Concur Travel
Training Guide

Table of Contents

Getting Started

| Log on	
1.	Navigate to travel.smu.edu.
2.	Click **Login**.
3.	Enter your **SMU ID** and **Password.**
4.	Click **Login**.

Before You Begin

First time users must Updated Profile settings before using Concur. Stand-alone instructions for one-time set up may be found at travel.smu.edu/training.

Requesting, Booking & Submitting Travel Expenses

Travel is divided into four sections. The instructions below outline these processes:

1. **Submit a Travel Request** (This step is required. Please note the request ID. This id is required to book travel.)

2. **Make a Travel Reservation**
3. **Create Expense Report**
4. **Review & Process Expense Report**
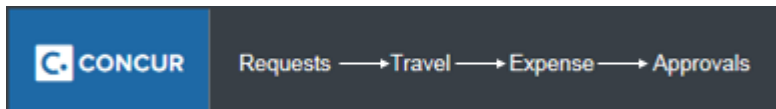
1. Submit a Travel Request	
Note: All travel must be preapproved prior to making travel reservations or leaving for the trip.	
1	From the **My Concur homepage** hover over **+ New**, select **Start a Request.**
2	The **Request Header** tab displays. Enter trip information. **Note**: A red bar appears to the left of each required field. **Report Name Format:** • Recommended format includes location and date: Austin TX 3-14-15. • Another option includes conference name and date: SCTEM 5-22-12. • No need to include your name, since you are doing this under your own account.
3	An estimated trip cost is required to submit a request. This can be done two ways: 1. Click the **Segments** tab. Select the appropriate icon to estimate expenses. 2. Click the **Expenses** tab and select **Estimated Trip Cost** (located on the right in the expense frame)**.** Complete information and click **Save**. Additional expenses may be added by repeating this step as needed.

4	The Request may include **Attachments** and can be viewed in PDF and distributed via **Print/Email. Please attach the conference itinerary.** To route for approval click **Submit Request.**

Attachments ▾ | Print / Email ▾ | Delete Request | Submit Request

Note: The following icons may display on request and expense reports:

🛑 Indicates that exceptions must be resolved before submitting the report.

⚠️ Indicates that a warning exists. The report may be submitted with this item. Review and adjust if needed.

| 5 | You will receive an email once the request is approved. The status of all <u>active</u> requests can be viewed by clicking on the Requests tab. `Requests`

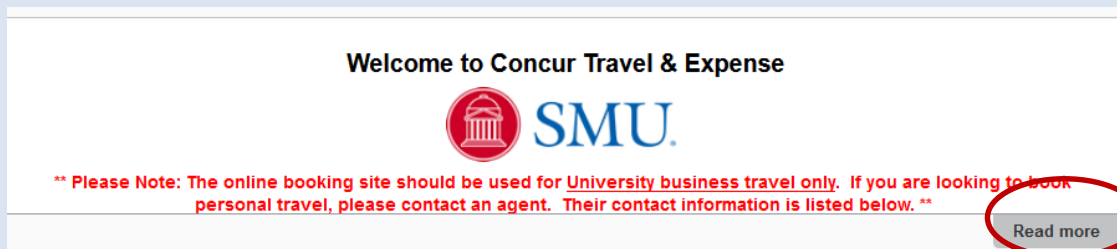(Tip: To view other requests click View and choose the appropriate criteria.)
Please note: You will be required to provide the approved Request ID in order to book travel. |

Request Name	Request ID	Status
Laurene Klassen Baylor _Adobe Meeting	33EW	Approved

2. Make a Travel Reservation

SMU faculty and staff will be required to use Christopherson Business Travel within Concur for booking airfare, hotel and rental cars.

