

Concur Getting Started QuickStart Guide



Concur Technologies

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- **Travel**

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Table of Contents

Welcome to Concur	4
Section 1: Logging on to Concur	4
Section 2: Retrieving and Changing your Password	5
Section 3: Navigating Concur.....	7
Section 4: Updating your Profile.....	8
Section 5: Using Concur Travel.....	3
Section 6: Creating an Expense Report	11

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

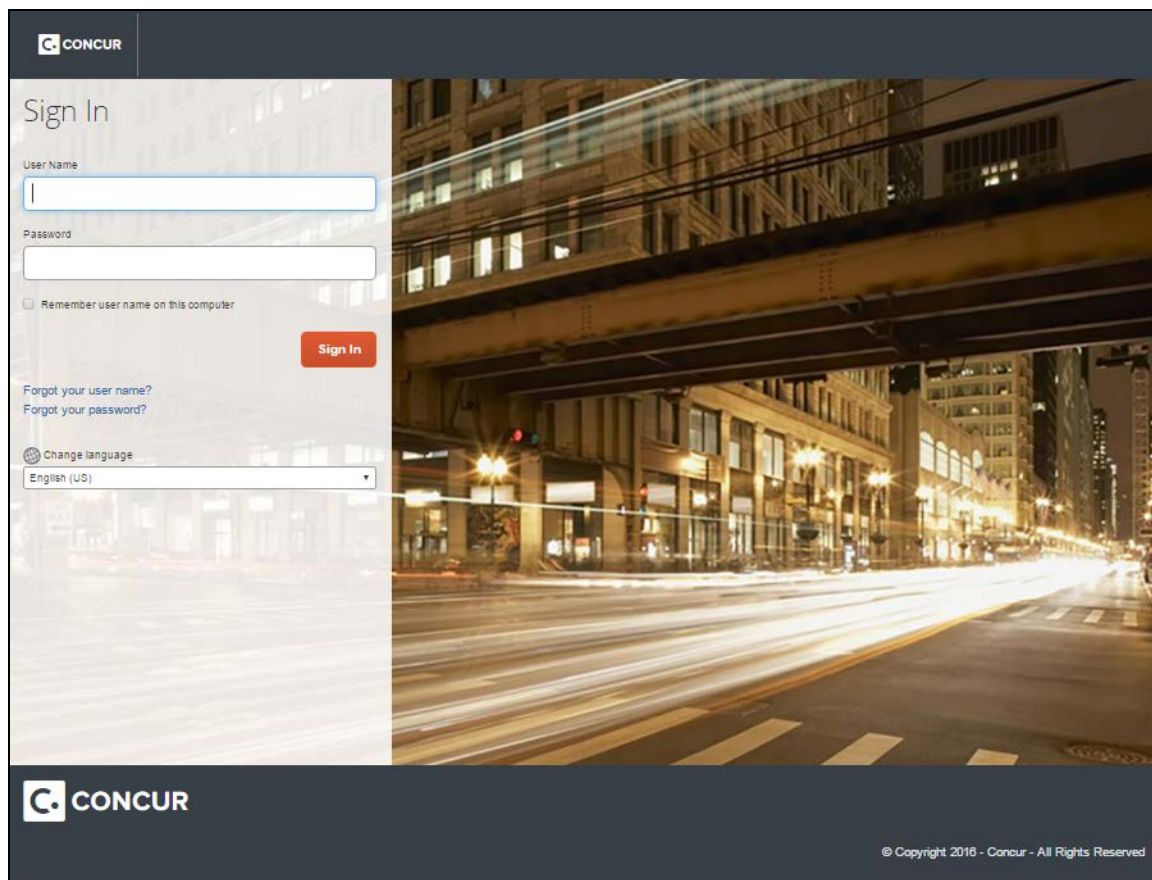
How to...

