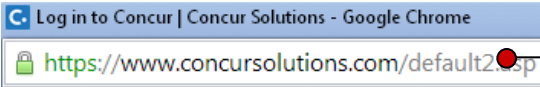


Getting Started Guide



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**.

Navigating

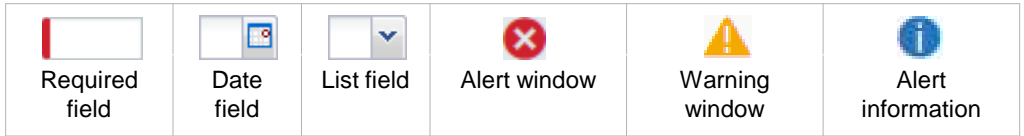
Use Common Fields



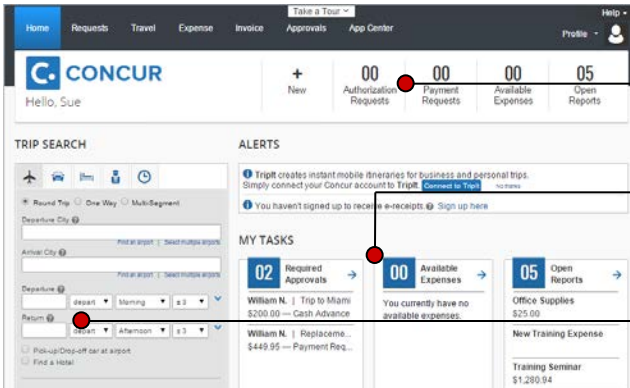
The QuickTask bar provides direct access to features. (e.g. *Create a new expense report.*)

 A field preceded by a red line must be filled.

Highlighted text indicates a link or action.



The Home Page

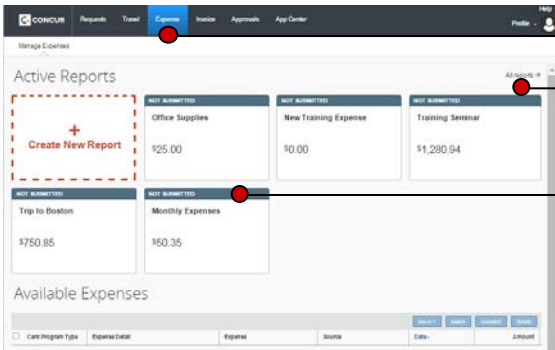


QuickTask bar for expenses, reports, requests, and actions.

Dashboard for expenses, approvals, etc.

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

The Expense Report Page



Action buttons.

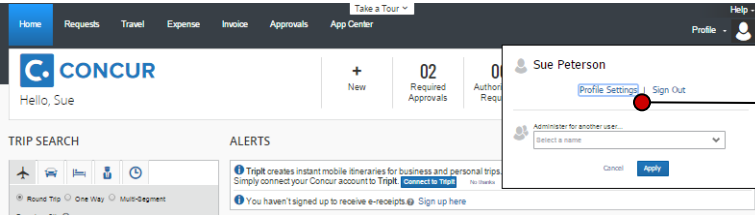
Click **All reports** to view all reports.

Expense report.

Updating Your Profile

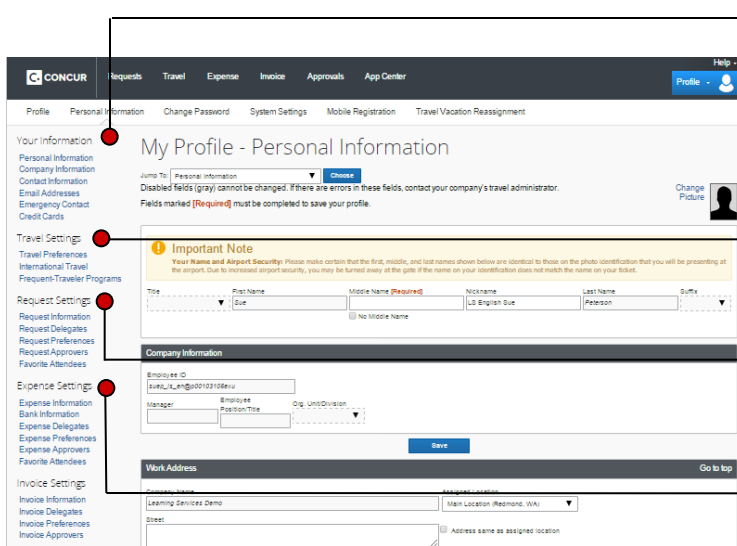
To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur Travel & Expense for the first time and update it whenever your information changes.

