



Concur User Essentials Thanks to Calleen Roper, FCRR Table of Contents

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Exploring the Home Page

The home page includes the following sections that make it easy for you to navigate and find the information you need.

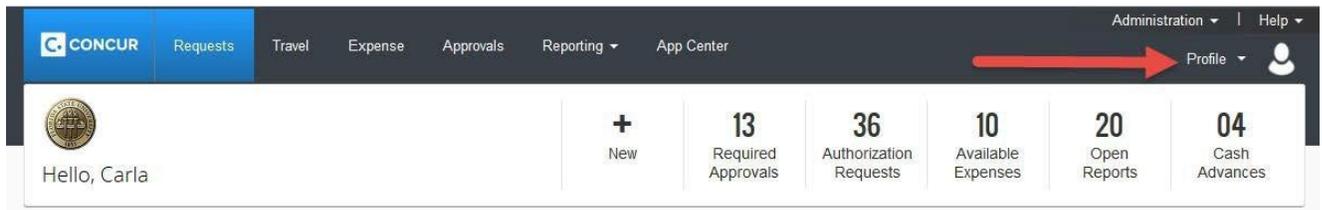
1. **Quick Task Bars** – Provide direct access to create or approve an expense report, authorize a travel request, apply available electronic expenses to an expense report, or access incomplete expense reports
2. **Company Notes** – Displays University specific information
3. **Trip Search/My Trips** – Provides access to travel booking, and upcoming trips.
4. **My Tasks** – Displays a dashboard for your approvals, available expenses, and open reports.
5. **Profile** – Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device

To return to the Home page from any screen, click the **Concur** logo in the upper left corner of your screen.

The screenshot shows the Concur Home Page interface. At the top, the navigation bar includes the Concur logo, menu items (Requests, Travel, Expense, Approvals, Reporting, App Center), and user options (Administration, Help, Profile). Below the navigation bar, a 'Quick Task Bars' section displays several metrics: '+ New', '13 Required Approvals', '36 Authorization Requests', '10 Available Expenses', '20 Open Reports', and '04 Cash Advances'. A red box highlights the 'Quick Task Bars' label and the '36 Authorization Requests' metric. Below this, the 'TRIP SEARCH' section is highlighted with a red box, showing options for booking (myself or guest) and a search form for mixed flight/train searches. To the right, a blue banner asks 'Is your Concur profile up to date? Add your reward programs now' with an 'Add Now' button. Below the banner, the 'COMPANY NOTES' section is highlighted with a red box, featuring a 'Concur Training Toolkit' link and an image of a 'WORLD TRAVEL' building. At the bottom left, the 'MY TRIPS (0)' section is highlighted with a red box, indicating no upcoming trips. At the bottom right, the 'MY TASKS' section is highlighted with a red box, showing three task cards: '13 Required Approvals' (with a sub-task for Michael W.), '10 Available Expenses' (with a sub-task for Los Compadres Restaurant), and '20 Open Reports' (with a sub-task for Athletics cash advance).

Updating Your Profile

From the Concur homepage click **Profile**, then **Profile Settings**



Your Information

Name: The complete name should match your government issued photo ID, such as a driver's license or passport, which you will present to airport security. If first/last name are different than what is on user's photo ID, please contact your department HR representative.

First and Last name will be populated from your University HR record.

- Verify or add Middle Name and, if applicable, Suffix to match your government issued ID.
- Ensure information is correct. User cannot modify again after saving.
- Click **Save**.

Company Information: Automatically populates

Work & Home Address: Optionally, you may enter work and home address.

Contact Information: **Required**

- Enter a work and home phone number; these can be mobile or land lines

Contact Information			
Work Phone [Required**]	Work Extension	Work Fax	2nd Work Phone/Remote Office
644-1956		850-644-8137	644-1956
Home Phone [Required**]			
Pager	Other Phone		
Mobile Phone			

Email Addresses: **Required**

Email Addresses					Go to top
Please add at least one email address.					
▶ How do I add an email address?					
▶ Travel Arrangers / Delegates					
▶ Why should I verify my email address?					
▶ How do I verify my email address?					
[+] Add an email address					
Email 1	Email Address	Verify	Contact?	Actions	
	lmasimore@fsu.edu	Not Verified	Yes	Verify	

Verify your email address

- Your '@humboldt.edu' email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the Verify link.
- To verify the email address, click the Verify link.
 - Check your email for a verification message from Concur.
 - Copy the code from the email message into the Enter Code box next to the email address.
 - Click OK
- Additional work and personal email addresses can be added by clicking Add an Email Address. Enter the email address and select whether you want travel notifications to be sent to that email. Click OK.

Emergency Contact Information:

Optional, but when traveling, if there should be an emergency, World Travel Services will have access to the Emergency Contact information.

Emergency Contact			
Name	Relationship		
<input type="text"/>	<input type="text"/>		
Street	<input type="checkbox"/> Address same as employee		
<input type="text"/>	<input type="text"/>		
City	State/Province/Region	Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Country	Phone	Alternate Phone	
<input type="text" value="United States of America"/>	<input type="text"/>	<input type="text"/>	

Travel Preferences:

Optional, but recommended for frequent travelers

- If you participate in Frequent Traveler Rewards programs, click **Add a Program**
- Enter air, car rental, and hotel Frequent Traveler program information
- Click "I Agree" to the terms and conditions TSA Secure Flight
- Enter your gender and date of birth
- If you have a TSA Pre-check number, it can be entered

TSA Secure Flight			
The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV .			
Gender [Required]	Date of Birth (mm/dd/yyyy)[Required]	DHS Redress No.?	TSA Pre✓ Known Traveler Number?
<input type="radio"/> Male <input checked="" type="radio"/> Female	<input type="text" value="xx/xx/xxxx"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Save"/>			

International Travel: Passports and Visas

For international travel, entering Passport or International Visa information ahead of time will allow it to be available when using Concur/World Travel to book travel.

Note: User's date of birth will be masked after editing it. If unsure that DOB is correct, users may re-edit the date.

- Click **International Travel**
- Enter Passport or International Visa Information
- Click **Save**

International Travel: Passports and Visas Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports

I do not have a passport

Add a Passport

Passport Date of Birth (mm/dd/yyyy)	Passport Nationality	Passport Number	Passport Date Issued (mm/dd/yyyy)
01/02/70	United States of America	123456	07/01/2016
Passport Expiration (mm/dd/yyyy)	Passport Place Issued (City, State)	Passport Place Issued (Country)	
06/30/2026	Pittsburgh, PA	United States of America	

International Visas

Add a Visa

Visa Nationality	Visa Type	Visa Number	Visa Expiration

Credit Cards: No personal

- HSU requires the State travel card. If you are a faculty or staff member and do not have a State travel card, please contact travel@humboldt.edu.
- Once you obtain a State travel card, click **Add a Credit Card**. A window should open (check for popups) to fill in the fields.

Credit Cards Go to top

You currently have the following credit cards saved with your profile.

You currently have no credit cards saved.

[+ Add a Credit Card](#)

Fill in the required fields:

- Display Name: i.e. HSU Travel Card
- Your name as it appears on this card: Must match card exactly
- Card Type: VISA
- Credit Card Number: Must match card exactly
- Expiration Date: Must match card exactly
- **Use this card as the default for:** Rail Tickets, Car Rentals, and Hotel Reservations.
- Billing Address:
 - Street: 1 Harpst St.
 - City: Arcata
 - State: California
 - Zip/Postal Code: 95521
 - Country: United States of America

Add a Credit Card

* Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) *	Your name as it appears on this card *
<input type="text" value="HSU Travel Card"/>	<input type="text" value="Jane Doe"/>

VISA

Card Type *	Credit Card Number *	Expiration Date *
<input type="text" value="VISA"/>	<input type="text"/>	<input type="text" value="4"/> <input type="text" value="2019"/>

Use this card as the default card for:

Rail Tickets Car Rentals Hotel Reservations

Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate.

Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street *	Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.	
<input type="text" value="1 Harpst St"/>		
City *	State *	Zip/Postal Code *
<input type="text" value="Arcata"/>	<input type="text" value="California"/>	<input type="text" value="95521"/>
Country *		
<input type="text" value="United States of America"/>		

Cancel

Concur Connected Apps

To take full advantage of the functionality in the Concur application, we recommend that you download the following applications onto your smartphone or mobile device. These are optional, but provide convenience to users.

1. **Concur Mobile** allows a user to manage trips and expenses. Users can collect data for an Expense Report and submit it, or approve an employee's Expense Report. Concur Mobile now contains Expenselt's receipt recognition technology, which allows users to create an expense line item and match the receipt to a card transaction.
2. **Tripit Pro** organizes travel plans putting all trip information in one place. The app will provide the user with updates during travel on things like gate changes, cancellations, etc., and provides the ability to select alternate flights when plans have changed or a flight has been cancelled. Family members can be provided visibility to travel plans by including them as part of the user's "inner circle". Consider it a personal travel assistant while on the road.

Concur Mobile & Registration:

Use this guide to set up your own mobile phone to capture receipts, submit expense reports, and address approvals.

1. Proceed to 1) **Profile**, 2) **Profile Settings**, 3) **Concur Mobile Registration**

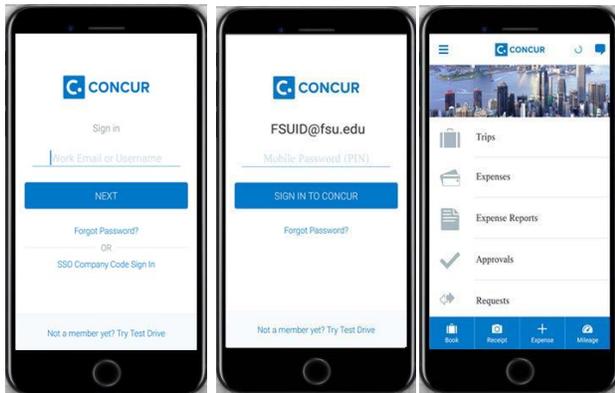
The screenshot shows the 'Profile Options' page in the Concur system. The top navigation bar includes 'Travel', 'Expense', and 'Approvals'. On the right, there is an 'Administration' and 'Help' dropdown, and a 'Profile' dropdown with a red circle '1' next to it. Below the navigation, there are links for 'Change Password', 'System Settings', 'Concur Mobile Registration', and 'Concur Mobile'. The main content area is titled 'Profile Options' and contains several sections: 'Personal Information', 'Company Information', 'Credit Card Information', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. A red circle '3' is placed over the 'Concur Mobile Registration' link. On the right side of the page, there is a 'System Settings' section with a red circle '2' over the 'Profile Settings' link. Below this is a section for 'Acting as other user' with a search box and 'Start Session' button.

Note your **Concur Username (HSUID@humboldt.edu)** and Create a **Concur Mobile PIN**

The screenshot shows the 'Concur Mobile' registration page. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right, there is an 'Administration' and 'Help' dropdown, and a 'Profile' dropdown. Below the navigation, there are links for 'Change Password', 'System Settings', 'Concur Mobile Registration', 'Concur Mobile Devices', and 'Travel Vacation Reassignment'. The main content area is titled 'Concur Mobile' and contains the following text: 'Manage your expenses and business travel on your mobile device. To get started, enter your email address below and we will send you a link to download the app.' There is an email input field and a 'Get Started' button. Below this, it says 'Or, review your sign-in details:'. Under 'Username', it shows 'FSUID@fsu.edu'. Under 'Password', it says 'Use the same password you use to sign in to Concur for Web. If you don't know your password, you may reset your password or create a Concur Mobile PIN'. A red arrow points to the text 'create a Concur Mobile PIN'. On the right side of the page, there is a smartphone displaying the Concur mobile app interface with options for 'Trips', 'Expenses', 'Expense Reports', and 'Approvals'.

1. Download the Concur application to your phone (Note: If you've already downloaded the app, open it from your mobile device)

2. **Concur Mobile will require a password or lock is used to unlock your mobile device if one is not created.**



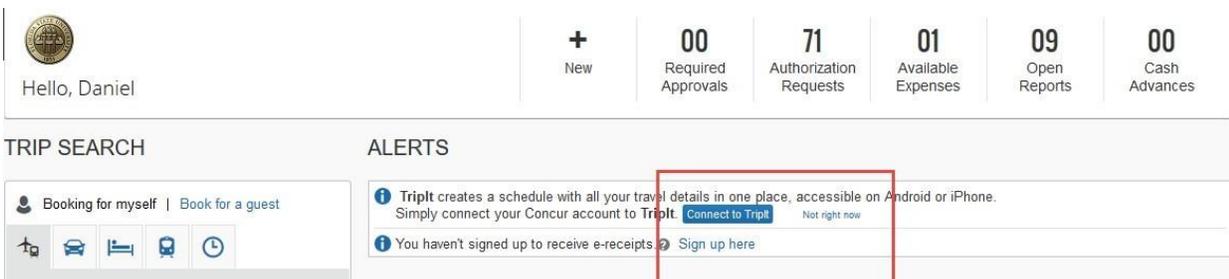
3. Login to Concur via mobile device, using your **Concur Username** as seen in the initial mobile registration page and use the PIN you have set as your password

4. Click **OK**, to allow Concur to send Notifications concerning approvals, expenses, etc. can be customized later.

You are now registered for access to Concur Mobile.

TripIt Pro:

On the Concur home page, under Alerts, you will see a message regarding eligibility for a free TripIt Pro subscription from time to time. Click Connect to TripIt.



Note: TripIt can also be initialized by proceeding to 1) **Profile**, 2) **Profile Settings** 3) **Connected Apps**

1. Enter your "a@humboldt.edu" email address, and a password. This password should be different from your University account password. (TripIt passwords are not managed by the University, and caution should be taken to protect your account)

2. TripIt will send a verification email to your @humboldt.edu email address. Click the link in the email to verify the account.

ACTIVATE YOUR TRIPIT PRO SUBSCRIPTION

You now have TripIt Pro to help you manage all your trip details.



One Place for All Your Travel Plans

Organize trip details into one master itinerary — even if your arrangements are booked on multiple websites.

Get Notifications on the Go

Easily get your flight status and refund alerts.

Activate your subscription.

Email Address

Password

Password help: It is best not to use your network or corporate password.

