# Concur Getting Started QuickStart Guide

## Concur Technologies

## Version 1.2

May 12, 2016

# Document Revision History

| Date | Description | Version | Author |
|---|---|---|---|
| 05/12/2016 | Concur Getting Started QuickStart Guide – converted to new template | 1.2 | Concur |
| | | | |

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Published by Concur Technologies, Inc.
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Bellevue, WA 98004

# Table of Contents

# Welcome to Concur

Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools you need to book travel as well as create and submit expense reports.

## Section 1: Logging on to Concur

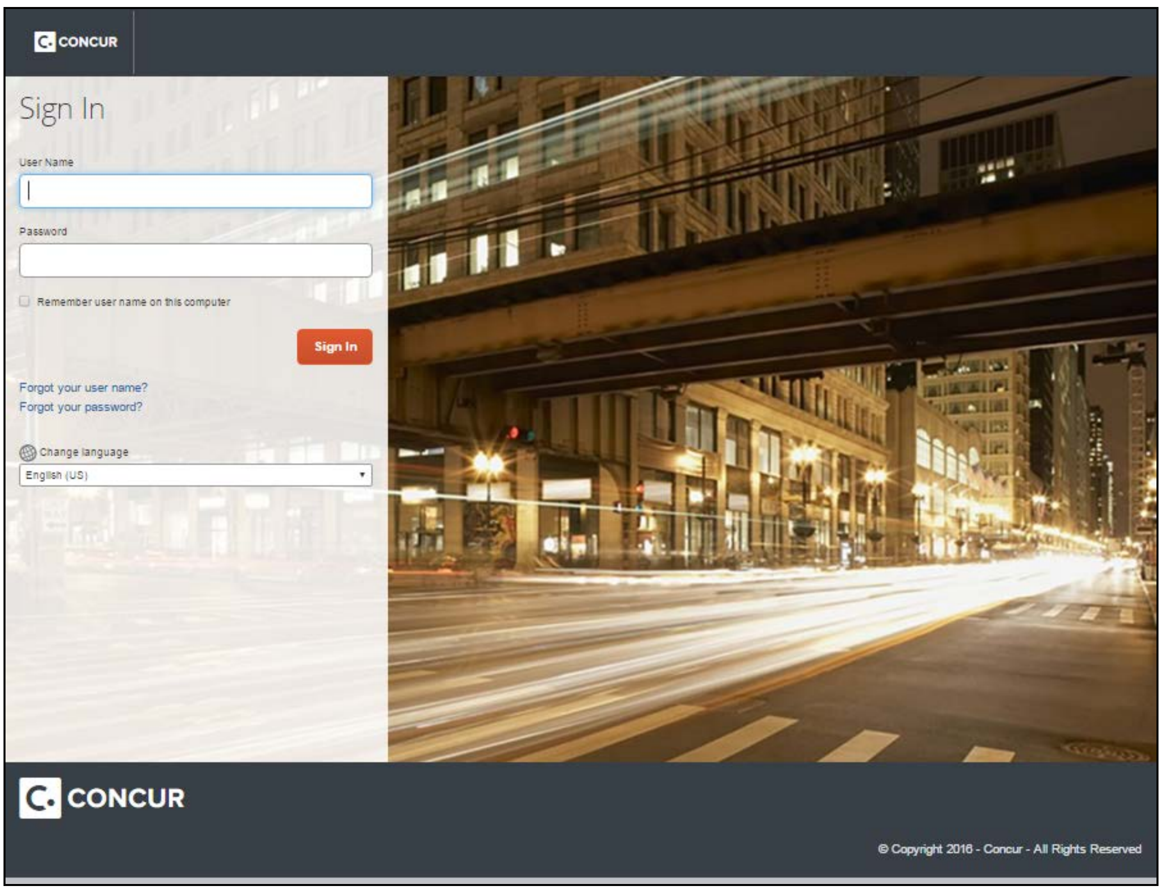
### How to...

1. Navigate to https://www.concursolutions.com.
2. Log onto Concur following your company's logon instructions.
3. After entering your **User Name** and **Password**, select the appropriate language option for your current session, and then click **Sign In**.

### Additional Information

If you are not sure how to start Concur, check with your company's system administrator. When starting Concur, you will first see the **Login** screen.

When logging onto Concur, remember that your password is case sensitive.



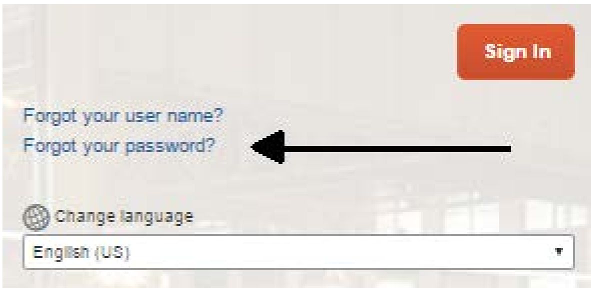
## Section 2: Retrieving and Changing your Password

If you have forgotten your password, you can request to receive it in an email.

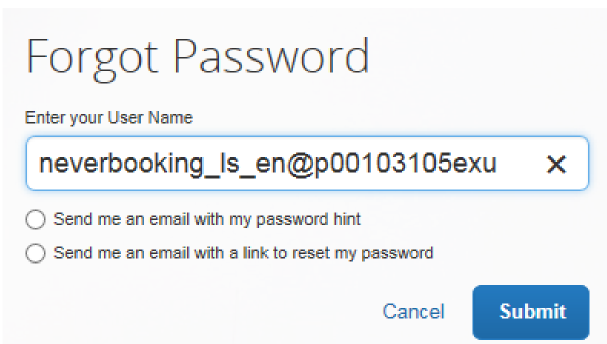
### Retrieving your password

| How to... | Additional Information |
| --- | --- |

1. On the **Login** page, click the **Forgot your password?** link.




2. Select if you want an email with a password hint, or if you want an email with a link to reset your password, and then click **Submit**.

