## Section 1: Getting Started

### Step 1: Log on to Concur Travel & Expense

1. **In the User Name field, enter your user name.**
2. **In the Password field, enter your password.**
3. **Click Login.**

*If you are not sure how to start Concur Travel & Expense, check with your company's system administrator.*

---

## Section 2: Use My Concur

### Step 1: Explore the available options

1. **Explore the Trip Search section.**
2. **Look at the Weather section (not available in Concur Standard).**
3. **Explore the Travel Info section.**
4. **Explore the Company Info section.**
5. **Locate the Expense Reports (sometimes labeled Active Work) section.**
   - *Active Work will appear if your company uses Travel Requests or Cash Advances.*
6. **View the Approval Queue section.**
   - *This section appears only if you are logged on as an approver.*
7. **Locate the Trip List section.**
8. **View the Trips Awaiting Approval section.**
   - *This section appears only if you are logged on as an approver.*

---

## Section 3: Update Your Profile

### Step 1: Change your password

1. **At the top of the My Concur page, click Profile.**
2. **On the Other Settings menu on the left side of the page, click Change Password.**
3. **In the Old Password field, enter your current password.**
4. **In the New Password field, enter your new password.**
5. **In the Re-enter New Password field, enter your new password.**
6. **In the Password Hint field, enter a hint or reminder for instances when you have forgotten your password.**
7. **Click Submit.**

### Step 2: Change your time zone, date format, or language

1. **At the top of the My Concur page, click Profile.**
2. **On the Other Settings menu on the left side of the page, click System Settings.**
3. **On the System Settings page, update the appropriate information, and then click Save.**

### Step 3: Update your personal information

1. **At the top of the My Concur page, click Profile.**
2. **Click Personal Information in the middle of the page.**

---

## Concur Travel & Expense Quick Reference Guide

### Step 4: Set up a Travel Arranger or Assistant

1. **At the top of the My Concur page, click Profile.**
2. **Select Personal Information.**
3. **Scroll down to the Assistants and Travel Arrangers section.**
4. **Click Add an Assistant located to the right of the section.**
5. **In the Search Criteria field, type the last name of the person you wish to add as an assistant/travel arranger.**
6. **Click Search.**
7. **From the Assistant dropdown menu, select the appropriate assistant.**
8. **Select Can Book Travel for Me.**
9. **Select Is my primary assistant for travel, if necessary.**
10. **Click Save.**

### Step 5: Verify Expense Information

1. **At the top of the My Concur page, click Profile.**
2. **On the Expense Settings menu on the left side of the page, click Expense Information.**
3. **On the Expense Information page, verify the pre-populated information.**

*If any of the Expense Information is incorrect, contact your company’s system administrator.*
### Step 6: Enter Bank Information

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Bank Information.
3. On the Bank Information page, in the Routing Number field, enter your bank’s routing number.
4. In the Bank Account field, enter the bank account number where you wish to receive your expense reimbursements.
5. In the Re-Type Bank Account Number field, enter the bank account number again.
6. Change the Account Type, if necessary.
7. Click Save.

### Step 7: Add an Expense Delegate

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Expense Delegates.
3. On the Expense Delegate page, click Add Delegate.
4. In the Search by employee name, email address or logon id field, type the last name of the delegate you wish to add.
5. From the list of matches, select the appropriate person.
6. Select the responsibilities you wish this delegate to perform on your behalf.
7. Click Save.

### Step 8: Change Expense Preferences

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Expense Preferences.
3. In the Send email when... section, select the appropriate actions.
4. In the Prompt...section, select the appropriate actions.
5. In the Display...section, select the appropriate options.
6. Click Save.

### Step 9: Verify Expense Approvers

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Expense Approvers.
3. On the Expense Approvers page, verify that your default expense approver is correct.

*If the approver name listed on the Expense Approvers page is incorrect or if the field is blank, contact your company's system administrator.*

### Step 10: Add a Company Car

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Company Car.

### Step 11: Add a Favorite Attendee

1. At the top of the My Concur page, click Profile.
2. On the Expense Settings menu on the left side of the page, click Favorite Attendee.
4. From the Type dropdown menu, select the appropriate Attendee Type.
5. In the Last Name field, enter the last name of the new attendee.
6. In the First Name field, enter the first name of the new attendee.
7. In the Attendee Title field, enter the job title of the attendee.
8. In the Company field, enter the company where the attendee is employed.
9. Click Save.

