# Table of Contents

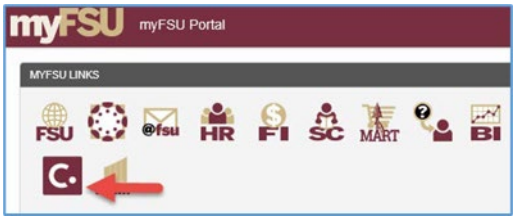
# Accessing Concur

**Purpose**: To assist users in logging into Concur Travel and Expense Management and navigating the Concur home screen.

### Logging into FSU - Concur Travel & Expense Management

FSU Employees will have access to the myFSU "Faculty & Staff" portal. To Log in:

1. Go to my.fsu.edu
2. Enter your username and password.
3. Click the link for Concur tile.



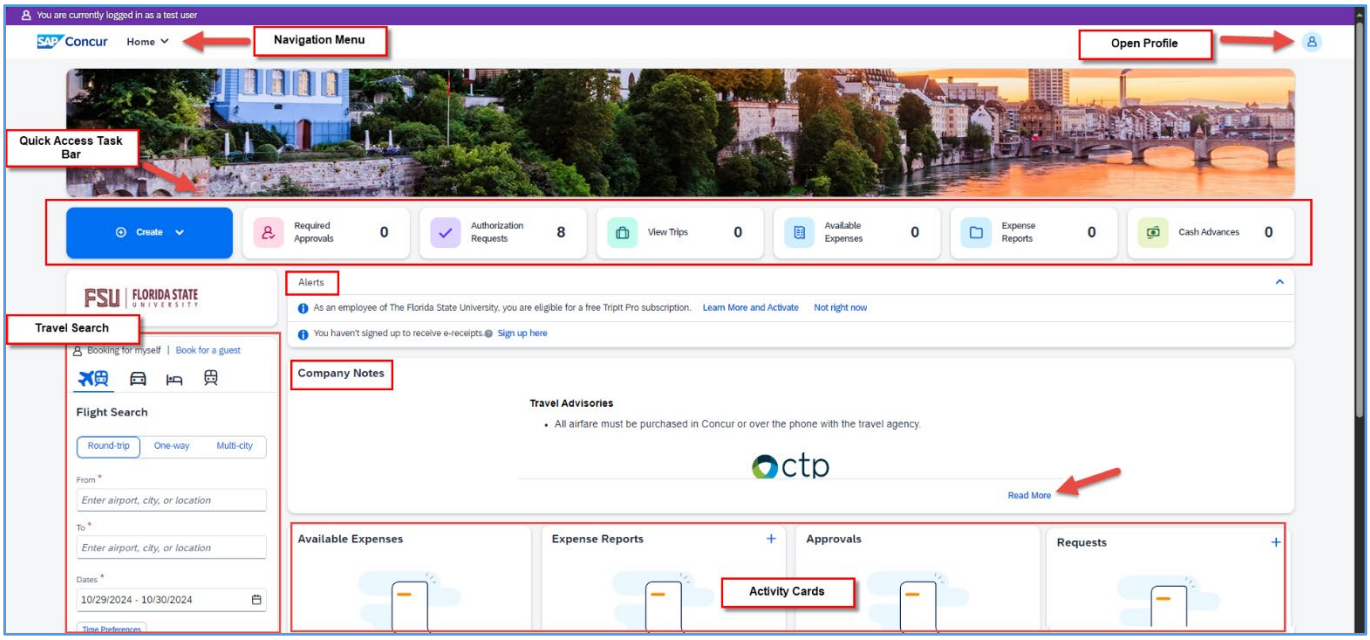

If you are an FSU employee and student, make sure you are on the Faculty and Staff view and not the Student view. If you are not redirected to Concur after clicking on that link, or you do not see the Concur icon, please contact travel@fsu.edu.

### Exploring the Home Page

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

- **Navigation Menu** – Expand the Home button to see the full list of all Concur products you have access to.
- **Open Profile** – Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device.
- **Quick Access Task Bar** – Provide direct access to create or approve travel requests or expense reports, apply available electronic expenses to an expense report, or access and modify requests or expense reports.
- **Alerts** – System generated notices reminding you of important information or tips.
- **Travel Search** – Provides quick access to travel search, booking, and upcoming trips.
- **Company Notes** – Displays university specific information. Click "Read more" to access Travel Management Company (TMC) agent and helpdesk contact information, and the missing receipt link for airfare booked through the TMC.

- **Activity Cards** – Displays a dashboard for your available expenses, approvals and open requests/reports.




To return to the Home page from any screen, click the SAP Concur logo in the upper left corner of your screen or expand the Navigation Menu and select **Home**.

# Required Fields & Audit Rules

Items marked with a red asterisk (*) in Concur are required fields and must be completed before moving to the next section. Failure to complete a required field or performing an action that is irregular or not allowed will result in an audit rule appearing on the header of a travel request or expense report.

Audit rules typically fall into one of two categories:

- (Alert) – These types of audit rules require interaction from the user to address the behavior or action that created the audit rule notification. These will prevent a travel request or expense report from being submitted and need to be cleared before submitting.
- (Information) – These audit rules typically serve as a notice of potential conflicts or behaviors that may require close examination by an approver or auditor. These will not prevent a travel request or expense report from being submitted.

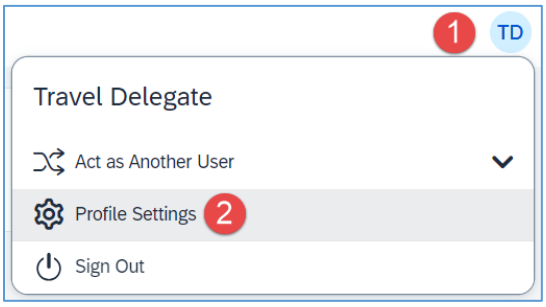
An exception text is generated when an audit rule detects a potential action or issue requiring further review or action. Users should read exception text carefully and take the action recommended to address any items requiring attention.