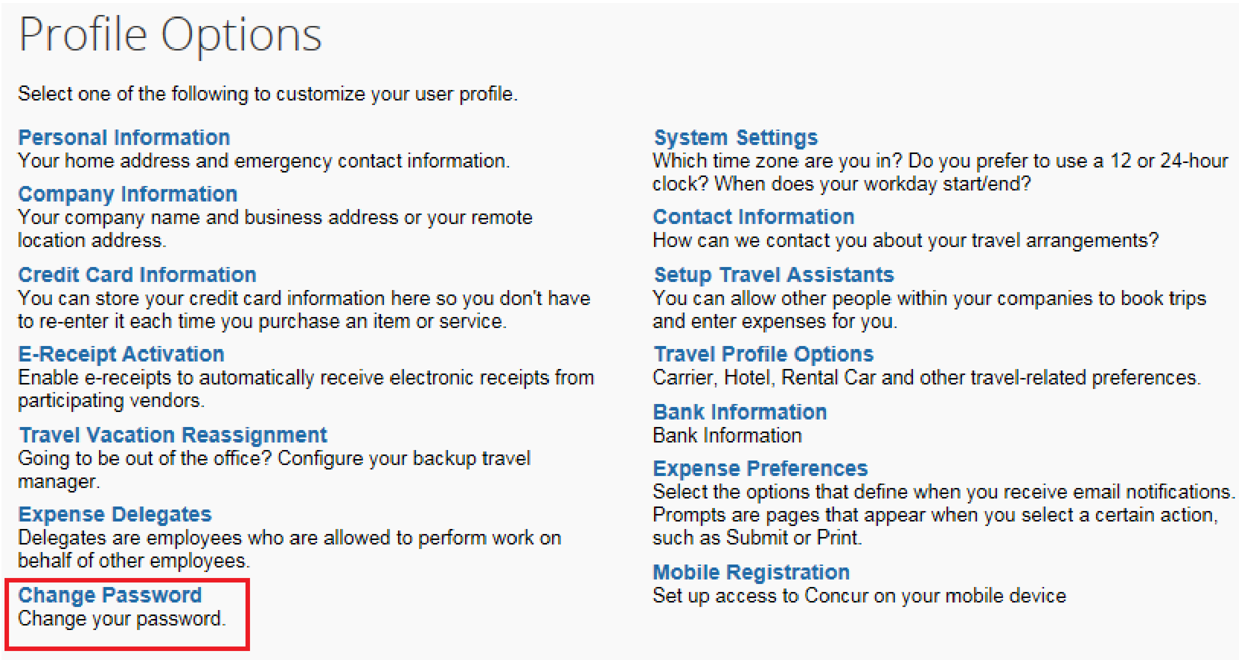



### Changing your password

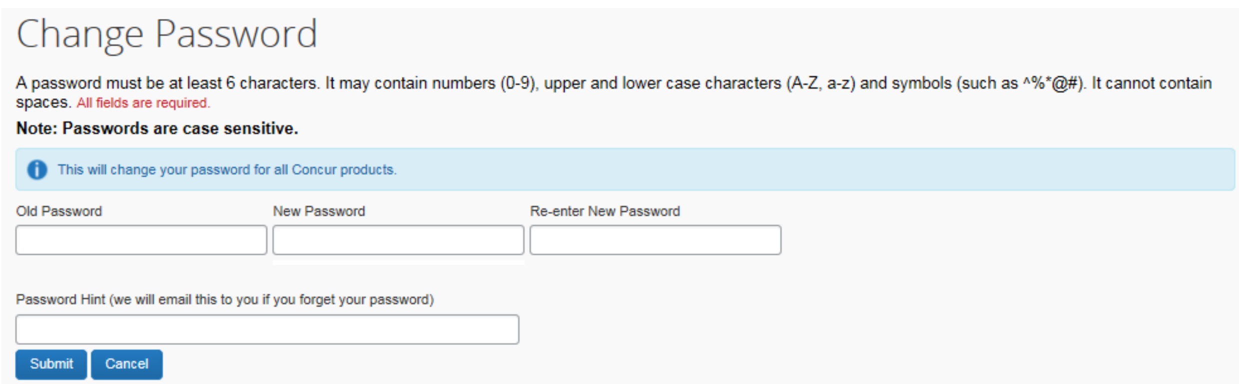
| How to... | Additional Information |
| --- | --- |

1. After you log in, in the upper right corner of the page, click **Profile**, and then click **Profile Settings**.


2. On the **Profile Options** page, click **Change Password**.




3. Enter and confirm your new password. Note that your password must be at least seven characters with at least one number and one letter.