1.	**Important: Remember to retrieve the Request ID before booking travel.** (See step 5 above.)
2.	You can search for travel directly from the homepage. To view a travel demo on how to book create a travel reservation click the **Read more** button. Then, click ***Travel Booking Demo**.*

Welcome to Concur Travel & Expense

🏛 **SMU.**

** Please Note: The online booking site should be used for <u>University business travel only</u>. If you are looking to book personal travel, please contact an agent. Their contact information is listed below. **

Read more

	Technical questions regarding travel may be directed to Christopherson's Online Support: **Phone:** 888-535-0179 or **Email:** onlinesupport@cbtravel.com.
3.	*<u>Making Changes to Existing Travel Reservations:</u>*

***Dedicated Agent Group – University Team:** 888-220-1072*
Email: SMUTravel@cbt.com
Emergency After Hours: 800-787-2702, VIT code – PJOO (emergencies only) |
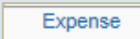
3. Create Expense Report from Approved and Completed Travel

1. ***For trips that contain–air, car and hotel expenses that were booked with Christopherson Business Travel:***

   After completing a trip, you can quickly create an expense report. Concur Travel & Expense will automatically add to your expense report all credit card transactions that are tied to the purchase of the trip, *or* that have transaction dates between the date you left and the date you returned. (Note: These transactions may need to be removed.)

   Select the **Travel** tab. Select **Upcoming Trips.** A list of booked trips will display, select the **Travel Policy** from the drop down list.
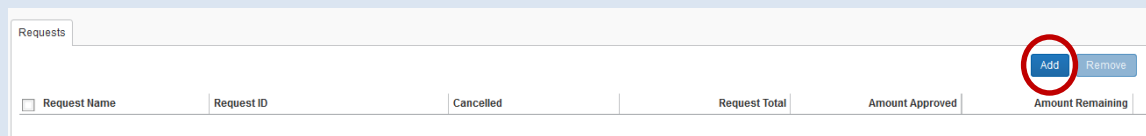
Policy for Expense Reports	*Travel Policy	▾

   Click **Expense** for the desired trip.   Expense

   Enter the requested information for the **Report Header** information.
   Note: A red bar appears to the left of each required field.

   Under the Requests tab, select **Add**. You will now link the approved travel request to this expense report. Check the desired request and click **Add.**

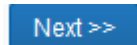 | Requests | | | | | | |
   | --- | --- | --- | --- | --- | --- | --- |
   | | | | | | Add | Remove |
   | ☐ Request Name | Request ID | Cancelled | | Request Total | Amount Approved | Amount Remaining |

   Proceed to step 4.

2. ***For trips that do not contain, hotel, car expenses that were booked with Christopherson Business Travel:*** (For example, a day trip to Austin with mileage and meal expenses only.)

   Concur creates the expense report from the request. Select the **Requests** tab. A list of **Active Requests** will display click **Expense** for the desired trip.
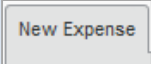
3. Enter the requested information for the **Report Header** information.
   Note: A red bar appears to the left of each required field.

4. Click **Next.**

   Next >>

5. A Travel Allowance box displays. Indicate if this report includes GSA Travel Per Diem per your established departmental business process. If using GSA see the Table of Contents for "GSA Travel Allowances".

Add Expenses

1. New Expense   From the **New Expense** tab, click the desired **expense type**. (The **Transaction Date** and **Amount** fields are required for all expense types. Some expense types will have different required fields.)

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.** See the Table of Contents for instructions on allocating, itemizing and attaching receipts.

Incidentals can be attached to your report by using one of the following:

Import/Available Expenses: Purchases that were made through the SMU card.

Available Receipts: These receipts were uploaded to Concur using the mobile app or emailed directly to receipts@concur.com. (Concur Mobile instructional videos and smartphone guides are available by clicking **Help** and selecting **Training**.)

Uploading Receipts: Receipts may be attached and uploaded. Acceptable file types include: .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff. 5 MB limit per file.

Import/Add Available Expenses (Attaching Credit Card Transactions)
1. Click **Import Expenses.**
2. **Check** the item(s) to be expensed.
3. Click **Move.**
4. Click the expense type to edit. Make changes as needed and click **Save.**

Add Available Receipts
1. Select **Available Receipts**.
2. Select the appropriate receipt and click the green arrow icon to attach. (Available Receipts may also be selected using the **Attach Receipt** button from a selected expense.) The **Receipt Image** will be located behind the **New Expense** tab and can be removed if needed by clicking **Detach From Entry.**   Note: Once your email has been verified in your profile. Receipts may be emailed to receipts@concur.com. Those receipts will then be added to your **Available Receipts**.

