arpt (PHL)
Depart: Monday, 08:39 am	Depart: Monday, 08:39 am	Arrive: Monday, 06:39 pm

Return Flight: Washington, DC (DCA) - Seattle, WA (SEA) - Fri, Nov 21

United #5452	Ronald Reagan National - (DCA)	O'Hare Int'l Arpt (ORD)
Depart: Friday, 02:39 pm	Depart: Friday, 02:39 pm	Arrive: Friday, 02:43 pm

ENTER TRAVELER INFORMATION
Ensure all traveler information below is correct.

PRIMARY TRAVELER
Name: Sue Peterson Phone: 206-555-1212

SEAT ASSIGNMENT
Seats will be automatically assigned based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete.

SELECT A METHOD OF PAYMENT
Add credit card

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

Please review the rules and restrictions listed below. When you purchase your ticket, you agree to these rules and restrictions. Please note that the most restrictive set of rules below applies to your entire itinerary. Click Fare to view Rules [Seattle -] [Washington - Seattle]

Reserve Flight and Continue

Validate the trip information. You can modify your itinerary and add a hotel and/or rental car.

Verify and enter any necessary traveler information, including frequent flyer programs.

Click **View seatmap** to select your seat assignment.

Select or add a method of payment.

Accept fare rules and restrictions.

Click **Reserve Flight and Continue**.

Using Concur Travel

Confirm Your Reservation

CONCUR Requests **Travel** Expense Invoice Approvals App Center Help

Travel Price-to-Beat Trip Library Templates Tools Profile

Trip Summary

Flights Reserved

Round Trip
SEA - WBG
Outbound Mon, 11/10/2014
Return Fri, 11/14/2014

Finalize Trip

Review Travel Details
Enter Trip Information
Submit Trip Confirmation

Travel Details

Trip Overview

I want to... [View Itinerary](#)
[Edit Itinerary](#)

Trip Name: Trip from Seattle to Washington [View](#)
Start Date: Nov 10, 2014
End Date: Nov 14, 2014
Created: Oct 29, 2014, Sue Peterson (Modified: Oct 29, 2014)
Description: (No Description Available) [View](#)
Agency Record Locator: MRH42V
Passengers: Sue Peterson
Total Estimated Cost: \$325.20 USD [Details](#)

Airfare must be booked by an agent by: 10/11/2014 2:00 AM Eastern

Add to your Itinerary
Car [Add](#) [View](#)
Hotel [Add](#) [View](#)
Taxi [Add](#) [View](#)

Internet!

Gogo Wi-Fi is available on some of your flights:

Type of pass: No. of Passes
All Day Pass \$1,400 each
\$14,000 approx (Retail price ranges up to \$24,000)
24-hours of continuous access on a single airline
Expires 1 year from purchase
How would you like to pay?
Please choose a credit card: [Add credit card](#)

[Purchase Gogo Wi-Fi](#)

By clicking Purchase Gogo "Wi-Fi", you agree to our:
[Privacy & cookie policy](#)
[Terms of use](#)
[Promotional code and all card usage policy](#)
Purchase seat fees is a company card

Reservations

Monday, November 10, 2014

Flight Seattle, WA (SEA) to Salt Lake City, UT (SLC)

[Cancel all Air](#)

Delta 1634
Departure: 06:00 AM
Seat: No seat assignment [Select seat](#)
Confirmation: GUDBYZ
Status: Confirmed
We were unable to confirm a seat assignment. Click on "Select seat" to view the seat map and manually select your seat.
Delta Tacoma Int. Apt (SEA)
Duration: 4 hours, 8 minutes
Nonstop

Arrival: 08:55 AM
Salt Lake City Int. Apt (SLC)
Terminal: 2

Additional Details
Aircraft: Boeing 737-200 Distance: 688 miles
E-Ticket
Cabin: Economy (Y)

53 min layover at Salt Lake City Int. Apt (SLC)

Flight Salt Lake City, UT (SLC) to Baltimore, MD (BWI)

[Cancel all Air](#)

Delta 1203
Departure: 09:48 AM
Seat: No seat assignment [Select seat](#)
Confirmation: GUDBYZ
Status: Confirmed
We were unable to confirm a seat assignment. Click on "Select seat" to view the seat map and manually select your seat.
Salt Lake City Int. Apt (SLC)
Terminal: 2
Duration: 4 hours, 8 minutes
Nonstop

Arrival: 03:53 PM
Baltimore Washington Int. Apt (BWI)

Additional Details
Aircraft: Airbus A320 Distance: 1980 miles
E-Ticket
Cabin: Economy (Y) Meal: Food for purchase

Friday, November 14, 2014

Flight Washington, DC (DCA) to Salt Lake City, UT (SLC)

[Cancel all Air](#)

Total Estimated Cost

Air		
Airfare quoted amount:	\$260.47 USD	View Fare Rules
Taxes and fees:	\$64.73 USD	
Total Estimated Cost:	\$325.20 USD	

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

Remarks

CONCUR ENCOUNTERED AN ERROR SETTING YOUR CREDIT CARD PAYMENT PLEASE CONTACT TRAVEL AGENCY TO ENSURE BILLING TO CARD OF CHOICE

If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit requirements will not be cancelled.

