

QuickStart Guide
Concur® Premier: Travel and Expense

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Welcome to Concur Premier

Concur Premier integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools users need to book travel as well as create and submit expense reports. Managers use the service to review and approve expense reports. Back-office employees use the service to produce audit reports, ensure compliance, and deliver business intelligence to help your company reduce its costs.

Section 1: Log on to Concur Premier

How to...

1. Log on to Concur Premier following your company's logon instructions.

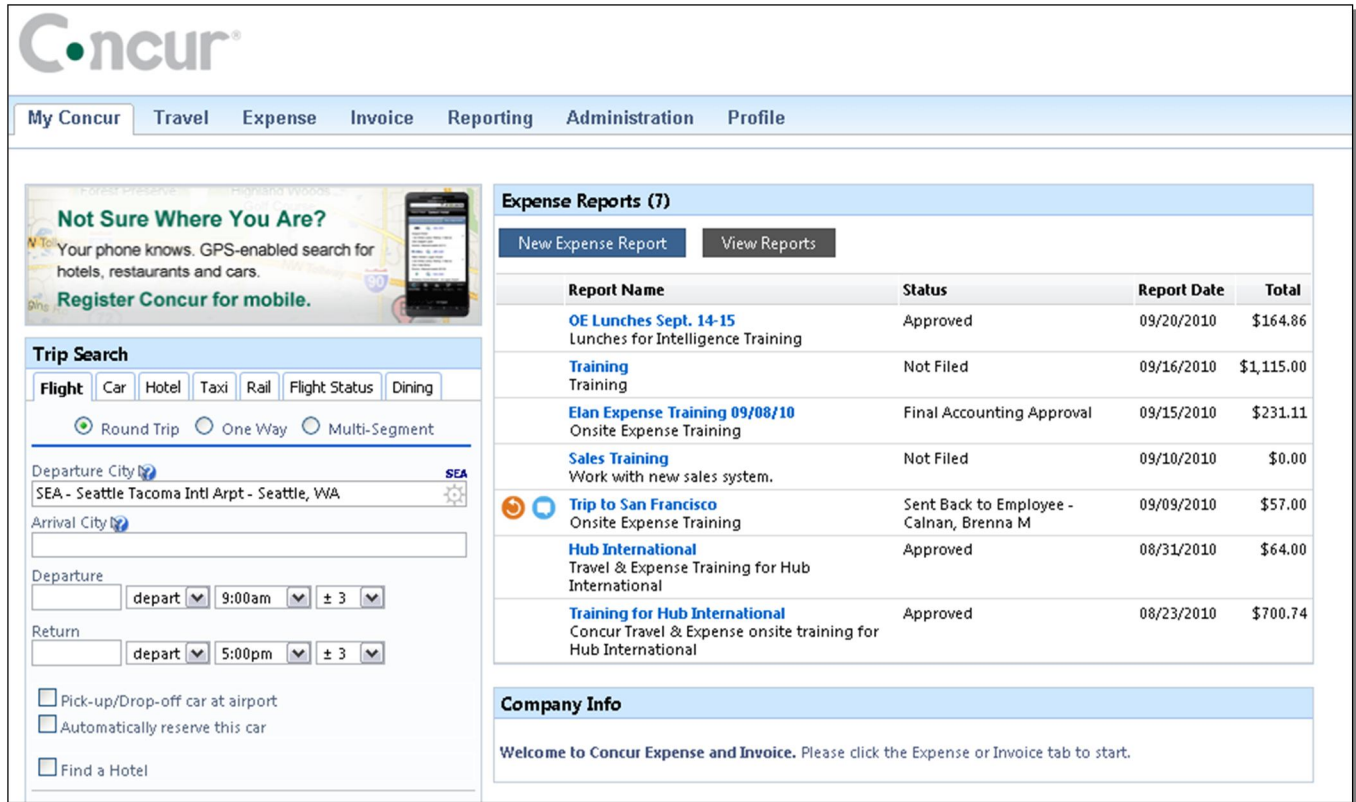
Additional Information

Your password is case sensitive.

If you are not sure how to log on, check with your company's Expense administrator.

Section 2: Explore the My Concur Page

The **My Concur** page includes several sections that make it easy for you to navigate and find the information you need.



My Concur | Travel | Expense | Invoice | Reporting | Administration | Profile

Not Sure Where You Are?
Your phone knows. GPS-enabled search for hotels, restaurants and cars.
Register Concur for mobile.

Trip Search
Flight | Car | Hotel | Taxi | Rail | Flight Status | Dining
Round Trip | One Way | Multi-Segment
Departure City: SEA - Seattle Tacoma Intl Arpt - Seattle, WA
Arrival City:
Departure: 9:00am ± 3
Return: 5:00pm ± 3
 Pick-up/Drop-off car at airport
 Automatically reserve this car
 Find a Hotel

Expense Reports (7)
New Expense Report | View Reports

Report Name	Status	Report Date	Total
OE Lunches Sept. 14-15 Lunches for Intelligence Training	Approved	09/20/2010	\$164.86
Training Training	Not Filed	09/16/2010	\$1,115.00
Elan Expense Training 09/08/10 Onsite Expense Training	Final Accounting Approval	09/15/2010	\$231.11
Sales Training Work with new sales system.	Not Filed	09/10/2010	\$0.00
Trip to San Francisco Onsite Expense Training	Sent Back to Employee - Calnan, Brenna M	09/09/2010	\$57.00
Hub International Travel & Expense Training for Hub International	Approved	08/31/2010	\$64.00
Training for Hub International Concur Travel & Expense onsite training for Hub International	Approved	08/23/2010	\$700.74

Company Info
Welcome to Concur Expense and Invoice. Please click the Expense or Invoice tab to start.

How to...

Use the **Trip Search** section.

Explore the **Weather** section.

Look at the **Company Info** section.

Additional Information

This section provides the tools you need to book a trip with any or all of these: flight, car, hotel, limo, and dining.

This section appears on My Concur only if your company uses Travel.

This section shows you the weather conditions at any selected airport.

The Weather section is not available if your company uses Concur Standard.

This section displays information and links provided by your company.

Section 2: Explore the My Concur Page (Continued)

How to...	Additional Information
Use the Expense Reports or Active Work section.	This section provides links to create a new expense report, or view your existing reports, authorization requests, or cash advances. It also lists your unsubmitted expense reports. <i>If your company uses Authorization Requests and/or Cash Advances, this section is titled "Active Work." Otherwise, the section is titled "Expense Reports."</i>
Explore the Approval Queue section.	This section lists the expense reports awaiting your review and approval as well as any authorization requests or cash advances. <i>This section appears on My Concur only if you are an Expense approver and if you have received at least one report for approval.</i>
Explore the Trip List section.	This section lists your outstanding trips. <i>This section appears on My Concur only if your company uses Travel.</i>
Explore the Trips Awaiting Approval section.	This section lists the trips awaiting your approval. <i>This section appears on My Concur only if your company uses Travel and if you are a travel approver.</i>
Explore the Available Company Card Charges section.	This section lists all imported credit card transactions.
Explore the Travel Info section.	This section provides contact information for help with booking travel and general travel information. <i>This section appears on My Concur only if your company uses Travel.</i>

Customize My Concur

You can move the panes around the **My Concur** page to better meet your needs. Click the top bar of a pane and drag it to a new position on the page.

The screenshot displays the Concur My Concur interface. At the top, there is a navigation bar with tabs for My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below this, there are several panes:

- Mobile App Promotion:** A banner titled "Not Sure Where You Are?" with a map and a smartphone image, encouraging users to register for the mobile app.
- Trip Search:** A form with tabs for Flight, Car, Hotel, Taxi, Rail, Flight Status, and Dining. It includes options for Round Trip, One Way, and Multi-Segment, and fields for Departure City (SEA - Seattle Tacoma Intl Arpt - Seattle, WA), Arrival City, Departure time (9:00am ± 3), and Return time (5:00pm ± 3). There are also checkboxes for "Pick-up/Drop-off car at airport", "Automatically reserve this car", and "Find a Hotel".
- Expense Reports (7):** A table with buttons for "New Expense Report" and "View Reports". The table lists various reports with columns for Report Name, Status, Report Date, and Total.
- Company Info:** A popup window titled "Company Info" with the text: "Welcome to Concur Expense and Invoice. Please click the Expense or Invoice tab to start."

Report Name	Status	Report Date	Total
OE Lunches Sept. 14-15 Lunches for Intelligence Training	Approved	09/20/2010	\$164.86
Training Training	Not Filed	09/16/2010	\$1,115.00
Elan Expense Training 09/08/10 Onsite Expense Training	Final Accounting Approval	09/15/2010	\$231.11
Sales Training Work with new sales system.	Not Filed	09/10/2010	\$0.00
Trip to San Francisco Onsite Expense Training	Sent Back to Employee - Calnan, Brenna M	09/09/2010	\$57.00
Hub International Travel & Expense Training for Hub International	Approved	08/31/2010	\$64.00
Training for Hub International Concur Travel & Expense onsite training for Hub International	Approved	08/23/2010	\$700.74

Section 3: Update Your Travel Profile

Before you use Travel for the first time, update your profile. You must save your profile before you first attempt to book a trip in Travel.

If you are a travel arranger, select the profile that you want to edit from the **You are Administering Travel For** dropdown menu (at the top of the Profile page).

Step 1: Change Your Password

Your company decides if you can change your password. If allowed, you will change your password on the Profile tab.

How to...

1. On the **My Concur** page, select **Profile** from the menu at the top of the page.
2. On the **Profile** submenu, click **Change Password**.
3. In the **Old Password** field, enter your current (temporary) password.
4. In the **New Password** field, enter your new password.
5. Verify your new password by re-entering it in the **Re-enter Password** field.
6. Enter a word or phrase in the **Password Hint** field to act as a reminder if you forget your password, and then click **Save**.

Additional Information

If your company uses Single Sign On, you access Travel via your company's intranet. If that is the case, you will not see this option on the Profile menu nor will you be able to change your password. To change your password, you need to know your old or temporary password.

Concur

My Concur | Travel | Expense | Invoice | Reporting | Administration | **Profile**

Personal Information | **Change Password** | System Settings | Mobile Registration | Travel Vacation Reassignment | System E-Mail Settings

My Profile

- Your Information**
 - Personal Information
 - Company Information
 - Contact Information
 - Emergency Contact
 - Credit Cards
- Travel Settings**
 - Travel Preferences
 - International Travel
 - Frequent-Traveler Programs
 - Assistants/Arrangers
- Expense Settings**
 - Expense Information

Change Password

A password must be at least 7 characters. It must contain numbers (0-9), and may contain upper and lower case characters (A-Z, a-z), and symbols (such as ^%*@#). It cannot contain spaces. **All fields are required.**

Note: Passwords are case sensitive.

This will change your password in both Cliqbook and the Concur Expense system.

Old Password New Password Re-enter New Password

Password Hint (we will email this to you if you forget your password)

Section 3: Update Your Travel Profile (Continued)

Step 2: Change your Time Zone, Date Format, or Language

How to...

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

Additional Information

You can change the system and regional settings (number, currently, date, and time format).

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

The screenshot shows the Concur user interface. At the top, there is a navigation bar with tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below this is a sub-menu with 'Personal Information', 'Change Password', 'System Settings' (highlighted), 'Mobile Registration', 'Travel Vacation Reassignment', and 'System E-Mail Settings'. The main content area is titled 'My Profile' and contains a search bar with a 'Me' dropdown and a 'Search' button. Below the search bar are three main sections: 'Regional Settings and Language', 'Calendar Settings', and 'Other Preferences'. The 'Regional Settings and Language' section includes dropdowns for 'Default Language' (English (United States)), 'Number Format' (1,000.00), 'Placement of Currency Symbol' (Before the amount), 'Negative Number Format' (-100), 'Negative Currency Format' (-100), 'Date Format' (mm/dd/yyyy), 'Time Format' (h:mm AM/PM), 'Hour/Minute Separator' (:), and 'Time zone (local time)' (GMT-08:00 Pacific Time (US & Canada; Tijuana)). The 'Calendar Settings' section includes 'Start week on' (Sunday), 'Start Day View At' (8:00 AM), 'End Day View At' (8:00 PM), and 'Default View' (month). The 'Other Preferences' section includes 'Home Page' (My Concur) and 'Rows per page' (25). Below these sections is a 'Travel Settings' section with several checkboxes: 'Send an email every time something is put in or removed from my approval queue', 'Send a daily summary of items in my queue', 'Let me know when one of my requests is approved or denied', 'Send Confirmation Emails', 'Do you want to receive an email each time you book travel? Unchecking this box will not stop emails to your assistant or arranger if you use one.', 'Send Trip-on-Hold Reminder Emails', 'Do you want to receive an email each time you place a trip on hold? Unchecking this box will not stop emails to your assistant or arranger if you use one.', and 'Send Ticketed Travel Reminder Email', 'Do you want to receive an email when a trip you've booked is ticketed? Unchecking this box will not stop emails to your assistant or arranger if you use one.' At the bottom of the page are 'Save', 'Reset', and 'Close' buttons.