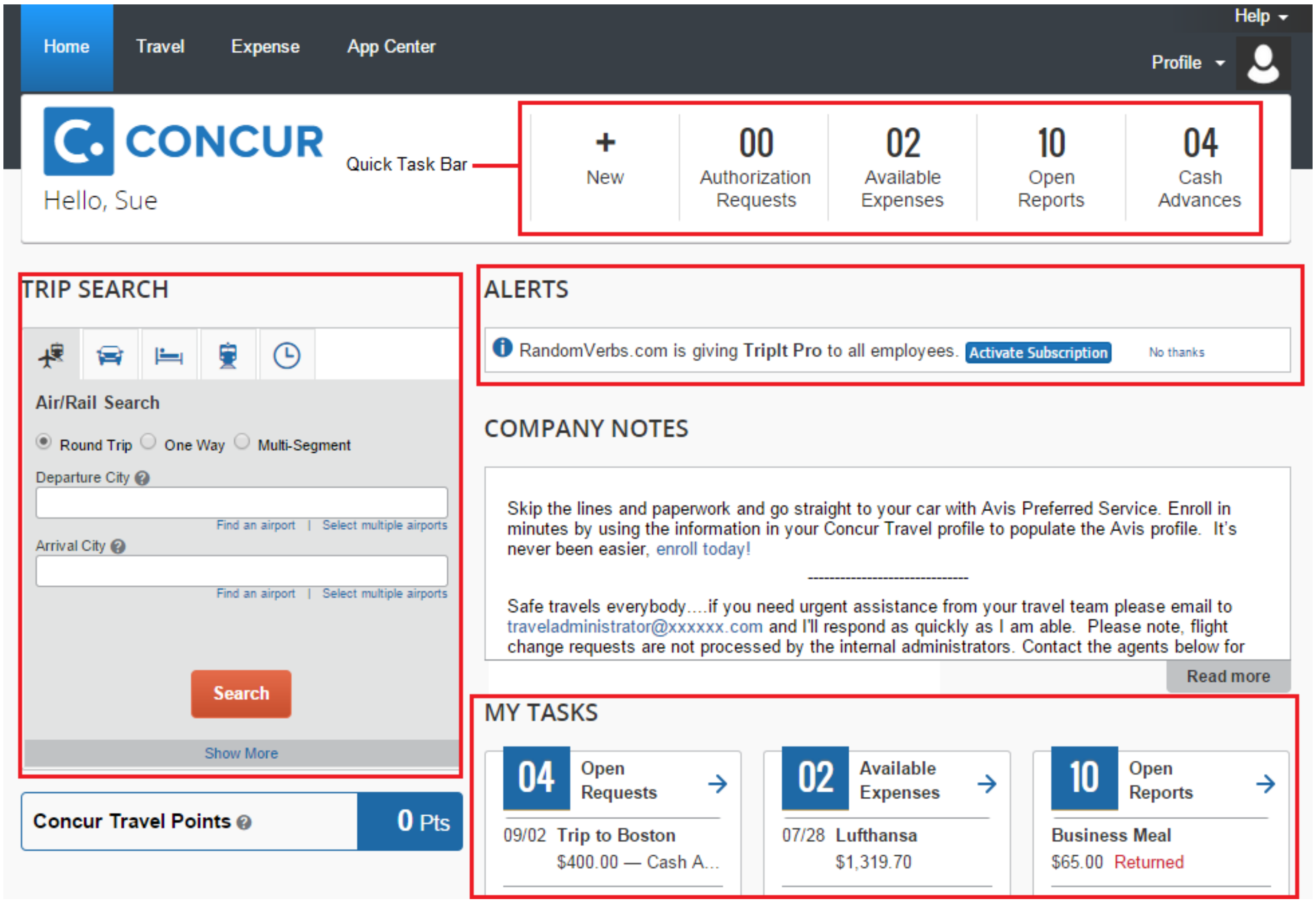



4. To act as a reminder, enter a hint for the password, and then click **Submit**.

## Section 3: Navigating Concur

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

- **Quick Task Bar –** Provides direct access to expenses, reports, request, and other Concur features.
- **Alerts –** Displays informational alerts about Travel features.
- **My Tasks –** Displays a dashboard for your open requests, expenses, approvals, etc.
- **Trip Search –** Provides the tools you need to book a trip (If Concur Travel is enabled).



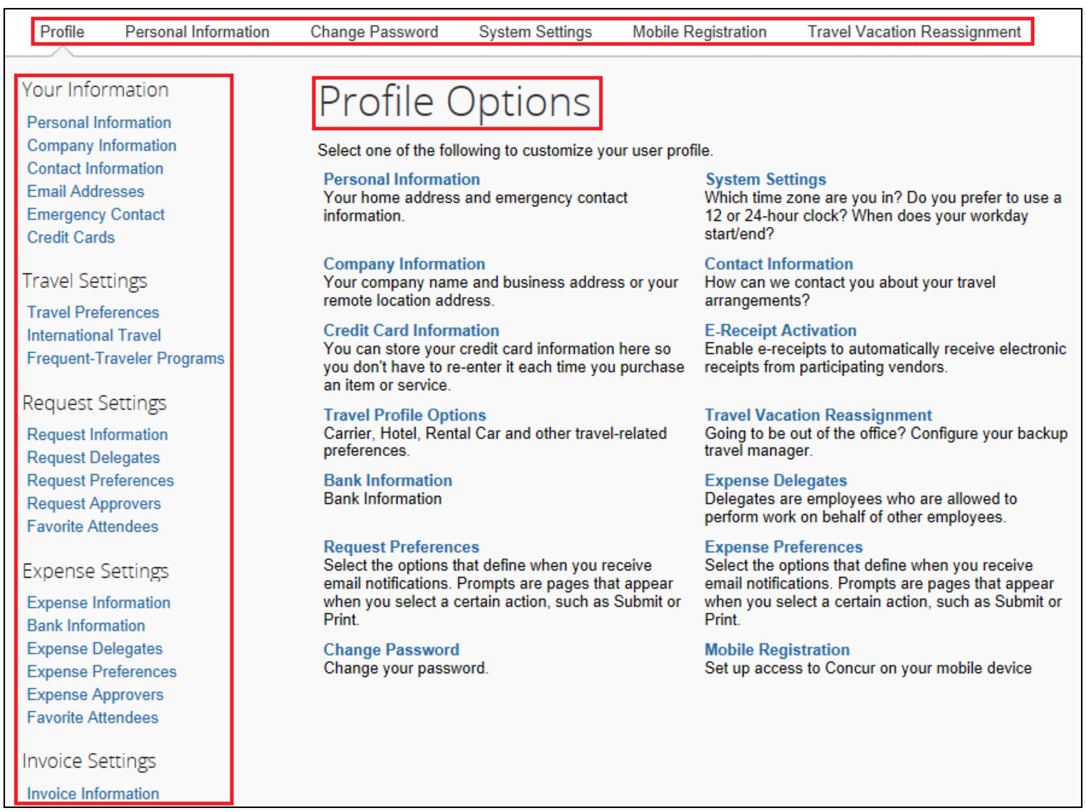
## Section 4: Updating your Profile

You use the **Profile Options** page to customize your user profile.

- **Your Information** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Travel Settings** - Enter expense preferences, add bank information, and company card information. You can also enter expense delegates and approvers.
- **Request Settings** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Expense Settings** - Enter expense preferences, add bank information and company card information. You can also enter expense delegates and approvers
- **Invoice Settings** – Enter invoice preferences, add invoice delegates and approvers.

### Step 1: Accessing your Profile page

| How to... | Additional Information |
|---|---|
| • On the **Profile Options** page, review your information, and select the appropriate links to update your profile information. | |



## Step 2: Completing your information

### How to...

- Click the appropriate links on the **My Profile – Personal Information** page to complete your profile information, as needed.

### Additional Information

To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur for the first time and update it whenever your information changes.

Update your Travel and Expense preferences and any other appropriate information.

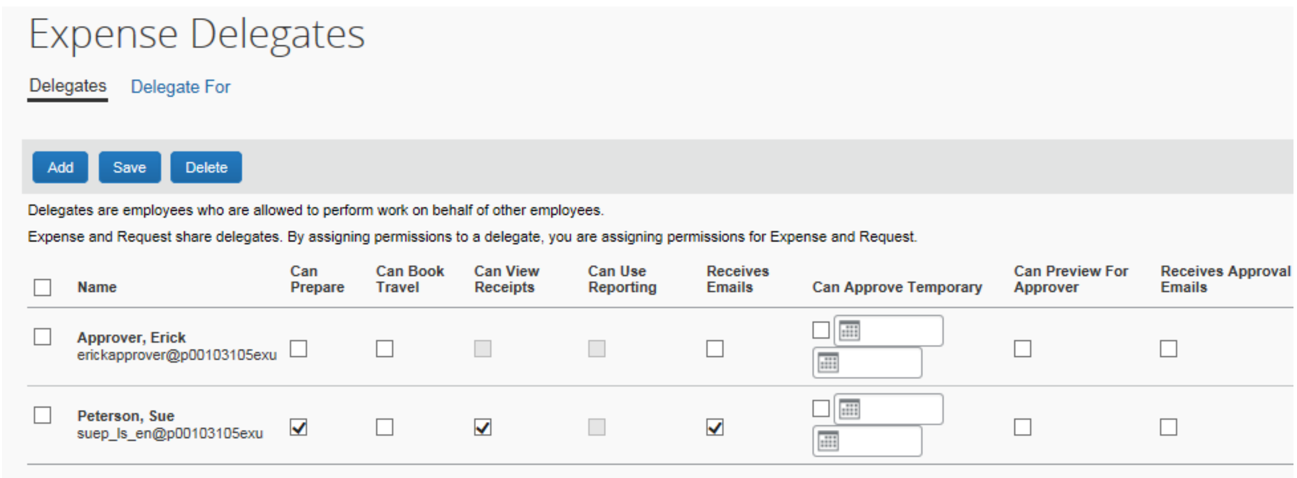
## Step 3: Adding a delegate

### How to...

1. In the **Expense Settings** section, click **Expense Delegates**.

### Additional Information

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




2. Click **Add**.
3. In the **Search by employee name, email address or logon ID** field, type the last name of the delegate you wish to add.

