

# CONCUR NEW USER INTERFACE

## Training Manual

### CREATE A NEW EXPENSE REPORT

1. Under the Expense tab, click CREATE NEW REPORT.
2. Enter the **Report Name, Trip Type (In-State, International, or Out of State Travel)**
3. Enter **Trip Start Date** (Start date of trip)
4. Enter **Trip End Date** (If an imported fee has a date after your trip end date, you will need to change that date to match. EX: Trip ended on 9/30, but fee imported says 10/2 -> trip end date should be set to 10/2). Enter **purpose of trip**. Add comment if necessary.

### CLAIM TRAVEL ALLOWANCE (Per Diem Meals)

1. This is your per diem meals – called “travel allowance” and it is pre-set to “Yes, I want to claim Travel Allowance”. Click **next**.
2. In this new window, locate the **Selection** menu. It is pre-set to **in state single day**. To change, click the drop-down arrow and select “**After 2/1/22 Overnight Travel (75% Rule)**” for **overnight in state or out of state trips**.

Travel Allowances For Report: Test

The screenshot shows a web interface with three tabs: '1 Create New Itinerary', '2 Available Itineraries', and '3 Expenses & Adjustments'. The 'Create New Itinerary' tab is active. Below the tabs is a form titled 'Itinerary Info'. It has two main sections: 'Itinerary Name' with a text input field containing 'Test', and 'Selection' with a dropdown menu. The dropdown menu is open, showing three options: 'After 2/1/22 In State (Single Da', 'After 2/1/22 In State (Single Day Trav', and 'After 2/1/22 Overnight Travel (75% R'. A green arrow points to the third option. Below the form are two buttons: 'Add Stop' and 'Delete Rows'.

3. Under **New Itinerary Stop**, enter your **Departure City** (the city you left from).
4. Enter the **Date** you left.
5. Enter the **Time** you left.
6. Enter your **Arrival City** (the city you arrived at).
7. Enter the **Date** you arrived (should be the same day).
8. Enter the **Time** you arrived.
9. Click **Save**.

**New Itinerary Stop**

Departure City  
Atlanta, Georgia

Date: 10/10/2022      Time: 8:00 AM

Arrival City  
St Simons Island, Georgia

Date: 10/10/2022      Time: 12:00 PM

10. You will see that your Departure City and your Arrival City have flipped. For example, if you put (Atlanta, GA as your departure city and St Simons Island, GA as your arrival city, they will trade places to show your departure city as St Simons Island, GA and your arrival city will be Atlanta, GA. This is where you enter your return trip).
11. Enter the **Date** you left at the end of your trip.
12. Enter the **Time** you left.
13. Enter the **Date** you arrived back home.
14. Enter the **Time** you arrived.
15. Click **Save**.

**New Itinerary Stop**

Departure City  
St Simons Island, Georgia

Date: 10/12/2022      Time: 4:00 PM

Arrival City  
Atlanta, Georgia

Date: 10/12/2022      Time: 8:00 PM

16. Your page should look like this:

Itinerary Name: Test      Selection: After 2/1/22 Overnight Travel (75% F)

**Add Stop**      Delete Rows

<input type="checkbox"/>	Departure City ▲	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Atlanta, Georgia 10/10/2022 08:00 AM	St Simons Island, Georgia 10/10/2022 12:00 PM	GLYNN COUNTY, US-GA, US
<input type="checkbox"/>	St Simons Island, Georgia 10/12/2022 04:00 PM	Atlanta, Georgia 10/12/2022 08:00 PM	FULTON COUNTY, US-GA, US

17. Click **Next >>**
18. Click **Next >>** again.
19. You will reach **Step 3 Expenses & Adjustments**. This is where you make your meal selections.

a. **FOR ANY MEALS THAT WERE PROVIDED BY THE LOCATION/ HOTEL/ CONFERENCE, PLEASE CHECK IN THE BOX FOR WHICH ONE WAS PROVIDED.**

b. **PLEASE NOTE:** Meal reimbursements will be automatically calculated. First day and last day reimbursable amount is \$37.50, and \$50 for all other days for in-state travel. (Out of state per diem amounts should reflect the GSA rates minus incidentals.) Your expenses & adjustments page should look like the screen shot below.