Upload & Attach Receipts
1. From the desired expense type select **Attach Receipt.**
2. Click **Browse**.
3. Locate the file you want to attach.
4. Select the file and click **Open**. Repeat the process as needed.
5. Click **Attach**. The **Receipt Image** will be located behind the **New Expense** tab and can be removed if needed by clicking **Detach From Entry.**

Allocate Expenses
Allocate an individual expense:
1. Select the expense you wish to allocate from the Expense List. In the lower right-hand corner of the window, click **Allocate**.
2. From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.
3. In the **Allocate** By field, enter the **Percentage** or **Amount**.

4.	Review and edit the Fund/Org Combination row as needed.
5.	Click **Add New Allocation**, and then repeat steps 3-4 for each new allocation.
6.	Click **Save**, and then click **OK**.
7.	In the **Allocate Report** window, click **Done.**
	Note: Allocations can be saved as favorites by selecting **Add to Favorites.**

Allocate multiple expenses:

1.	Check the expenses you wish to allocate**.**
2.	From the multiple expenses list, select **Allocate the selected expenses.**
3.	Repeat steps 2-7 as needed.

Business Meals: Add Attendees
1. Several event types require an attendee list for entertainment expenses. From the **New Expense** tab, select an **Entertainment**, **Business Meals**, or **Team**/**Group Meals** expense type.
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.
4. In the **Amount** field, enter the amount of the expense. (See the Table of Contents for information on itemizing expenses.)
5. *Adding Attendees***:**   To add a new attendee, click **New Attendee**. Complete the required fields, and then click **Save**.
6. To search for an attendee, click **Search**, enter your search criteria in the **Search Attendees** window, and then click **Add to Expense**.
7. To search for a favorite that was previously added, click **Favorites**.
8. On the **Favorites** tab in the **Search Attendees** window, select the attendees for this expense, and then click **Add to Expense**. Click **Save**.   • You can make Attendees favorites by clicking **Favorites.** Then, select **New Attendee.** Populate the required fields and click one of the **Save** options.   • To add attendee groups, check the desired attendees, click **Create Group**, enter the **Group Name** and click **Save. (Import)**
9. *Importing Attendees:* Click **Import**. The attendee import window will display. Right click the link provided and open up the excel template.
10 Select the appropriate menu option to save the template spreadsheet to your computer.
11 Once saved, populate the desired information on the **Attendee** tab.   **Note**: In order for the spreadsheet to successfully upload the **Attendee Type** must be entered and should be populated with one of the following attendee type values. **(These must be entered exactly as shown.)**   Guest   Spouse/Partner   Student
12 To upload your attendee information click **Browse**. Locate your spreadsheet and click **OK**. Click **Next.**
13 A preview of attendees to be imported will display. Click **Next.**
14 The results will display. Click **Done.**

Cash Advance

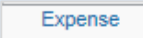Cash advances may only be requested under special circumstances. Contact Millicent Grant at travel@smu.edu.

Calculate Car Mileage

1. On the **New Expense** tab, select **Personal Car Mileage**.
2. Click the calendar from the **Transaction** Date field and select the date.
3. Enter the **Purpose of Trip**
4. Populate the **From Location** and **To Location** fields. Note: The starting point for mileage reimbursements is from the SMU campus, which is the traveler's work location.
5. Click the **Mileage Calculato**r. Mileage Calculator
6. If the total miles do not display click **Calculate Route**.
7. If required, select **Make Round Trip.**
8. Click **Add Mileage to Expense** and **Save** the expense.