[Sign Up](#)

Already have a TripIt account? [Sign In](#)

By clicking Sign up, you confirm that you accept the [User Agreement](#). We don't share your email addresses. [More Info](#)

3. Click **Verify Email**.
4. Install Tripit from your device application store.
5. Open Tripit
6. Login with your previously created and verified username and password

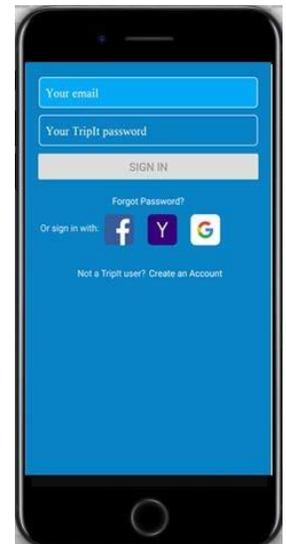
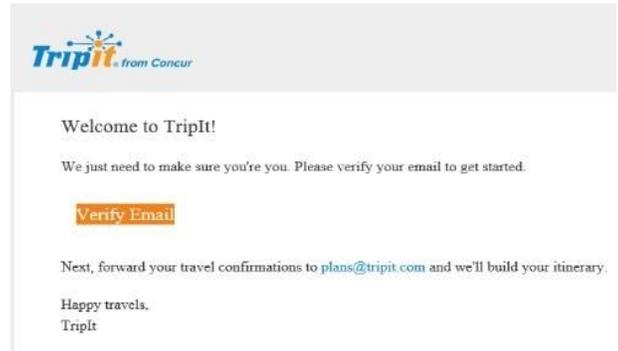
Note: Users of Tripit can forward confirmation emails to plans@concur.com from any **verified email address** and can view itinerary information from Tripit while traveling for status updates, gate changes, and more. You can add additional email addresses by going to **Profile > Profile Settings > Personal Information > Email Addresses**.

Additional information on Tripit can be found at the following site:

http://www.concurtraining.com/triplink/end_user

Forgot Your Mobile Pin?

If you forget your mobile PIN there is a link under **Other Settings** in your **Profile Settings**.



For Device Specific Information

Please see <http://www.concurtraining.com/pr/mobile>

For all other questions, send your emails to Travel@humboldt.edu or call Denise Gentry at x3512 for further assistance and troubleshooting.

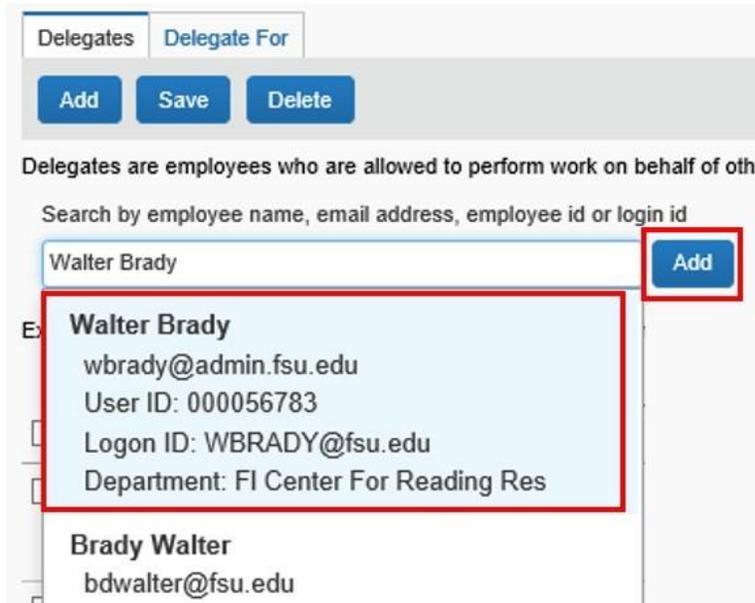
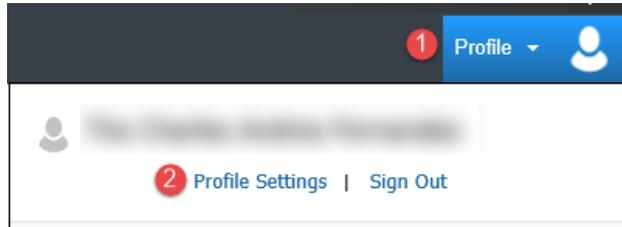
Travel Request & Expense Settings

Request/Expense Delegates - Important!

- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare and submit travel requests, book travel, and prepare, but not submit an expense report on behalf of the traveler.
- **It is the responsibility of the traveler to add or delete Delegates.**
- **Request Delegates & Expense Delegates** are linked, changes to one will impact the other.

To Add or Remove a Delegate (Someone who may enter/approve travel on your behalf):

1. Navigate to Profile
2. Profile Settings
3. Click on Request Delegates
4. Click Add.
5. Search for the person you wish to add as a Delegate, and click Add.



6. Check the boxes that correspond with the permissions you are granting to the delegate. **Travelers should ask their department who they should add as a travel rep.**
7. Click **Save**.

Delegate Permissions

Recommended permissions for Delegates acting as Travel Delegates (*) or Approver Delegates (~)

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Brady, Walter wbrady@admin.fsu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	Burnside, Sally sburnside@fcr.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	Moore, Francetta fmoore@fcr.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

- (*) **Can Prepare** – delegate has authority to prepare travel requests and expense reports
- (*) **Can Book Travel** – delegate has authority to book travel (select with Can Submit Requests)
- (*) **Can Submit Requests** – delegate has authority to submit travel requests
- (*) (~) **Can View Receipts** – this will check automatically, when you select “Can Prepare” or “Can Approve”
- (*) **Can Submit Reports** – delegate can click “submit” in order to check for audit rules, but the traveler still must submit the report
- (*) **Receives Emails** – delegate receives email notifications
- (~) **Can Approve (for approvers only)** – this allows an approver to delegate approval authority to someone else. Approval authority can be permanent or temporary.

❖ Approval authority should not be delegated to a subordinate employee. Approval authority should be given to the immediate supervisor above the approver or to another approver of equal rank (i.e. another supervisor of staff, or a budget manager).

To delete a delegate, click the checkbox to select the person, click Delete and confirm deletion.

This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Masimore, Lynn masimore@fsu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

To See Who You are a Delegate For

Click **Delegate For**

Request Delegates

Delegates **Delegate For**

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Masimore, Lynn masimore@fsu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

To remove the ability to act as a delegate on behalf of another user

- Select the check box to the left of the individual(s) and click **Delete**
- **Important!** Once you remove yourself as a delegate you will need to communicate with that user to be added back as a Delegate in the future.

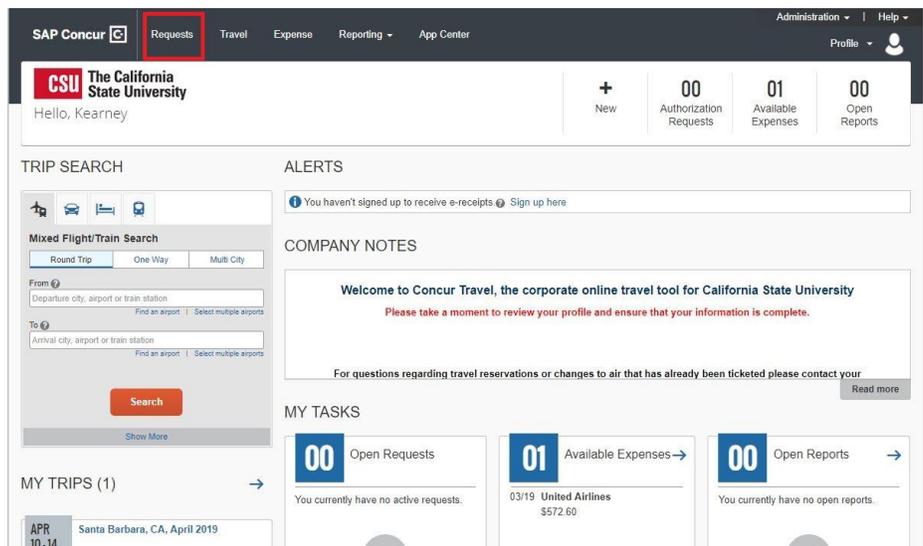
This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Masimore, Lynn masimore@fsu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