# Updating Your Profile

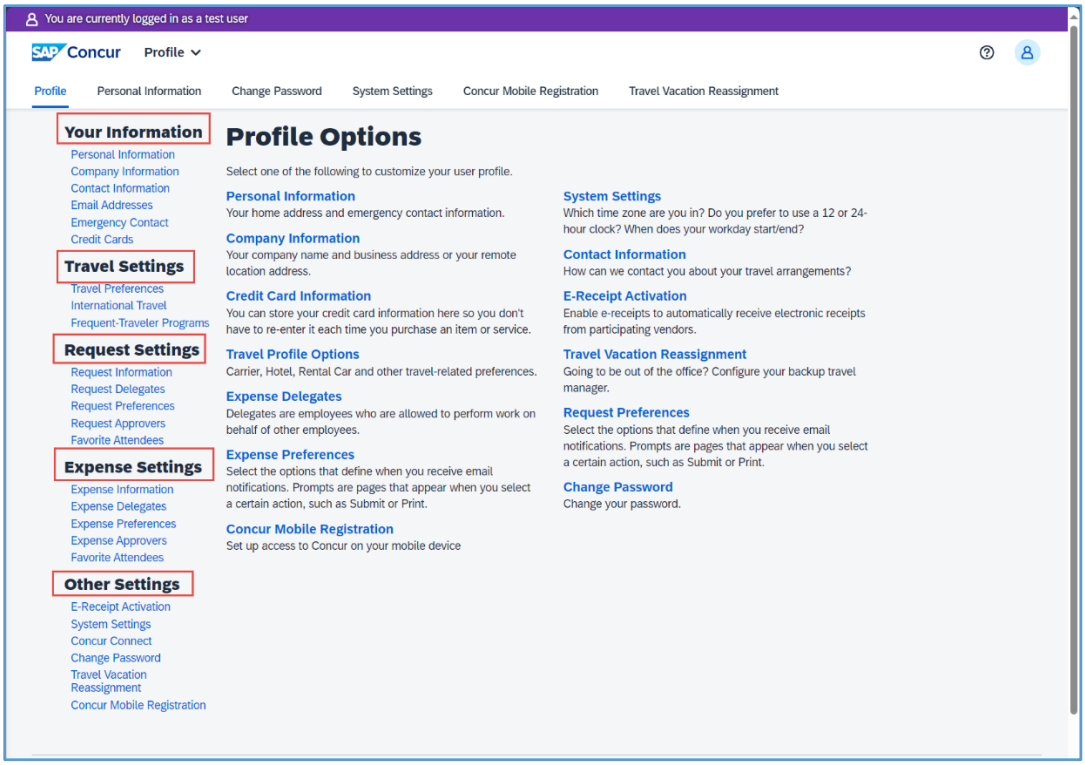
**Purpose:** Verifying and updating your information in the profile is the first thing all new users should do when they log into Concur.

**Important note:** To prevent errors and delays in booking travel, it is important to keep your profile, including credit cards and frequent flyer information, up to date and accurate.

To update your profile click on the **Open Profile** Icon, then **Profile Settings**. You can click on any of the displayed links to update your user profile in a specific section or start from the top with Personal Information.




**Note**: The "**Required**" notice does not disappear when the information is submitted. But it must be entered before you can save the profile. It is recommended to click the **Save** button after completing each section.

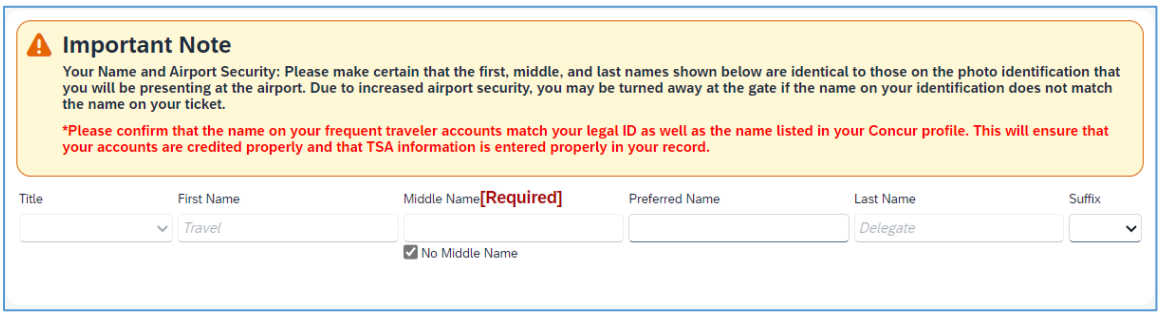


## Personal Information

Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket. If first/last name are different than what is on user's photo ID, please contact travel@fsu.edu.

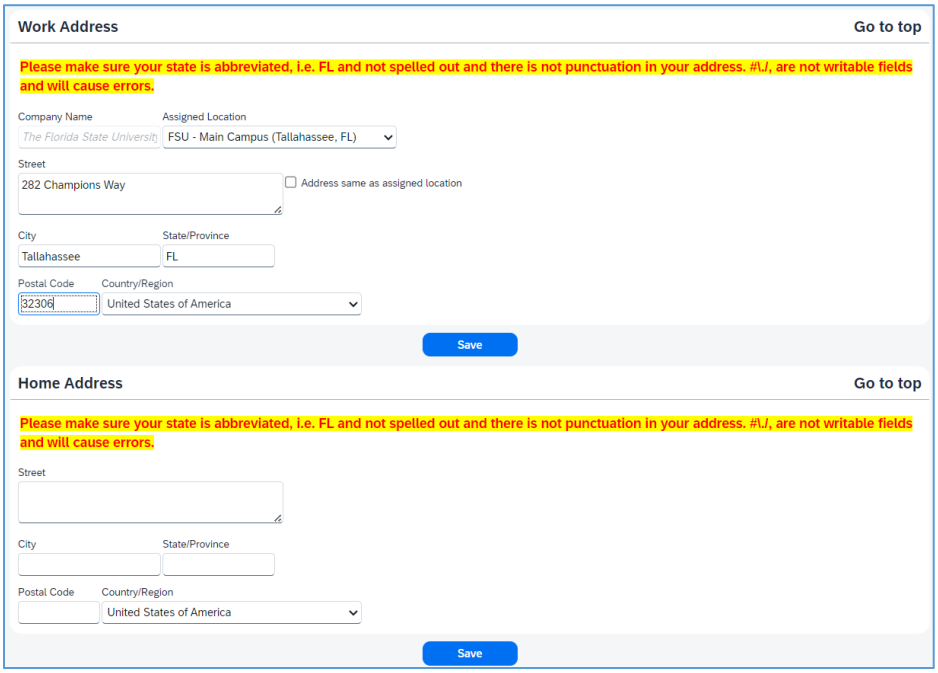
First and Last name will be populated from your university HR record.

Verify or add Middle Name and, if applicable, Suffix to match your government issued ID. Ensure information is correct. User cannot modify again after saving. If user needs to modify and is unable, contact travel@fsu.edu.



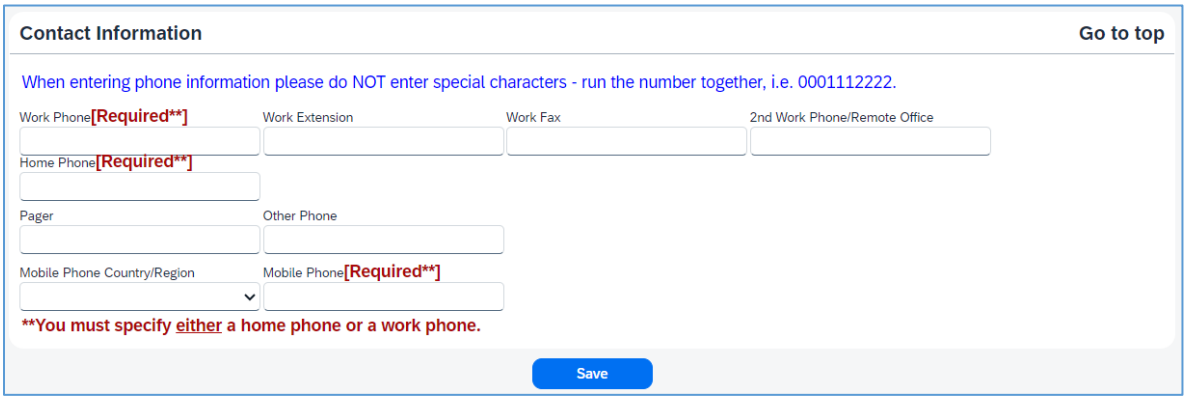

## Work/Home Address

Please make sure your state is abbreviated, I.E. FL and not spelled out and there is not punctuation in your address. #\./, are not writable fields and will cause errors.