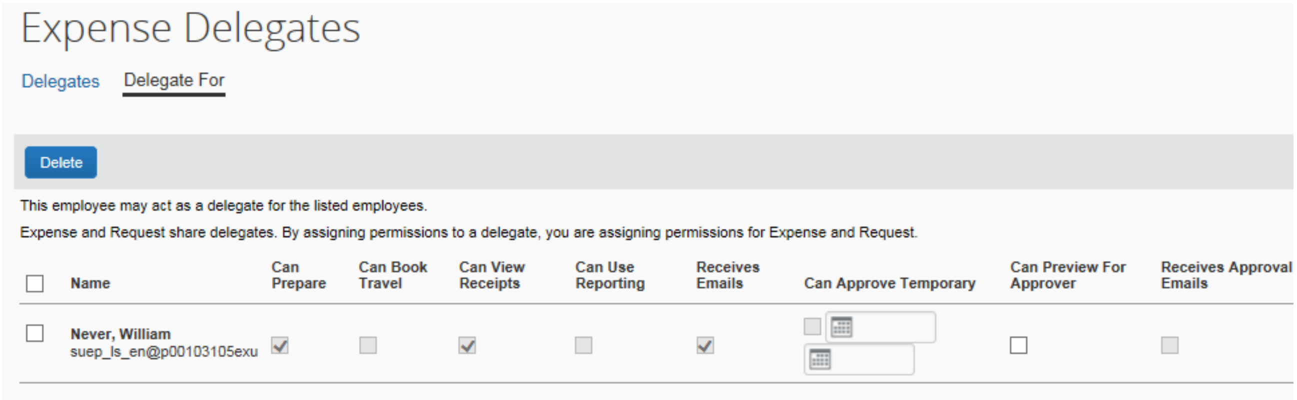
   As you begin to type the name, Expense provides a list of users to select from.

4. Click the name of the delegate from the list.
5. Select the appropriate task check boxes.

   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.

6. To add additional delegates, repeat steps 2-5.
7. Click **Save**.

   You can see if others have added you as their delegate by clicking the **Delegate For**.




## Step 4: Reviewing Expense approvers

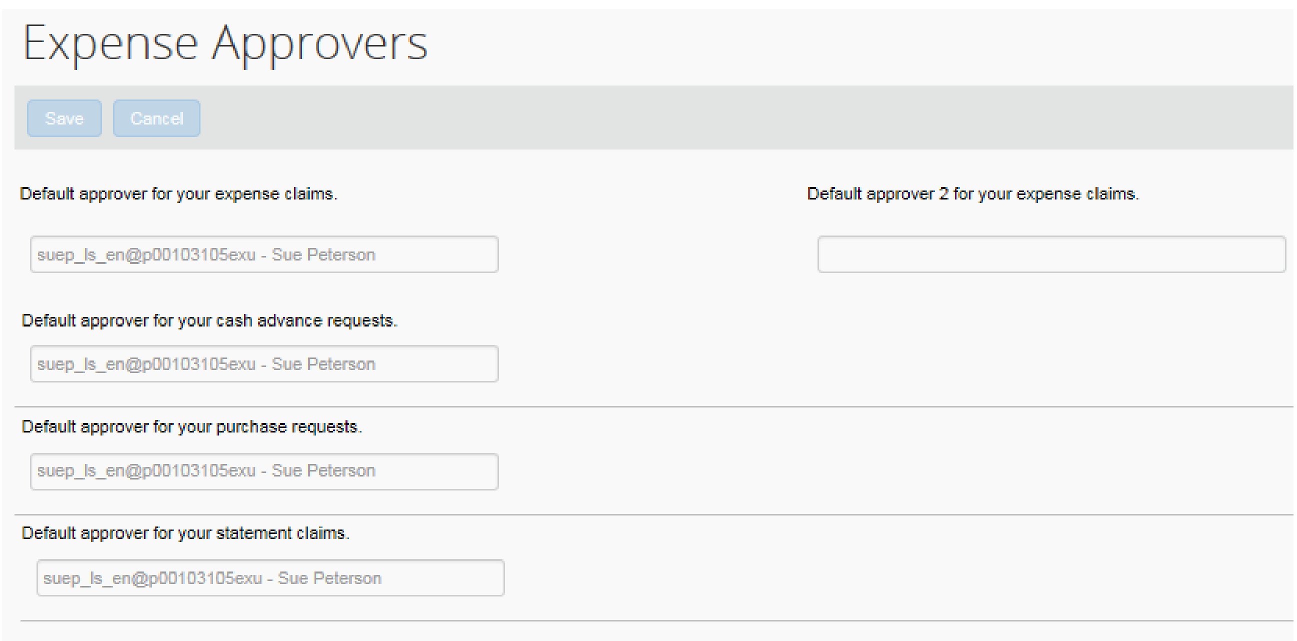
### How to...

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 appropriate fields, select the approver, 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.

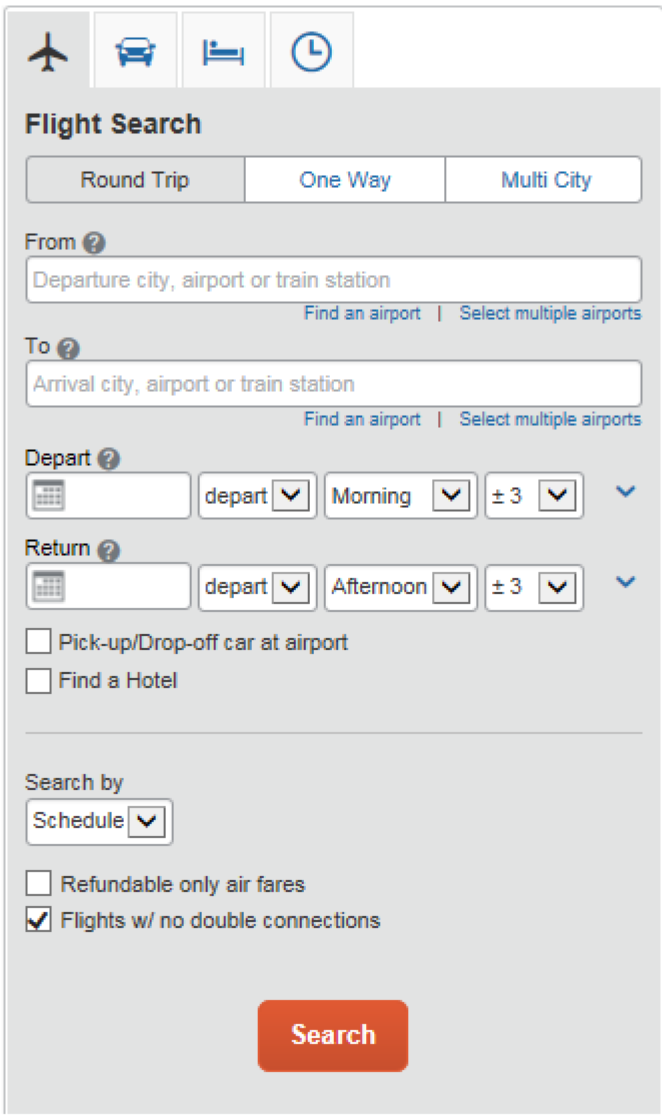


# Section 5: Using Concur Travel

You use Concur Travel to book a flight, rail, car, and/or hotel reservation.