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

Arrival City

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

Chosen Carriers

Outbound	Carrier	Class	Time	Price
United 1712	SEA	Economy	11:00 am	\$119
United 1714	ORD	Economy	09:00 am	\$119

NOTE: Please use schedule page to select your flights.

Outbound	Carrier	Class	Time	Price
SEA	SEA	Economy	11:00 am	\$119
SEA	ORD	Economy	09:00 am	\$119

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

Trip Summary
Select Flights
SEA - WAS
Outbound Mon, 11/17/2014
Return Fri, 11/21/2014

Chosen Carriers

Outbound	Carrier	Class	Time	Price
United 1712	SEA	Economy	11:00 am	\$119
United 1714	ORD	Economy	09:00 am	\$119

NOTE: Please use schedule page to select your flights.

Return	Carrier	Class	Time	Price
US Airways 17117	DCA	Economy	12:00 pm	\$219
US Airways 17141	DFW	Economy	09:00 am	\$219

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

Using Concur Travel

Select Trip Fare

Seattle, WA To Washington, DC
Mon, Nov 10 - Fri, Nov 14

Price-to-Best \$947

Carrier	Class	Price	Duration
United	Y	\$947	10:00 AM - 11:30 AM
American	Y	\$947	12:24 PM - 05:40 PM
Delta	Y	\$947	03:25 PM - 12:54 PM

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

Review and Reserve Flight

REVIEW FLIGHTS

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

Carrier	Class	Price	Duration
United	Y	\$947	10:00 AM - 11:30 AM
American	Y	\$947	12:24 PM - 05:40 PM
Delta	Y	\$947	03:25 PM - 12:54 PM

ENTER TRAVELER INFORMATION

PRIMARY TRAVELER

Name: Sue Peterson Phone: 200-555-1212

SEAT ASSIGNMENT

SELECT A METHOD OF PAYMENT

ACCEPT FARE RULES AND RESTRICTIONS

Click **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

The screenshot displays the Concur Travel interface. At the top, there are navigation tabs for 'CONCUR', 'Requests', 'Travel', 'Expenses', 'Invoice', 'Approvals', and 'App Center'. Below this, a 'Trip Summary' sidebar shows 'Flights Reserved' and 'Finalize Trip' options. The main area is titled 'Travel Details' and contains a 'Trip Overview' section with fields for 'Trip Name', 'Start Date', 'End Date', 'Created', 'Description', 'Agency Record Location', and 'Passengers'. A 'Total Estimated Cost' is shown as \$325.20 USD. Below this is a 'Gogo Wi-Fi' advertisement. The 'Reservations' section lists two flights: 'Seattle, WA (SEA) to Salt Lake City, UT (SLC)' and 'Salt Lake City, UT (SLC) to Baltimore, MD (BWI)'. Each flight entry includes departure and arrival times, flight numbers, and a 'Cancel All Air' link. At the bottom, a 'Total Estimated Cost' table shows a breakdown of Airfare, Taxes and Fees, and Total Estimated Cost. A 'Remarks' section contains a message about a credit card payment error. At the very bottom, there are 'Next' and 'Cancel' buttons.

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.


Using Concur Travel

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**.