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

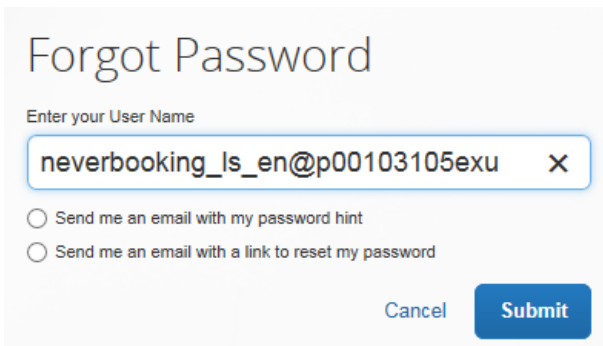
How to...

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



Additional Information

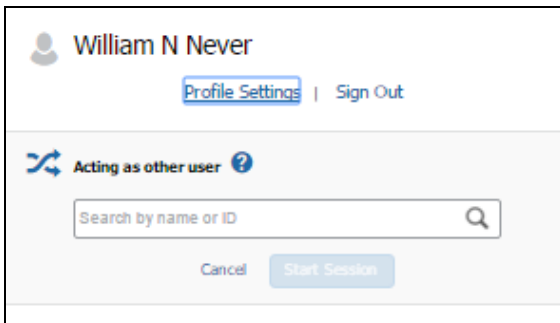
2. Select if you want an email with a password hint, or if you want an email with a link to reset your password, and then click **Submit**.

A screenshot of the 'Forgot Password' form. The title is 'Forgot Password'. Below it is the instruction 'Enter your User Name' and a text input field containing 'neverbooking_ls_en@p00103105exu'. There are two radio button options: 'Send me an email with my password hint' and 'Send me an email with a link to reset my password'. At the bottom right are 'Cancel' and 'Submit' buttons.

Changing your password

How to...

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



Additional Information

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

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Expense Delegates

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

Change Password

Change your password.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Bank Information

Bank Information

Expense Preferences

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.

Mobile Registration

Set up access to Concur on your mobile device


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.

Change Password

A password must be at least 6 characters. It may 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)

Submit

Cancel

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).

The screenshot shows the Concur home page with the following sections highlighted by red boxes:

- Quick Task Bar:** Located at the top right, it displays five metrics: New (+), Authorization Requests (00), Available Expenses (02), Open Reports (10), and Cash Advances (04).
- TRIP SEARCH:** Located on the left side, it includes an "Air/Rail Search" section with radio buttons for Round Trip, One Way, and Multi-Segment. It has input fields for Departure City and Arrival City, each with a "Find an airport" and "Select multiple airports" link. A "Search" button and a "Show More" link are also present.
- ALERTS:** Located in the middle right, it displays a notification from RandomVerbs.com about Tript Pro, with an "Activate Subscription" button and a "No thanks" link.
- COMPANY NOTES:** Located below the alerts, it contains two paragraphs of text. The first paragraph promotes Avis Preferred Service. The second paragraph provides contact information for urgent assistance. A "Read more" button is at the bottom right.
- MY TASKS:** Located at the bottom right, it displays three task cards: "04 Open Requests" with a sub-task "09/02 Trip to Boston \$400.00 — Cash A...", "02 Available Expenses" with a sub-task "07/28 Lufthansa \$1,319.70", and "10 Open Reports" with a sub-task "Business Meal \$65.00 Returned".

At the bottom left, there is a "Concur Travel Points" section showing "0 Pts".

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.