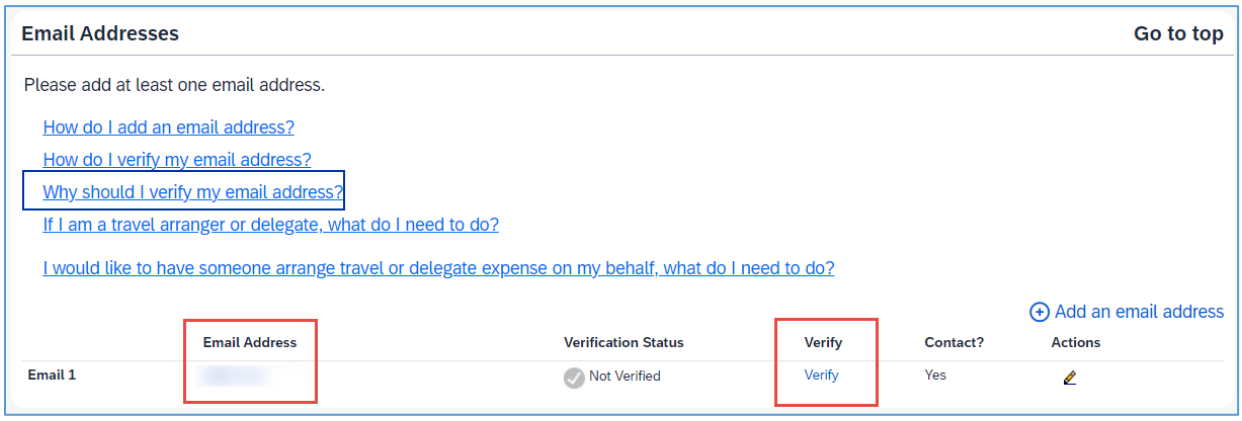
## Contact Information

Enter a work and home phone number; these can be cellular or land lines. Optionally, you may enter a mobile phone. When entering phone information please do NOT enter special characters - run the number together, i.e. 0001112222.




## Email Addresses

Your '@fsu.edu' email account will automatically be uploaded into the Concur Travel & Expense system, but you must verify your email address within Concur by clicking the Verify link. By verifying your email address, Concur can associate your email address with your Concur account.




**Note**: Once you verify your email address, you will be able to forward any electronic receipts to receipts@concur.com. They will then be displayed in the Available Receipts in the Expense portion of the application. It also enables itinerary information to be emailed to plans@tripit.com if you have connected your Concur account to TripIt.

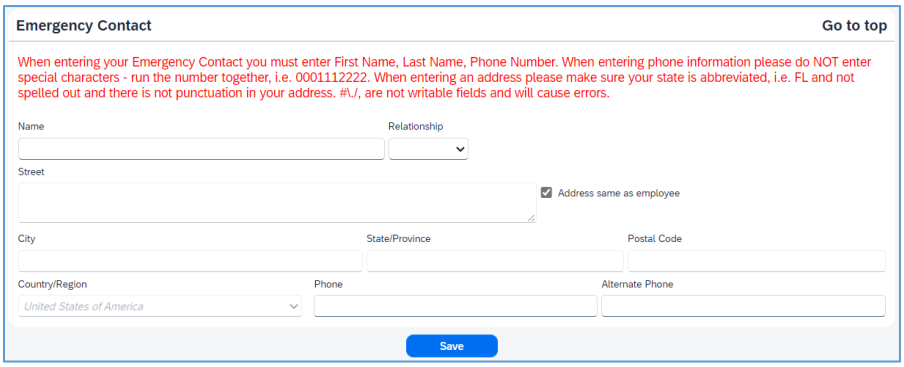
Additional work and personal email addresses can be added by clicking Add an Email Address. Enter the email address and select whether you want travel notifications to be sent to that email. Click OK.

1. To verify the email address, click the Verify link

2. Check your email for a verification message from Concur
3. Copy the code from the email message into the Enter Code box next to the email address
4. Click OK

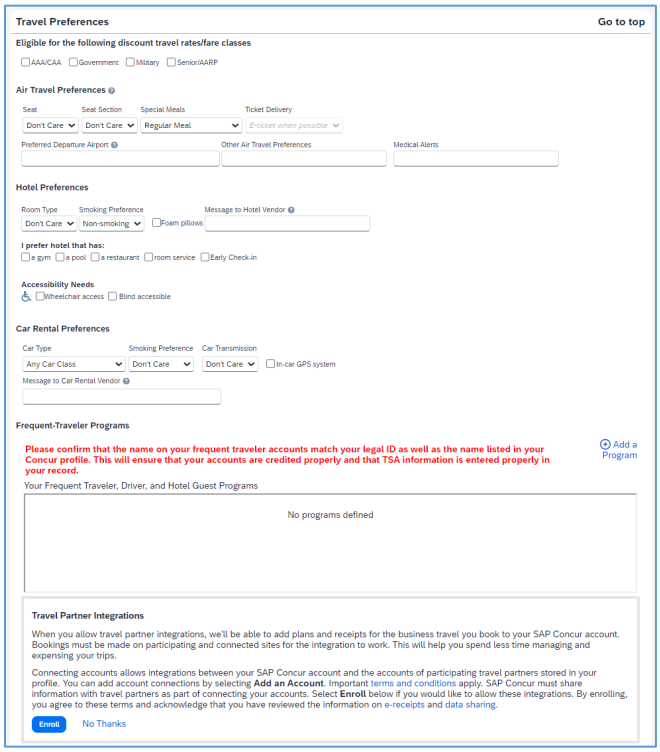
### Emergency Contact

Optional, but when traveling, if there should be an emergency, our travel management companies will have access to the Emergency Contact information.



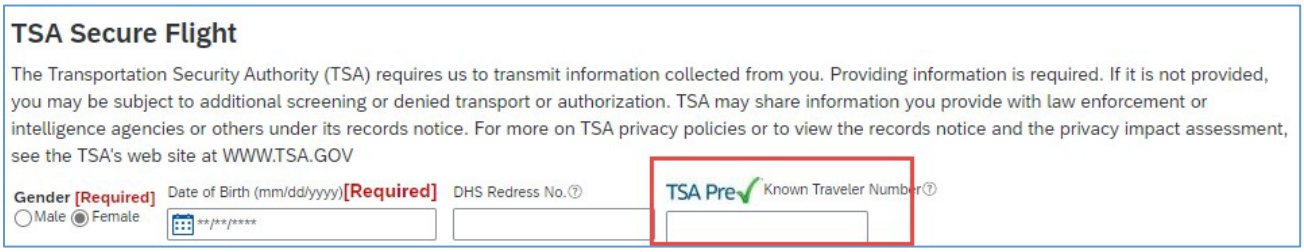

### Travel Preferences

Optional, but recommended for frequent travelers. If you participate in Frequent Traveler Rewards programs, click **Add a Program** and then enter air, car rental, and hotel Frequent Traveler program information. Click "I Agree" to the terms and conditions if you agree.