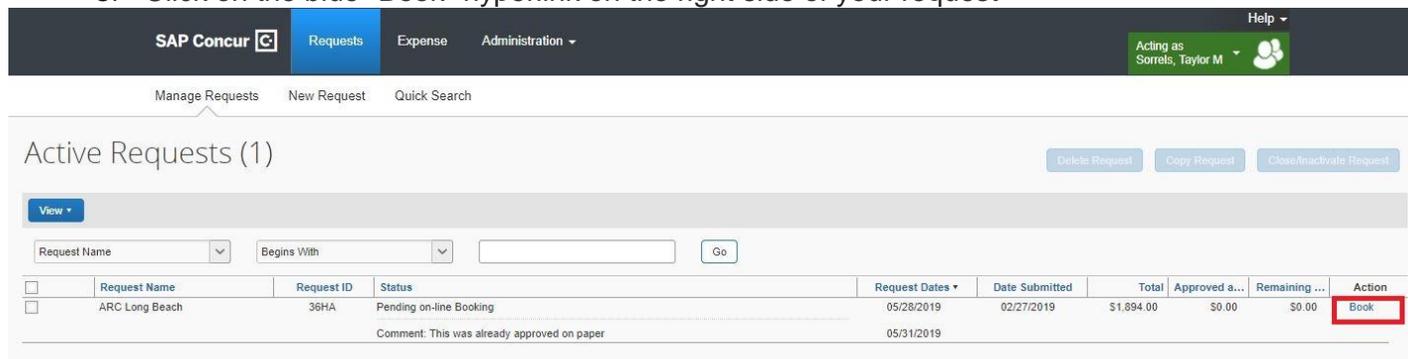
Travel: Making Travel Reservations

Airfare

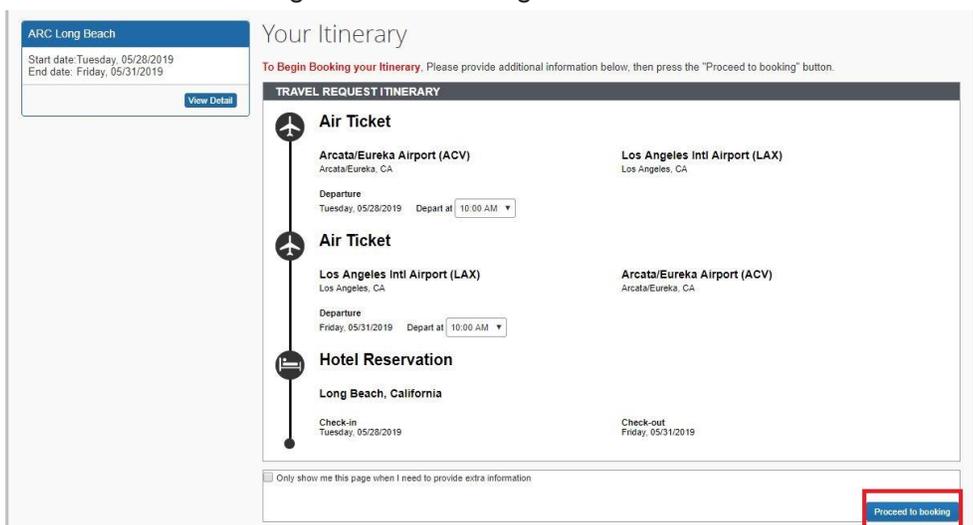
1. Log into SAP Concur
2. Click on "Requests" in the upper left



3. Click on the blue "Book" hyperlink on the right side of your request



4. Your Itinerary will show the segment(s) you had requested to book through Concur.
5. Click on "Proceed to Booking" in the bottom right.



6. If you get an error message that shows that there are no results, click on "Change Search" on the left side of your screen.

The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Expense', and 'Administration' menus. On the right, it says 'Acting as Sorrels, Taylor M'. The main content area is titled 'ARCATA/EUREKA TO LOS ANGELES TUE, MAY 28 - FRI, MAY 31'. Below the title, there are links for 'Hide matrix' and 'Print / Email'. A message states: 'Sorry, we are unable to return search results, which may be due to: your company's travel policy, the way your company has configured Concur Travel, no available options for the dates/times searched. Please try another search.' On the left side, there is a 'Trip Summary' panel with 'Select Flights or Trains' and 'Finalize Trip' buttons. A 'Change Search' button is highlighted with a red box.

7. Change the To destination as the Airport you will be flying into. Then hit "Search"

The screenshot shows the SAP Concur interface with the 'Change Search' dialog box open. The dialog box has a 'From' field with 'ACV - Arcata/Eureka Airport - Arcata/Eureka, CA' and a 'To' field with 'LAX - Los Angeles Intl Airport - Los Angeles, CA'. The 'To' field is highlighted with a red box. Below the 'To' field, there are 'Depart' and 'Return' sections with date and time pickers. At the bottom, there is a 'Search by' dropdown set to 'Price' and a 'Search' button.

Multiple flights will show up after you hit search. You can sort the flights by All, 1 stop, 2 Stops, Fares, or Schedule. Once you have found a flight you'd like to choose, click on the amount on the right of the flight.

Trip Summary

Select Flights or Trains

Round Trip
ACV - LAX
Depart: Tue, 05/28/2019
Return: Fri, 05/31/2019

Finalize Trip

ARCATA/EUREKA, CA TO LOS ANGELES, CA
TUE, MAY 28 - FRI, MAY 31

Show as USD

Hide matrix Print / Email

All 61 results	United	Multiple
1 stop 16 results	449.60 8 results	601.90 8 results
2 stops 45 results	766.80 17 results	697.60 28 results

Shop by Fares **Shop by Schedule**

Please note: search results are based on your selected criteria and other factors including company policies. Fare, schedule or availability information may not be complete or in neutral order.

Flight Number Search Sorted By: Price - Low to High

Displaying: 61 out of 61 results. Previous | Page: 1 of 7 | Next | All

United	10:50a ACV → 03:35p LAX	1 stop SFO	4h 45m	\$449.60
	10:45a LAX → 05:30p ACV	1 stop SFO	6h 45m	
United	10:50a ACV → 03:35p LAX	1 stop SFO	4h 45m	\$449.60
	12:15p LAX → 05:30p ACV	1 stop SFO	5h 15m	

- Once you have chosen your departing and returning flights, Concur will show you an overview before purchasing your tickets. Scroll down and approve your selection by clicking "Reserve Flight and Continue."

Trip Summary

Flights Selected

Round Trip
ACV - LAX
Depart: Tue, 05/28/2019
Return: Fri, 05/31/2019

Finalize Trip

Review and Reserve Flight

REVIEW FLIGHTS

DEPART ✕ Tue, May 28 – Arcata/Eureka, CA to Los Angeles, CA / 1h 54m layover in San Francisco, CA Hide details

Tue, May 28	10:50a ACV → 12:06p SFO	1h 16m	United 5349 E7W
	<i>Layover in San Francisco, CA</i>	<i>1h 54m</i>	<i>San Francisco Airport</i>
	02:00p SFO → 03:35p LAX	1h 35m	United 1248 Airbus Industrie A320-100/200

RETURN ✕ Fri, May 31 – Los Angeles, CA to Arcata/Eureka, CA / 3h 47m layover in San Francisco, CA Hide details

Fri, May 31	10:45a LAX → 12:23p SFO	1h 38m	United 2186 Airbus Industrie A320-100/200
	<i>Layover in San Francisco, CA</i>	<i>3h 47m</i>	<i>San Francisco Airport</i>
	04:10p SFO → 05:30p ACV	1h 20m	United 5555 Canadair Regional Jet

ENTER TRAVELER INFORMATION
Ensure all traveler information below is correct.