Section 3: Update Your Travel Profile (Continued)

Step 3: Update Your Personal Information

How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** submenu, click **Personal Information**.
3. On the **My Profile** page, update the appropriate information, and then click **Save**.

Additional Information

The submenu is listed horizontally under the **Profile** tab. You can also hover over the **Profile** tab to view a dropdown version of the submenu.

Complete these sections of your travel profile:

- Name & Airport Security
- Home Address
- Work Address
- Contact Information
- Emergency contact
- Travel Preferences
- Credit Cards

You must complete all fields marked **Required** (in orange) to save your profile.

Verify that the first and last name fields match the ID used at the airport.

If you cannot edit these fields, contact your travel agency or travel manager to make changes.

The country you select in the work address fields will determine the default map that appears on the **Concur Travel Map** tab.

There are several **Save** buttons on the profile page. You only need to save once as every **Save** button saves the entire profile.

My Profile

[Home Address](#) [Work Address](#) [Contact Info.](#) [Emergency Contact](#) [Travel Preferences](#) [Assistants](#) [Credit Cards](#)

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me

Fields marked **[Required]** must be completed to save your profile. [Change Picture](#)

Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name [Required]	Middle Name	Nickname	Last Name [Required]	Suffix
	Kevin	John		Dorsey	

No Middle Name

Concur Cost Center: 8512

Company Information

Employee ID	Exchange Login	
200030		
Manager	Position/Title	Org. Unit/Division
Brenda Calnan	Training Consultant	

Section 3: Update Your Travel Profile (Continued)

Step 4: Set Up a Travel Arranger or Assistant

How to...

1. On the **My Concur** page, click **Profile** on the menu at the top of the page.
2. On the **Profile** dropdown menu, select **Personal Information**.
3. Click **Assistants** at the top of the page.
4. Click **Add an Assistant** to search for your assistant's last name.
5. In the **Search Criteria** field, enter the assistant's name.
6. Click **Search**.
7. Click the **Assistant** dropdown arrow.
8. Select the appropriate name from the dropdown list.
9. Select **Can book travel for me**.
10. Select **Is my primary assistant for travel**.
11. Click **Save**.

Additional Information

Use **Assistants & Travel Arrangers** to give other Travel users the ability to view and modify your profile or book travel and trips for you.

The primary assistant's name and work phone number become part of the traveler's GDS profile, if configured.

Important: Your assistant must have an existing Travel account before you can add him or her to your profile.

Hint: When searching, use the following format: *LastName,FirstName* (no spaces).

For example: Smith,June

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to have this assistant included on any agency-generated emails about your trips. This will only occur if your Travel Management Company has configured your site to send information to your GDS profile.

Section 4: Make a Travel Reservation

Step 1: Make a Flight Reservation

How to...

1. On the **My Concur** page, click the **Flight** tab at the left side of the page.
2. Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi-Segment

The screenshot shows the flight reservation interface. At the top, there are tabs for 'Flight', 'Car', 'Hotel', 'Taxi', 'Rail', 'Flight Status', and 'Dining'. Below the tabs, there are radio buttons for 'Round Trip' (selected), 'One Way', and 'Multi-Segment'. The 'Departure City' field is populated with 'MSP - Minneapolis St Paul Intl - Minneapolis, MN'. The 'Arrival City' field is empty. Below these are 'Departure' and 'Return' sections, each with a 'depart' dropdown, a time selection (9:00am and 5:00pm respectively), and a time range dropdown (± 3). There are checkboxes for 'Pick-up/Drop-off car at airport', 'Automatically reserve this car', and 'Find a Hotel'. At the bottom, there are checkboxes for 'Specify airline' and 'Refundable only air fares', a 'Number of adults' dropdown (set to 1), a 'Class of service' dropdown (set to Economy class), and radio buttons for 'Search flights by: Price' (selected) and 'Schedule'. A checkbox for 'Flights w/ no double connections' is checked. A 'Search' button is at the bottom.

3. In the **Departure City** and **Arrival City** fields, enter the cities for your travel.
4. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.
5. If you need a car, select the **Pick-up/Drop-off car at Airport** checkbox.

Additional Information

If you have a car, hotel, limo, or rail to book without airfare, use the corresponding tabs.

When you type in a city, airport name, or code, Travel will automatically search for a match.

You can also select the appropriate **Departure** and **Return** times and time range. Travel searches before and after the time you select.

Depending on your company's configuration, you can automatically reserve a car, allowing you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.

If you need an off-airport car or have other special requests, you can make these requests on the **Car Results** page or you can skip this step and add a car from the **Itinerary** page.

Step 1: Make a Flight Reservation (Continued)

How to...

6. If you need a hotel, select the **Find a Hotel** checkbox.
7. If also booking for a companion, from **the Number of Adults** dropdown menu, select the number of adults traveling.
8. To search only fully refundable fares, select the **REFUNDABLE only** checkbox.
9. Select **Search flights by Price** or **Schedule**.
10. Click **Search**.

Additional Information

You can choose to search for the hotel by:

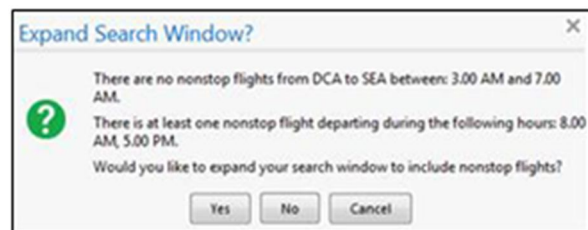
- Airport
- Address
- Company Location
- Reference Point / Zip Code (a city or neighborhood)

If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel from the **Itinerary** page.

Your company decides if this field appears in the Trip Search section. When displayed, if a companion is selected, the payment screen will provide the option to use the credit card from the companion's profile.

The forward tab that you see on the search results screen will depend on which you select.

Depending on your company's configuration, you might be notified that there are non-stop flights, but they don't exactly fit the times you have entered. If you want, you can change your search criteria to include non-stop flights.



To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the right. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

You can also click the **more like this** link, and then select either **Outbound flight** or **Return flight** to view more options for the selected flight.

Step 1: Make a Flight Reservation (Continued)

How to...

11. Review the search results on the **Shop By Fares** tab, and then click **Show Details**.
12. Select any green (unoccupied) seat and position the mouse pointer over a seat to see the seat number.

Additional Information

Click **show details** to expand flight information, to view fare rules and, if needed, to add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.

To select a seat, click the **View Seatmap** icon next to the flight. A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential.

Select preferential seats (highlighted in yellow) if you have preferred status on the selected airline. Your frequent flyer number must be in your Travel profile. If you select a preferential seat and this information is not in Travel, your seat request might not be honored.

Some seats are marked handicapped and can only be selected by a travel agent. If you are entitled to a handicapped seat, make sure your travel agent is aware of your situation.

The screenshot shows a web browser window with the URL http://rqa3-cb.outtask.com/twPopup/popup_seatmap.asp?airv=A5&flnum=660&bic=V&startdt=2010-12-27&numseats=1&startcity=SEA&endcit. The page title is "Seat Map". The flight information is: Alaska Airlines Flight: 660 Boeing 737-900, Seattle Tacoma Intl Arprt (SEA) - Dallas Ft Worth Intl (DFW), 12/27/2010. There is a "Seat Selection:" label and an empty input box. The seat map shows a Boeing 737-900 aircraft with rows A through F and seats 6 through 31. The legend indicates: Available seat (green), Occupied seat (blue), Preferential seat (yellow), Exit row (grey), and Selected seat (orange). The exit row is row 14. The legend also includes a warning: "Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status." Buttons for "Select Seat" and "Close" are visible.

Seat assignment is subject to change up until time of departure

Available seat Occupied seat Preferential seat Exit row Selected seat

Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status.

Step 1: Make a Flight Reservation (Continued)

How to...

- Click the appropriate seat to select it, and then click **Select Seat**.
- Once you have made your seat selection, click **Close**. Repeat for all flights.
- From the **Shop By Fares** tab, click **Reserve** to select your airfare.

Additional Information

To change your seat, click the seat you prefer. Point to a seat to view the seat number.

After you select your seat for a flight, you can either click **Change Seat** or select the next flight in your reservation. Travel will prompt you to save your new seat selection.

Policy information appears next to the **Reserve** button. The **Reserve** buttons are color coded as:

- A **green Reserve** button indicates the fare is within policy.
- A **yellow Reserve** indicates the fare is outside of policy. If you select this fare, you must enter additional information. Yellow buttons will not appear if your company uses Concur Standard.
- A **red Reserve** button indicates the fare is outside of policy. If you select this fare, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved by a manager.

The screenshot displays the Concur Travel interface for a flight search from Seattle, WA to Dallas, TX, for the dates Nov 22 to Nov 25. The interface includes a navigation menu at the top with options like My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below the navigation, there are search filters and a table of carrier selection options. The main section shows a list of flight results, including the price, carrier (Alaska Airlines), departure and arrival times, and the number of stops/duration. Each flight result has a 'Reserve' button, which is green in this case, indicating the fare is within policy. The right sidebar contains additional search filters for Outbound and Return flights, as well as a Price filter and Display Settings.

Carrier	Price	Depart	Arrive	Stops / Duration
Alaska Airlines	\$364.10	SEA 7:00 am → DFW 12:50 pm	DFW 4:35 pm ← SEA 10:12 pm	0 / 3h 50m 1 / 6h 7m
Alaska Airlines	\$364.10	SEA 7:00 am → DFW 12:50 pm	DFW 4:35 pm ← SEA 11:40 pm	0 / 3h 50m 1 / 6h 5m
Alaska Airlines	\$364.10	SEA 7:00 am → DFW 12:50 pm	DFW 5:50 pm ← SEA 11:40 pm	0 / 3h 50m 1 / 6h 5m

Section 4: Make a Travel Reservation (Continued)

Step 2: Select a Car

How to...

1. If you selected **Pick Up/Drop off Car at airport** on the **Flight** tab, you will see the results for the car search.
2. Select the appropriate rental car, and then click **Reserve**.

Additional Information

If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

You can sort the car results to help find your selection.

Yellow diamonds indicate preferred vendors and your preferred car type will be selected automatically.

Depending on your company's configuration, you might be able to select **In-car GPS system** or **Ski rack** under **Car booking options** on the right. Other preferences or car program ID numbers can also be added.

Picking up the car at: (DFW) on 10/18/2010 12:51 PM
 Returning on 10/19/2010 6:55 PM

[Print / E-mail](#)

[Hide matrix](#)

All 34 results	Economy Car	Compact Car	Intermediate Car	Full-size Car	Standard Car	Intermediate Car Hybrid
National	45.00	45.00	46.00	48.00	48.00	--
Thrifty	38.00	40.00	42.00	44.00	43.00	--
Enterprise	43.00	43.00	44.00	46.00	46.00	--
Hertz	60.76	60.76	--	64.09	61.87	119.63
Avis	53.00	53.00	56.00	60.00	58.00	--
Budget	53.00	53.00	55.00	59.00	57.00	--

Displaying: 7 out of 34 results.

Sorted By: Policy - Most Compliant

Economy Car (Worldspan) E-Receipt Enabled

\$45.00 per day (Corporate rate)

Unlimited miles
Automatic transmission
Total cost **\$132.59***

[Reserve](#)

Economy Car (Worldspan)

\$38.00 per day (Corporate rate)

Unlimited miles
Automatic transmission
Total cost **\$114.79***

[Reserve](#)

Car booking options

In-car GPS system Ski rack

Other Car Preferences:

Use the following Car Program:

[+ Add car Mileage Program](#)

Use my default credit card: 'My Corporate Credit Card'.