### Step 12: Enable E-Receipts

1. At the top of the My Concur page, click Profile.
2. On the Other Settings menu on the left side of the page, click E-Receipt Activation.
3. On the E-Receipts page, click E-Receipt Activation.
Travel & Expense

Step 13: Exclude a Credit Card from E-Receipts

1. At the top of the My Concur page, click Profile.
2. On the Profile page, scroll down to the credit card section.
3. Click the Edit icon (pencil icon located to the far right of the credit card section) for the credit card you wish to exclude.
4. Uncheck the Receive e-receipts for this card checkbox.
5. Click Save Changes.

Section 4: Make a Travel Reservation

Step 1: Make a flight reservation

1. On the Flight tab, select one of these:
   - Round Trip
   - One Way
   - Multi-Segment
2. In the Departure City and Arrival City fields, enter the cities for your travel.
3. In the Departure and Return fields, select the appropriate dates and times.
4. If you need a car, select Pick-up/Drop-off car at airport.
5. If you need a hotel, select Find a Hotel. (More information appears; make the appropriate choices.)
6. Select Refundable Only, if appropriate.

Step 2: Select a car

1. If you specified that you need a car on the Flight tab, you will see car results for the car search.
2. Select the appropriate rental car, and then click Reserve.

Step 3: Select a hotel

If you selected the Find a Hotel option on the Flight tab, the hotel results are displayed after you choose your rental car.

1. Use the filter options to narrow your search by Amenity, Neighborhood, or Chain.
2. Click Show Details for a specific hotel to view more detailed information.
3. A rate range appears. Click choose room to view rates and details about the room.
4. When ready to reserve your room, click the radio button to the left of the rate, and then click Reserve.

Step 4: Complete the Booking

1. Enter your trip information in the Trip Name and Trip Description fields.
2. Click Next to finalize your reservation.
3. To complete the booking, click Purchase Ticket.

Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

Flight changes are available for e-tickets that include a single carrier.

If the trip is already ticketed but has not occurred, you can change the time or date of the flight. Your change options will be with the same airline and routing.

Contact your travel agency, the appropriate Website, or vendor directly if you did not book your trip using Concur Travel.

1. At the top of the My Concur page, click Travel.
2. In the Upcoming Trips section of My Concur, click the name of the trip.
3. Click Change Trip.

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Section 7: Create a New Report

Step 1: Create the report

1. In the Expense Reports (sometimes also labeled Active Work) section of My Concur, click New Expense Report.

2. In the Report Name field, enter a name for the expense report.

3. In the Business Purpose field, enter the business purpose for the expense report.

4. Complete all required and optional fields as directed by your company.

5. Click Next.

Step 2: Add an out-of-pocket expense to the new expense report

1. On the New Expense tab, select the appropriate expense type.

2. Click the Transaction Date field, and then use the calendar to select the date of the transaction.

3. In the Amount field, enter the amount spent on the expense.

4. Click Save (or click Itemize to itemize the expense).

The Transaction Date and Amount fields are required for all expense types. Some expense types will have different required fields that other expense types do not have. Be sure to fill out all required fields (denoted by red).

Section 8: Review or Edit a Report

1. In the Expense Reports (sometimes also labeled Active Work) section of My Concur, click the name of the report that you want to review.

2. Make the appropriate changes.

3. Click Save.

Section 9: Use Special Features

Convert Foreign Currency Transactions

1. Click New Expense.

2. On the New Expense tab, select the appropriate expense type.

3. Complete all required fields as usual except Amount.

4. In the Amount field, enter the amount spent on the expense.

5. Select the "spend" currency from the dropdown list to the right of the Amount field.

6. Click the appropriate mathematical symbol to change the conversion format, if required.

7. Click Save (or click Itemize to itemize the expense).

Section 6: Create an Expense Report from a Completed Trip

When your trip has completed (past the trip end date), the button appears in the Exp Report? Column of the Trip List section of My Concur.

1. Click the Exp Report? Button. Concur Travel & Expense creates an expense report for you and attaches the applicable expenses to the report.

