QuickStart Guide
Concur Travel and Expense
QuickStart Guide Concur®

Travel and Expense
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Revised – April 29, 2013

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Published by Concur Technologies, Inc.
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Redmond, Washington 98052
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Section 2: Explore the My Concur Page

Section 3: Update Your Travel Profile

Password

Change your Time Zone, Date Format, or Language

Step 1: Change Your Password

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Section 9: Review and Edit an Expense Report
Revised: April 29, 2013

Welcome to Concur

Concur 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

**How to...**

1. Log on to Concur 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.
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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.

How to...

Use the Trip Search 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 displays information and links provided by your company.
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.

Use the Trip Search section. 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.

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| 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.  
  
  *If your company uses Travel Requests and/or Cash Advances, this section is titled “Active Work.” Otherwise, the section is titled “Expense Reports.”*                                                                                                                                                                                                 |
| 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.  
  
  *This section appears on My Concur only if you are an Expense approver and if you have received at least one report for approval.*                                                                                                                                                                                                 |
| Explore the **Trip List** section.            | This section lists your outstanding trips.  
  
  *This section appears on My Concur only if your company uses Travel.*                                                                                                                                                                                                                                                                              |
| Explore the **Trips Awaiting Approval** section. | This section lists the trips awaiting your approval  
  
  *This section appears on My Concur only if your company uses Travel and if you are a travel approver.*                                                                                                                                                                                                                                               |
| 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.  
  
  *This section appears on My Concur only if your company uses Travel.*                                                                                                                                                                                                                                                                              |
Section 2: Explore the My Concur Page (Continued)

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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.
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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.

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<th>How to...</th>
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<td>1. On the My Concur page, select Profile from the menu at the top of the page.</td>
<td>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.</td>
</tr>
<tr>
<td>2. On the Profile submenu, click Change Password.</td>
<td></td>
</tr>
<tr>
<td>3. In the Old Password field, enter your current (temporary) password.</td>
<td></td>
</tr>
<tr>
<td>4. In the New Password field, enter your new password.</td>
<td></td>
</tr>
<tr>
<td>5. Verify your new password by re-entering it in the Re-enter Password field.</td>
<td></td>
</tr>
<tr>
<td>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.</td>
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