Change Car Search

Car Display Filters

Choose currency: USD \$

Unlimited miles

Air conditioning

Hybrid

Car Transmission

Automatic

Manual

Section 4: Make a Travel Reservation (Continued)

Step 3: Select a Hotel

How to...

1. If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results appear after you choose your rental car.
2. To filter by hotel chain, , enter the chain name in the **With names containing** box next to the **Sorted by** box
3. Use the filter options to narrow your search by **Amenity** or **Chain**.
4. To filter by neighborhood, select the desired neighborhoods in the **Neighborhood** box on the right.
5. Click the **more info** link for a specific hotel to find more detailed information for the hotel.
6. Click **choose room** to view room rates.
7. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Reserve**.
8. Review the information on the **Rate details/Cancellation policy** pop-up window, click to agree, and then click **Continue**.

Additional Information

You can sort the list of hotels by **Preference**, **Price**, **Rating**, **Distance** and **Policy**.

Depending on your company's configuration, you might be prompted to provide the hotel information if you are booking a roundtrip overnight stay without a hotel.

To filter by multiple chains, in the **Hotel chain** box on right, click **hide all** and then select only the chains you want displayed.

A map of hotels appears at the top of the page. Your company's preferred hotels are indicated with pink dots.

The **Reserve** buttons are color coded as follows:

- A *green* **Reserve** button indicates the hotel rate is within policy.
- A *yellow* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information. Yellow buttons will not appear if your company uses Concur Standard.
- A *red* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved.

You will see a notification if a hotel is outside of policy. You can view the type of rate and room, as well as other information that is available from the agency system.

A *grey* or *yellow* diamond indicates that the hotel property is company preferred.

After clicking the **Reserve** button, the hotel confirmation page appears.

Step 3: Select a Hotel (Continued)

Check-in Mon, Oct 18 - Check-out Tue, Oct 19

Hide Map Print / E-mail

Map Satellite Hybrid

Hotel Preferences

Room Type: Don't Care Smoking Preference: Don't Care

Foam pillows Rollaway bed

Crib

Other Hotel Preferences

Use my default credit card: 'My Corporate Credit Card'.

Change search

Price

Display Settings

Neighborhood

Hotel chain

Hotel Amenities

Sorted By: Preference With names containing:

Displaying: 71 out of 71 results. <<Previous | Page: 1 of 8 | Next>> | All

	Embassy Suites Dallas - DFW Airport North ...	2.24 miles	\$209
	2401 Bass Pro Drive Grapevine, Texas 76051	★★★★☆	\$379
	E-Receipt Enabled	more info compare view rates	
	Sleep Inn DFW North	1.94 miles	\$48
	Hackberry Creek 4770 Plaza Drive Irving, Texas 75063	★☆☆☆☆	\$82

Step 4: Complete the Reservation

How to...

1. Review the details of the reservation, and then click **Next**.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click **Next**.
4. Click **Purchase Ticket** to finalize your trip.

Additional Information

From here, you can add or make changes to the car, hotel as well as change the dates of the flight. Depending on your company's configuration you may be able to add Parking, Taxi or dining at this time.

The trip name and description data are for your record keeping. If you have any special requests for the travel agent, please enter them into the agent comments section. Some request may result in higher fees.

You will see the name and itinerary, along with the quoted airfare amount.

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

How to...

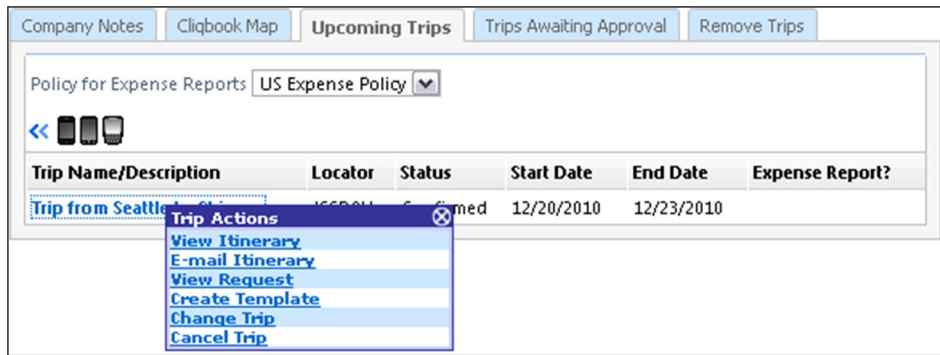
1. At the top of the **My Concur** page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

Additional Information

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 and/or date of the flight. Your change options will be with the same airline and routing.

Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.



3. From the **Trip Actions** menu, click **Change Trip**.
4. On the **Itinerary** page, select the portion of the trip you want to change.

From the **Itinerary** page, you can:

- 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
- Add, change, or cancel dining

5. To cancel your entire trip, click the **Upcoming Trips** tab.

When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips.

6. From the **Trip Actions** menu, click **Cancel Trip**, and then click **OK**.

Section 6: Update Your Expense Profile

Step 1: Review Your Expense Settings

How to...

1. In the left-hand navigation, in the **Expense Settings** section, click **Expense Information**.

Additional Information

The **Expense Information** page is read-only. If the information needs to be changed, contact your site administrator.

Step 2: Add a Delegate

How to...

1. In the **Expense Settings** section, click **Expense Delegates**.
2. Click **Add Delegate**.
3. In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
4. Click the name of the delegate from the list.
5. Click **Add**.
6. Select the appropriate task checkboxes.
7. To add additional delegates, repeat steps 2-6.
8. Click **Save**.

Additional Information

The **Expense Delegates** page appears.

From this page, you will give other Expense users the ability to prepare, submit, approve, view receipts, approve reports, or receive emails on your behalf.

As you begin to type the name, Expense provides a list of users to select from.

The delegate can only perform the tasks you select. A delegate will need to be an approver in order to approve reports on your behalf.



Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	Calnan, Brenna brennac@concur.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Section 6: Update Your Expense Profile (Continued)

Step 3: Select Expense Preferences

How to...

1. In the **Expense Settings** section, click **Expense Preferences**.
2. In the **Send email when** section, select the applicable checkboxes.
3. In the **Prompt** section, select the applicable checkboxes.
4. In the **Display** section, select the applicable checkboxes.
5. Click **Save**.

Additional Information

From this page, you can specify when you will receive email notifications and prompts.

In this section, you determine when you will receive email notifications.

In this section, you determine when Expense will prompt you for further action.

Expense Preferences

Save Cancel

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval
- The status of an authorization request changes
- An authorization request is submitted for approval

Prompt...

- For an approver when an expense report is submitted
- For an approver when an authorization request is submitted
- To add company card transactions to report

Display...

- Make the Single Day Itineraries page my default in the Travel Allowance wizard

Step 4: Review Expense Approvers

How to...

1. In the **Expense Settings** section, click **Expense Approvers**.
2. Review your **Expense Approvers**.

Additional Information

If your company allows you to select your Approver, type all or part of the approver's name in the **Search by...** fields by, select the appropriate person, and then click **Save**.

If your company does not allow you to select your approver, verify that the listed approver is correct. Notify your system administrator for any needed corrections.

Section 6: Update Your Expense Profile (Continued)

Step 5: Add Favorite Attendees

How to...

1. In the **Expense Settings** section, click **Favorite Attendees**.
2. Click **New Attendee**.
3. Select the **Attendee Type** from the list.
4. Enter the **Last Name** of the attendee.
5. Enter the **First Name** of the attendee.
6. Enter the **Attendee Title**.
7. Enter the attendee's **Company**.
8. Click **Save**.

Additional Information

The **Favorite Attendees** page appears, which allows you to add, edit, or delete frequently-used attendees.

If you need to add more than one attendee, click **Save & Add Another**.

Your favorite attendees list is also updated based on attendees you add to your expense reports.

The screenshot displays the 'Favorite Attendees' interface. At the top, there are tabs for 'Attendees' and 'Attendee Groups'. Below this is a search section with the text 'Find every attendee where' followed by a dropdown menu set to 'Last Name', another dropdown for 'Begins With', and a text input field containing an asterisk. A 'Go' button and an 'Advanced Search' link are also present. Below the search bar are buttons for 'New Attendee', 'Edit', and 'Delete'. The main content is a table with the following data:

<input type="checkbox"/>	Attendee Name ^	Attendee Title	Company	Attendee Type	Annual Total
<input type="checkbox"/>	King, Susan			This Employee	\$0.00
<input type="checkbox"/>	Smith, Anne			Business Guest	\$0.00

At the bottom of the page, there is a pagination bar showing 'Page 1 of 1' and a refresh icon.

Section 7: Create an Expense Report from a Completed Trip

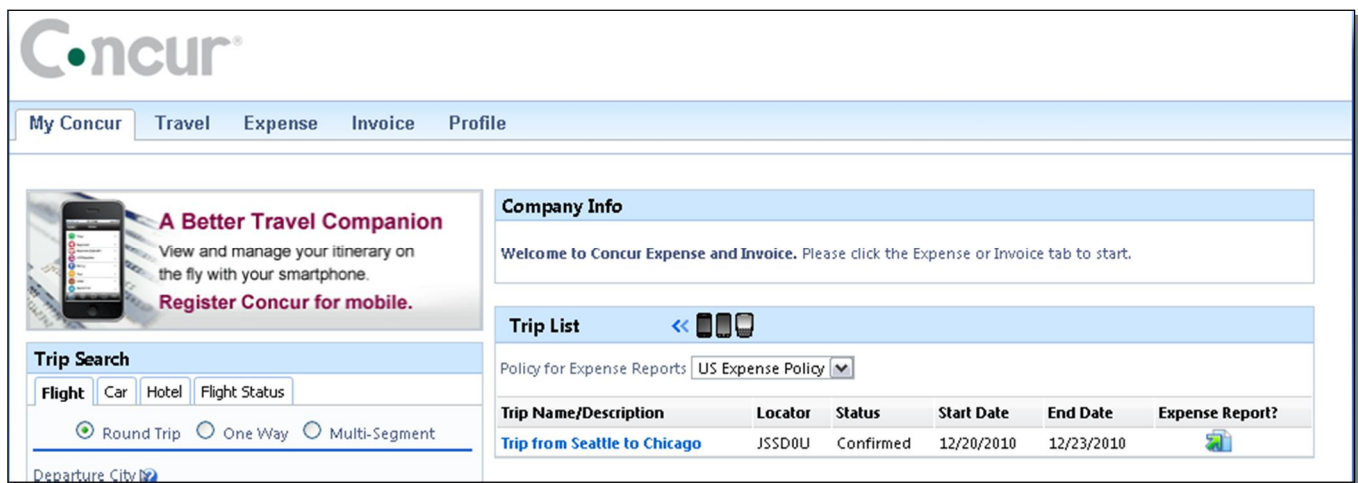
How to...

1. On the **My Concur** page, in the **Expense Report?** column of the **Trip List** section, click the button for the appropriate trip.
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.


Additional Information

The button appears in the **Expense Report?** column after you have completed the trip.

Concur Premier transfers the data from your travel booking itinerary and automatically creates the expense report. The report will have the same name as your trip itinerary and contains all the expense entries for each of the trip reservations, including your airfare, hotel, and car rental.



The screenshot shows the Concur web application interface. At the top, there is a navigation bar with tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', and 'Profile'. Below this, there is a promotional banner for 'A Better Travel Companion' with a smartphone image and text: 'View and manage your itinerary on the fly with your smartphone. Register Concur for mobile.' To the right of the banner is a 'Company Info' section with a welcome message: 'Welcome to Concur Expense and Invoice. Please click the Expense or Invoice tab to start.' Below the banner is a 'Trip Search' section with tabs for 'Flight', 'Car', 'Hotel', and 'Flight Status'. Under 'Flight', there are radio buttons for 'Round Trip', 'One Way', and 'Multi-Segment'. Below the search section is a 'Departure City' field. To the right of the search section is a 'Trip List' section with a dropdown menu for 'Policy for Expense Reports' set to 'US Expense Policy'. Below this is a table with the following data:

Trip Name/Description	Locator	Status	Start Date	End Date	Expense Report?
Trip from Seattle to Chicago	JSSD0U	Confirmed	12/20/2010	12/23/2010	

Section 8: Create a New Expense Report

Step 1: Create a New Report

How to...