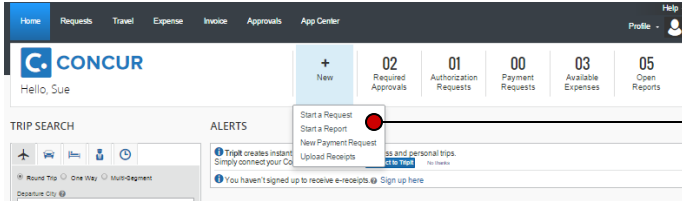
 At this time, **tickets are only reserved and unissued**. Approval of the reservation is required before issuance of the ticket (except in special cases with **low cost** airline tickets)

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

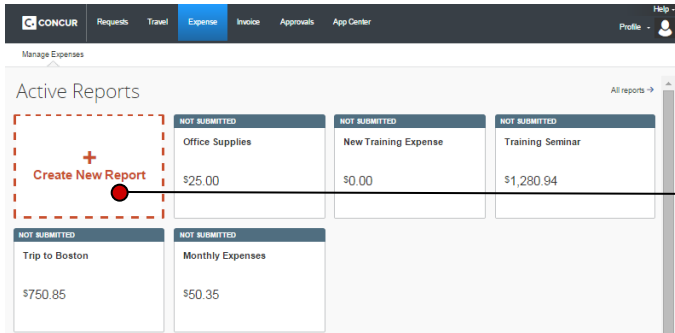
Click **Confirm Booking** to confirm, or **Cancel** to cancel trip.

Creating an Expense Report

Create a New Expense Report



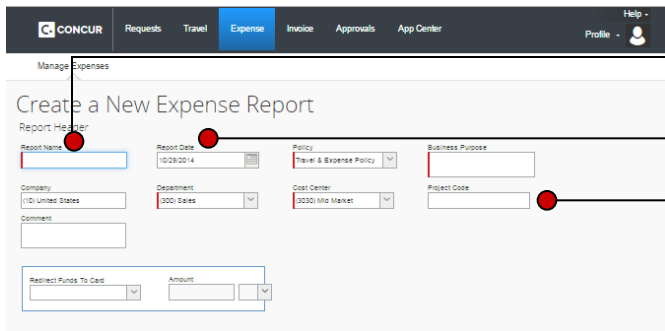
From the Home page, click the **New** quick task bar, and then select **Start a Request**.



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

Complete an Expense Report

First, complete the Expense Report header



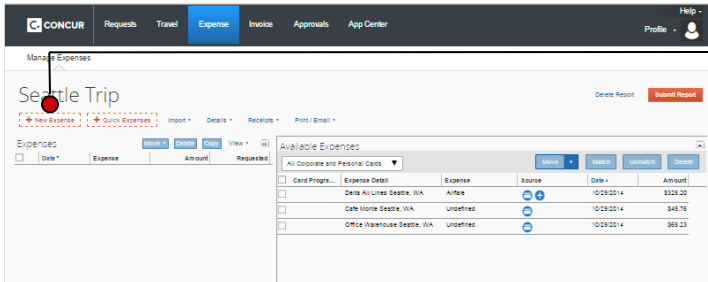
Enter the report name.

Enter the report date.

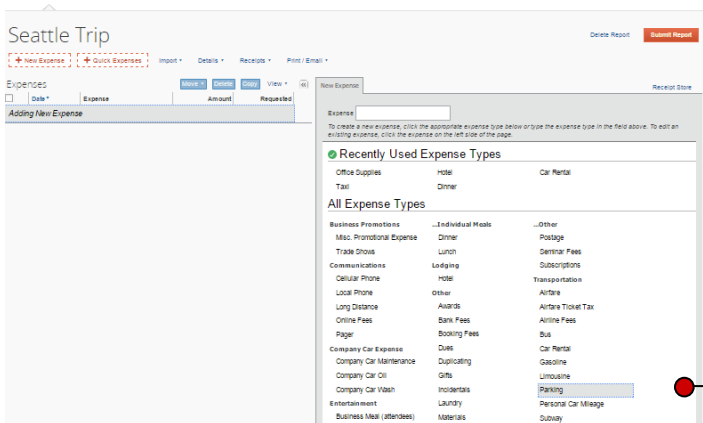
Depending on the configuration, specific fields can be filled.

