

QuickStart Guide
Concur® Travel and Expense

Concur™

QuickStart Guide Concur

®

Travel and Expense

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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 1: Log on to Concur

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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.

The screenshot shows the My Concur interface with the following sections and data:

- Travel Alerts:** Includes a link to 'Manage your Concur account's Rights' and 'Debit Card'.
- Travel Info:** Contains a message about booking travel with Concur and a 'Travel' icon.
- Trip Search:** Features a search bar with the example 'Flight from JFK to Paris on Tuesday' and filters for 'Flight', 'Car', 'Hotel', 'Taxi', and 'Flight Status'. It also has options for 'Round Trip', 'One Way', and 'Multi-Segment'.
- Company Info:** Displays a welcome message: 'Welcome to Expense. Please click the Expense tab to start an expense report, view status of existing reports, and more.'
- Expense Reports (1):** A table with the following data:

Report Name	Status	Payment Status	Report Date	Requested Amount
Home office expense	Not Submitted	Not Paid	11/30/2012	1440.00
monthly office expense				
- Available Card Charges:** A table with the following data:

Card Name	Card Number	Card Status	Total Unexpensed
Test Payment Type	[***11111]	Active	\$13,537.48
Test Payment Type	[***11111]	Active	1440.00
American Express	[***0020]	Active	\$6.25
American Express	[***0018]	Active	\$425.00

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.

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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.

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.

Look at the Company Info section. This section displays information and links provided by your company.

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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 Travel 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>

Section 2: Explore the My Concur Page (Continued)

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.

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 My Concur web application interface. At the top, there is a navigation bar with tabs for "My Concur", "Travel", "Expense", and "Profile". The main content area is divided into several panes:

- Expense Reports (1)**: A pane containing a "New Expense Report" button, a "View Reports" button, and a table with the following data:

Report Name	Status	Payment Status	Report Date	Requested Amount
Home office Expense monthly office expense	Not Submitted	Not Paid	11/30/2012	PHP 0.00
- Trips Awaiting Approval**: A pane with the message "You have no trips to approve."
- Company Info**: A pane with the message "Welcome to Expense. Please click the Expense tab to start an expense report, view status of existing reports, and more."
- Trip Search**: A pane with a search input field containing "e.g. flight from IFE to Paris on Tuesday" and a "Search" button. Below the search field are tabs for "Flight", "Car", "Hotel", "Taxi", and "Flight Status". There are also radio buttons for "Round Trip", "One Way", and "Multi-Segment". At the bottom, there is a "Departure City" dropdown menu with "SEA - Seattle Tacoma Intl Aport - Seattle, WA" selected.
- Trip List**: A pane with a table header for "Trip Name/Description", "Status", "Start Date", "End Date", and "Expense Report?".

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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.

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.

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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.

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.

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. 3. In the Old Password field, enter your current

(temporary) password.

To change your password, you need to know your old or 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.

Concur

My Concur Travel Expense **Profile**

Personal Information **Change Password** System Settings Mobile Registration Travel Vacation Reassignment

My Profile

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

Change Password

A password must be at least 6 characters. It can contain numbers (0-9), 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 for all Concur products.

Old Password New Password Re-enter New Password

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

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