1. In the **Active Work** or **Expense Reports** section of the **My Concur** page, click **New Expense Report**.
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
3. Click **Next**.

Additional Information

The **Create a New Expense Report** page appears. The fields that appear on this page are defined by your company.

The expense report page appears.

The screenshot displays the 'Create a New Expense Report' interface in the Concur system. At the top, the Concur logo is visible, followed by a navigation bar with tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below the navigation bar, there are links for 'View Charges', 'View Reports', and 'New Expense Report'. The main heading is 'Create a New Expense Report'. Underneath, the 'Report Header' section contains several input fields: 'Report Name' (with a red bar on the left), 'Policy' (a dropdown menu showing 'US OPR Standard'), 'Report Date' (a date field showing '09/20/2010'), 'Business Purpose' (with a red bar on the left), and 'Comment'. Below these, there are fields for 'Company' (110), 'Region' (101), and 'Department' (8512). At the bottom right of the form, there are two buttons: 'Next >>' and 'Cancel'.

Section 8: Create a New Expense Report (Continued)

Step 2: Add a Company Card Transaction to the New Expense Report

Company card transactions are automatically imported into Expense for you – ready to be added to an expense report. Your company determines how frequently new card transactions appear.

How to...

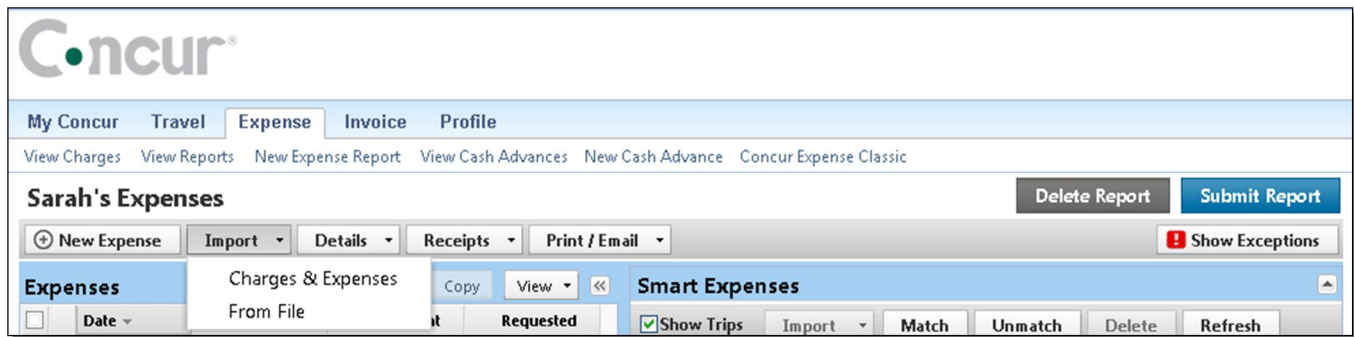
1. On the **Expense Report** page, from the **Import** dropdown menu, select **Charges & Expenses**.

Additional Information

If your company uses Travel and/or uses the personal credit card import feature in Expense, this dropdown menu is titled "Import." If your company does not use Travel or does not allow a personal credit card import, you will see the **Add Card Charges** button.

The **Smart Expenses** pane appears. A Smart Expense combines: trip data from Travel, corporate card data, and e-receipt data.

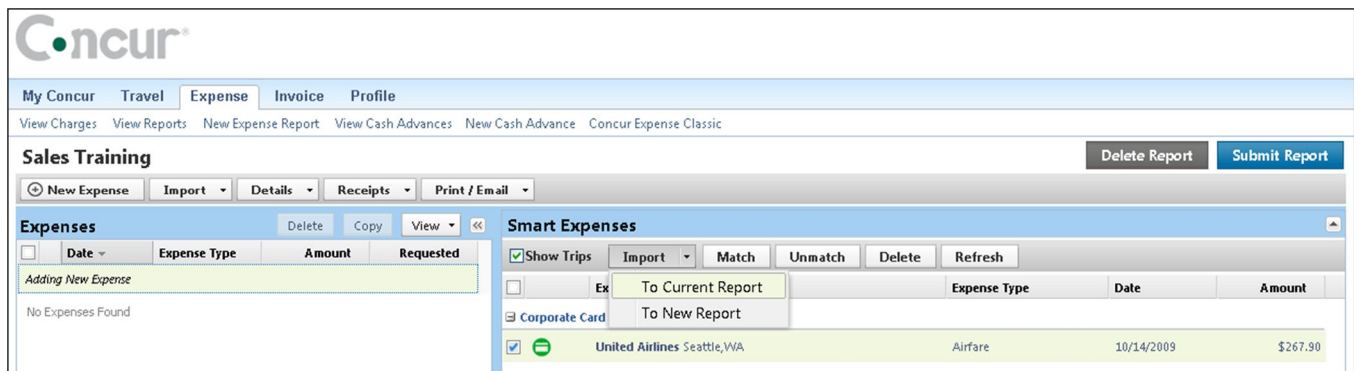
If you have activated the option in your **Expense Settings** to be prompted to add company card transactions, you will not need to select **Charges & Expenses** from the **Import** dropdown menu.



2. In the **Unmatched Charges** section, select each transaction that you want to assign to the current expense report.
3. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**.

You can also add **Unmatched Charges** to an expense report by dragging and dropping into the **Expense List** area of the page.

The expense appears on the left side of the page, with all applicable icons, such as company card or exceptions.



Section 8: Create a New Expense Report (Continued)

Step 3: Add a Personal Credit Card Transaction to the New Expense Report

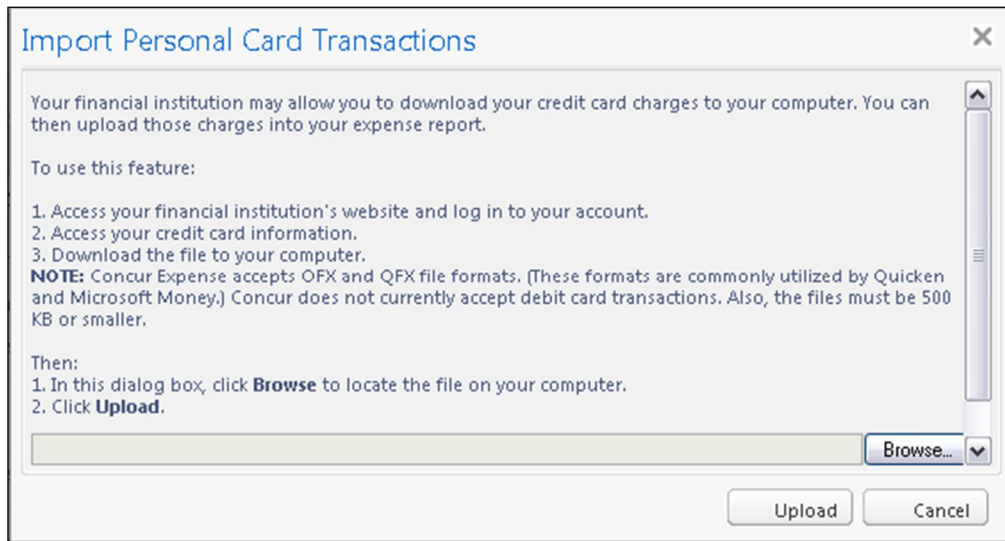
Using Concur Premier, you can import into an expense report a personal credit card transaction that you download from a financial institution.

How to...

1. On the **Expense Report** page, from the **Import** dropdown menu, select **From File**.
2. In the **Import Personal Card Transactions** window, click **Browse**.

Additional Information

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.



3. Locate the file you want to attach.
4. Click **Upload**.

Step 3: Add a Personal Credit Card Transaction to the New Expense Report (Continued)

How to...

5. Select each transaction that you want to assign to the current expense report.
6. Click **Import**.

Additional Information

The imported card transaction will appear as an **Undefined** expense type. You will need to update the expense type and add any additional information required by your company.

You have selected to import the following credit card transactions from your personal credit card. Select the credit card charges you would like to add to your expense report. Once you have selected the transactions, the credit card charges will be converted to expenses and saved to your expense report.

<input type="checkbox"/>	Expense Detail	Date Posted ▲	Amount
<input type="checkbox"/>	PURCHASE WITH PIN TARGET T1957 B	07/20/2010	\$184.21
<input type="checkbox"/>	CHECK	07/20/2010	\$50.00
<input type="checkbox"/>	PURCHASE WITH PIN TOP FOOD AND D	07/20/2010	\$12.55
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) CHIPOTLE	07/20/2010	\$6.44
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) STARBUCK	07/21/2010	\$6.99
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) SUBWAY	07/21/2010	\$6.83
<input checked="" type="checkbox"/>	VISA PURCHASE (NON-PIN) SAFEWAY	07/22/2010	\$40.76
<input checked="" type="checkbox"/>	VISA PURCHASE (NON-PIN) FAMILY P	07/22/2010	\$12.00
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) ICHITER	07/22/2010	\$11.15
<input type="checkbox"/>	VISA PURCHASE (NON-PIN) PANERA B	07/22/2010	\$8.42
<input type="checkbox"/>	PURCHASE WITH PIN SAFEWAY STORE	07/22/2010	\$4.16

Import Cancel

Section 8: Create a New Expense Report (Continued)

Step 4: Add an Out-of-Pocket Expense to the New Expense Report

How to...

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

Additional Information

The **New Expense** tab appears.

The page refreshes, displaying the required and optional fields for the selected expense type.

Concur

My Concur | Travel | **Expense** | Invoice | Reporting | Administration | Profile

View Charges | View Reports | New Expense Report

Sales Training Delete Report Submit Report

+ New Expense | Import | Details | Receipts | Print / Email

Expenses Delete Copy View <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
Adding New Expense				
No Expenses Found				

New Expense

Expense Type: Individual Dinner

Transaction Date: [Date Picker]

Business Purpose: [Text Field]

Enter Vendor Name: [Text Field]

City: [Text Field]

Payment Type: Cash

Amount: [Text Field] USD

Save Remize Cancel

TOTAL AMOUNT: \$0.00 | TOTAL REQUESTED: \$0.00

Step 4: Add an Out-of-Pocket Expense to the New Expense Report (Continued)

For date fields, use the calendar to select the date of the expense.

For lists, select from the list.

For auto-complete fields, type the first portion of your choice and then select from the list.

Complete other text fields and checkboxes as usual.

How to...

- Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
- Click **Save**.

Additional Information

For different types of expenses, such as hotel or car mileage, or for expenses incurred in a currency other than your reimbursement currency, refer to *Using Special Features* in this guide.

The expense appears on the left side of the page.

Section 9: Review and Edit an Expense Report

You should review for accuracy and edit (if necessary) your reports and all expenses, including company card transactions, before submitting your expense report.

Step 1: Review the Report Information

How to...

1. On the **Expense Report** page, in the **Expense List**, click any transaction to view the details.
2. From the **Details** dropdown menu, select **Report Header**.
3. Make the appropriate changes, and then click **Save**.

Additional Information

The expense details appear on the right side of the page.

The **Report Header** page appears and you can view and update report header information.

Step 2: Review the Exceptions

How to...

1. On the **Expense Report** page, click **Show Exceptions**.
2. Click the exception that you want to review.

Additional Information

The **Exceptions** pane opens, which displays all exceptions for the expense report. In this pane, you can select an exception to view the expense details.

The expense details appear on the right side of the page.

Exceptions			
Expense Type	Date	Amount	Exception
Local Phone	09/13/2010	\$20.00	! Missing required fields: City

3. Make the appropriate changes, and then click **Save**.

Section 9: Review and Edit an Expense Report (Continued)

Step 3: Edit Multiple Expenses

How to...

1. On the **Expense Report** page, in the **Expense List**, select the checkbox for the expenses that you want to update.
2. Select the action you would like to perform for the expenses.

Additional Information

The multiple expense options box appears. When you select more than one expense, you will have the ability to delete, allocate, or edit the expenses at the same time.

If you choose to **Edit** the selected expenses, you will be prompted for all of the field(s) that you can update.