## Step 1: Making a flight reservation

| How to… | Additional Information |
|---|---|
| 1. On the **Concur** home page, on the **Flight** tab on the left side of the page, select one of the following options.<br>• Round Trip<br>• One Way<br>• Multi City | If you have a car, hotel, limo, or rail to book without airfare, use the corresponding tabs. |




| | |
|---|---|
| 2. In the **From** and **To** fields, enter the cities for your travel, and then click **Search**. | When you type in a city, airport name, or code, Travel will automatically search for a match. |
| 3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar. | |

4. Select **depart** or **arrive**, the time of day you want to fly, and time range from the dropdown arrows.

Travel searches before and after the time you select.

5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.

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

6. If you need a hotel, select the **Find a Hotel** check box.

You can choose to search for the hotel by:

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

7. Select **Schedule** or **Price** from the **Search by** dropdown arrow.
8. To search only fully refundable fares, select the **Refundable only air fares** check box.
9. If you do not want a flight with a double connection, select the **Flights w/ no double connections** check box.
10. Click **Search**.

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 left. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

11. Review the search results and select the most appropriate option for your flight.

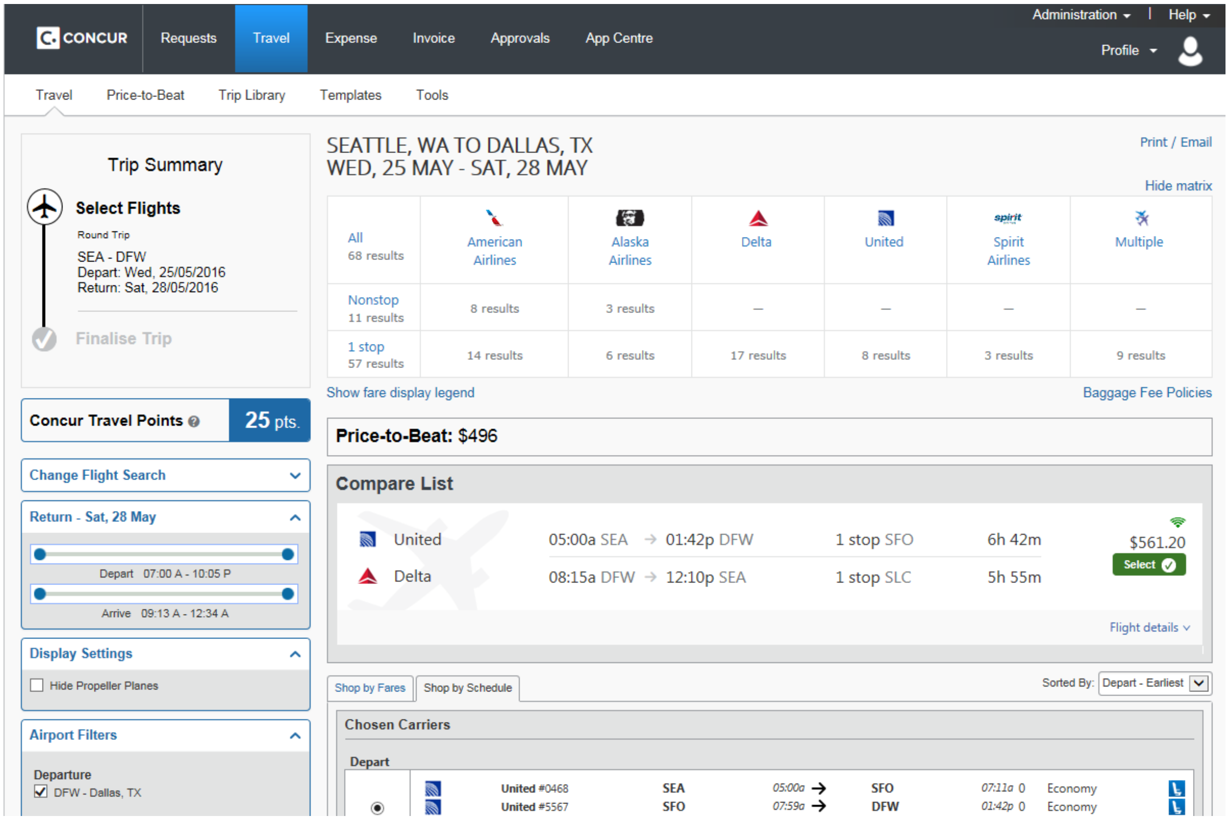
To select a seat, click the **View Seatmap** icon next to the flight. A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential.

13. To select your flight:
    - On the **Shop by Schedule tab**, click **Price these Options**, and then click **Select** for the appropriate flight.

      -OR-
    - On the **Shop by Fares** tab, click **Select** next to the appropriate flights.

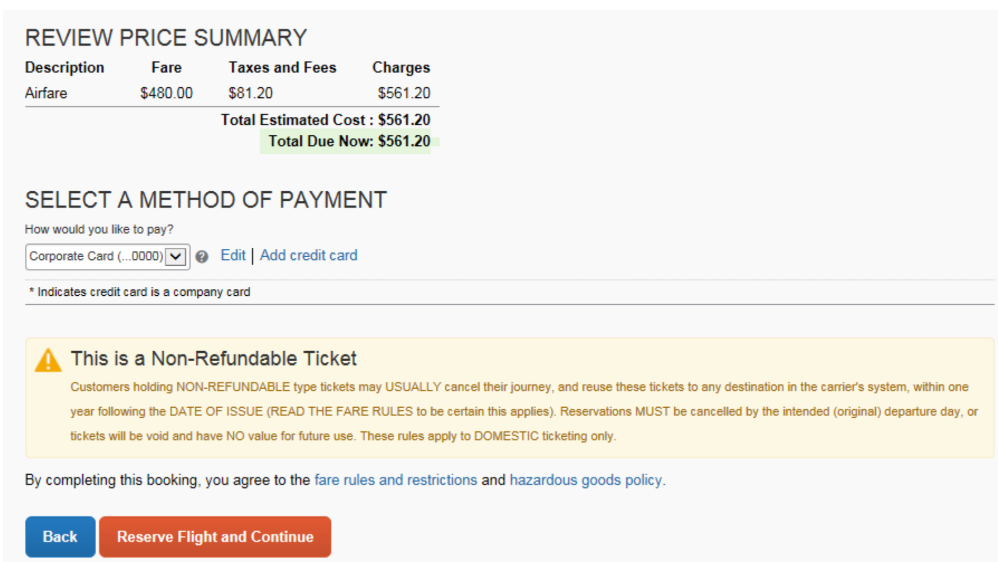
The **Select** buttons are color coded as:

- A *green* **Select** button indicates the fare is within policy.
- A *yellow* **Select** button 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* **Select** 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.