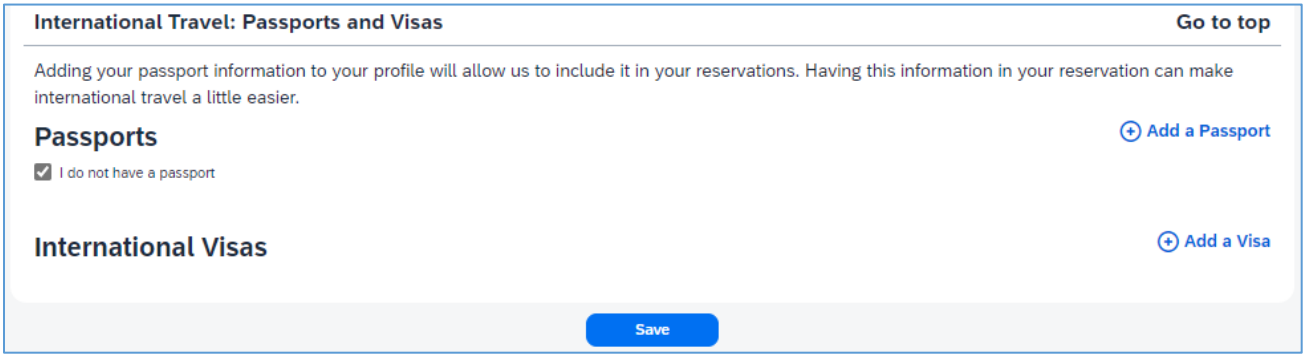
### TSA Secure Flight

Users with Transport Security Authority (TSA) Pre-Check access can enter their number here. The Known Traveler Number is a unique number assigned to "known travelers" from whom the Federal Government has already conducted a threat assessment and has determined do not pose a security threat.




### International Travel: Passports and Visas

For international travel, entering Passport or International Visa information ahead of time will allow it to be available when using Concur to book travel. **Note:** User's date of birth will be masked after editing it. If unsure that DOB is correct, users may re-edit the date.

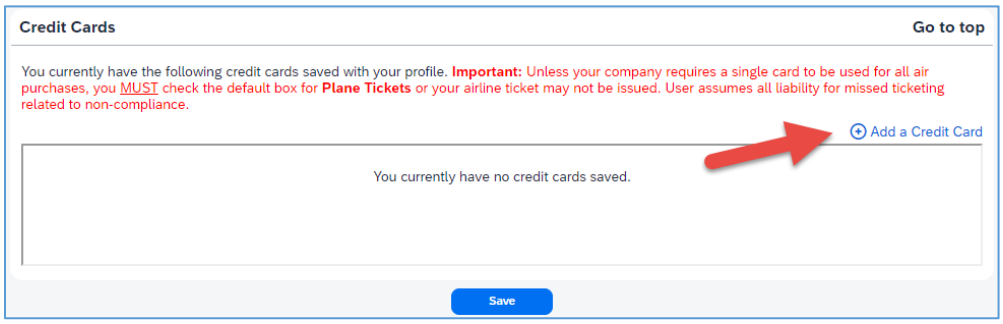



**Note:** You can enable e-receipts by following the instructions here.

### Credit Cards: Recommended

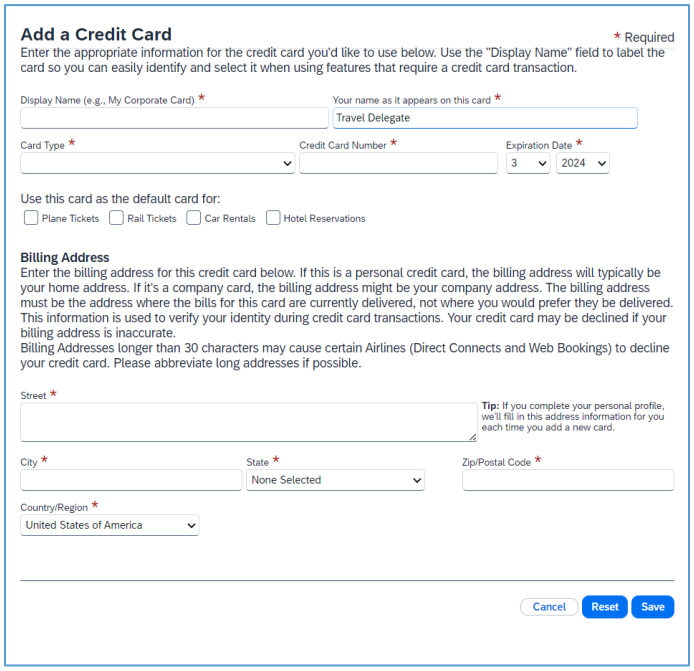
**Note:** FSU recommends the University Travel Card (T-Card) for frequent travelers. If you do not have a university travel card, please work with your department travel representative or the university Travel department on determining if one would suit your needs. If desired or required, a personal credit card can be entered into the profile following the steps in Concur and will be available for purchasing plane tickets, or hotel and car rental reservations.

Click **Add a Credit Card**. A window should open (check for popups) to fill in the fields.




If using a **university travel card** fill in the required fields as seen below:

- Display Name: A name to distinguish the t-card from any personal cards (i.e. university travel card)
  - Your name as it appears on this card: Must match card exactly
- Card Type: VISA
- Credit Card Number: Must match card exactly
- Expiration Date: Must match card exactly
- Billing Address:
  - Street: 5607A Univ. Center
  - City: Tallahassee
  - State: Florida
  - Zip/Postal Code: 32306-2394
  - Country: United States of America
- **Recommended**: Use this card as the default for: Plane Tickets, Rail Tickets, Car Rentals, Hotel Reservations.



**Request/Expense Preferences**

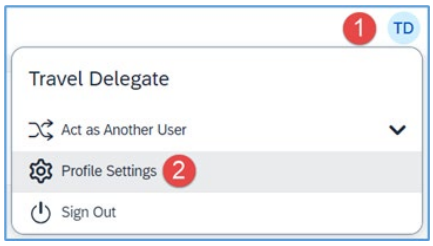
No changes necessary

**Request/Expense Settings**

Information, Delegates, Approvers, and Favorite Attendees are shared between Request and Expense Settings. Information that was entered (or edited) in Request Settings will carry through to the Expense Settings and vice versa.

## To Add or Remove a Delegate (Someone who may enter or approve travel on your behalf):

1. Navigate to **Open Profile**
2. **Profile Settings**



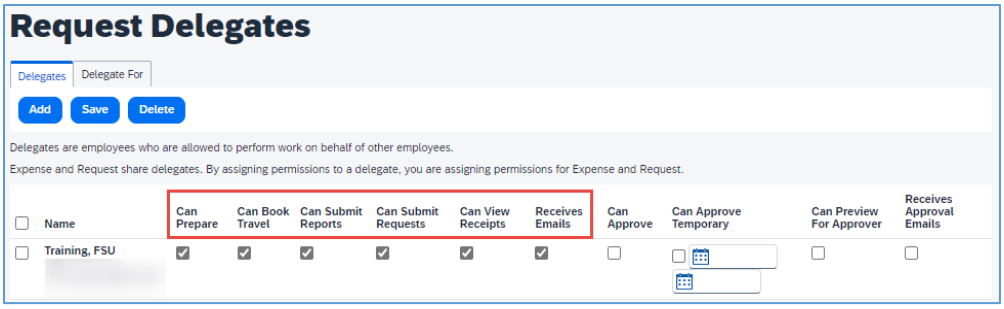

3. Click on **Request Delegates** (Delegate settings are shared between Request/Expense Delegates)
4. Click **Add**
5. Search for the person you wish to add as a Delegate and click **Add**
6. Check the boxes that correspond with the permissions you are granting to the delegate
    a. To delete a delegate, click the checkbox to select the person, click **Delete** and confirm deletion
7. Before navigating away from the page, click **Save**

### Recommended permissions for Delegates

### Travel Delegates

- **Can Prepare** – delegate has authority to prepare expense reports
- **Can Book Travel** – delegate has authority to book travel
- **Can Submit Requests** – delegate has authority to submit travel requests
- **Can View Receipts** – delegate can view electronic receipts that the traveler has sent to Concur. This will automatically get checked when you select "Can Prepare" or "Can Approve"
- **Can Submit Reports** – delegate can click the submit button to check for audit rules, but traveler still must submit the report
- **Receives Emails** – delegate receives email notifications

Once the appropriate permissions have been assigned click **Save**.