The screenshot shows the 'Training' expense report interface. At the top right are 'Delete Report' and 'Submit Report' buttons. Below are navigation tabs: 'New Expense', 'Import', 'Details', 'Receipts', and 'Print / Email'. The main area is titled 'Expenses' and contains a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. Three rows are visible, with the first two selected (checkboxes checked). A modal dialog box is open on the right, displaying the message: 'You have selected multiple expenses. What would you like to do?' with two options: 'Delete the selected expenses' and 'Edit one or more fields for the selected expenses'.

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	09/10/2010	Business Meals - Meetings Morton's, San Francisco, California	\$150.00	\$150.00
<input checked="" type="checkbox"/>	> 09/10/2010	Office Supplies Staples, San Francisco, California	\$200.00	\$200.00
<input type="checkbox"/>	> 09/09/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00

Section 10: Use Special Features

Itemize Nightly Lodging Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. These expenses must be itemized so that they can be accounted for correctly. Concur Premier gives you the tools to quickly itemize your lodging-related expenses.

Step 1: Verify Auto-Itemized Hotel Expenses

The hotel auto-itemization feature automatically itemizes any card transactions that have hotel folio data or an e-receipt from a hotel vendor. Your company determines if your hotel expenses are automatically itemized. If not, you can manually itemize your hotel expenses as described in Step 2 below.

The result of hotel auto-itemization is similar to what you see if you manually itemize the hotel expense. Expense itemizes the hotel expense based on predetermined mapping. Examples of the itemizations you will see on your expense report are: parking, meals, and internet access. You can update the auto-itemized expenses and itemize any remaining balance as described in Step 3 below.

The screenshot displays the Concur Premier interface for a trip titled "Trip from Seattle to Chicago". At the top, there are tabs for "Details", "Receipts", and "Print / Email". Below this is the "Expenses" section, which includes a table with columns for "Date", "Expense Type", "Amount", and "Approved". The table lists several expenses, including a car rental and a hotel stay. The hotel stay is the primary focus, with a total amount of \$403.72. To the right of the table is a detailed view of the selected hotel expense, showing fields for "Transaction Date", "Expense Type", "Business Purpose", "Enter Vendor Name", "City", "Payment Type", and "Amount". The "Total Amount" is \$403.72, "Remized" is \$403.72, and "Remaining" is \$0.00.

Date	Expense Type	Amount	Approved
07/24/2009	Car Rental THRIFTY CAR RENTAL MDW, Chicago, Illir	\$99.04	\$99.04
07/23/2009	Hotel OHIO EAST HOTEL LLC, Chicago, Illinois	\$403.72	\$403.72
07/22/2009	Parking - Tolls	\$25.00	\$25.00
07/22/2009	Hotel	\$153.26	\$153.26
07/22/2009	Hotel Tax	\$18.24	\$18.24
07/22/2009	Hotel Tax	\$5.36	\$5.36
07/21/2009	Parking - Tolls	\$25.00	\$25.00
07/21/2009	Hotel	\$153.26	\$153.26
07/21/2009	Hotel Tax	\$18.24	\$18.24
07/21/2009	Hotel Tax	\$5.36	\$5.36

Total Amount: \$403.72 | Remized: \$403.72 | Remaining: \$0.00

Transaction Date: 07/23/2009
Expense Type: Hotel
Business Purpose:
Enter Vendor Name: OHIO EAST HOTEL LLC
City: Chicago, Illinois
Payment Type: American Express
Amount: 403.72 USD

Itemize Nightly Lodging Expenses (Continued)

Step 2: Create and Itemize a Lodging Expense

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select the lodging expense type.
3. Complete the required fields on the page as usual.

Additional Information

The **New Expense** tab appears.

Your company determines the name of the expense type. It may be called Lodging, Hotel, or something similar.

The screenshot shows the Concur interface for creating a new expense. The top navigation bar includes 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below this, there are links for 'View Charges', 'View Reports', and 'New Expense Report'. The main header is 'Training' with 'Delete Report' and 'Submit Report' buttons. The 'New Expense' tab is active, showing a form with the following fields: Transaction Date (09/10/2010), Expense Type (Hotel), Business Purpose, Enter Vendor Name (Marriott), City (San Francisco, California), Payment Type (Cash), Amount (300.00 USD), and Comment. At the bottom, there are 'Itemize' and 'Cancel' buttons, and a summary table showing 'TOTAL AMOUNT \$0.00' and 'TOTAL REQUESTED \$0.00'.

4. Click **Itemize**.

The expense appears on the left side of the page and the **Nightly Lodging Expenses** tab appears.

Step 2: Create and Itemize a Lodging Expense (Continued)

The screenshot shows the Concur Expense report interface. At the top, there are navigation tabs: My Concur, Travel, Expense, Invoice, Reporting, Administration, and Profile. Below these are links for View Charges, View Reports, and New Expense Report. The main header is 'Training' with buttons for 'Delete Report' and 'Submit Report'. A secondary header contains 'New Expense', 'Import', 'Details', 'Receipts', and 'Print / Email', along with a 'Show Exceptions' button.

The 'Expenses' table has the following data:

Date	Expense Type	Amount	Requested
09/10/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00

Below the table, a message states: 'All hotel expenses must be itemized. Itemizations are required for this entry.'

The 'Nightly Lodging Expenses' tab is active, showing the following fields:

- Check-in Date: [Calendar icon]
- Check-out Date: 09/10/2010 [Calendar icon]
- Number of Nights: [Text field]

Recurring Charges (each night)

- Room Rate: [Text field]
- Room Tax: [Text field]
- Other Room Tax 1: [Text field]
- Other Room Tax 2: [Text field]
- Combine room rate and taxes into a single entry

Additional Charges (each night)

- Expense Type: Choose an expense type [Dropdown] Amount: [Text field]
- Expense Type: Choose an expense type [Dropdown] Amount: [Text field]

At the bottom, there are two summary boxes:

TOTAL AMOUNT	TOTAL REQUESTED
\$300.00	\$300.00

Buttons for 'Save Itemizations' and 'Cancel' are located at the bottom right.

- On the **Nightly Lodging Expenses** tab, in the **Check-in Date** field, type the date or use the calendar. The number of nights appears automatically.
- In the **Room Rate** field, enter the amount that you were charged per night for the room.
- In the **Room Tax** fields, enter the amount of each room tax that you were charged.
- In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
- In the **Amount** field, enter the amount of the expense.

Step 2: Create and Itemize a Lodging Expense (Continued)

How to...

- Repeat steps 8-9 using the second **Expense Type** field if you have more than one recurring additional charge.
- Click **Save Itemizations**.

Additional Information

If there is a remaining amount to be itemized, the remaining amount is displayed and the **New Itemization** tab appears.

The screenshot shows the Concur Expense Management interface for a report titled 'Training'. The interface includes a navigation bar with tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below this, there are links for 'View Charges', 'View Reports', and 'New Expense Report'. The main area is divided into two panes. The left pane, titled 'Expenses', contains a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. The right pane, titled 'New Itemization', contains a dropdown menu for 'Expense Type' and a 'Show Exceptions' button. At the bottom of the interface, there are summary fields for 'TOTAL AMOUNT' and 'TOTAL REQUESTED', both showing '\$270.00'. There are also 'Save' and 'Cancel' buttons at the bottom right.

Date	Expense Type	Amount	Requested
09/10/2010	Hotel Marriott, San Francisco, California	\$300.00	\$270.00
Adding New Itemization			
<input type="checkbox"/>	09/09/2010 Hotel	\$75.00	\$75.00
<input type="checkbox"/>	09/09/2010 Hotel Tax	\$15.00	\$15.00
<input type="checkbox"/>	09/08/2010 Hotel	\$75.00	\$75.00
<input type="checkbox"/>	09/08/2010 Hotel Tax	\$15.00	\$15.00
<input type="checkbox"/>	09/07/2010 Hotel	\$75.00	\$75.00
<input type="checkbox"/>	09/07/2010 Hotel Tax	\$15.00	\$15.00

TOTAL AMOUNT: \$270.00 | TOTAL REQUESTED: \$270.00

Expense Type: Choose an expense type

Total Amount: \$300.00 | Remized: \$270.00 | Remaining: \$30.00

Step 3: Itemize the Remaining Balance

How to...

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**.
4. Repeat steps 1-3 until the **Remaining Amount** equals \$0.00.

Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page and the remaining amount equals zero.

Section 10: Use Special Features (Continued)

Add Attendees

For some expense types, such as business meals or entertainment, your company might require that you list the attendees who were present at these events.

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select an Entertainment, Business Meals, or Group Meals expense type.
3. Complete all required fields *except* the attendee information.

Additional Information

The **New Expense** tab appears.

Your company defines the expense type names that apply to entertaining clients, customers, or group meals that include employees.

The page refreshes, displaying the required and optional fields for the selected expense type.

In the attendee area, your name automatically appears as an attendee with the full amount of the expense. As you add attendees to the expense, the expense amount is distributed over all attendees.

Your company decides whether your name appears automatically and whether you can manually adjust the amounts allotted to attendees.

The screenshot shows the Concur 'New Expense' form. The 'Expenses' table on the left lists a hotel expense for \$300.00. The 'New Expense' form on the right shows the following details:

- Expense Type: Business Meals - Meetings
- Transaction Date: 09/08/2010
- Business Purpose: Client Dinner
- Enter Vendor Name: Morton's
- City: San Francisco, California
- Payment Type: Cash
- Amount: 150.00 USD
- Personal Expense (do not reimburse me):
- Comment: (empty)

The 'Attendees' section shows one attendee:

Attendee Name	Attendee Title	Company	Attendee Type	Amount
Dorsey, Kevin			Employee	\$150.00

At the bottom, the 'TOTAL AMOUNT' is \$300.00 and the 'TOTAL REQUESTED' is \$300.00. Buttons for 'Save', 'Remize', and 'Cancel' are visible.

Add Attendees (Continued)

How to...

4. Click **Favorites**.
5. On the **Favorites** tab in the **Search Attendees** window, select the attendees for this expense, and then click **Add to Expense**.
6. To add a new attendee to the expense, click **New Attendee**, complete the required information, and then click **Save**.
7. To search for an attendee, click **Search**, enter your search criteria in the **Search Attendees** window, and then click **Add to Expense**.
8. Click **Save**.

Additional Information

The **Search Attendees** window opens.

You can also locate an attendee that is already in your **Favorites** list by typing the first letter of the attendee name in the **Favorites** field, and then selecting the attendee name from the dropdown list.

The new attendee is added to the list. The expense amount is distributed among the attendees.

The "found" attendee is added to the list. The expense amount is distributed among the attendees.

The expense appears on the left side of the page.

Section 10: Use Special Features (Continued)

Itemize Expenses

You itemize expenses to account for expenses that include both business and personal items or to make sure that each of your expenses is billed to the correct department in your organization.

How to...

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 then select the appropriate expense.

Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page. The **New Itemization** tab appears which displays the total amount, itemized amount, and remaining amount.

The page refreshes, displaying the required and optional fields for the selected expense type.

The screenshot shows the Concur Expense Report interface. At the top, there is a navigation bar with tabs for 'My Concur', 'Travel', 'Expense', 'Invoice', 'Reporting', 'Administration', and 'Profile'. Below this, there are links for 'View Charges', 'View Reports', and 'New Expense Report'. The main header area includes a 'Training' section with 'Delete Report' and 'Submit Report' buttons, and a 'New Expense' section with 'Import', 'Details', 'Receipts', and 'Print / Email' options. The 'Expenses' table lists three items: a Hotel for \$300.00, Software for \$100.00, and Business Meals - Meetings for \$150.00. The 'New Itemization' form is open for the 'Business Meals - Meetings' expense, showing fields for Expense Type (Office Supplies), Transaction Date (09/10/2010), Business Purpose, Enter Vendor Name (Staples), City (San Francisco, California), Payment Type (Cash), Amount (50.00), and a checkbox for Personal Expense. The total amount is \$100.00, with \$0.00 itemized and \$100.00 remaining. At the bottom, there are 'Save' and 'Cancel' buttons.

Expenses	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	> 09/10/2010	Hotel Marriott, San Francisco, California	\$300.00	\$300.00
<input type="checkbox"/>	09/10/2010	Software Staples, San Francisco, California	\$100.00	\$100.00
Adding New Itemization				
<input type="checkbox"/>	09/08/2010	Business Meals - Meetings Morton's, San Francisco, California	\$150.00	\$150.00

TOTAL AMOUNT: \$550.00 | TOTAL REQUESTED: \$550.00

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

Itemize Expenses (Continued)

How to...