14. On the **Review and Reserve Flight** page, review your information, select a method of payment, and then click **Reserve Flight and Continue**.

Add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.




15. Review your flight details, and then click **Next**.

## Step 2: Selecting a car

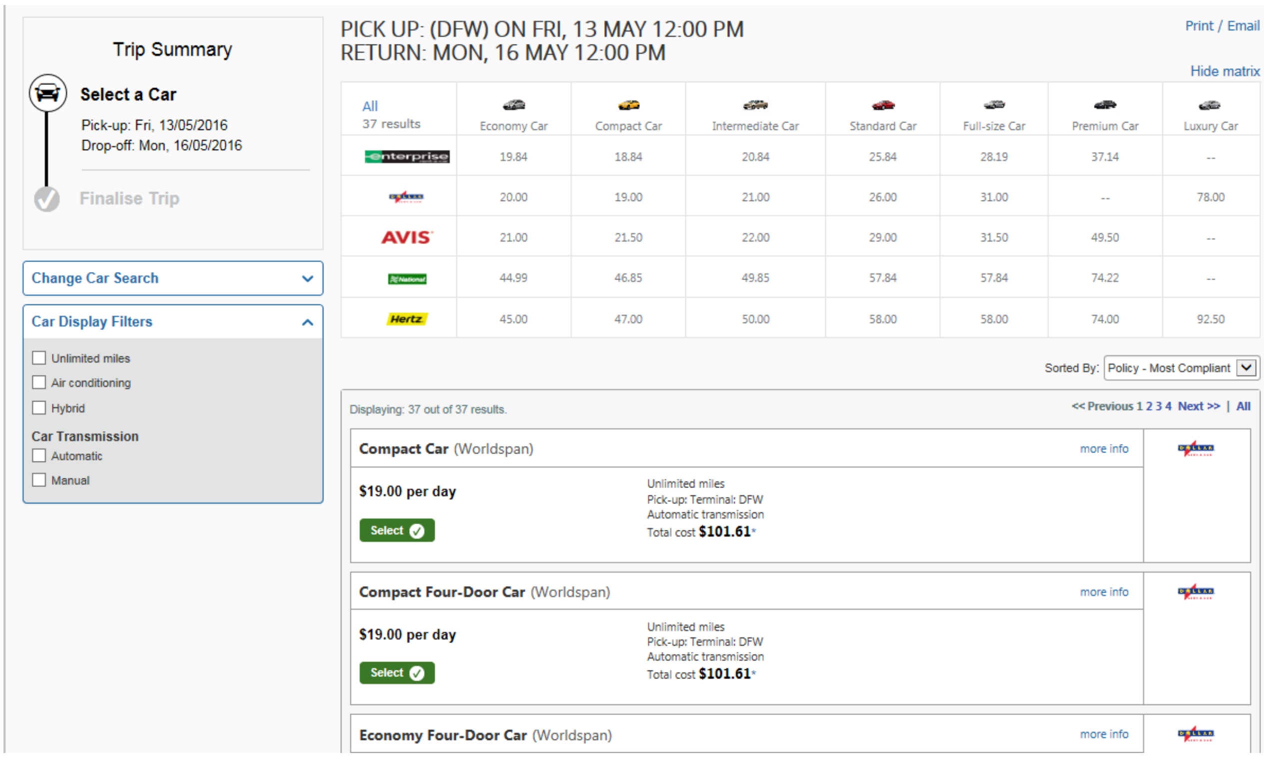
### How to...

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. Click **Select** next to the appropriate rental car.

### 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.



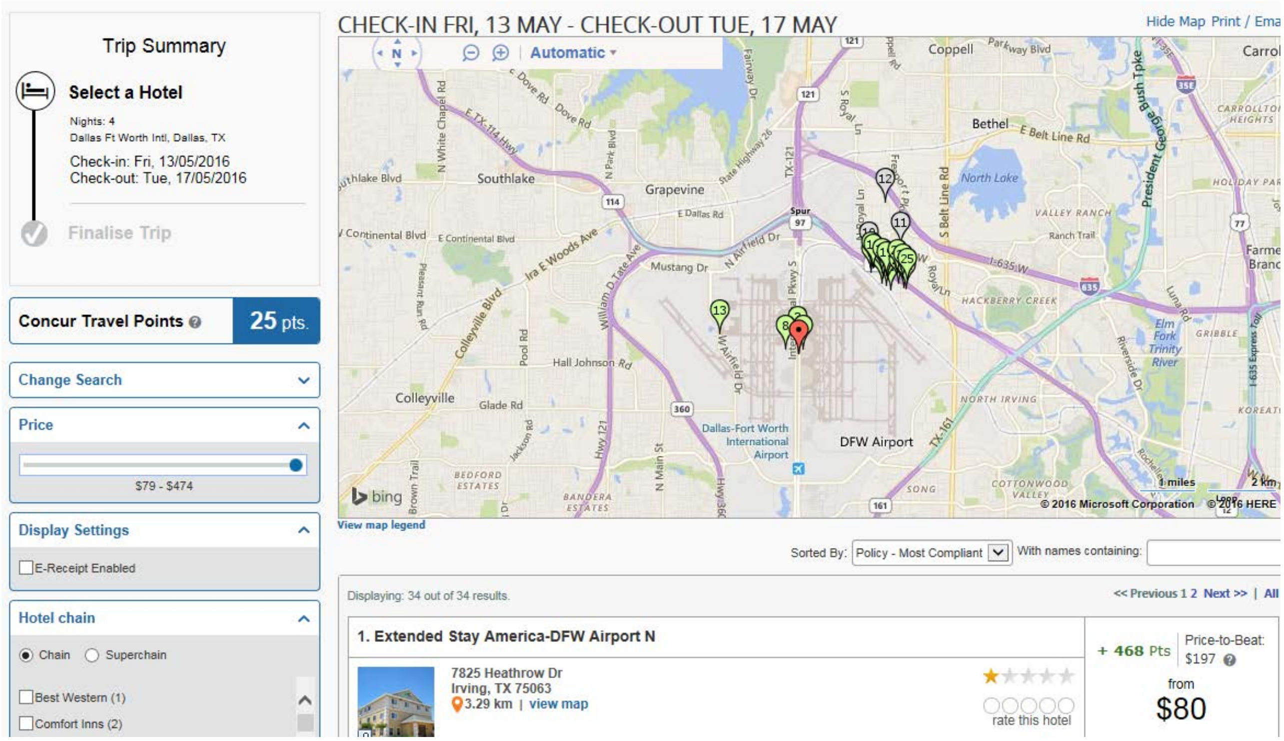

3. Review your car rental details, and then click **Reserve Car and Continue**.
4. Review your travel details, and then click **Next**.