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from  to

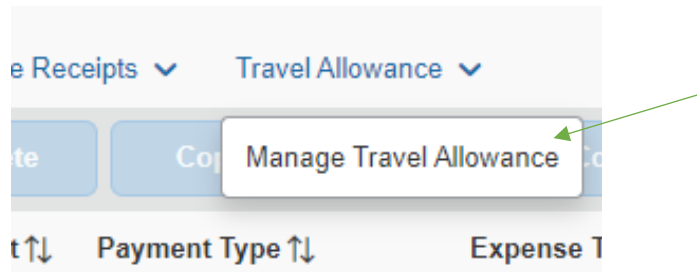
Exclude   All <input type="checkbox"/>	Date/Location *	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	10/10/2022 St Simons Island, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$37.50
<input type="checkbox"/>	10/11/2022 St Simons Island, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$50.00
<input type="checkbox"/>	10/12/2022 St Simons Island, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$37.50

20. Click **Create Expenses**.

21. You should now see your “Fixed meals” in your report.

### EDIT EXISTING TRAVEL ALLOWANCE

1. To edit an existing travel allowance, click on **Travel Allowance -> Manage Travel Allowance**.



2. Click on the itinerary created and click **Edit**. (must click itinerary first so the word Edit will highlight in blue).

Departure City	Date and Time *	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Test				
Atlanta, Georgia	10/10/2022 08:00 AM	St Simons Island, Georgia	10/10/2022 12:00 PM	GLYNN COUNTY, US-GA, US
St Simons Island, Georgia	10/12/2022 04:00 PM	Atlanta, Georgia	10/12/2022 08:00 PM	FULTON COUNTY, US-GA, US

3. Make changes to itinerary and click **Next>>**

4. Click **Update Expenses**.

### IMPORT TRAVEL REQUEST

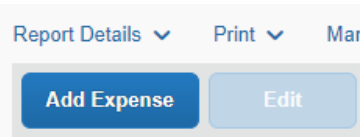
1. Click on **Report Details -> Manage Requests**

2. Click **Add**.

3. Select the request needed to be added and click **Add to Report**.

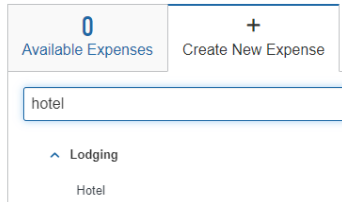
## ADDING HOTEL EXPENSES – Manual Entry

1. Click **Add Expense**.



2. Search for **Hotel** under **Lodging** or type in **"hotel"** in the search bar. Click **Hotel**.

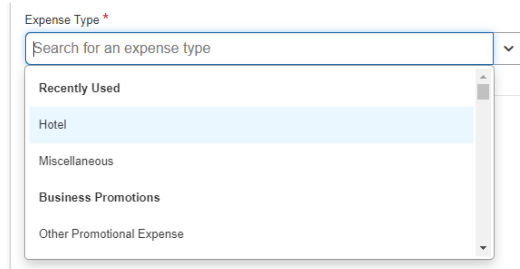
Add Expense



3. Enter the **Check-in Date**, **Check-Out Date**, **Vendor** (Hotel name), **City**, **Hotel Zip Code**, and **Amount**.
4. You must add a comment if the hotel is not booked in Concur. Your page should look like the screen shot below.

A screenshot of the 'Details' tab in the 'Add Expense' form. The form contains several fields: 'Expense Type' (Hotel), 'Check-in Date' (10/10/2022), 'Check-out Date' (10/12/2022), 'Nights' (2), 'Transaction Date' (10/12/2022), 'Purpose of Trip' (Test), 'Vendor' (Holiday Inn), 'City' (St Simons Island, Geor...), 'Hotel Zip Code' (12345), 'Payment Type' (Out of Pocket), 'Amount' (246.90), 'Currency' (US, Dollar), 'Trip Type' (In-State Travel), and a 'Comment' field with the text 'Must add comment if hotel is not booked in Concur.'.

5. Click on the **Itemizations** tab (see screen shot above).
6. Click on **Create Itemization**.
7. Under **Expense Type** select the drop-down arrow and choose **Hotel**.



8. NOTE: If your hotel room rate was **different** every night, select **"Not the Same"** on this page. If not, move to the next step. Refer to the screen shot below.



- Enter the **Room Rate** and **Room Tax (occupancy tax)**. For any other taxes, enter it in **Tax 2**, and **Tax 3**. Refer to the screen shot below.