The screenshot shows the 'Profile Options' page. At the top, there is a navigation bar with tabs: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. The 'Profile' tab is selected. On the left side, there is a sidebar menu with the following categories and links:

- Your Information
 - Personal Information
 - Company Information
 - Contact Information
 - Email Addresses
 - Emergency Contact
 - Credit Cards
- Travel Settings
 - Travel Preferences
 - International Travel
 - Frequent-Traveler Programs
- Request Settings
 - Request Information
 - Request Delegates
 - Request Preferences
 - Request Approvers
 - Favorite Attendees
- Expense Settings
 - Expense Information
 - Bank Information
 - Expense Delegates
 - Expense Preferences
 - Expense Approvers
 - Favorite Attendees
- Invoice Settings
 - Invoice Information

The main content area is titled 'Profile Options' and contains the following text: 'Select one of the following to customize your user profile.' Below this, there are several settings categories with descriptions:

- Personal Information**: Your home address and emergency contact information.
- Company Information**: Your company name and business address or your remote location address.
- Credit Card Information**: You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- Travel Profile Options**: Carrier, Hotel, Rental Car and other travel-related preferences.
- Bank Information**: Bank Information
- Request Preferences**: 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.
- Change Password**: Change your password.
- System Settings**: Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**: How can we contact you about your travel arrangements?
- E-Receipt Activation**: Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**: Going to be out of the office? Configure your backup travel manager.
- Expense Delegates**: Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**: 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.
- Mobile Registration**: Set up access to Concur on your mobile device

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...

- 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.

Expense Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Approver, Erick erickapprover@p00103105exu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Peterson, Sue suep_is_en@p00103105exu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click **Add**.
- In the **Search by employee name, email address or logon ID** field, type the last name of the delegate you wish to add.
- Click the name of the delegate from the list.
- Select the appropriate task check boxes.
- To add additional delegates, repeat steps 2-5.
- Click **Save**.

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.

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

Expense Delegates

[Delegates](#) Delegate For

Delete

This employee may act as a delegate for the listed employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Never, William suep_ls_en@p00103105exu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Expense Approvers

Save

Cancel

Default approver for your expense claims.

suep_ls_en@p00103105exu - Sue Peterson

Default approver 2 for your expense claims.

Default approver for your cash advance requests.

suep_ls_en@p00103105exu - Sue Peterson

Default approver for your purchase requests.

suep_ls_en@p00103105exu - Sue Peterson

Default approver for your statement claims.

suep_ls_en@p00103105exu - Sue Peterson

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...

1. On the **Concur** home page, on the **Flight** tab on the left side of the page, select one of the following options.
 - Round Trip
 - One Way
 - Multi City

Additional Information

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

The screenshot shows the 'Flight Search' form in the Concur system. At the top, there are four icons: an airplane, a car, a bed, and a clock. Below these icons, the 'Flight Search' section is titled. It features three tabs: 'Round Trip' (selected), 'One Way', and 'Multi City'. The 'From' field is labeled 'From ?' and contains the placeholder text 'Departure city, airport or train station'. Below this field are links for 'Find an airport' and 'Select multiple airports'. The 'To' field is labeled 'To ?' and contains the placeholder text 'Arrival city, airport or train station'. Below this field are also links for 'Find an airport' and 'Select multiple airports'. The 'Depart' section includes a calendar icon, a 'depart' dropdown, a 'Morning' dropdown, and a '± 3' dropdown. The 'Return' section includes a calendar icon, a 'depart' dropdown, an 'Afternoon' dropdown, and a '± 3' dropdown. There are two checkboxes: 'Pick-up/Drop-off car at airport' and 'Find a Hotel'. A 'Search by' dropdown is set to 'Schedule'. There are two more checkboxes: 'Refundable only air fares' and 'Flights w/ no double connections' (checked). A red 'Search' button is at the bottom.

2. In the **From** and **To** fields, enter the cities for your travel, and then click **Search**.
3. Click in the **Departure** and **Return** date fields, and then select the appropriate dates from the calendar.

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

4. Select **depart** or **arrive**, the time of day you want to fly, and time range from the dropdown arrows.
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.
6. If you need a hotel, select the **Find a Hotel** check box.
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**.
11. Review the search results and select the most appropriate option for your flight.
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.

Travel searches before and after the time you select.

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.

You can choose to search for the hotel by:

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

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.

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.

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.