## Step 3: Selecting 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.

### Additional Information




2. Use the filter options to narrow your search by **Amenity** or **Chain**.

3. Click **choose room** to view room rates.

4. When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Select**.

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

- A *green* **Select** button indicates the hotel rate is within policy.
- A *yellow* **Select** 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* **Select** 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.

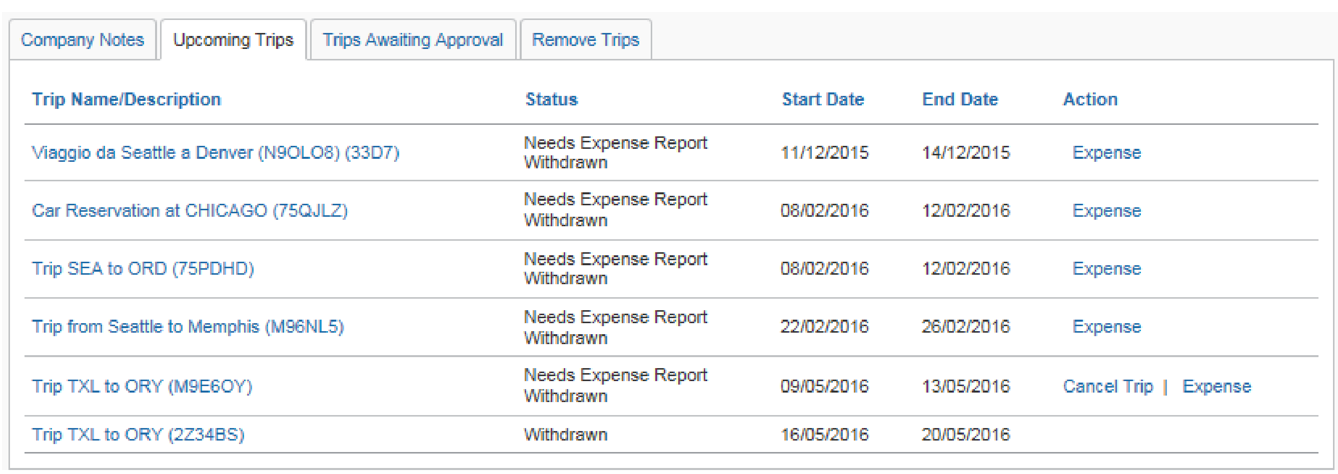
5. Review the information on the **Review and Reserve Hotel** page, click to agree**,** and then click **Reserve Hotel and Continue.**

## Step 4: Completing the reservation

| How to… | Additional Information |
|---|---|
| 1. Review the details of the reservation, and then click **Next**. | From here, you can add or make changes to the car or 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. |
| 2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields. | 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. |
| 3. Click **Next.** | You will see the name and itinerary, along with the quoted airfare amount. |
| 4. Click **Confirm Booking** to finalize your trip. | |

## Step 5: Cancelling or changing an airline, car rental, or hotel reservation

| How to… | Additional Information |
|---|---|
| 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. | Flight changes are available for e-tickets that include a single carrier.<br>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.<br>Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel. |


Company Notes | Upcoming Trips | Trips Awaiting Approval | Remove Trips

| Trip Name/Description | Status | Start Date | End Date | Action |
|---|---|---|---|---|
| Viaggio da Seattle a Denver (N9OLO8) (33D7) | Needs Expense Report<br>Withdrawn | 11/12/2015 | 14/12/2015 | Expense |
| Car Reservation at CHICAGO (75QJLZ) | Needs Expense Report<br>Withdrawn | 08/02/2016 | 12/02/2016 | Expense |
| Trip SEA to ORD (75PDHD) | Needs Expense Report<br>Withdrawn | 08/02/2016 | 12/02/2016 | Expense |
| Trip from Seattle to Memphis (M96NL5) | Needs Expense Report<br>Withdrawn | 22/02/2016 | 26/02/2016 | Expense |
| Trip TXL to ORY (M9E6OY) | Needs Expense Report<br>Withdrawn | 09/05/2016 | 13/05/2016 | Cancel Trip \| Expense |
| Trip TXL to ORY (2Z34BS) | Withdrawn | 16/05/2016 | 20/05/2016 | |

3. To change a trip, in the **Action** column, click

**Change Trip**.

4. On the **Itinerary** page, select the portion of the trip you want to change.

5. To cancel your entire trip, in the **Action** column, click **Cancel Trip**, and then click **OK**.

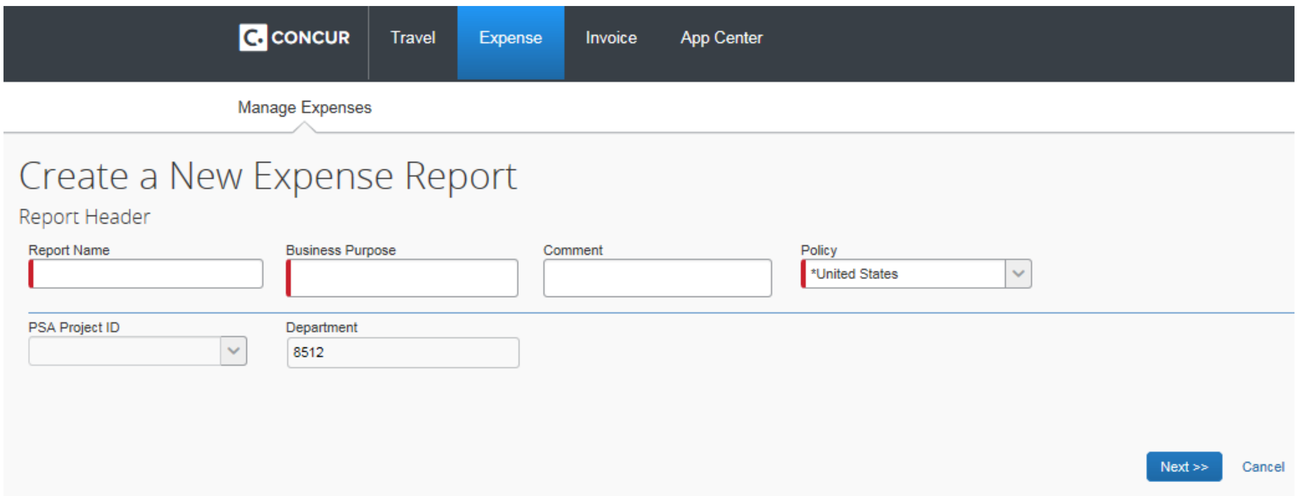
When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips.