UA 2186 Economy (Q) [View seat map](#)

UA 5555 Economy (Q) [View seat map](#)

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$383.26	\$66.34	\$449.60
Total Estimated Cost: \$449.60			
Total Due Now: \$449.60			

METHOD OF PAYMENT

This purchase will be charged to your company directly.

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.

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

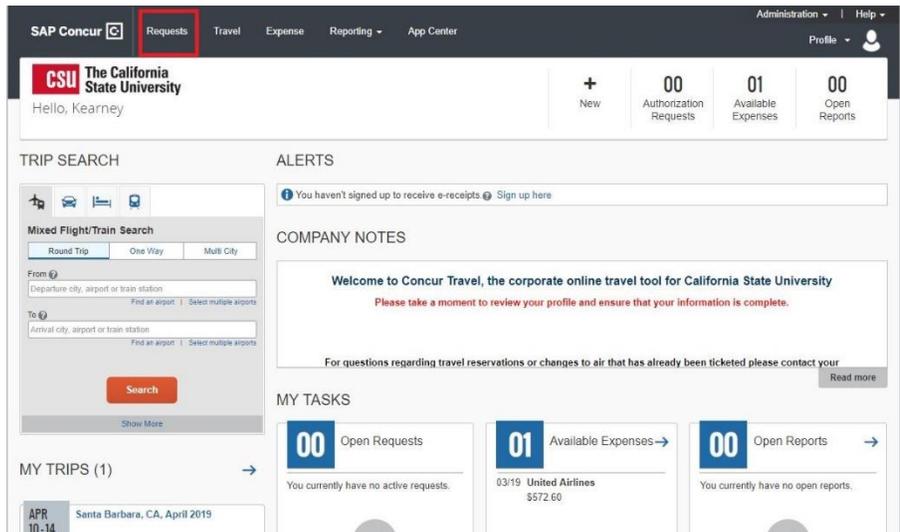
[Back](#)

[Reserve Flight and Continue](#)

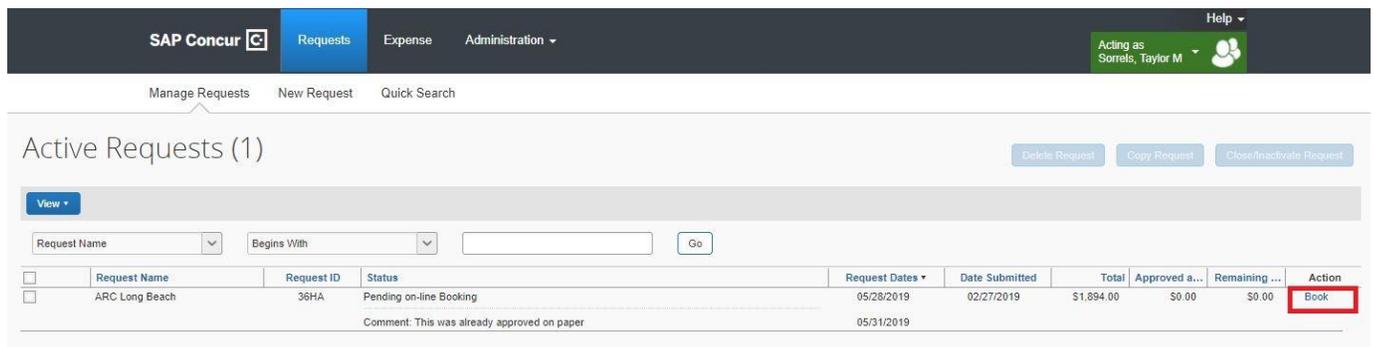
9. If you have multiple segments, Concur will prompt you to the next step for booking either a rental car, or your hotel.

Hotel

1. Log into SAP Concur (if you were not prompted to Hotel after booking airfare)
2. Click on "Requests" in the upper left

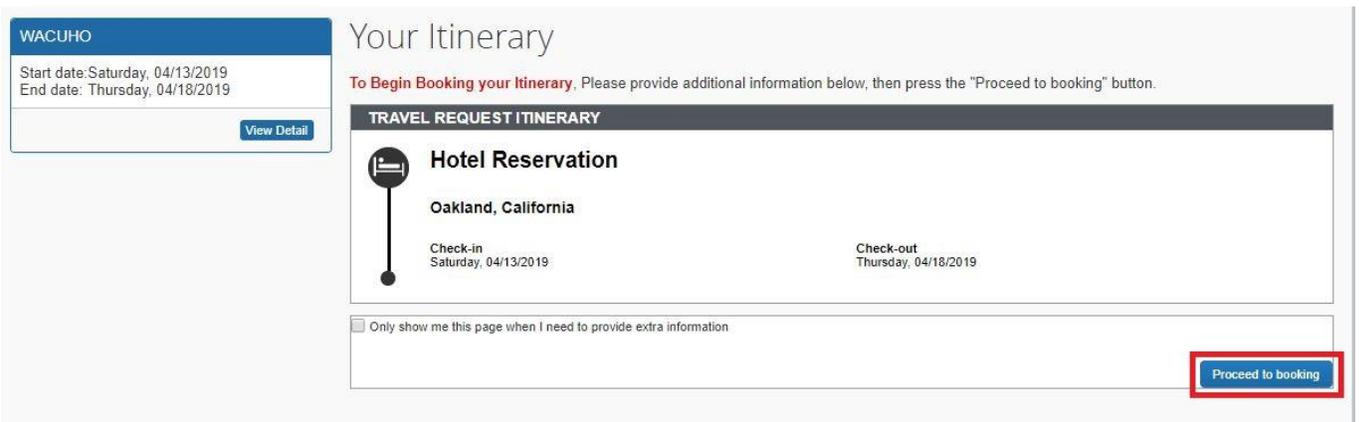


3. Click on the blue "Book" hyperlink to the right of your request



Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
ARC Long Beach	36HA	Pending on-line Booking	05/28/2019	02/27/2019	\$1,894.00	\$0.00	\$0.00	Book

4. Your Itinerary of segment(s) you had requested to book through Concur will show.
5. Click on "Proceed to booking"



WACUHO
Start date: Saturday, 04/13/2019
End date: Thursday, 04/18/2019
[View Detail](#)

Your Itinerary

To Begin Booking your Itinerary, Please provide additional information below, then press the "Proceed to booking" button.

TRAVEL REQUEST ITINERARY

Hotel Reservation
Oakland, California
Check-in: Saturday, 04/13/2019
Check-out: Thursday, 04/18/2019

Only show me this page when I need to provide extra information

[Proceed to booking](#)

- A map of your destination with hotel options will show. You can search for a hotel using the map or the options on the left side of your screen.

TRIP SUMMARY

SELECT A HOTEL

Nights: 5
Oakland, CA
Check-in: Sat, 04/13/2019
Check-out: Thu, 04/18/2019

Finalize Trip

Change Search

Price: \$103 - \$469

Display Settings: Hide Sold Out

Property Brand: Chain Superchain

- Alesia (1)
- Best Value Inns (3)
- Best Western (2)
- BT Advantage (3)
- Clarion (1)

CHECK-IN SAT, APR 13 - CHECK-OUT THU, APR 18

Hide Map Print / Email

Company Preferred Accommodation

Displaying: 100 out of 100 results. Previous 1 2 3 4 Next | All

1. Americas Best Value Inn Oakland
122 East 12th Street, Oakland, CA 94606 Map it
0.86 miles ★★★★★ \$103 View Rooms

- If you click on “View Rooms” on a hotel you are interested in booking, it will provide you with the hotel room options and prices.

