Getting Started Guide

CONCUR
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:

- Enter and confirm your new password. (It must be at least 7 characters with at least one number and one letter.)
- Enter a hint for the password.
- Click **Submit**.
A field preceded by a red line must be filled.
Highlighted text indicates a link or action.

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

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.
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

- 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

- Select **Quote for Price** to add to the **Chosen Carriers** list.
- Click the **Price these options** button to view fares.
Using Concur Travel

Select Trip Fare

- 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

- 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.
Confirm Your Reservation

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.
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.
How to create a new Expense Report:

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

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

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

Select an expense type.

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.
Creating an Expense Report

Move Expenses to Current or New Expense Reports

1. Click **Import** and then click **Charges & Expenses**.
2. Select one or more lines of expenditure to add to the expense report.
3. Click **Move** to move to an existing or new expense report.

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

Submit an Expense Report for Approval

1. Once the expense report is complete, click **Submit Report** to send it to the approver.
2. Review notes and click **Accept & Submit**.

Final Review

By clicking the “Accept & Submit” button, I certify that

1. The total and accurate accounting of expenses required to accomplish official business and there are no expenses claimed as reimbursable which relate to personal or unreasonable expenses.
2. All required receipts/images have been attached to this report.
3. If I have not received, nor will I receive, reimbursement for any portion of the expenses claimed I assume responsibility for repaying in full for those expenses.
4. 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
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.