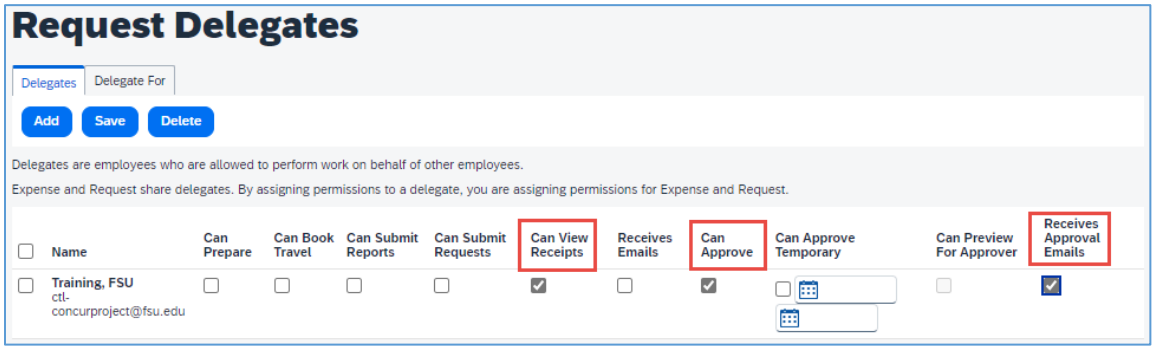


## Approver Delegates

**A Note on Approver Delegates:** Per FSU Travel Policy 4-OP-D-2-D, Approver Delegates can approve travel requests and expense reports on behalf of an approver. Supervisors or Budget Approvers may appoint delegates. Budget Approver Delegates must be authorized signers or be designated and authorized in writing by the DDDHC or PI. The Approver Delegate form (or similar documentation containing the same information) is to be completed and kept at the Department Level for record keeping and auditing purposes. Upon request, a list of approver delegates can be provided for one's department.

- **Can View Receipts** – delegate can view electronic receipts that the traveler has sent to Concur. This will automatically get checked when you select "Can Prepare" or "Can Approve"
- **Can Approve** – this is typically used by an approver to delegate approval authority to someone else. Approval authority can be added or removed by the approver at any point.
- **Can Approve Temporary** – this is used by an approver to delegate approval authority to someone else on a temporary basis. Approvers can set a start and end date for when a delegate can approve on their behalf.
- **Can Preview for Approver** – this is typically used to add an additional level of review, for example, reviewing for proper account number assignment, before the final review. A Previewer cannot approve or reject a report.
- **Receives Approval Emails** – Copied on email notifications when the approver is required to approve a travel request or expense report in Concur.

See screenshot below for suggested Approval Delegate settings. Once the appropriate permissions have been assigned click **Save**.

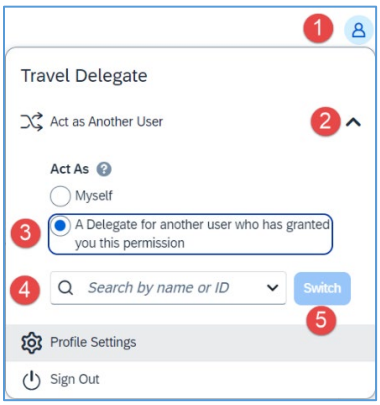


# Create a Travel Request

**Purpose**: All travel requires a Travel Request for pre-trip approval prior to traveling. Travel Requests are also used to contact a travel agent for booking assistance.

Amounts on a travel request are estimates. As travel requests should be created prior to travel, it is not possible to know the exact amounts or detailed expense types of expenses to be incurred.

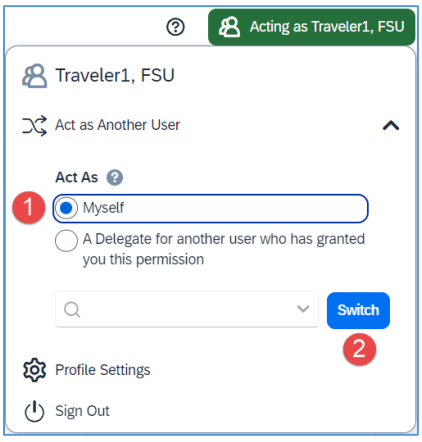
### If Creating a Request on Behalf of Another Employee




The user must act as a delegate for that employee. To act as a delegate:

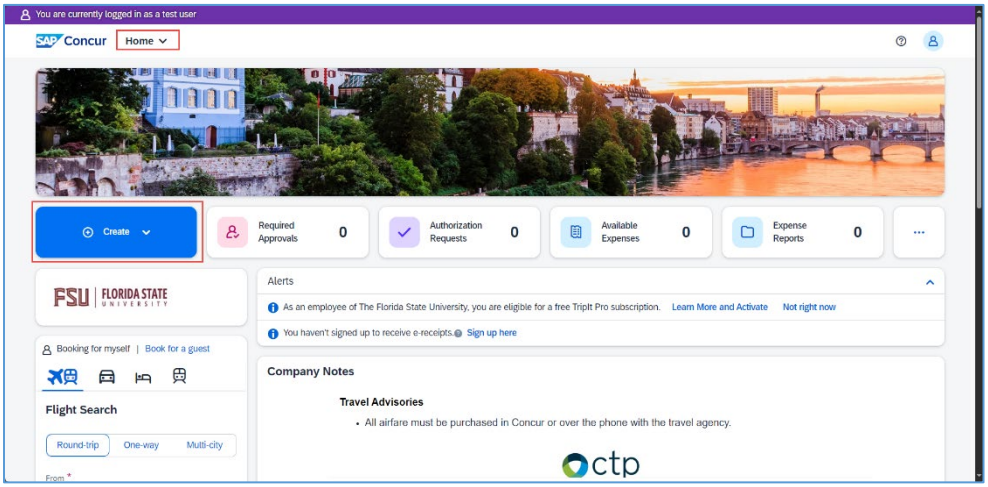
1. Click on **Open Profile**
2. Click **Act as Another User**
3. Select button next to "A Delegate for another user who has granted you this permission"
4. Search by name or ID
5. Click **Switch**