The screenshot shows the Concur Travel interface for a trip from Seattle, WA to Dallas, TX, scheduled from Wednesday, May 25 to Saturday, May 28, 2016. The interface includes a navigation bar with options like Requests, Travel, Expense, Invoice, Approvals, and App Centre. The main content area is divided into several sections:

- Trip Summary:** Shows the trip details, including the route (SEA - DFW), departure and return dates, and the number of Concur Travel Points (25 pts.).
- Select Flights:** A section with a 'Finalise Trip' button.
- Flight Matrix:** A table showing the number of results for various airlines and flight types (All, Nonstop, 1 stop).
- Price-to-Beat:** A section showing a price-to-beat of \$496.
- Compare List:** A section comparing two flight options:

Carrier	Flight	Stops	Duration	Price
United	05:00a SEA → 01:42p DFW	1 stop SFO	6h 42m	\$561.20
Delta	08:15a DFW → 12:10p SEA	1 stop SLC	5h 55m	
- Chosen Carriers:** A section showing the selected carriers and flight details, including the carrier name, flight number, departure and arrival times, and the fare class.

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.

The screenshot shows the 'REVIEW PRICE SUMMARY' page. It includes a table with the following data:

Description	Fare	Taxes and Fees	Charges
Airfare	\$480.00	\$81.20	\$561.20
Total Estimated Cost : \$561.20			Total Due Now: \$561.20

Below the table, there is a section titled 'SELECT A METHOD OF PAYMENT' with a dropdown menu set to 'Corporate Card (...0000)'. There are also links for 'Edit' and 'Add credit card'. A warning message states: 'This is a Non-Refundable Ticket'. At the bottom, there are two buttons: 'Back' and 'Reserve Flight and Continue'.

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.

Trip Summary

Select a Car
Pick-up: Fri, 13/05/2016
Drop-off: Mon, 16/05/2016

Finalise Trip

Change Car Search

Car Display Filters

- Unlimited miles
- Air conditioning
- Hybrid

Car Transmission

- Automatic
- Manual

PICK UP: (DFW) ON FRI, 13 MAY 12:00 PM
RETURN: MON, 16 MAY 12:00 PM

[Print / Email](#)
[Hide matrix](#)

All 37 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car
	19.84	18.84	20.84	25.84	28.19	37.14	--
	20.00	19.00	21.00	26.00	31.00	--	78.00
	21.00	21.50	22.00	29.00	31.50	49.50	--
	44.99	46.85	49.85	57.84	57.84	74.22	--
	45.00	47.00	50.00	58.00	58.00	74.00	92.50

Sorted By: **Policy - Most Compliant**

Displaying: 37 out of 37 results. [<< Previous](#) [1](#) [2](#) [3](#) [4](#) [Next >>](#) | [All](#)

Compact Car (Worldspan) [more info](#)

\$19.00 per day [Select](#)

Unlimited miles
Pick-up: Terminal: DFW
Automatic transmission
Total cost: **\$101.61***

Compact Four-Door Car (Worldspan) [more info](#)

\$19.00 per day [Select](#)

Unlimited miles
Pick-up: Terminal: DFW
Automatic transmission
Total cost: **\$101.61***

Economy Four-Door Car (Worldspan) [more info](#)

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

Trip Summary

Select a Hotel

Nights: 4
 Dallas Ft Worth Intl, Dallas, TX
 Check-in: Fri, 13/05/2016
 Check-out: Tue, 17/05/2016

Finalise Trip

Concur Travel Points **25 pts.**

Change Search

Price
 \$79 - \$474

Display Settings
 E-Receipt Enabled

Hotel chain
 Chain Superchain
 Best Western (1)
 Comfort Inns (2)

CHECK-IN FRI, 13 MAY - CHECK-OUT TUE, 17 MAY

Sorted By: Policy - Most Compliant With names containing:

Displaying: 34 out of 34 results.