Your hotel room rate was:

The Same Every Night  Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
<input type="text" value="100.00"/>	<input type="text" value="5.00"/>	<input type="text" value="10.25"/>	<input type="text" value="8.20"/>

(Amounts in USD) Add Tax Fields

Combine room rate and taxes into a single entry

- Click **Save Itemization**.

### ATTACH RECEIPT TO EXPENSE

- Click on the Icon in the **Receipt** column. Refer to screen shot below.

Alerts ↑↓	Comments ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓	^
			Out of Pocket	Hotel	Holiday Inn St Simons Island, Georgia	10/12/2022	\$246.90 Itemized	^

- Click on **Upload receipt image**, select the receipt image and upload. It should look like this.

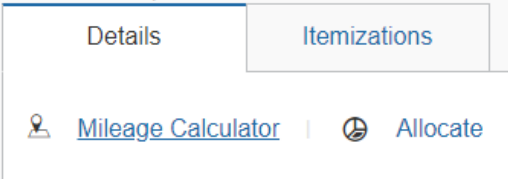
<input type="checkbox"/>	Alerts ↑↓	Comments ↑↓	Receipt ↑↓	P
<input type="checkbox"/>				C

### ADD PERSONAL CAR MILEAGE

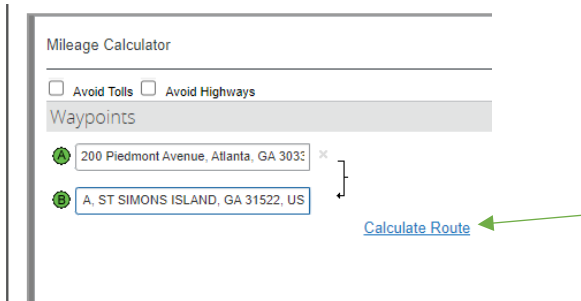
- Click **Add Expense**.

Report Details ▾ Print ▾ Mar

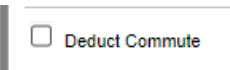
- Search for **Personal Car Mileage** under **Transportation** or type in **"mil"** in the search bar. Click on **Personal Car Mileage**.
- Enter Transaction Date (date of travel – the first day you drove).
- Before typing anything else in, click on Mileage Calculator.**



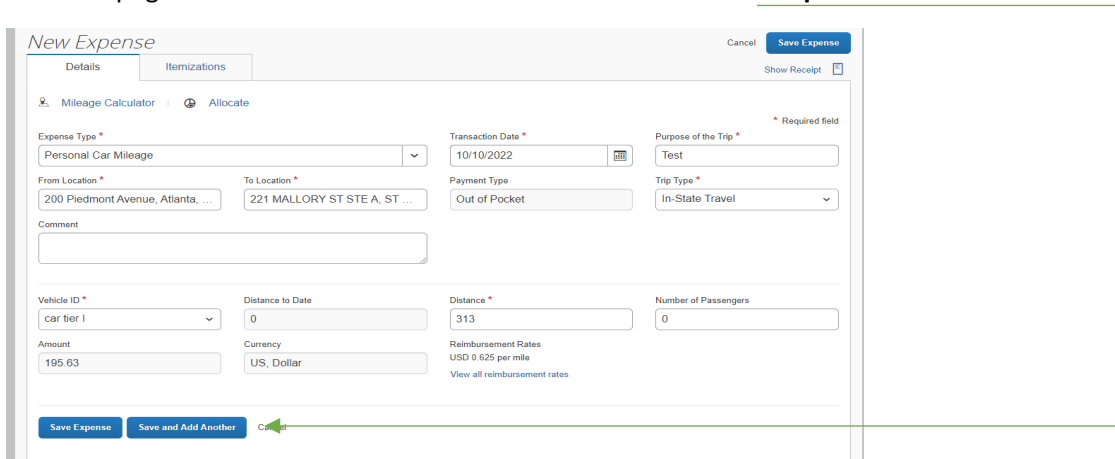
5. Type in **Waypoints**. For overnight travel, you should only enter **one way, not round trip**. Enter the **full address** of each location. Click **Calculate Route**. Refer to screen shot below.