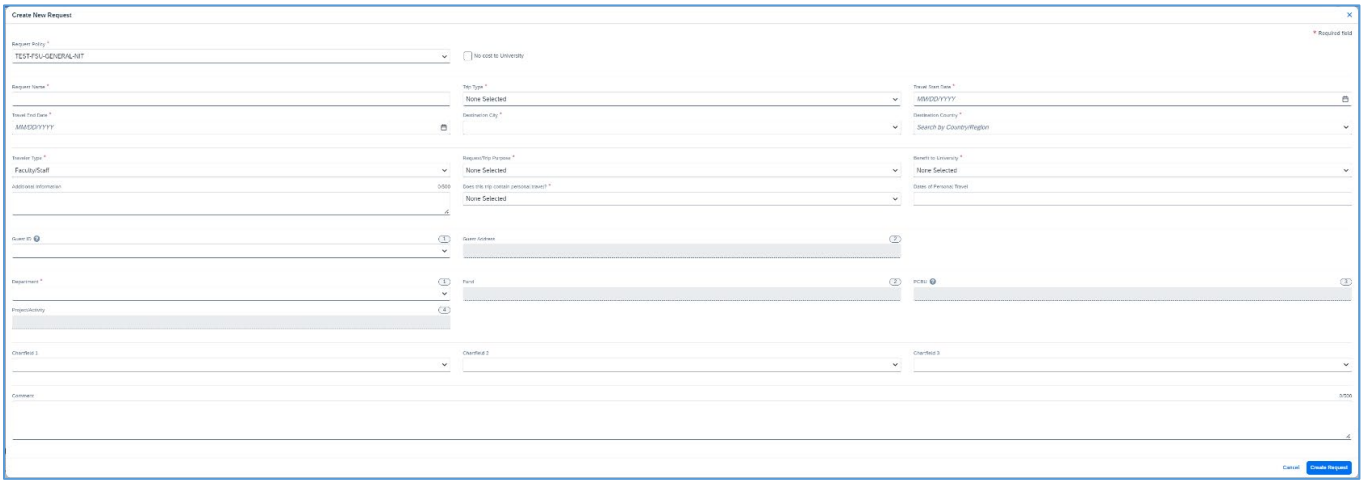
When acting as a delegate, the appearance of the top right corner changes, indicating that the user is acting as a delegate. **When you are done acting as a delegate**, click the drop-down menu and click the button next to "Myself" and then **Switch**.



## Create a Travel Request

To begin a new Travel Request, click on **Home**, select the **Requests** application, then select **Create New Request**. The user may alternatively click **Create**, then select **Start a Request**.




1. All fields with a red asterisk are required. In the Request Header section, enter the appropriate values for each field.
    a. **No Cost to University** – Check this box if the trip is being funded by a non-FSU or non-DSO source. Do not check this box if you anticipate reimbursement from or expenses paid by the university.
    b. **Request Name** – Enter something meaningful to you and your department, using location and date can help distinguish travel easily.
    c. **Trip Type** – In-state, Out of state, Foreign. Non-Travel is not a valid travel request option.
    d. **Travel Start/End Dates** – These fields should represent the dates of the business trip, and not include any extra days of personal travel.
    e. **Destination City** – Begin typing the city name and choose from list.

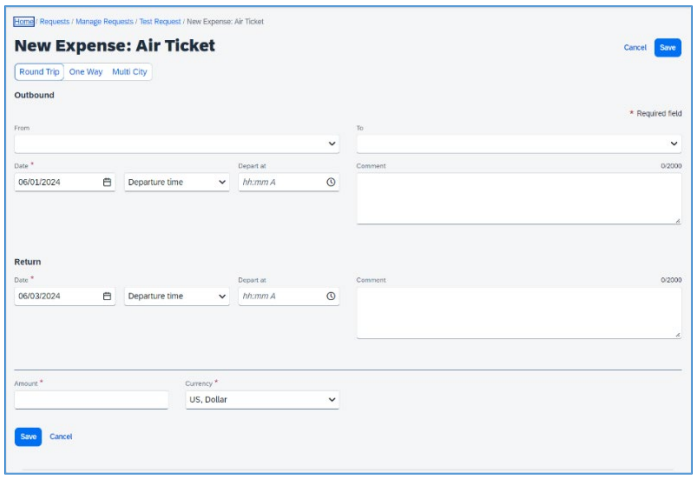
f. **Destination Country** – Will auto-populate based on city selection but you may type in the field.
g. **Traveler Type** – Select from drop down menu.
h. **Request/Trip Purpose** – Select from the drop-down menu.
i. **Benefit to University** – Select from drop down menu.
j. **Additional Information** – Required if Request/Trip Purpose or Benefit to University is "Other". Otherwise, use the comment field.
k. **Does this trip contain personal travel?** – Select yes or no.
l. **Dates of personal travel** – Fill in if answer to previous field is yes.
m. **Guest ID** – If booking guest (non-employee) travel, enter the traveler's name or ID here.
n. **Guest Address** – Required if previous field is completed to verify the guests address.
o. **Department & Fund** – Required for all requests.
p. **PCBU** – Project Costing Business Unit. Required for travel on projects only.
q. **Project/Activity** – Required if travel is on a project.
r. **Chartfields 1, 2, & 3** – Optional.
s. **Comment** – Required in certain circumstances, also helpful in explaining unusual situations.

2. Click **Create Request**. A unique request ID is generated. If **No cost to University** box is checked, you can click **Submit**. Otherwise, if you anticipate expenses and/or reimbursements, proceed to adding estimated expenses.

## Adding Expenses

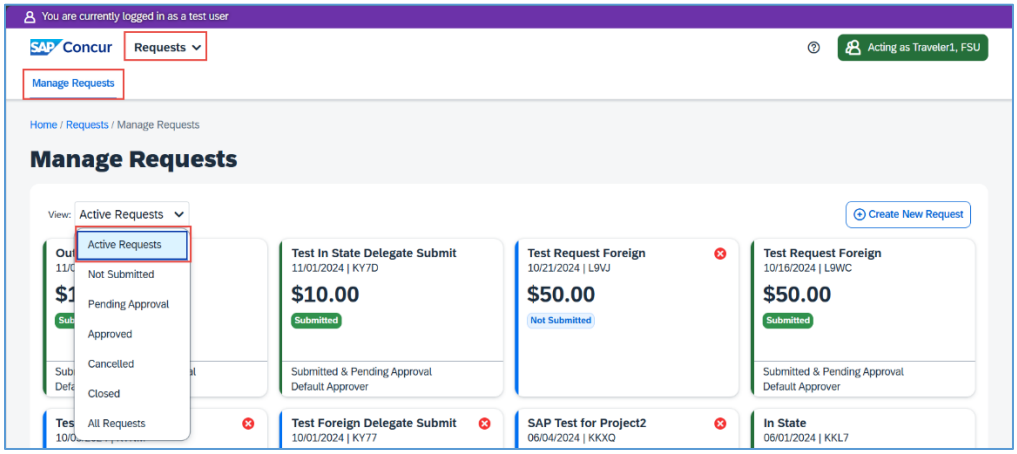
Expenses must be added to the request to complete and submit the request unless "No cost to University" checkbox is selected. Expenses include but are not limited to airfare, car rental, and hotel. At least one expense must be completed.

1. Click the **Add** button. In this example we will look at airfare. Click "**Air Ticket**".
2. Select Round Trip, One Way, or Multi-Segment. Round Trip is the default.