2. Make any necessary changes.

3. Print, submit, and provide receipts. Refer to sections 10 and 11 of this guide for details regarding printing, providing receipts and submitting your expense report.

4. On the itineray, click the appropriate link to:
   - Email your itinerary
   - Change seat
   - Change the flight day or time for travel (you cannot change the airline)
   - Add, change, or cancel parking
   - Add, change, or cancel a taxi
   - Add, change, or cancel car rental
   - Add, change, or cancel hotel

5. To cancel your entire trip, in the Upcoming Trips section of My Concur, click the name of the trip.

6. Click Cancel Trip, and then click OK.
**Use Special Features (continued...)**

**Import a Trip or Company Card Transaction to Your Expense Report**

Company card transactions (charges) are automatically transferred (imported) to Concur Travel & Expense. (Your company determines how frequently new company card transactions appear.)

1. Create a new expense report as usual. *Refer to Section 7 of this guide.*

2. From the **Import** dropdown menu, select **Charges & Expenses**.

3. In the **Unmatched Charges** section, select the trip or charges to be imported by clicking the checkbox to the left of the expense or trip.

4. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**. You can also click and drag all highlighted card charges to the Expense List section of your expense report.

**Use Special Features (continued...)**

**Add a Personal Credit Card Transaction to Your Expense Report**

Before you can import the personal credit card transactions, you need to download the transactions from the financial institution, and then save them to your computer. Debit card transactions are not supported. This feature must be activated during configuration. Your company may not allow import of personal card transactions.

1. Create a new expense report as usual.

---

**Concur Travel & Expense Quick Reference Guide**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Amount field, enter the amount spent on the expense.</td>
</tr>
<tr>
<td>2</td>
<td>In the Number of Nights field, enter the number of nights for your hotel stay (the Check-in Date will be filled in once you enter the number of nights).</td>
</tr>
<tr>
<td>3</td>
<td>In the Room Rate field, enter the amount you were charged per night for the room.</td>
</tr>
<tr>
<td>4</td>
<td>In the Room Tax fields, enter the amount of each room tax that you were charged.</td>
</tr>
<tr>
<td>5</td>
<td>In the Additional Charges (each night) section, from the first Expense Type dropdown menu, select the appropriate expense type.</td>
</tr>
<tr>
<td>6</td>
<td>In the Amount field, enter the amount of the expense.</td>
</tr>
<tr>
<td>7</td>
<td>Repeat steps 9-10 using the second Expense Type field if you have more than one recurring additional charge.</td>
</tr>
<tr>
<td>8</td>
<td>Click Save Itemization.</td>
</tr>
<tr>
<td>9</td>
<td>Click Save Itemization.</td>
</tr>
<tr>
<td>10</td>
<td>Click Save Itemization.</td>
</tr>
<tr>
<td>11</td>
<td>Click Save Itemization.</td>
</tr>
</tbody>
</table>

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**Itemize Nightly Lodging Expenses**

**Step 1: Itemize nightly lodging expenses**

1. On the New Expense tab, select the Hotel expense type. Your company will define this expense type. It may also be listed as Room Rate, Lodging, Accommodations, etc.

2. Click the Transaction Date field, and then use the calendar to select the date of the transaction.

3. Fill out all other required fields as defined by your company.

**Step 2: Add remaining lodging itemizations**

1. If the amount remaining is more than zero, on the New Itemization tab, click the Expense Type dropdown arrow, and then select the appropriate expense from the dropdown list.

2. Complete all required and optional fields as directed by your company.

3. Click Save.
Use Special Features (continued...)

Allocate Expenses
You can select multiple expenses to allocate, click Allocate in the right-side pane, and then continue with step 4.

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.
   Your company may define Department as Cost Center or some other alternative.
7. Click Add New Allocation, and then repeat steps 6-6 for each new allocation.
8. Click Save, and then click OK.
9. In the Allocate Report window, click Done.

Use Special Features (continued...)

Itemize Expenses
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 by your company.
5. Click Save.
6. Repeat steps 3-5 until the Remaining Amount equals $0.00.

Use Special Features (continued...)

Add Attendees
1. On the New Expense tab, select an Entertainment, Business Meals, or Group Meals expense type.
   Your company defines the expense type names that deal with entertaining clients, customers, or group meals that include employees.
2. Click the Transaction Date field, and then use the calendar to select the date of the transaction.
3. Fill out all other required fields for this expense type as directed by your company.
4. In the Amount field, enter the amount of the expense.
5. Click Save.