Creating an Expense Report

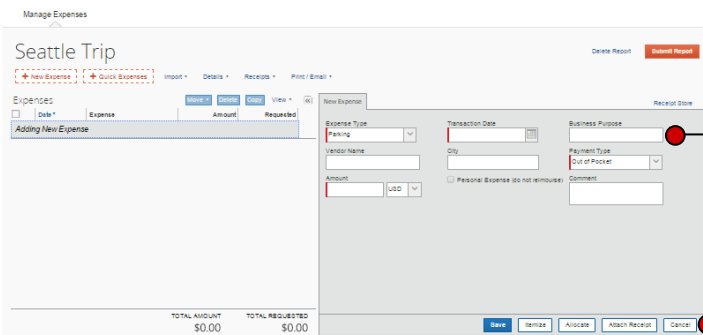
Expense Type details



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

Card/Program	Expense Detail	Expense	Source	Date	Amount
Bank of America Credit Card	Bank Air Lines Seattle, WA	Airfare	Bank of America	10/26/2014	\$100.00
Bank of America Credit Card	Cafe Morio Seattle, WA	Unclassified	Bank of America	10/26/2014	\$45.76
Bank of America Credit Card	Office Supplies Seattle, WA	Unclassified	Bank of America	10/26/2014	\$99.22

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

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.

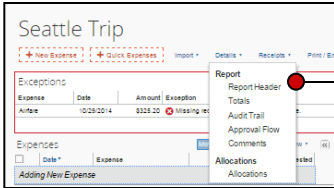
You may request up to the amount due you from the company be paid to your company card on your behalf. Please cancel the report submission if you want to make this change.

Accept & Submit Cancel

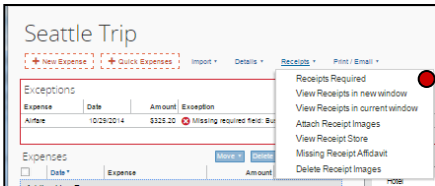
Review notes and click **Accept & Submit**.

Creating an Expense Report

View Details and Manage Receipts

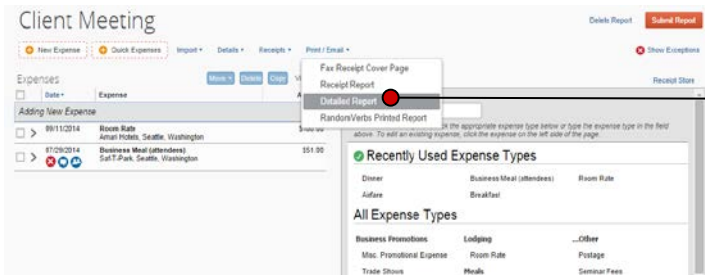


Click **Details** to view the report header, totals, the audit trails, approval flow, allocations, and comments

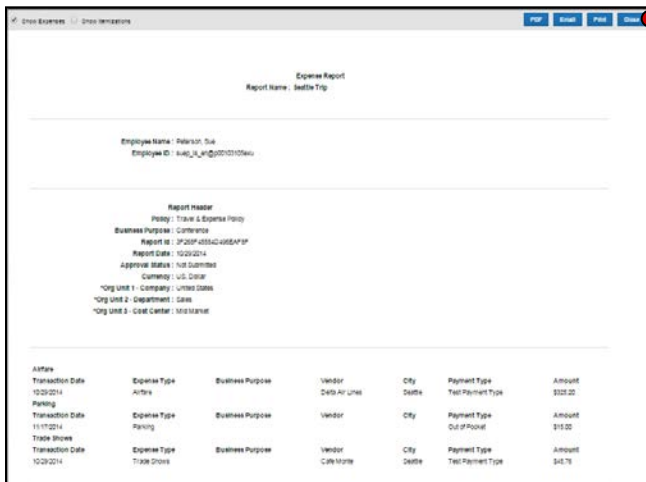


Click **Receipts** to view required receipts, attach receipt images, view receipt store, view a missing receipt affidavit, or delete receipt images

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.