1. Holiday Inn Paris - Auteuil
21, rue Gudin, Paris 75016 Map it
2.15 miles ★★★★★ \$138 Hide Rooms

Per diem limits: Jan 15-Jan 18: \$425 Hotel details

Room Options

Advance Saver No Refunds 1 Double Bed Nonsmoking Wifi And High Speed Internet Access
Pay Tv Satellite Tv Windows (Worldspan)
[Rules and cancellation policy](#)

\$138 Deposit required

- Note that international hotel reservations have the foreign maximum lodging limits for that location listed as a guide to use when reserving a room.
- On the Review and Reserve Hotel page, verify all information and check the box I agree to the hotel’s rate rules, restrictions, and cancellation policy.

10. Click **Reserve Hotel** and **Continue**

ACCEPT RATE DETAILS AND CANCELLATION POLICY
Please review the rate details and cancellation policy provided by the hotel.

You have selected a hotel that requires a deposit. This deposit may be non-refundable.

The hotel provided the following information:
RATE CHANGES OVER DURATION OF STAY

Hotel Rate
00 USD PER NIGHT STARTING 12DEC FOR 3 NIGHTS

I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

Rental Car

1. If you have already begun your booking process, you will be prompted to book your Rental Car automatically. If you are returning to your booking for your rental car, begin by clicking on "Requests" in the top left, and the blue hyperlink, "book."

SAP Concur | **Requests** | Travel | Expense | Reporting | App Center | Administration | Help | Profile

CSU The California State University
Hello, Kearney

+ New | 00 Authorization Requests | 01 Available Expenses | 00 Open Reports

TRIP SEARCH: Mixed Flight/Train Search (Round Trip, One Way, Multi City). Fields for From and To with search buttons.

ALERTS: You haven't signed up to receive e-receipts. Sign up here.

COMPANY NOTES: Welcome to Concur Travel, the corporate online travel tool for California State University. Please take a moment to review your profile and ensure that your information is complete.

MY TASKS: 00 Open Requests (You currently have no active requests.), 01 Available Expenses (03/19 United Airlines \$572.60), 00 Open Reports (You currently have no open reports.).

SAP Concur | **Requests** | Expense | Administration | Help | Acting as Sorrels, Taylor M

Manage Requests | New Request | Quick Search

Active Requests (1)

Request Name: ARC Long Beach | Request ID: 36HA | Status: Pending on-line Booking | Request Dates: 05/26/2019 | Date Submitted: 02/27/2019 | Total: \$1,894.00 | Approved a.m.: \$0.00 | Remaining: \$0.00 | Action: **Book**

Comment: This was already approved on paper | 05/31/2019

2. Your Itinerary summary will show. Click on the “Proceed to booking” in the lower right.

Your Itinerary

To Begin Booking your Itinerary, Please provide additional information below, then press the “Proceed to booking” button.

TRAVEL REQUEST ITINERARY

Air Ticket

Arcata/Eureka Airport (ACV)
Arcata/Eureka, CA

Departure
Monday, 03/25/2019 Depart at 10:00 AM ▼

Los Angeles Intl Airport (LAX)
Los Angeles, CA

Air Ticket

Los Angeles Intl Airport (LAX)
Los Angeles, CA

Departure
Friday, 03/29/2019 Depart at 10:00 AM ▼

Arcata/Eureka Airport (ACV)
Arcata/Eureka, CA

Car Rental

Los Angeles Intl Airport (LAX)
Los Angeles, CA

Pick-up at airport
Monday, 03/25/2019 10:00 AM ▼

Los Angeles Intl Airport (LAX)
Los Angeles, CA

Return to airport
Friday, 03/29/2019 10:00 AM ▼

Only show me this page when I need to provide extra information

[Proceed to booking](#)

3. Check to make sure your pick-up location is correct in the lower left of your screen. If you edit the airport or city, be sure to hit “Search” again to update your choices.
4. The middle of your screen will show many different options for rental cars from the airport or city. The CSU is contracted with Enterprise and National, so you will be covered through the CSU insurance.
5. Once you see a car type you like, click on the amount as shown below.

Trip Summary

Select a Car

Pick-up: Tue, 03/26/2019
Drop-off: Fri, 03/29/2019

Finalize Trip

Previous Searches

Previous Searches ▼

[Load](#)

Change Car Search

Pick-up date
03/26/2019 10:00 am ▼

Drop-off date
03/29/2019 12:00 pm ▼

Pick-up car at
 Airport Terminal Off-Airport
 Please enter an airport.
 LAX - Los Angeles Intl Airport - Los Angeles, CA

Additional insurance purchased may not be reimbursable, refer to the CSU Travel Procedures.

PICK UP: (LAX) ON TUE, MAR 26 10:00 AM
RETURN: FRI, MAR 29 12:00 PM Show as USD ▼

Hide matrix Print / Email

All	Compact Car	Intermediate Car	Standard Car	Full-size Car	Mini Van	Intermediate SUV	Standard SUV	Full-size SUV
58 results								
Enterprise	196.50	196.95	206.65	207.82	310.94	310.63	470.76	604.50
Preferred								
National	197.22	197.67	207.41	208.58	312.16	311.84	472.67	606.99
Preferred								
Thrifty	256.74	252.63	270.08	262.42	256.48	208.39	195.29	344.63
Hertz	221.14	222.83	208.57	222.08	370.57	342.24	404.50	360.57
Alamo	225.25	230.32	239.48	240.65	319.92	1,144.34	351.58	1,750.19
Car Rental	--	--	--	--	234.45	--	--	--
Budget	320.63	240.53	328.73	325.05	458.19	343.35	484.02	--
AVIS	287.34	282.57	311.21	293.51	490.99	327.34	353.35	--

Sorted By: Policy - Most Compliant ▼

- Detailed information about the car will show including the total amount for your travel on the right side. Click the amount in the blue button to continue to the review and confirm screen.

Displaying: 1 out of 58 results. ?




Compact Car - \$35.01 per day (Worldspan)

Automatic transmission
 Unlimited miles, Pick-up: Terminal: LAX
 Adults: 2, Children: 2, Large bags: 1, Small bags: 2
 (Corporate rate)

Total cost*

\$196.50

Preferred Car Vendor for CSU Office of the Chancellor / E-Receipt Enabled ?

[Location details](#)

Displaying: 1 out of 58 results. ?

Total cost*: Rates and total cost do not include charges for optional services such as fuel and insurance waivers. These and any additional fees or surcharges may be applied at the time of rental. Any currency conversion is based on the exchange rate for that day. The final price at the time of rental may be different.

- You will be prompted to review your rental information. If everything looks good, click on “Reserve Car and Continue” on the bottom of your screen.

Trip Summary

Car Selected

Pick-up: Tue, 03/26/2019
 Drop-off: Fri, 03/29/2019

Finalize Trip

Review and Reserve Car

REVIEW RENTAL CAR

Enterprise Car Rental

Type	Pick-up	Drop-off
Compact Car	Airport Terminal	Airport Terminal
Features	LAX: Los Angeles 10:00 am Tue, 03/26/2019	LAX: Los Angeles 12:00 pm Fri, 03/29/2019

PROVIDE RENTAL CAR PREFERENCES

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

Ex: Need early pick-up (10am)

ENTER DRIVER INFORMATION

Ensure the name below matches the I.D. you have with you on the day of pick-up. ?