Delete Expenses

1. An expense can be removed by selecting the appropriate expense lines and clicking **Delete**.

GSA Travel Allowances/Per Diem

1. Select the **Requests** tab. A list of **Active Requests** will display click **Expense** from for the trip that will contain GSA Travel Allowances/Per Diem. Expense

2. Enter the requested information for the **Report Header** information.
3. Click **Next.**
4. A Travel Allowance box for meals and lodging displays. Indicate if this report includes GSA Travel Per Diem per your established departmental business process. Click **Yes**.
5. In the New Itinerary Stop window enter all of the departure information for the first leg of the trip. Click **Save.**
6. Repeat step 5 as needed. (At a minimum there should be an outbound and inbound itinerary. However, additional stops may be needed. Click **Save**.) Once completed, click **Next.**
7. Review the itinerary. Adjustments can be made by clicking **Previous.**
8. To proceed click **Next.**
9. Check the box for meals that were provided and should be excluded from calculation.
10 Click **Create Expense.**
11 To exclude lodging or any meals that were provided, click the appropriate rows from the expense list. Click **Delete**.

Hotel: Itemizing Nightly Lodging Expenses

1. On the **New Expense** tab, select the **Hotel** expense type.
2. Fill out the required fields.
3. Click **Itemize**.
4. On the **Nightly Lodging Expenses** tab enter the **Check-in** and **Check-out-Date** (the number of nights for your stay will be filled in based on your dates).
5. In the **Room Rate** field, enter the amount you were charged per night for the room.
6. In the **Room Tax** fields, enter the amount of each room tax that you were charged.

7.	In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
8.	In the **Amount** field, enter the amount of the expense.
9.	Repeat steps 7-8 using the second **Expense Type** field if you have more than one recurring additional charge.
10	Click **Save Itemizations**.
11	Complete all required fields.
12	Click **Save**.

International Travel: Foreign Transactions

1.	Click **New Expense**.
2.	On the **New Expense** tab, select the appropriate expense type.
3.	Complete all required fields *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).

Itemize Receipt 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 fields.
5.	Click **Save**.
6.	Repeat steps 3-5 until the **Remaining Amount** equals $0.00.
7.	**Note the following**: • Airfare must be itemized to separate baggage, priority access, ticket change and other fees. • Hotel must be itemized to separate taxes, meals and incidentals.

Missing Receipts

Note: **Only one Missing Receipt is allowed per travel report.**

1.	If a receipt is missing you are required to submit a missing receipt affidavit. From the expense report click Receipts.
2.	Select **Missing Receipt Affidavit.**
3.	Select the expense that requires the receipt.
4.	Click **Accept & Create.**
5.	A confirmation will display.

Review & Submit Expense Report

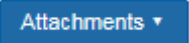|	
1.	After thorough review of all expenses click **Submit Report.**
2.	If successful, you will receive a confirmation. Click **Close.** Note: The approver will receive a workflow email indicating that a report is awaiting approval.
3.	If the report was unsuccessfully submitted a **Report Submit Status** window will display indicating that exceptions must be resolved before submitting the report. Correct the errors and repeat steps 1-2.

Reviewing a Returned Expense Report

1. If the approver sent back a report it will be displayed with the approver's comments under the Expense tab. (Note: the report will also be listed in the Open Reports section on the My Concur homepage and labeled **Returned**.)

   Click Expense, the report will indicate **Returned** and the comment will display. Adjust the expense report as directed and resubmit.

RETURNED	04/28/2015
TVL	
$24.99	
○ use your cash advance	
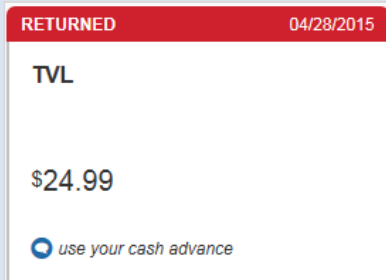
4. **Approvers:** Review & Process Expense Reports

1. From the **My Concur** homepage, under the **Required Approvals** section, click the desired report you wish to review.
2. To view attachments, click the Attachments button. From the drop down list click **Check Documents**.   `Attachments ▾`
3. To return a report to the originator click **Send Back Request.** Enter a **Comment** as to why you are returning the request. Click **OK**.
4. To process a report click **Approve.**   `Approve`

Navigating the Report Library

A history of all Request and Expense Reports can be accessed as needed.

Viewing Requests:
Click the **Requests** tab and select the **View** drop down list. Next, choose the desired request criteria.

Viewing Expenses:
Click the **Expenses** tab. A list of active expense reports display. Click the **Report Library** link and select the **View** drop down list. Next, choose the desired request criteria.