3. Outbound and return dates default from the Request Header but can be changed to different days within the time period of the request.
4. Enter the estimated amount of the airline ticket in the "**Amount**" field.
5. Click **Save**.
6. Similarly, select "**Car Rental**", "**Hotel Reservation**", estimated expenses for meals, per diem, car mileage, etc. from the drop-down menu, if applicable, then enter the required information. Click **Save**.
    a. If you need to change something, click the box next to the item(s) you want to change and click **Edit**.
7. When finished click **Submit Request**.
8. Review the confirmation agreement. If you agree with the terms, click **Accept & Continue**. If you do not agree with the terms or need to make a change, click **Cancel**.

The request will appear on the Active Requests page. You may click on the request to open it and review its expenses and status. You may recall a request at any point in the approvals workflow to modify it. **Requests cannot be modified after they are fully approved.**

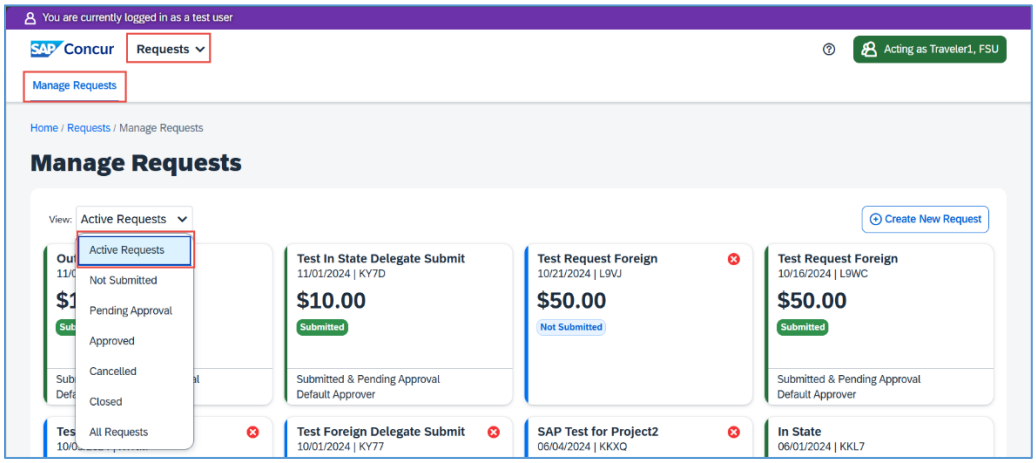


## Recalling a Request

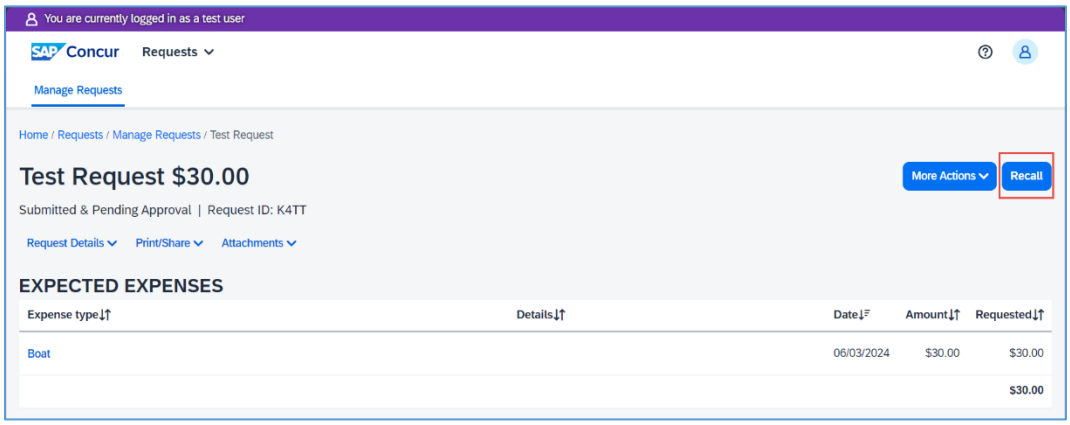
**Purpose**: You cannot change, cancel, or close/inactivate a Request that has been submitted unless you Recall it first. A user may recall a request at any point in the approvals process.

- Cancelling an approved request will indicate that travel will not occur but will not allow any changes or additions to the request. A cancelled request can be used to process expense and refunds from a cancelled trip.
- Closing/inactivating a request will remove the request from your active requests page and no expense reports can be created from a closed/inactivated request. If assistance is needed with reopening a closed request, contact travel@fsu.edu for assistance.

Click the Request from the Manage Requests page.




Click the **Recall** button. The status of the request is updated to Sent Back to User




Make any necessary changes, then select **Save**. You can **Cancel the Request** if it is no longer needed, or **Submit Request** to resubmit through the approval process.

## Foreign Travel Requests

**Purpose**: International or "Foreign" travel refers to travel to any country (including Mexico and Canada) outside the continental United States, Alaska, and Hawaii. Travel to the noncontiguous U.S. locations of American Samoa, Guam, Midway Islands, Northern Mariana Islands, Puerto Rico, Virgin Islands, and Wake Island is considered foreign travel for meal allowance rates but should be entered as "Out of State" under the Trip Type field. Please note that student travelers and international visitors do not need to comply with the International Travel Preapproval process. Use the "Guest" option when selecting Traveler Type in Concur for these individuals.

Per section 1010.36 of the Florida Statutes, and FSU Policy 4-OP-D-2-D, travelers must request preapproval for university-sponsored international travel. This involves reviewing the confirmation agreement terms and submitting their own Travel Request. Travelers should also review FSU's International Travel Guidance document before submitting their request. The guidance document can be found here.

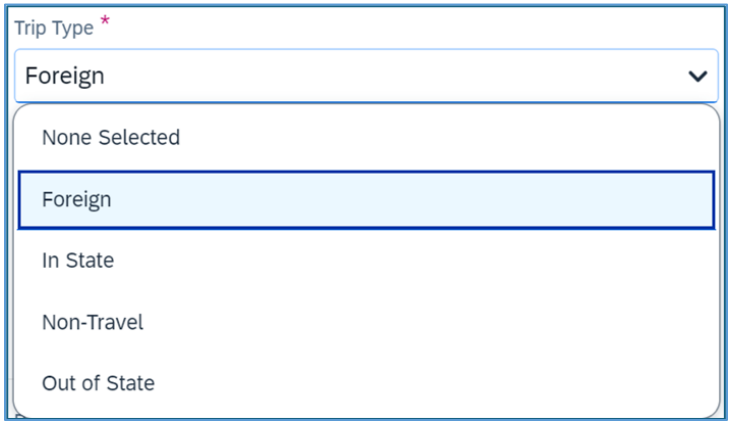
### Creating a Foreign Travel Request

Follow the instructions here (until step 8) to create a new travel request, ensure all appropriate fields are filled on the request header and estimated expenses are provided. Ensure trip type used is "Foreign".

### Reviewing and Submitting the International Travel Preapproval:

By reviewing the terms and conditions of the electronic agreement, the traveler is providing a digital signature and attestation to the necessary terms for International Travel Preapproval. As part of the review process, FSU's Office of Compliance and Ethics may reach out directly should additional information or documentation be required.