5. Click **Save**.
6. Repeat steps 3-5 until the **Remaining Amount** equals \$0.00.

Additional Information

The itemized item appears in the expense list and the totals are adjusted accordingly.

As you click **Save** for each item, the remaining total changes accordingly.

Section 10: Use Special Features (Continued)

Convert Foreign Currency Transactions

When adding an out-of-pocket expense that was incurred in a currency other than your reimbursement currency, Expense will assist you in converting the expense to your standard reimbursement currency.

How to...

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 foreign currency amount.
5. Select the “spend” currency from the dropdown list to the right of the **Amount** field.
6. Click the multiplication sign to switch, if needed, and then click **Save** (or click **Itemize** to itemize the expense).

Additional Information

The **New Expense** tab appears.

The page refreshes, displaying the required and optional fields for the selected expense type.

Because the currency conversion rate is based on the Transaction Date that you select, be sure to select the exact Transaction Date.

If you select a **City** that has a different currency than your reimbursement currency, Expense automatically selects the spend currency for you.

Expense supplies the **Rate** and calculates the reimbursement **Amount**.

Currency can be converted by multiplying by a particular rate or dividing by a different rate. You may need to switch from multiplication to division of the rate, depending on the type of rate you received, by clicking the symbol above the rate field.

The screenshot shows the 'Trip to San Francisco' interface. At the top, there are buttons for 'Delete Report' and 'Submit Report'. Below that, a navigation bar includes 'New Expense', 'Import', 'Details', 'Receipts', and 'Print / Email'. The main area is divided into two panes. The left pane, titled 'Expenses', shows a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. A 'New Expense' tab is active on the right. The 'New Expense' form includes fields for 'Expense Type' (Taxi), 'Transaction Date' (09/02/2010), 'Business Purpose', 'Enter Vendor Name', 'City', and 'Payment Type' (Cash). The 'Amount' field is highlighted with a red box, showing '60.00' in CAD, a multiplication sign, a rate of '0.94650000', and a calculated 'Amount in USD' of '56.79'. At the bottom, there are buttons for 'Save', 'Itemize', 'Allocate', and 'Cancel'. A summary bar at the bottom shows 'TOTAL AMOUNT \$0.00' and 'TOTAL REQUESTED \$0.00'.

Section 10: Use Special Features (Continued)

Work with Mileage

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select the appropriate expense type.
3. In the **Transaction Date** field, type the date or use the calendar.
4. In the **From Location** field, enter the starting location of your trip.
5. In the **To Location** field, enter the ending location of your trip.
6. Click the **Mileage Calculator**.
7. Click **Add Mileage to Expense**.
8. Complete any additional required fields as directed by your company, and then click **Save**.

Additional Information

The **New Expense** tab appears.

Your company determines the name of the expense type. It may be called Car, Mileage, or something similar.

The **Mileage Calculator** helps you to determine mileage between locations. Notice that the To and From locations that you entered for the expense automatically appear. Using the **Mileage Calculator**, you can change the locations or add additional locations. The distance between locations will appear for you to add to your expense report.

The expense appears on the left side of the page.

The screenshot shows the 'Sarah's Expenses' application. On the left, there is a table of existing expenses:

Date	Expense Type	Amount	Requested
10/15/2009	Breakfast Jimmy John's, Seattle, Washington	\$8.32	\$8.32
10/15/2009	Miscellaneous	\$25.00	\$25.00
10/14/2009	Airfare United Airlines, Seattle, Washington	\$267.90	\$200.00
10/14/2009	Miscellaneous	\$25.00	\$25.00
10/02/2009	Business Meal (attendees) Fedex, Seattle, Washington	\$145.76	\$145.76
09/15/2009	Postage Fedex, Seattle, Washington	\$35.67	\$35.67
09/01/2009	Airfare United Airlines, Seattle, Washington	\$428.50	\$428.50

At the bottom of the table, it shows: TOTAL AMOUNT \$936.15 and TOTAL REQUESTED \$868.25.

On the right, the 'New Expense' form is visible. The 'Expense Type' is set to 'Personal Car Mileage'. The 'Transaction Date' is '10/02/2009'. The 'Purpose of the Trip' is 'Client Dinner'. There are fields for 'From Location' and 'To Location'. The 'Payment Type' is 'Cash'. The 'Distance' is '0' and the 'Amount' is '0.00'. There are also fields for 'Division', 'Cost Center', 'Department', and 'Location'. A 'Mileage Calculator' button is present. At the bottom right of the form, there are 'Save', 'Allocate', and 'Cancel' buttons.

Section 10: Use Special Features (Continued)

Copy an Expense

Use the copy feature to copy an expense within an expense report. You can then edit the copied expense, as needed.

How to...

1. On the **Expense Report** page, from the **Expense List**, select the checkbox next to the expense you wish to copy.
2. Click **Copy**.
3. Click on the new expense.
4. Make all necessary changes to the new expense.
5. Click **Save**.

Additional Information

The expense is highlighted.

The new expense appears below the original.

The expense details appear.

The screenshot displays the Concur web interface for an expense report titled "Trip to San Francisco". The top navigation bar includes "My Concur", "Travel", "Expense", "Invoice", "Reporting", "Administration", and "Profile". Below this, there are links for "View Charges", "View Reports", and "New Expense Report".

The main content area is divided into two sections. On the left, the "Expenses" table lists items with columns for "Date", "Expense Type", "Amount", and "Requested". The table contains two entries: "Local Phone" for \$12.00 and "Taxi-Shuttle-Train" for \$45.00. The "Taxi-Shuttle-Train" entry is selected, and the "Copy" button in the table's action column is highlighted with a red box.

On the right, the "Expense" details form is visible. It includes fields for "Expense Type" (Taxi-Shuttle-Train), "Transaction Date" (09/02/2010), "Business Purpose", "Enter Vendor Name", "City" (Seattle, Washington), "Payment Type" (Cash), "Amount" (45.00 USD), "Personal Expense" checkbox, "Top Task" (INTERNAL), "Sub Task" (Non-Travel Expense), "Billable" (NO), "Non Billable Reason Code" (Administrative), "Billing Remarks", and "Comment".

At the bottom of the interface, there are summary boxes for "TOTAL AMOUNT \$57.00" and "TOTAL REQUESTED \$45.00", along with "Save", "Remize", and "Cancel" buttons.

Section 10: Use Special Features (Continued)

Allocate Expenses

The Allocations feature allows you to allocate expenses to projects or departments. The departments you choose will be charged for those expenses.

How to...

1. Complete all expenses as usual.
2. Select the expense you wish to allocate from the expense list.
3. Click **Allocate** near the lower right-hand corner of the expense details section.

Additional Information

The expense details appear.

The **Allocate Report** window appears.

The screenshot displays the Concur Expense Management interface for 'Sarah's Expenses'. On the left, a table lists expenses with columns for Date, Expense Type, Amount, and Requested. The selected expense is 'Airfare' for \$428.50. On the right, the 'Expense' details form is visible, including fields for Transaction Date, Expense Type, Vendor, Amount, and Department. The 'Allocate' button is highlighted with a red box at the bottom right of the form.

Date	Expense Type	Amount	Requested
10/15/2009	Breakfast Jimmy John's, Seattle, Washington	\$8.32	\$8.32
10/15/2009	Miscellaneous	\$25.00	\$25.00
10/14/2009	Miscellaneous	\$25.00	\$25.00
10/02/2009	Business Meal (attendees) Fedex, Seattle, Washington	\$145.76	\$145.76
09/15/2009	Postage Fedex, Seattle, Washington	\$35.67	\$35.67
09/01/2009	Airfare United Airlines, Seattle, Washington	\$428.50	\$428.50

TOTAL AMOUNT: \$668.25 | TOTAL REQUESTED: \$668.25

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.
7. Select the department that will receive the allocation.

Depending on your company's configuration, you might see different fields, other than Department, to complete on the **Allocate Report** page.

Allocate Expenses (Continued)

Allocations for Report: Sales Training

Expense List

Allocate Selected Expenses Clear Selections View /

Select Group ▾

Date ▾	Expense Type	Group	Amount
09/01/2010	Office Supplie		\$100.00

Allocations

Total Amount :\$100.00
 Allocated Amount:\$100.00 (100%)
 Remaining :\$0.00 (0%)

Allocate By: ▾ Add New Allocation Delete Selected Allocations

<input type="checkbox"/>	Percentage	Department	Region	Division	Code
<input type="checkbox"/>	50	Training			Training
<input type="checkbox"/>	50	IT			IT

Save Cancel

Done

8. Click **Add New Allocation**.
9. Repeat steps 5-7 for each new allocation.
10. Click **Save**.
11. In the confirmation message box, click **OK**.
12. In the **Allocate Report** window, click **Done**.

A new allocations field appears.

Add as many allocations as necessary. You can adjust the amounts and percentages. You do not have to allocate 100% of the total. The amount that you do not allocate is charged as usual, probably to your own cost center.

The allocation icon appears on the left side of the page with the expense.



Section 10: Use Special Features (Continued)

Allocate Multiple Expenses

If you have multiple expenses in a report to allocate, you can select and allocate all applicable expenses at the same time.

How to...

1. Complete all expenses as usual.
2. Select all the expenses you wish to allocate from the expense list.

Additional Information

A message appears in the right pane, which states that you have selected multiple expenses and provides three options.

The screenshot shows the Concur Expense report interface for 'Sarah's Expenses'. The interface includes a navigation bar with 'My Concur', 'Travel', 'Expense', 'Invoice', and 'Profile'. Below the navigation bar are links for 'View Charges', 'View Reports', 'New Expense Report', 'View Cash Advances', 'New Cash Advance', and 'Concur Expense Classic'. The main content area displays a table of expenses with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. The table lists several expenses, including Breakfast, Miscellaneous, Business Meal (attendees), Postage, and Airfare. A message box on the right side of the interface states: 'You have selected multiple expenses. What would you like to do?' and provides three options: 1. Delete the selected expenses, 2. Allocate the selected expenses, and 3. Edit one or more fields for the selected expenses.

Expenses	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	10/15/2009	Breakfast Jimmy John's, Seattle, Washington	\$8.32	\$8.32
<input type="checkbox"/>	10/15/2009	Miscellaneous	\$25.00	\$25.00
<input type="checkbox"/>	10/14/2009	Miscellaneous	\$25.00	\$25.00
<input type="checkbox"/>	10/02/2009	Business Meal (attendees) Fedex, Seattle, Washington	\$145.76	\$145.76
<input checked="" type="checkbox"/>	09/15/2009	Postage Fedex, Seattle, Washington	\$35.67	\$35.67
<input checked="" type="checkbox"/>	09/01/2009	Airfare United Airlines, Seattle, Washington	\$428.50	\$428.50

3. 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.
7. Select the department that will receive the allocation.
8. Click **Add New Allocation**.

The **Allocate Report** window appears.

A dropdown list of departments appears. Depending on your company's configuration, you might see different fields, other than Department (i.e., Cost Center or Project), to complete on the **Allocate Report** page.

A new allocations field appears.

Allocate Multiple Expenses (Continued)

How to...

9. Repeat steps 5-7 for each new allocation.

10. Click **Save**.
11. In the confirmation message box, click **OK**.
12. In the **Allocate Report** window, click **Done**.

Additional Information

Add as many allocations as necessary. You can adjust the amounts and percentages. You do not have to allocate 100% of the total. The amount that you do not allocate is charged as usual, probably to your own cost center.

The allocation icon appears on the left side of the page with the expense. If the expense is 100% allocated, the icon is yellow, red, and green. If the expense is not 100% allocated, the icon is blue and gray.

Section 11: Print and Submit/Resubmit Expense Reports

Preview and Print Your Expense Report

How to...