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Revised: November 5, 2012
Use Special Features (continued...)

<table>
<thead>
<tr>
<th>1</th>
<th>On the Expense Report page, from the Expense List, select the checkbox next to the expense you wish to copy.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Click Copy.</td>
</tr>
<tr>
<td>3</td>
<td>Click on the new expense.</td>
</tr>
<tr>
<td>4</td>
<td>Make all necessary changes to the new expense.</td>
</tr>
<tr>
<td>5</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>

Section 10: Print & Submit or Resubmit Expense Reports

<table>
<thead>
<tr>
<th>Preview, print, and submit your report</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

Correct and resubmit a report sent back by your approver

| In the Expense Reports (sometimes also                                      |

Section 11: Fax or Attach Receipts

If your company uses Concur Imaging, you can fax or attach scanned images of your receipts.

Fax your receipts

| 1 | From the Print dropdown menu, select Fax Receipt Cover Page.                                |
| 2 | Click Print.                                                                                 |
| 3 | Fax the cover page and the receipts to the number on the cover page.                         |
| 4 | To view the faxed receipts, from the Receipts dropdown menu, select View Receipts.          |

Attach scanned images of your receipts

| 1 | On the Expense Report page, from the Receipts dropdown menu, select Attach Receipt Images.   |
| 2 | Click Browse.                                                                               |
| 3 | Locate the file you want to attach.                                                         |
| 4 | Click the file, and then click Open.                                                        |
| 5 | To attach another image, click Browse, and then repeat the process.                          |

Section 12: Review & Approve Expense Reports

Step 1: Review and approve a report

| 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.                                                                              |

Step 2: 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.                                                                 |

6 | Click Attach.                                                                 |
7 | Click Done, when finished.                                                                |
8 | To view the attached receipts, from the Receipts dropdown menu, select View Receipts.      |
1 | On the Expense Report page, from the Receipts dropdown menu, select Delete Receipt Images. |
2 | In the confirmation window, click Yes. When you select the Delete Receipt Images option, all images attached at the report level are deleted. You cannot delete individual receipt images at the report level. |

Concur Technologies, Inc.  
Revised: November 5, 2012
### Travel & Expense

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the <strong>Approval Queue</strong> section of My Concur, click the name of the report that you want to view.</td>
</tr>
<tr>
<td>2</td>
<td>Review the expense report.</td>
</tr>
<tr>
<td>3</td>
<td>Click the expense that you wish to send back for correction.</td>
</tr>
<tr>
<td>4</td>
<td>Select the <strong>Send Back Expense?</strong> checkbox.</td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Approve</strong>.</td>
</tr>
</tbody>
</table>

**Note:** You can send back multiple expenses on an expense report without sending back the entire report. You will repeat the steps for each expense that needs to be sent back.

### Step 4: Adjust authorized amounts on an expense report

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the <strong>Approval Queue</strong> section of My Concur, click the name of the report that you want to view.</td>
</tr>
<tr>
<td>2</td>
<td>On the <strong>Expense Report</strong> page, click the expense you want to adjust.</td>
</tr>
</tbody>
</table>
| 3    | Change the amount in the **Approved Amount** field.  

**Note:** This option must be activated during configuration. Your company may not allow approvers to adjust Approved Amounts. |
| 4    | Click **Save**. |
| 5    | To approve the report with the changes, click **Approve**. |

### Step 5: Add an additional review step for an expense report

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the <strong>Approval Queue</strong> section of My Concur, click the name of the report that you want to view.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Approve &amp; Forward</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>Approval Flow</strong> window, click the <strong>Search Approvers By</strong> dropdown arrow.</td>
</tr>
<tr>
<td>4</td>
<td>Select the desired search option from the dropdown list.</td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>User-Added Approver</strong> field, type the search criteria.</td>
</tr>
<tr>
<td>6</td>
<td>From the list of options displayed by the search, select the appropriate approver.</td>
</tr>
<tr>
<td>7</td>
<td>Click <strong>Approve</strong>.</td>
</tr>
</tbody>
</table>

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**Revised: November 5, 2012**

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