1. Extended Stay America-DFW Airport N

7825 Heathrow Dr
 Irving, TX 75063
 3.29 km | [view map](#)

★☆☆☆☆
 rate this hotel

+ 468 Pts Price-to-Beat: \$197
 from **\$80**

- Use the filter options to narrow your search by **Amenity** or **Chain**.
- Click **choose room** to view room rates.
- When you are ready to reserve your hotel room, click the radio button next to the desired room type, and then click **Select**.
- Review the information on the **Review and Reserve Hotel** page, click to agree, and then click **Reserve Hotel and Continue**.

- 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.

Step 4: Completing 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 **Confirm Booking** to finalize your trip.

Additional Information

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.

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.

Step 5: Cancelling or changing 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.

Trip Name/Description	Status	Start Date	End Date	Action
Viaggio da Seattle a Denver (N9OLO8) (33D7)	Needs Expense Report Withdrawn	11/12/2015	14/12/2015	Expense
Car Reservation at CHICAGO (75QJLZ)	Needs Expense Report Withdrawn	08/02/2016	12/02/2016	Expense
Trip SEA to ORD (75PDHD)	Needs Expense Report Withdrawn	08/02/2016	12/02/2016	Expense
Trip from Seattle to Memphis (M96NL5)	Needs Expense Report Withdrawn	22/02/2016	26/02/2016	Expense
Trip TXL to ORY (M9E6OY)	Needs Expense Report 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**.

Additional Information

The screenshot shows the 'Create a New Expense Report' page in the Concur system. At the top, there is a navigation bar with 'CONCUR' logo and tabs for 'Travel', 'Expense' (selected), 'Invoice', and 'App Center'. Below the navigation bar is the 'Manage Expenses' header. The main content area is titled 'Create a New Expense Report' and contains a 'Report Header' section with the following fields: 'Report Name' (required, indicated by a red bar), 'Business Purpose' (required, indicated by a red bar), 'Comment', and 'Policy' (dropdown menu with '*United States' selected). Below these are 'PSA Project ID' (dropdown menu) and 'Department' (text field with '8512' entered). At the bottom right, there are 'Next >>' and 'Cancel' buttons.

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

The screenshot shows the 'Business Trip' page in the Concur system. At the top, there is a navigation bar with 'Manage Expenses' header. The main content area is titled 'Business Trip' and contains a 'New Expense' modal. The modal has a 'Expense Type' field and a list of expense types. The list is organized into categories: '01-Transportation' (Airfare, Airfare Fees, Car Rental, Gas - Petrol (rental car only), Mileage (personal car only), Parking - Tolls, Parking Subsidy (Bellevue Employees Only), Taxi-Shuttle-Train), '02-Lodging' (Hotel, Hotel Phone, Laundry), and '03-Meals and Entertainment' (Beverages, Business Meals - Meetings, Entertainment, Individual Breakfast). At the top right of the modal, there are 'Delete Report' and 'Submit Report' buttons. At the bottom left of the modal, there are 'Move', 'Delete', 'Copy', and 'View' buttons. At the bottom right of the modal, there is an 'Available Receipts' button. The modal also contains a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'.

2. Select an **Expense Type**.
3. Complete all required fields and the optional fields as directed by your company.
4. Click **Import Expenses**.
5. For any expenses that require itemizations, click **Itemize**.
6. Click **Save Itemizations**.

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

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

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

Complete all required and optional fields, as necessary.

Step 2: Submitting the expense report for approval

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

The screenshot shows the 'Manage Expenses' interface for a 'Business Trip' expense. The form is titled 'Business Trip' and includes a 'Delete Report' button and a 'Submit Report' button. The form fields are as follows:

Expense Type	Transaction Date
Hotel	05/31/2016
Business Purpose	Enter Vendor Name
Business Trip	Hilton
City (Required field)	Payment Type
Dallas, Texas	Cash
Amount	PSA Project ID
145.00	
USD	
Comment	

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.

The screenshot shows the 'Manage Expenses' interface for a 'Business Trip' expense. The 'Details' dropdown menu is open, showing the following options:

- Report
- Report Header
- Totals
- Audit Trail
- Approval Flow
- 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.