1. From the **Print** menu, select the appropriate print option.

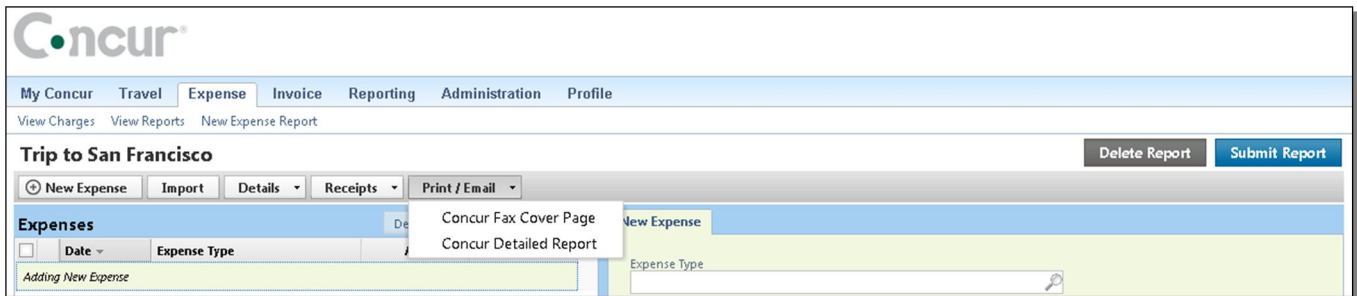
Additional Information

The three print options:

- For a fax cover page to use with Concur Imaging, select **Fax Receipt Cover Page**.
- For a listing of expenses that require receipts, select **Receipt Report**.
- For a detailed report, select **Detailed Report**.

The report appears in a separate window.

2. To print the report, click **Print**.



Fax or Attach Scanned Receipt Images

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

Fax Images

How to...

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 **Check Receipts**.

Additional Information

The fax cover page appears.

After you have checked receipts for the first time, you will see two different options on the **Receipts** menu: **View Receipts in New Window** and **View Receipts in Current Window**.

Fax or Attach Scanned Receipt Images (Continued)

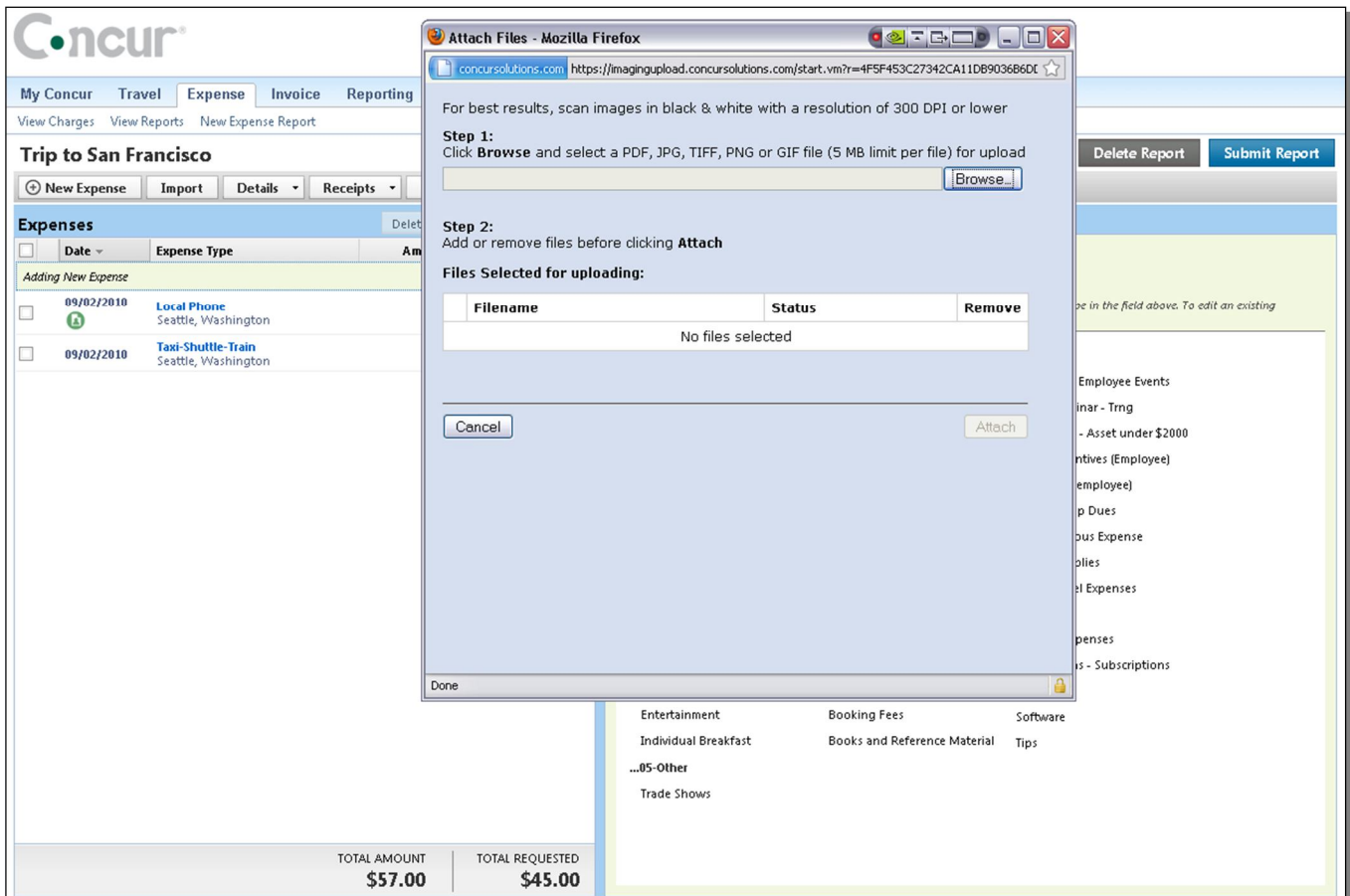
Attach Scanned Images

How to...

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Attach Receipt Images**.

Additional Information

The **Attach Files** window appears.



2. Click **Browse**, and then locate the file you want to attach.
3. Click the file, and then click **Open**.
4. To attach another image, click **Browse**, and then repeat the process.
5. Click **Attach**, and then click **Done**.
6. To view the attached receipts, from the **Receipts** dropdown menu, select **Check Receipts**.

The selected file appears in the **Files Selected for uploading** section of the window.

After you have checked receipts for the first time, you will see two different options on the Receipts menu: **View Receipts in New Window** and **View Receipts in Current Window**.

Section 11: Print and Submit/Resubmit Expense Reports (Continued)

Delete Receipt Images

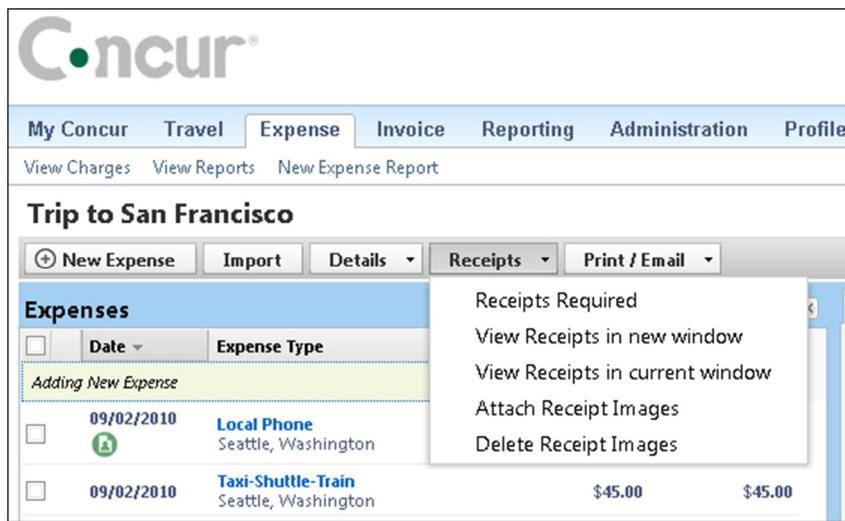
How to...

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Delete Receipt Images**.
2. In the confirmation window, click **Yes**.

Additional Information

A confirmation window appears.

When you select the **Delete Receipt Images** option, all attached images are deleted. You cannot delete individual receipt images.



The screenshot shows the Concur web interface for an expense report titled "Trip to San Francisco". The navigation bar includes "My Concur", "Travel", "Expense", "Invoice", "Reporting", "Administration", and "Profile". Below the navigation bar, there are links for "View Charges", "View Reports", and "New Expense Report". The main content area has a sub-header "Trip to San Francisco" and a toolbar with buttons for "New Expense", "Import", "Details", "Receipts", and "Print / Email". The "Receipts" dropdown menu is open, showing options: "Receipts Required", "View Receipts in new window", "View Receipts in current window", "Attach Receipt Images", and "Delete Receipt Images". Below the menu, there is a table of expenses:

<input type="checkbox"/>	Date	Expense Type		
	Adding New Expense			
<input type="checkbox"/>	09/02/2010	Local Phone Seattle, Washington		
<input type="checkbox"/>	09/02/2010	Taxi-Shuttle-Train Seattle, Washington	\$45.00	\$45.00

Section 11: Print and Submit/Resubmit Expense Reports (Continued)

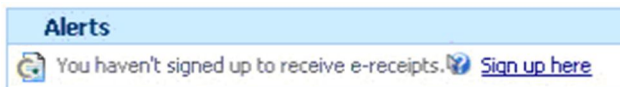
Use E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. If your company allows e-receipts, you must opt in from your Profile before e-receipts will show in Expense. If your company has enabled e-receipts, you will be notified in the Alerts section on the **My Concur** page.

Enable E-Receipts

How to...

1. On the **My Concur** page, in the **Alerts** section, click **Sign up here**.



2. Click **E-Receipt Activation**.

Additional Information

The E-Receipt Activation page appears.

The **E-Receipt Activation and Use Agreement** appears.



3. Click **I Accept**.

The e-receipts confirmation appears.

Once you have confirmed the e-receipt activation, all of your corporate cards are included. From your Profile, you can choose to exclude a particular card.

As you create your expense reports, you will see the e-receipt icon next to any transactions that have an e-receipt. You can click the icon to view the e-receipt.




Use E-Receipts (Continued)

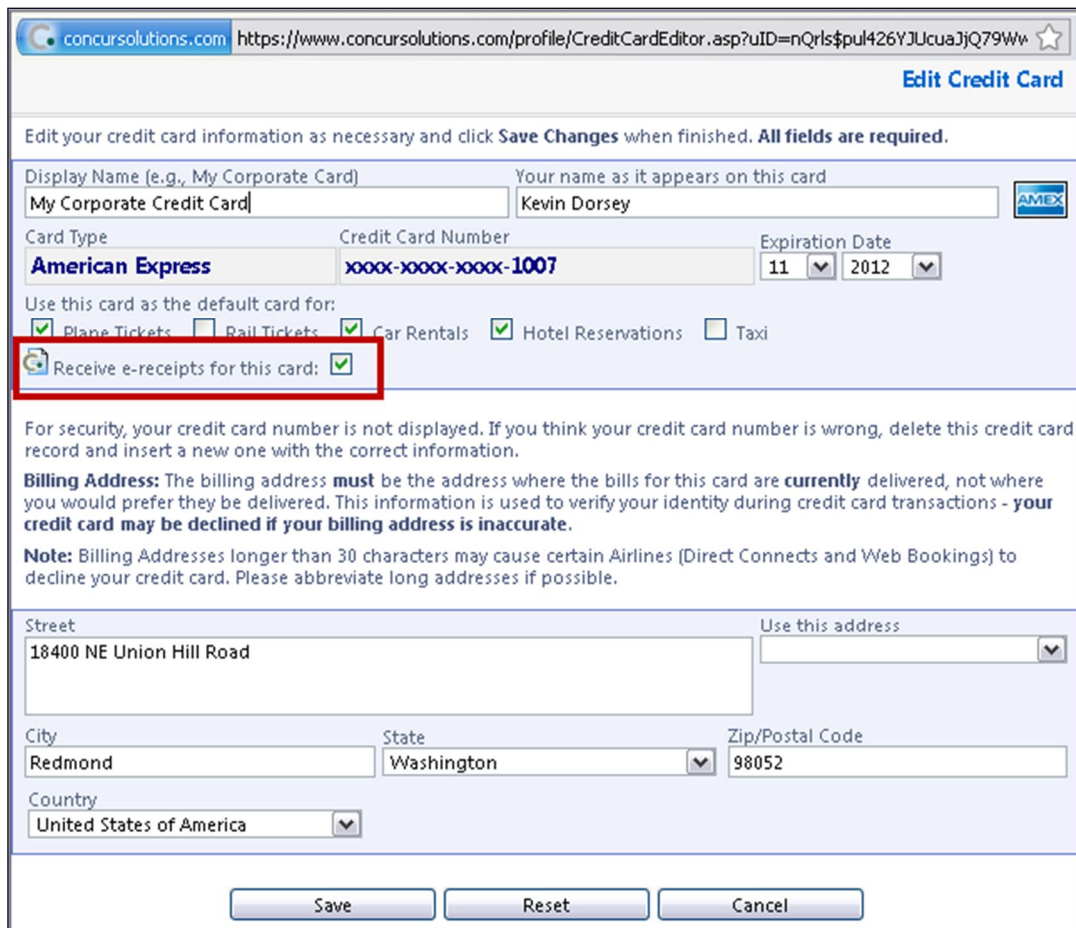
Exclude a Credit Card from E-Receipts

If you have a credit card listed in your Profile for which you do not want to receive e-receipts, you can exclude that credit card.