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

Verify travel details. You can add car, taxi, hotel, and wifi to your travel itinerary.

You may have the option to select in-flight internet service.

Click **Cancel all Air** if your reservations are incorrect.

Confirm your travel reservations. You can add your seat assignment, or add car, hotel, and taxi.

Click **Next** to continue.

Confirm Your Reservation

Verify the name of the trip – you can update the name, as needed.

To send a copy of your travel confirmation, add an email address.

Once the information is complete, click **Next**.

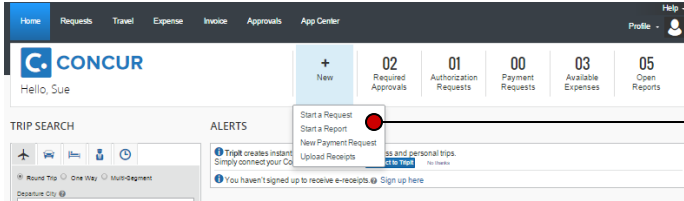
At this time, **tickets are only reserved and unissued**. Approval of the reservation is required before issuance of the ticket (except in special cases with **low cost** airline tickets)

Confirm the trip on the **Trip Confirmation** page.

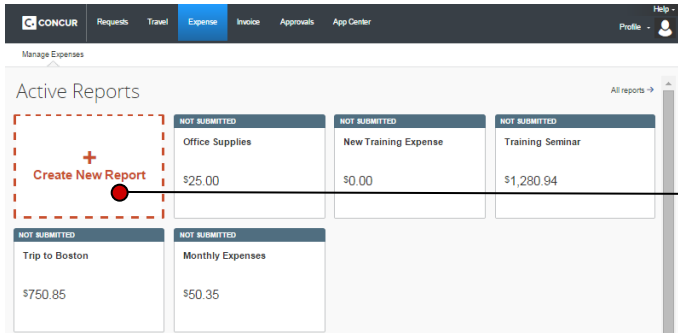
Click **Confirm Booking** to confirm, or **Cancel** to cancel trip.

Creating an Expense Report

Create a New Expense Report



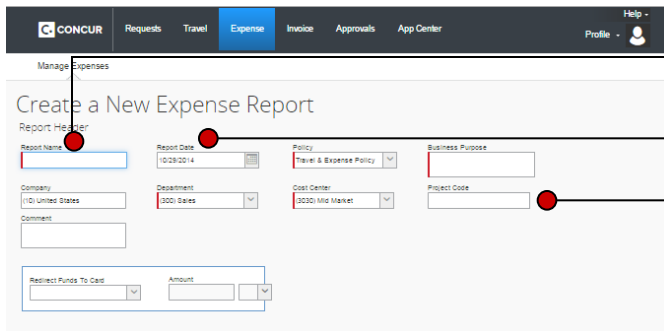
From the Home page, click the **New** quick task bar, and then select **Start a Request**.



On the **Expense** page, click **Create New Report**.

Complete an Expense Report

First, complete the Expense Report header



Enter the report name.

Enter the report date.

Depending on the configuration, specific fields can be filled.

Creating an Expense Report

Expense Type details

Manage Expenses

Seattle Trip

Expenses

Available Expenses

Card Progr...	Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/>	City Home Seattle, WA	Auto		10/28/2014	\$225.00
<input type="checkbox"/>	City Home Seattle, WA	Unrefined		10/28/2014	\$48.76
<input type="checkbox"/>	Office Warehouse Seattle, WA	Unrefined		10/28/2014	\$88.23

Click **New Expense** to create a new expense.

Seattle Trip

New Expense

Expense

Recently Used Expense Types

- Office Supplies
- Hotel
- Car Rental
- Taxi
- Dinner

All Expense Types

- Business Promotions
- Misc. Promotional Expense
- Trade Shows
- Communications
- Cellular Phone
- Local Phone
- Long Distance
- Online Fees
- Pager
- Company Car Expenses
- Company Car Maintenance
- Company Car Oil
- Company Car Wash
- Entertainment
- Business Meal (attendees)
- Individual Meals
- Dinner
- Lunch
- Lo-filing
- Hotel
- Other
- Awards
- Bank Fees
- Spoking Fees
- Dues
- Duplicating
- Gifts
- Incidentals
- Laundry
- Materials
- Other
- Salaries Fees
- Subscriptions
- Transportation
- Airfare
- Airfare Ticket Tax
- Airline Fees
- Bus
- Car Rental
- Gasoline
- Litrouline
- Parking
- Personal Car Mileage
- Subway

Select an **expense type**.