6. If instructed to deduct commute check in the box on the bottom left of page. Otherwise, do not check.



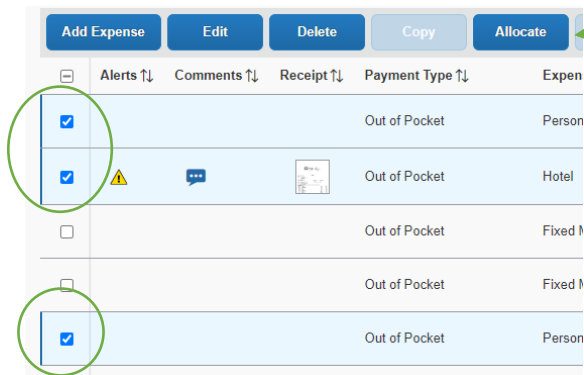
7. Click **Add Mileage to Expense** on bottom right of page.
8. Your page should look like the screen shot below. Click **Save Expense and Add Another**.



1. Search for **Personal Car Mileage** under **Expense type** or type in **“mil”** in the search bar. Click on **Personal Car Mileage**.
2. Enter Transaction Date (date of travel – the last day you drove).
3. Repeat steps 4-7. Click **Save Expense**.

## ALLOCATE EXPENSES

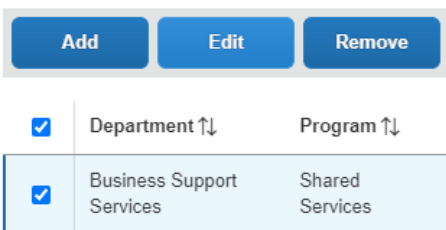
1. Click the check box next to each expense that needs to be allocated. Click **Allocate**.



2. Click **Add**. You can edit/ make changes to your allocation information if needed. Scroll to the bottom of the window and click **Save**. Click **Save** again to save allocations.

## UPDATE/CHANGE ALLOCATIONS

1. To edit allocations, click the check box next to each expense that needs to be edited. Click **Allocate**. Refer to screen shot above.
2. Click the check box next to the existing allocation and select **Edit**.



3. After you make your changes, click **Update** on the bottom right of the window.
4. Click **Save**.

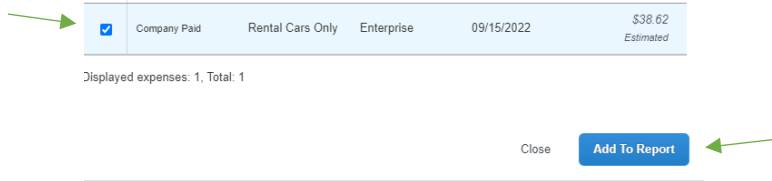
## IMPORT EXPENSES (from Available Expenses)

1. In your expense report, click **Add Expense**.
2. Click on **Available Expenses**.

Add Expense



3. Click the check box next to the expense you need to import and click **Add to Report**. See screen shot below.



4. Once added to report, click the expense to open it.
5. Enter any fields highlighted in **red**. Refer to screen shot below.
6. Click **Upload Receipt Image** on right side of page to upload receipt.

A screenshot of an expense detail form. The form has several fields, some of which are highlighted in red. On the right side, there is a red-bordered box containing an 'Upload Receipt Image' button. Green arrows point to the red highlights and the 'Upload Receipt Image' button.

City \*  
Amount \*  
Avg. Daily Rate \*  
Trip Type \*  
Comment

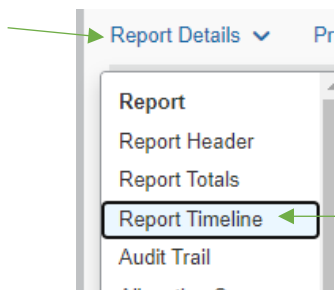
Enterprise  
Payment Type \*  
Currency \*  
Personal Expense (do not reimburse)  
Car Class \*  
Reservation Number

Upload Receipt Image

7. Click **Save Expense**.

## EDIT/ADD APPROVER

1. Click on **Report Details** -> **Report Timeline**.



2. On the left, you will see **Approval Flow**.



3. Click **Edit**. Enter approver's information (you can search by name, EID, or email address).

Authorized Approval

▼ Search by Last Name

- Last Name
- First Name
- Email Address
- Login ID
- Employee ID

4. Click **Save**.
5. To add an additional approver (if necessary) click **+ Add Step** under **Authorized Approval** section.

Authorized Approval

▼ Johnson,

[+ Add Step](#) ←

6. Enter approver's information (you can search by name, EID, or email address).
7. Click **Save**.