How to...

1. From the **Profile** page, click **Personal Information**.
2. In the **Credit Cards** section, click the edit  icon for the credit card you wish to exclude.
3. Clear the **Receive e-receipts for this card** checkbox.
4. Click **Save Changes**.


Additional Information



concur solutions.com https://www.concursolutions.com/profile/CreditCardEditor.asp?uID=nQrls\$puL426YJUcuaJjQ79Ww

[Edit Credit Card](#)

Edit your credit card information as necessary and click **Save Changes** when finished. **All fields are required.**

Display Name (e.g., My Corporate Card) Your name as it appears on this card 

Card Type Credit Card Number Expiration Date

Use this card as the default card for:
 Plane Tickets Rail Tickets Car Rentals Hotel Reservations Taxi

Receive e-receipts for this card:

For security, your credit card number is not displayed. If you think your credit card number is wrong, delete this credit card record and insert a new one with the correct information.

Billing 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.**

Note: 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 Use this address

City State Zip/Postal Code

Country

Section 11: Print and Submit/Resubmit Expense Reports (Continued)

Submit Your Completed Expense Report

If your company uses cost object approval, your expense report might be sent to multiple approvers at the same time. If one of the approvers makes changes to your expense report, you will be notified and the report might need to go through the approval process again. Cost object approval allows multiple approvers to review a report at once and helps to ensure control, compliance, and visibility of expenses.

How to...

1. On the **Expense Report** page, click **Submit Report**.
2. Click **Submit Report**.
3. Click **Close**.

Additional Information

The **Final Review** window appears, which lists all expenses that require receipts.

The **Report Submit Status** window confirms that the report was successfully submitted.

The **Expense Report List** page appears.

Correct and Resubmit a Report Sent Back by Your Approver

If your approver requires changes or additional information, he/she will return your expense report.

The returned report appears in the **Expense Report** or **Active Work** section of the **My Concur** page, along with a comment from your approver.

How to...

1. Click the report name (link) to open the report.
2. Make the requested changes.
3. Click **Submit Report**.

Additional Information

The **Expense Report** page appears.

Report Name	Status	Report Date	Total
OE Lunches Sept. 14-15 Lunches for Intelligence Training	Approved	09/20/2010	\$164.86
Training Training	Not Filed	09/16/2010	\$550.00
Elan Expense Training 09/08/10 Onsite Expense Training	Approved	09/15/2010	\$231.11
Sales Training Work with new sales system.	Not Filed	09/10/2010	\$20.00
Trip to San Francisco Onsite Expense Training	Sent Back to Employee - Calnan, Brenna M	09/09/2010	\$57.00
Hub International Travel & Expense Training for Hub International	Approved	08/31/2010	\$64.00
Training for Hub International Concur Travel & Expense onsite training for Hub International	Approved	08/23/2010	\$700.74

Section 12: Review and Approve Expense Reports

As an approver, you can approve an expense report “as is”; send an expense report back to the employee to modify and resubmit; or adjust the authorized amount of one or more expenses to comply with company policy and then approve the expense report for the lowered amount. (Your company may or may not allow you to adjust authorized amounts.)

If your company uses cost object approval, an employee’s expense report might be sent to multiple approvers at the same time. If one of the approvers makes changes to your expense report, the report might need to go through the approval process again. Cost object approval allows multiple approvers to review a report at once and helps to ensure control, compliance, and visibility of expenses.

Review and Approve an Expense Report

All reports awaiting your review and approval appear in the **Approval Queue** section of **My Concur**.

How to...

1. Click the report name (link) to open the report.
2. To review the report information, from the **Details** dropdown menu, select **Report Header** (under **Report**).
3. To review expense entry information, click an expense entry.
4. When ready to approve, click **Approve**.

Additional Information

- The **Expense Report** page appears.
- The **Report Header** page appears. Click **Cancel** on the **Report Header** page.
- The expense entry details appear on the right side of the page.
- The report moves to the next step in the workflow.

Send an Expense Report Back to the Employee

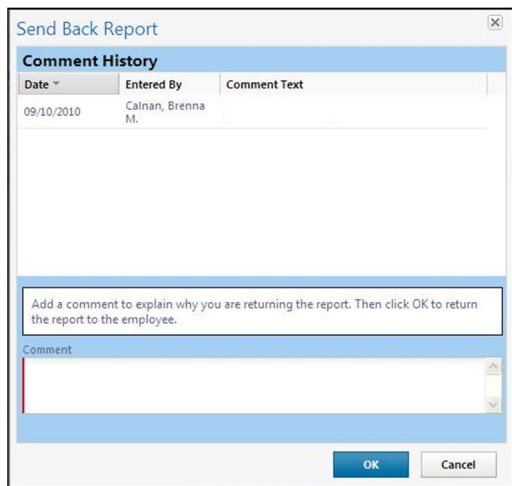
All reports awaiting your review and approval appear in the **Approval Queue** section of the **My Concur** page.

How to...

1. Click the report name (link) to open the report.
2. Click **Send Back to Employee**.
3. Enter a comment for the employee, and then click **OK**.

Additional Information

- The **Expense Report** page appears.
- The **Send Back Report** box appears.
- The report is returned to the employee.



Section 12: Review and Approve Expense Reports (Continued)

Send Single Expenses Back to an Employee

Expense allows you to send back an individual expense item to an employee for correction instead of sending back the entire expense report.

How to...

1. In the **Approval Queue** section of **My Concur**, click the name of the report that you want to view.
2. Review the expense report.
3. Click the expense you wish to send back for correction.
4. In the expense details sections, select the **Send Back Expense?** checkbox.
5. Click **Approve**.

Additional Information

The expense report opens.

The expense details appear.

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.

The screenshot shows the 'Trip to Dallas' expense report interface. At the top, there are buttons for 'Send Back to Employee', 'Approve', and 'Approve & Forward'. Below these are tabs for 'Details', 'Receipts', and 'Print / Email'. The main area is divided into two sections: 'Expenses' and 'Expense'.

Date	Expense Type	Amount	Requested
09/16/2010	Car Rental Hertz, Dallas, Texas	\$140.00	\$140.00
> 09/16/2010	Room Rate Marriott Hotels, Dallas, Texas	\$300.00	\$300.00
09/01/2010	Airfare American Airlines	\$350.00	\$350.00

At the bottom of the 'Expenses' section, it shows: TOTAL AMOUNT \$790.00 and TOTAL REQUESTED \$790.00.

The 'Expense' section shows details for the selected 'Car Rental' expense. Fields include: Expense Type (Car Rental), Transaction Date (09/16/2010), Business Purpose, Vendor (Hertz), City (Dallas, Texas), Payment Type (Cash), Amount (140.00 USD), Reviewed (No), Approved Amount (140.00), and Comment. A checkbox labeled 'Send Back Expense?' is checked and highlighted with a red box. There is also an unchecked checkbox for 'Personal Expense (do not reimburse)'. At the bottom right of the 'Expense' section are 'Save' and 'Allocate' buttons.

Section 12: Review and Approve Expense Reports (Continued)

Add an Additional Review Step for an Expense Report

Depending on your company's configuration, you can add additional approval steps for an expense report, as needed. For example, if an expense report has an amount that is greater than your authorized approval limit or if the expense report has an allocation to a cost center that is not within your approval authorization, you can manually select the appropriate approver for the report.

How to...

1. On the **My Concur** page in the **Approval Queue** section, click the report name (link) to open the report.
2. Click **Approve & Forward**.
3. In the **Approval Flow** window, click the **Search Approvers By** dropdown arrow.
4. Select the desired search option from the dropdown list.
5. In the **User-Added Approver** field, type the search criteria.
6. From the list of options displayed by the search, select the appropriate approver.
7. Click **Approve**.

Additional Information

The **Expense Report** page appears.

The **Approval Flow** window appears.

A list of search options appears.

The system displays all matches for the search criteria that you entered.

The expense report is forwarded to the selected approver.

The screenshot shows a window titled "Approval Flow for Report: Trip to Dallas". It has three main sections for adding approvers:

- Manager Approval:** A text input field containing "Falkmore, Artemis N." with a search icon and a close icon.
- User-Added Approver:** A search dropdown menu with "Search Approvers By" selected, a search icon, and a close icon.
- Approval for Processing:** A search icon and a close icon.

At the bottom of the window, there are four buttons: "Approve", "Send Back", "Save Workflow", and "Cancel".

Section 12: Review and Approve Expense Reports (Continued)

Adjust Authorized Amounts on an Expense Report

All reports awaiting your review and approval appear in the **Approval Queue** section of the **My Concur** page. Depending on your company's configuration, you might not have the ability to adjust authorized amounts on expense reports.

How to...

1. Click the report name (link) to open the report.
2. Make the appropriate adjustments, and then click **Save**.
3. Click **Approve**.


















Additional Information

The expense report page appears.

If you have the authority to adjust amounts, then the **Amount** field is editable.

The report moves to the next step in the workflow.

Section 13: Action Buttons and Icons

Button/Icon Description	
Add New Allocation	Add New Allocation: Add a new allocation row.
	Airfare: Click to view your airfare booking information.
Allocate By: ▾	Allocate By: Choose between allocating by percentage or amount.
	Allocations: Indicates that an expense entry has been allocated.
	Attendees: Indicates that an expense entry has associated attendees.
Approve	Approve: Approve the expense report for processing.
Approve & Forward	Approve & Forward: Add additional review steps for an expense report.
	Car Rental: Click to view booking information for your car rental.
	Credit Card Transaction: Indicates that an expense entry was from a credit card transaction.
	Comments: Indicates that an expense entry has comments associated with it.
	Create Expense Report From Trip: Creates an expense report from a completed trip.
Delete Report	Delete Report: Deletes the current expense report.
Details ▾	Details: Provides options to view details of the expense report such as the report header, allocations, and audit trail.
	E-Receipt: Indicates that an e-receipt was imported for this entry.
	Exceptions: Indicates that an expense entry has an exception associated with it.
Import ▾	Import: Provides access to import trip details or credit card charges to the current expense report.
Itemize	Itemize: Save the current expense entry and begin the itemization process.
	Lodging: Click to view your lodging booking information.
	Mobile Expense: Indicates that the expense was entered in Concur Mobile.
	Multiply: Reverses the exchange rate when working with foreign out of pocket transactions.
New Attendee	New Attendee: Add a never before used attendee to an expense report.
+ New Expense	New Expense: Create an out of pocket expense entry.
New Expense Report	New Expense Report: Create a new expense report.
Next >>	Next: After creating the expense report header go to the next step in the process.
	Personal: Indicates that an expense entry was marked as personal.
Print / Email ▾	Print: Print the fax cover page or detail report for the current expense report.
	Rail: Click to view your rail booking information.
Receipts ▾	Receipts: Access to attach receipt images or view previously attached receipts.
Reserve	Reserve: Reserves the selected trip details.
	Seat map: Click to view the flight seat map.
Send Back to Employee	Send Back to Employee: Allows the approver to send the expense report back for corrections.
Submit Report	Submit Report: Submit the expense report for approval.
	Tooltip: Click the tooltip icon to view the associated field-related help.
▽ >	Show / Hide Itemization: Click this icon to view or hide itemization specifics.
	Yellow Diamond: Indicates a company preferred vendor.

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