Manage Expenses

Seattle Trip

New Expense

Expense Type: Parking

Transaction Date: 11/10/2014

Business Purpose: [Redacted]

Vendor Name: [Redacted]

City: [Redacted]

Amount: \$15.00

Payment Type: Out of Pocket

Comment: [Redacted]

TOTAL AMOUNT: \$0.00

TOTAL REQUESTED: \$0.00

Enter required expense fields.

Click **Save**. You can also **Itemize**, **Allocate**, **Attach Receipt**, and **Cancel**.

To delete an unsubmitted report, click the check box, and click **Delete**

Expenses

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input checked="" type="checkbox"/>	11/10/2014	Parking	\$15.00	\$15.00

Creating an Expense Report

Move Expenses to Current or New Expense Reports

Expenses	Date	Expense	Amount
<input checked="" type="checkbox"/>	11/15/2014	Parking	\$16.00

Card Progr...	Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/>	Delta Air Lines Seattle, WA	Airfare		10/29/2014	\$328.20
<input checked="" type="checkbox"/>	Gate 1606 Seattle, WA	Undefined		10/29/2014	\$48.76
<input type="checkbox"/>	Office Warehouse Seattle, WA	Undefined		10/29/2014	\$68.23

Click **Import** and then click **Charges & Expenses**.

Select one or more lines of expenditure to add to the expense report.

Click **Move** to move to an existing or new expense report.

This symbol automatically appears under the date of the the imported credit card expenses

Submit an Expense Report for Approval

Business Trip

Expenses

Adding New Expense

TOTAL AMOUNT \$0.00 TOTAL REQUESTED \$0.00

Recently Used Expense Types

Dinner	Business Meal (attendees)	Room Rate
Airfare	Breakfast	

All Expense Types

Business Promotions	Lodging	...Other
Misc. Promotional Expense	Room Rate	Postage
Trade Shows	Meals	Seminar Fees
Communications	Breakfast	Subscriptions
Cellular Phone	Dinner	Transportation
Local Phone	Lunch	Airfare
Long Distance	Other	Airfare Ticket Tax
Online Fees	Journals	Bus
Pager	Bank Fees	Car Rental

Once the expense report is complete, click **Submit Report** to send it the approver.

Final Review

User Submit

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

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

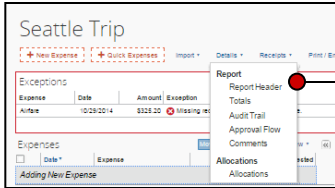
You may request up to the amount due you from the company be paid to your company card on your behalf. Please cancel the report submission if you want to make this change.

Accept & Submit Cancel

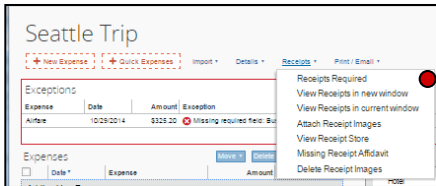
Review notes and click **Accept & Submit**.

Creating an Expense Report

View Details and Manage Receipts

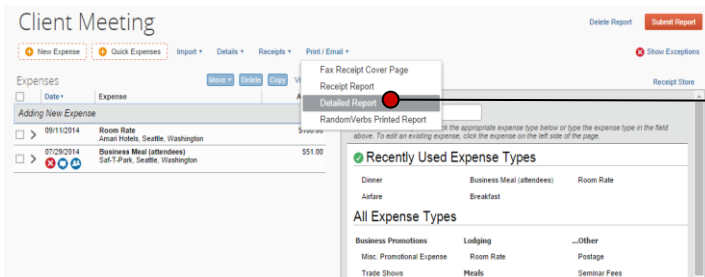


Click **Details** to view the report header, totals, the audit trails, approval flow, allocations, and comments

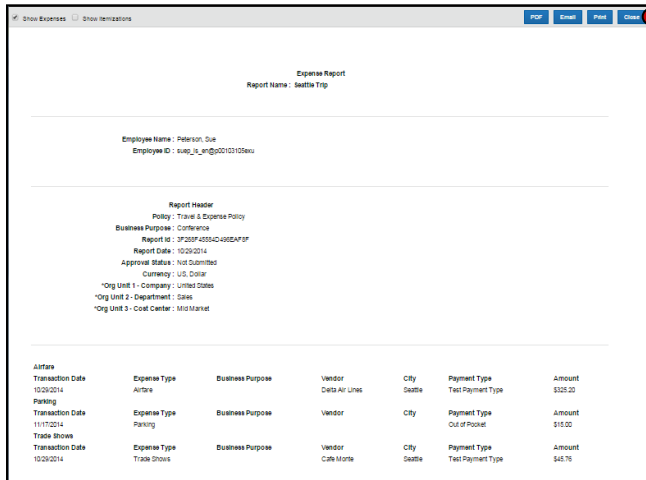


Click **Receipts** to view required receipts, attach receipt images, view receipt store, view a missing receipt affidavit, or delete receipt images

Print an expense report



Click **Print/E-mail** and then **Detailed Report**.



Click **Print**, optionally you can view the report in PDF format, email the report, or close the report.