Driver [Edit](#) | [Review all](#)

Name: Kearney Vander Sal **Phone:** 707-826-5791 krv5@humboldt.edu

Rental Car Agency Program [Add a Program](#)

No Program selected

REVIEW PRICE SUMMARY

Description	Daily Rate	Dates	Total
Enterprise Car Rental	\$35.01	Mar 26 - Mar 29	\$196.50*
Total Estimated Cost: \$196.50			
Total Due Now: \$0.00**			

* Rental provider's estimated amount. Exact fees unknown. Does not include additional fees incurred during time of travel.
 ** Remaining amount due at rental location.

Back

Reserve Car and Continue

Receipt Submission Methods

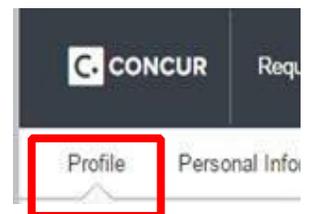
E-receipt Activation in Concur

Must have Verified Email Address

Many vendors provide electronic versions of traditional paper receipts. If E-Receipts are activated in a user's Concur profile, when electronic receipts are available, they will flow directly into the user's Available Receipts. Click **Profile** and select **Other Settings**.

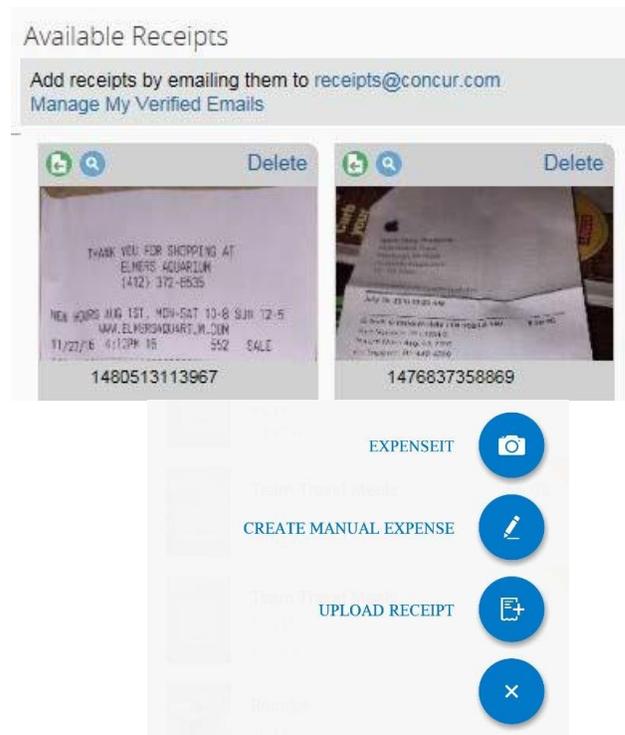
Enabling E-receipts allows the automatic collection of electronic receipts and folio data (e.g., lodging), or "e-receipts", from participating suppliers.

1. Click the link **E-Receipt Activation**
2. Accept the E-Receipt Activation and Use Agreement
3. You will receive a confirmation that E-Receipts has been activated
4. When booking travel (airfare, hotel, car rental) in Concur, vendors participating in E-Receipts will display the following icon 



Mobile App

- **Note:** See Concur Mobile Registration for directions to install the Concur application on a mobile device. This must be done before receipt images can be uploaded from a cell phone or other mobile device.
- There are three options in Concur Mobile when you go to "Expenses" and click on the blue plus sign. (See screenshot)
- **ExpenseIt** – Uses Optical Character Recognition (OCR) to turn images paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the "Expenses" area on the mobile app, or once you add the expense to an ER.
- **Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since requires a lot of manual entry on the phone. **(Does not count as a receipt)**
- **Upload Receipt** – This is the best option for including pictures of things like conference agendas, copies of online transactions, digital or handwritten notes, etc.



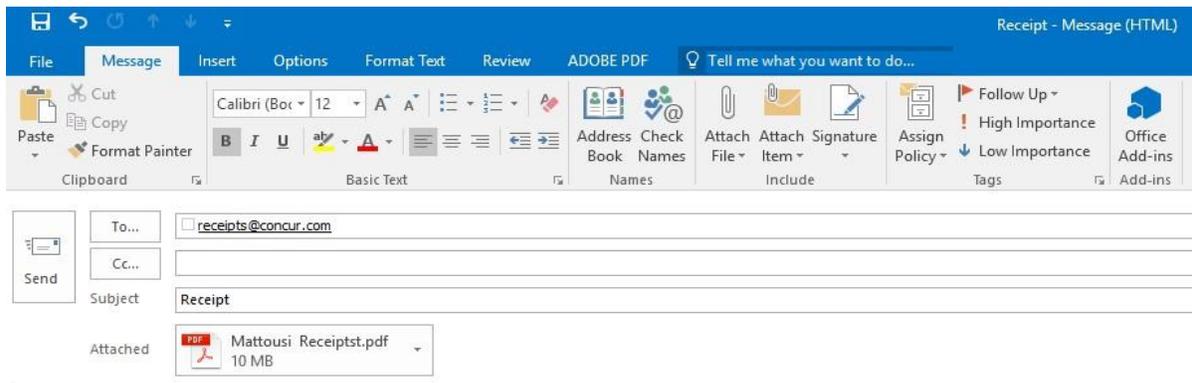
Scanned Images & Email

Your email address must be verified in your Concur Profile.

Scan your receipts and save the file(s) to your computer
Save files as .png, .jpg, .jpeg, .pdf, .html, .tif, or.tiff
5MB limit per file

Email your e-receipt or receipt images as attachments to receipts@concur.com. The receipts will be added to your **Receipts Store**.

From your expense report, click **Receipt Store** (or click **Receipts, View Available Receipts**). Drag a receipt to the corresponding expense line item on your report.



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Submitting an Expense Report

Delegates (travel reps) may create and complete expense reports on behalf of a traveler; however, the traveler must ensure that the expense report is correct and submit it. **Delegates cannot submit expense reports on behalf of other people**

When your expense report is ready to submit, you will receive notification from your travel delegate to let you know the ER is ready for your review and submission. If you have any questions regarding the ER, please contact travel@Humboldt.edu before submitting.

If a travel rep is processing your expense report, DO NOT submit the expense report until you receive notification stating it is ready for submission!

To submit an expense report:

1. In Concur, there are two ways to access Open Reports:

The screenshot shows the SAP Concur dashboard. At the top, there are navigation tabs for Requests, Travel, Expense, and Approvals. The user is logged in as Compton, Donald. Summary cards are displayed for: New (+), Required Approvals (00), Authorization Requests (02), Available Expenses (00), and Open Reports (01). The Open Reports card is highlighted with a red box. Below the summary cards, there are sections for TRIP SEARCH (Mixed Flight/Train Search), COMPANY NOTES (WELCOME TO CONCUR!), and TASKS. The TASKS section contains three cards: Required Approvals (00), Available Expenses (00), and Open Reports (01). The Open Reports card is also highlighted with a red box and shows a report for 07/25 Brighton - July 2018 with a total of \$797.00 and a status of Returned.

2. On the Manage Expenses screen, select the report indicated in the email received from your Travel Delegate – be sure match the trip name and amount to the email to ensure you are accessing and reviewing the correct report.
 - **NOTE:** Each ER button indicates the status of the report: Not Submitted, Submitted, or Returned. For submitted reports, the lower part of the expense button will indicate the status of approval.