# Section 6: Creating an Expense Report

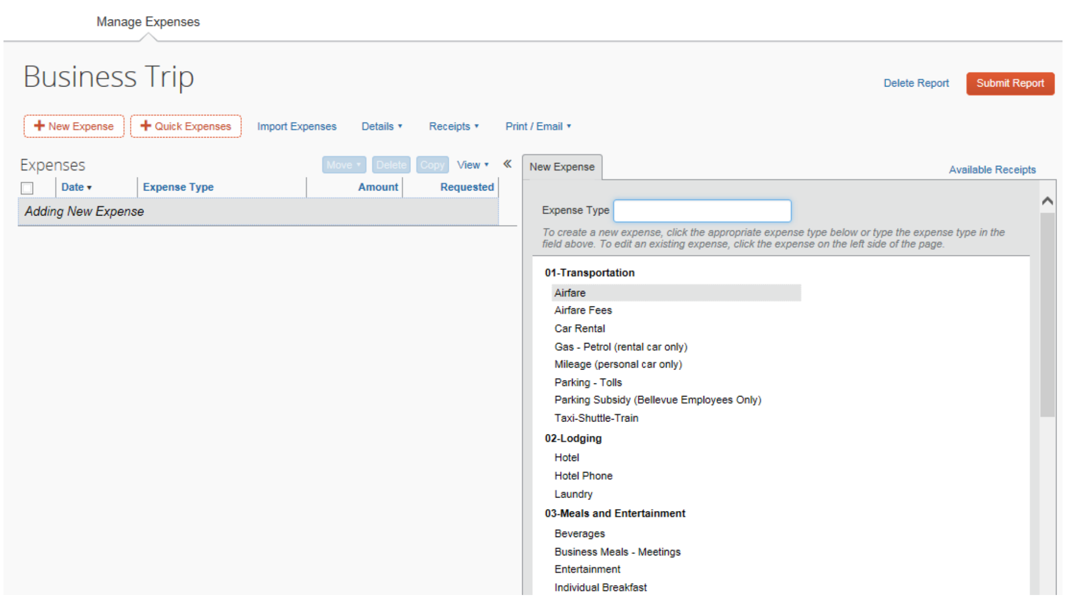
## Step 1: Creating a new report

### How to...

1. On the **Concur** home page, click **New** from the quick task bar, and then click **Start a Report**.
2. On the **Manage Expenses** page, click **Create New Report**.
3. On the **Create a New Expense Report** page, complete all required fields (indicated with a red bar) and the optional fields as directed by your company, and then click **Next**.




4. Click **New Expense** to create a new expense.




### Additional Information

2. Select an **Expense Type**.

   After you select the expense type, the **Expense Type** fields automatically populate.

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

   To delete an unsubmitted report, click the check box, and then click **Delete Report**.

4. Click **Import Expenses**.

   Complete all required fields. If you have receipts for the expense, click **Attach Receipt**. Click **Browse,** select the appropriate file, and then click **Attach**.

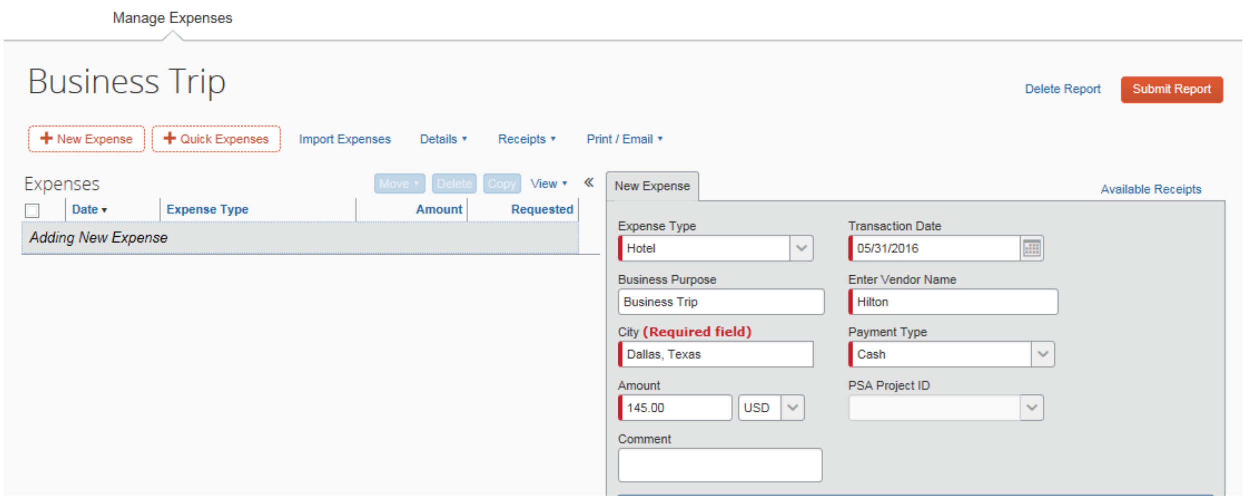
5. For any expenses that require itemizations, click **Itemize**.

   Complete all required and optional fields, as necessary.

6. Click **Save Itemizations**.

## Step 2: Submitting the expense report for approval

1. Once the expense report is complete, click **Submit Report** to send it to the approver.

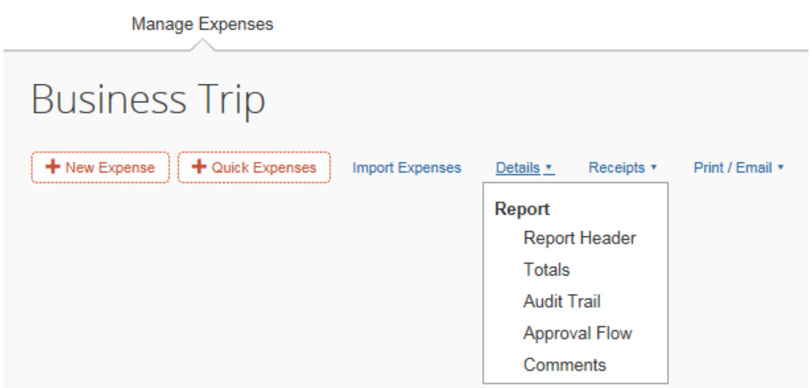



2. Perform a final review, and then click **Submit Report**.

## Step 3: Viewing details and managing receipts

1. Click **Details**, and then select the appropriate action.

   You can view the report header, totals, audit trails, approval flow, allocations, and comments.



2. To view the required receipts, click **Receipts**, and then click **Receipts Required**.

You can check receipts, attach receipt images, view available receipts, and create missing receipt affidavits.

## Step 4: Printing an expense report

1. Click **Print/E-mail**, and then click **Detailed Report**.
2. Click **Print**.

Optionally, you can view the report in PDF format, email the report, or close the report.