Concur Getting Started QuickStart Guide

Concur Technologies

Version 1.2

May 12, 2016
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<thead>
<tr>
<th>Date</th>
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<tr>
<td>05/12/2016</td>
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- Expense
- Travel

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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 you need to book travel as well as create and submit expense reports.

Section 1: Logging on to Concur

<table>
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<tr>
<th>How to...</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Navigate to <a href="https://www.concursolutions.com">https://www.concursolutions.com</a>.</td>
<td>If you are not sure how to start Concur, check with your company's system administrator. When starting Concur, you will first see the <strong>Login</strong> screen.</td>
</tr>
<tr>
<td>2. Log onto Concur following your company’s logon instructions.</td>
<td>When logging onto Concur, remember that your password is case sensitive.</td>
</tr>
<tr>
<td>3. After entering your <strong>User Name</strong> and <strong>Password</strong>, select the appropriate language option for your current session, and then click <strong>Sign In</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

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![Sign In](https://via.placeholder.com/150)

**Concur Getting Started QuickStart Guide**

*Version 1.2 | May 12, 2016*
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

<table>
<thead>
<tr>
<th>How to...</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. On the Login page, click the <strong>Forgot your password</strong>? link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>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 <strong>Submit</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

Changing your password

<table>
<thead>
<tr>
<th>How to...</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. After you log in, in the upper right corner of the page, click <strong>Profile</strong>, and then click <strong>Profile Settings</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>2. On the <strong>Profile Options</strong> page, click <strong>Change Password</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
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...**

- On the Profile Options page, review your information, and select the appropriate links to update your profile information.

**Additional 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.

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.

5. Select the appropriate task check boxes.

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

6. To add additional delegates, repeat steps 2-5.

7. Click Save.
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...

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

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

   ![Flight Search](image)

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.

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.

   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.

   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)
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**

If you selected **Automatically reserve this hotel**, Travel will add your hotel and then display your car results.
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...**

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.

**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.

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

**Additional Information**

1. 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. 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. You will see the name and itinerary, along with the quoted airfare amount.

**Company Notes**

- **Trip Name/Description**
- **Status**
- **Start Date**
- **End Date**
- **Action**

<table>
<thead>
<tr>
<th>Trip Name/Description</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viaggio da Seattle a Denver (N90LO8) (33D7)</td>
<td>Needs Expense Report Withdrawn</td>
<td>11/12/2015</td>
<td>14/12/2015</td>
<td>Expense</td>
</tr>
<tr>
<td>Car Reservation at CHICAGO (75QULZ)</td>
<td>Needs Expense Report Withdrawn</td>
<td>08/02/2016</td>
<td>12/02/2016</td>
<td>Expense</td>
</tr>
<tr>
<td>Trip SEA to ORD (75PADX)</td>
<td>Needs Expense Report Withdrawn</td>
<td>06/02/2016</td>
<td>12/02/2016</td>
<td>Expense</td>
</tr>
<tr>
<td>Trip from Seattle to Memphis (M96NL5)</td>
<td>Needs Expense Report Withdrawn</td>
<td>22/02/2016</td>
<td>26/02/2016</td>
<td>Expense</td>
</tr>
<tr>
<td>Trip TXL to ORY (M9660Y)</td>
<td>Needs Expense Report Withdrawn</td>
<td>09/05/2016</td>
<td>13/05/2016</td>
<td>Cancel Trip</td>
</tr>
<tr>
<td>Trip TXL to ORY (2234BS)</td>
<td>Withdrawn</td>
<td>16/05/2016</td>
<td>20/05/2016</td>
<td></td>
</tr>
</tbody>
</table>
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

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.
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.

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.