The screenshot shows the 'Manage Expenses' screen. It features a 'Create New Report' button and a 'Report Library' section. The Report Library contains three reports: 'London -JULY 2018' (07/26/2018, \$72.48, NOT SUBMITTED), 'Brghton -JULY 2018' (07/20/2018, \$2,825.07, NOT SUBMITTED), and 'London -JULY 2018' (07/31/2018, \$210.08, SUBMITTED). The 'NOT SUBMITTED' status labels are highlighted with red boxes. The 'SUBMITTED' report shows a status of 'Approved and Pending Processor Manager', which is also highlighted with a red box.

3. Review expense report details including totals, receipts, and any comments
4. If the information listed on the ER is correct, click the **Submit Report** button in the upper right corner.

- **NOTE:** If you feel the information listed is incorrect, please contact your travel rep to discuss the changes needed. DO NOT submit until all issues are addressed.

Buttons for 'Delete Report' and 'Submit Report' are shown. The 'Submit Report' button is highlighted with a red box.

5. The Final Review window will appear.
6. Read the statement and if you agree, click **Accept & Submit**.

If you cannot successfully submit the report or a message appears describing a report error or exception, please contact your travel rep or travel@Humboldt.edu.

Final Review □ ×

User Electronic Agreement

I certify that this claim for reimbursement is true and correct in every material matter, that the travel expenses were actually incurred by me as necessary in the course of official duties; that per diem claimed has been appropriately reduced by any meals or lodging included in the convention or conference registration fees claimed by me and that this voucher report conforms in every respect with the requirements of Section 112.061, Florida Statutes and the Policies of The Florida State University.

If paid from state appropriated funds, I certify that this travel is/was critical to the mission of The Florida State University.

Accept & Submit
Cancel

Reviewing and Approving a Transaction

This section is for individuals who are responsible for approving requests or reports submitted by users.

Expense reports pending approval can be accessed from multiple links on the Concur Home page.

- **Approvals** link on the Quick Task Bar
- **Required Approvals** link next to the HSU- Concur welcome message
- **Required Approvals** link found under My Tasks

The screenshot displays the SAP Concur interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Travel' (highlighted with a red box), 'Expense', 'Approvals', 'Reporting', and 'App Center'. Below this, a user greeting 'Hello, Calleen' is shown alongside a '+ New' button and four summary cards: '02 Required Approvals' (highlighted with a red box), '00 Authorization Requests', '00 Available Expenses', and '00 Open Reports'. The main content area is divided into 'TRIP SEARCH' and 'COMPANY NOTES'. The 'TRIP SEARCH' section includes a search form with 'From' (TLH - Tallahassee Airport - Tallahassee, FL) and 'To' fields, and a 'Search' button. The 'COMPANY NOTES' section features a 'WELCOME TO CONCUR!' message and a 'MY TASKS' section. In the 'MY TASKS' section, '02 Required Approvals' is highlighted with a red box, along with '00 Available Expenses' and '00 Open Reports'.

Approving submitted transactions

1. Click the name of the request or report you want to open
2. Review the expense items listed to ensure they are appropriate for the trip taken.
 - a. To review the budgetary information, click the “Details” link and select “Report Header.” This will allow you to review the travel dates, and budget info (see picture below).
 - b. To review receipts, click the “Receipts” link and select “View Receipts in a New Window” as per picture below.

DFO Cal Poly

Summary Details Receipts Print / Email

Expense Type	Date	Amount	Exception
Airline Fees	02/27/2019	\$5.00	⚠ This expense entry may be a duplicate of the following Report: Parking, Expense: 02/27/2019, Airline Fees, \$5.00

Date	Expense Type	Amount	Approved
03/28/2019	Dinner - Domestic GIOVANNI'S FISH MARKET, Morro E	\$28.76	\$28.76
03/28/2019	Hotel THE KINNEY SLO, San Luis Obispo	\$431.87	\$431.87
03/28/2019	Lunch - Domestic LAX AIRP ENGINE CO 28, Los Ange	\$6.00	\$6.00
03/28/2019	Parking/Tolls RPS EUREKA, McKinleyville, Califor	\$11.00	\$11.00
03/27/2019	Dinner - Domestic TST* BUN MEE SFO, San Francisoc	\$31.31	\$31.31
03/26/2019	Dinner - Domestic THE KINNEY SLO F & B, San Luis C	\$22.47	\$22.47
02/27/2019	Airline Fees AGENT FEE 8900773746280	\$5.00	\$5.00
02/27/2019	Airfare United, Arcata, California	\$687.60	\$687.60

TOTAL AMOUNT: **\$1,224.01** TOTAL APPROVED: **\$1,224.01**



Report header for: DFO Cal Poly

Report Id 119AEE80436A4583AD3F	Report Key 2377	Report/Trip Name DFO Cal Poly	Trip Type 1-In-State
Travel Start Date 03/28/2019	Travel End Date 03/28/2019	Are you travelling to a banned state? No	Traveler Type 2-Staff
Trip Purpose Meeting	Personal Dates of Travel-If none enter NA NA	Is this trip going to be reimbursed by the Chancellor's Office? No	

Business Unit (HMCMP) HMCMP - Humboldt State	Fund (HM500) HM500 - OPERATING FUF	Department (D30011) D30011 - FAC MGT - ADM	Program
Class	Project		

Report Currency US, Dollar	Approval Status Approved & In Accounting Review	Report Total 1,224.01	Personal Expenses 0.00
Amount Not Approved 0.00	Amount Approved 1,224.01	Amount University Paid 0.00	Amount Due University 0.00
Amount Due User 0.00	Amount Due University Card 1,224.01	Total Amount Claimed 1,224.01	

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
DFO Cal Poly	38FJ	No	\$1,501.00	\$1,501.00	\$342.38

3. If all items are approved, click Approve. The expense report will then route to the department budget manager and project managers for further review/approval.

Send a Transaction Back to the Preparer

To return the entire expense report to the preparer for correction:

1. Click Send Back to User
2. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.



Concur Buttons and Items

Concur users will encounter many icons while using the system. Knowing their meanings can increase user efficiency. Hovering over icons encountered in travel requests and expense reports can reveal more information without the need to click to a different window.

Various displays and operating systems may render icons in different colors.



Attendees: Indicates that an expense entry has associated attendees.



Trip Data: Indicates trip information from an itinerary.



Taxi: Indicates a Taxi expense.



Credit Card Transaction: Indicates that an expense entry was a credit card transaction.



Electronic Receipt: Indicates Electronic receipt has been sent by a vendor to a users account.



Exception: Indicates that an expense entry exception must be resolved before submission.



Full Allocation: Indicates that the expense entry has been fully allocated.



Partial Allocation: Indicates that the expense entry has only been partially allocated.



OCR Receipt: Indicates that an expense entry has an Optical Character Recognition (OCR) receipt.



Paper Receipt Required: Indicates that an expense requires a paper receipt.



Receipt Required: Indicates that an expense requires a receipt.



Receipt Attached: Indicates that the required receipts have been attached.



Receipt Affidavit: Indicates a missing receipt affidavit has been attached to the expense.



XML Receipt Attached: Indicates that an XML receipt is attached to the expense.



Pending Processor Review: Indicates that the submitted expense report is pending review.



Personal Expense: Indicates that an expense entry was marked as personal.



Report Ready for Submission: Indicates that the expense report is ready for submission.