1. If the traveler will be leaving the United States at any point during their trip, you must select the "Foreign" option from the Trip Type drop-down menu on the Request Header page:



2. Once all necessary expenses have been created and all Audit Rules have been cleared**.** Review the travel request and attachments as needed, then when ready, hit **Submit Request.**
3. The electronic agreement screen will appear. The user cannot hit "Accept & Continue" until they fully review the terms of the International Travel Preapproval included in the agreement prior to submitting the Request.


**Note: Travel Delegates can prepare a Foreign Travel Request as normal but will be unable to fully submit the Request on behalf of the traveler. Travelers must be notified that their request is ready for them to submit and they must access the Concur system.**

## Requesting a Cash Advance

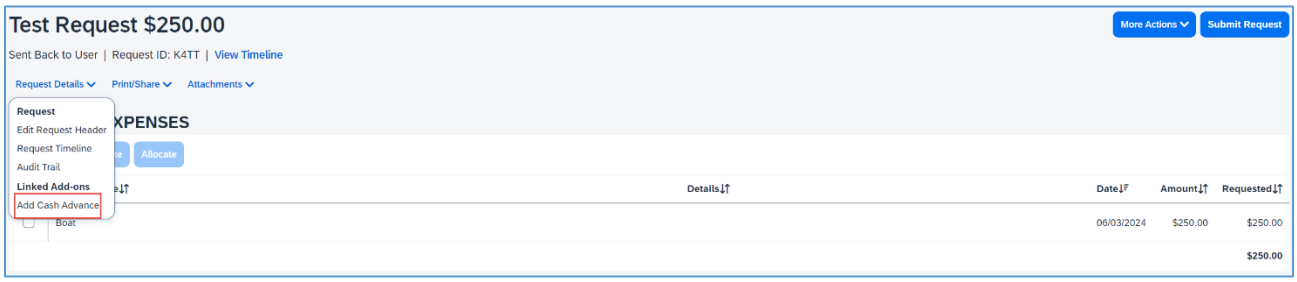
**Purpose**: Concur users cannot request a cash advance by default. Users will need to contact the Travel Office (travel@fsu.edu) to have the ability to create a cash advance. The steps outlined below describe the process to request a cash advance when other methods of handling travel expenses are impossible or inappropriate.

**Cash Advances are not encouraged, but are available case-by-case, when use of the travel card is difficult or unavailable, or extended foreign travel is involved. Email the FSU Travel Office at travel@fsu.edu for eligibility before requesting an advance.**

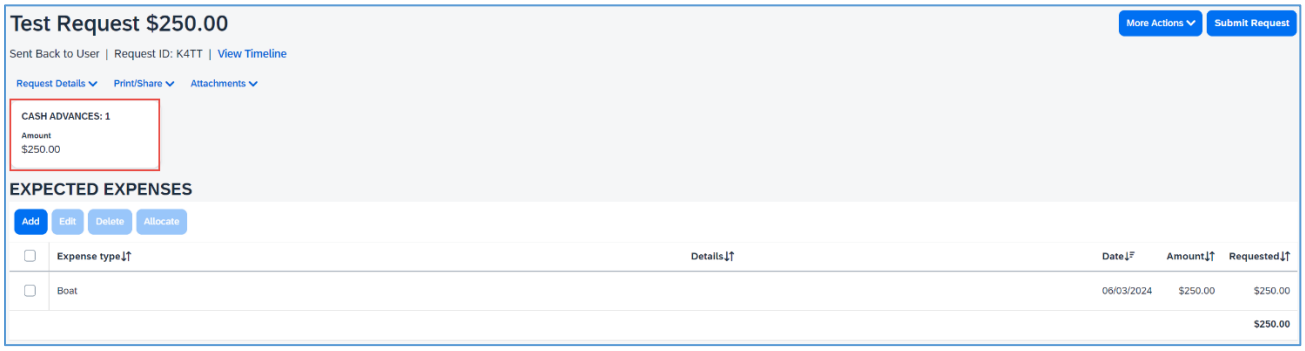
Cash advances are completed as part of the request process and must be done prior to submitting the request. When an employee is eligible for a cash advance, the fields pictured below will be accessible from the Linked Add-ons of the Request Details section.

**To Request a Cash Advance or Travel Cash Advance:**

1. Navigate to **Request**, **Manage Requests**, and choose your created request.
2. From the **Request Details** menu, choose **Add Cash Advance** and enter the amount.




3. Click **Save**. It will populate above your expected expenses.




**Note: Your cash advance request can be equal to or less than the amount of the estimated expenses, but it cannot exceed the amount of the estimated expenses.**

## Reimbursing Guests in Concur

**Purpose**: This document describes the steps needed to complete a travel request on behalf of a traveler who is not an FSU employee.

**Before entering guest travel, the user should be familiar with navigating Concur, entering travel requests and entering expense reports.**

Expenses can be entered in Concur for individuals who are not university employees. The following are examples of some Non-Employee payments:

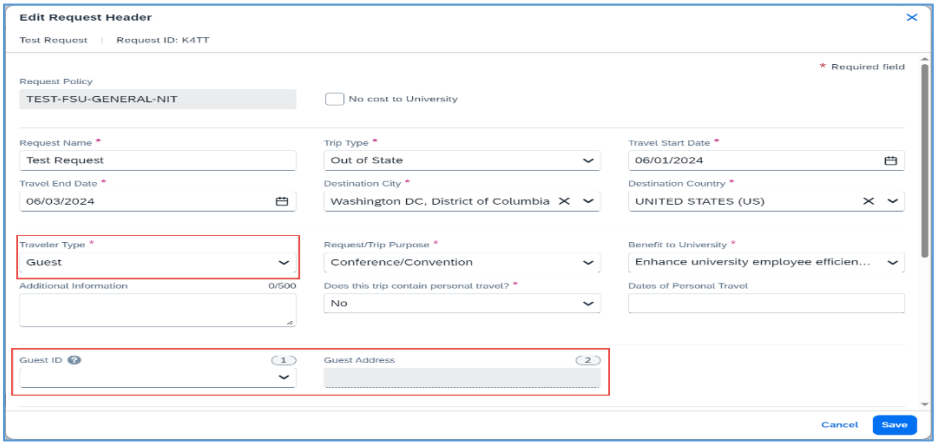
- A guest speaker traveling to FSU to present on their field of expertise
- A student who will be reimbursed for out-of-pocket expenses while attending a conference
- A job candidate who will be reimbursed for expenses incurred while traveling to the university for interviews

**You must complete a Guest Traveler Profile form and have a Guest ID number issued if the payee is not a university employee.** You will be able to book travel with the new guest ID 24 hours after your submission has been processed and confirmed by the Travel Office. Please reach out to the Travel Office if you encounter any issues. **Note: Travel reps do not act as a delegate to enter guest travel. Guest travel is entered under the travel rep's own profile. Guests are not employees and do not have a profile.**

**Enter a Travel Request for a Guest Traveler:**

1. On the Concur home page in your own profile, on the Quick Task Bar, place your mouse pointer over New, and then click Start a Request.
2. Complete the header with required information pertaining to the guest's travel.
3. The Traveler Type must be Guest, and you must fill in the Guest ID and Guest Address fields.

**Note: The address provided in the Guest Address field is where the check will go and confirms that you have the correct guest traveler.**



Pay particular attention to funding information (department, fund, PCBU, etc.), as it is pre-populated with the Travel Rep's accounting defaults. It may need to be changed before submitting.

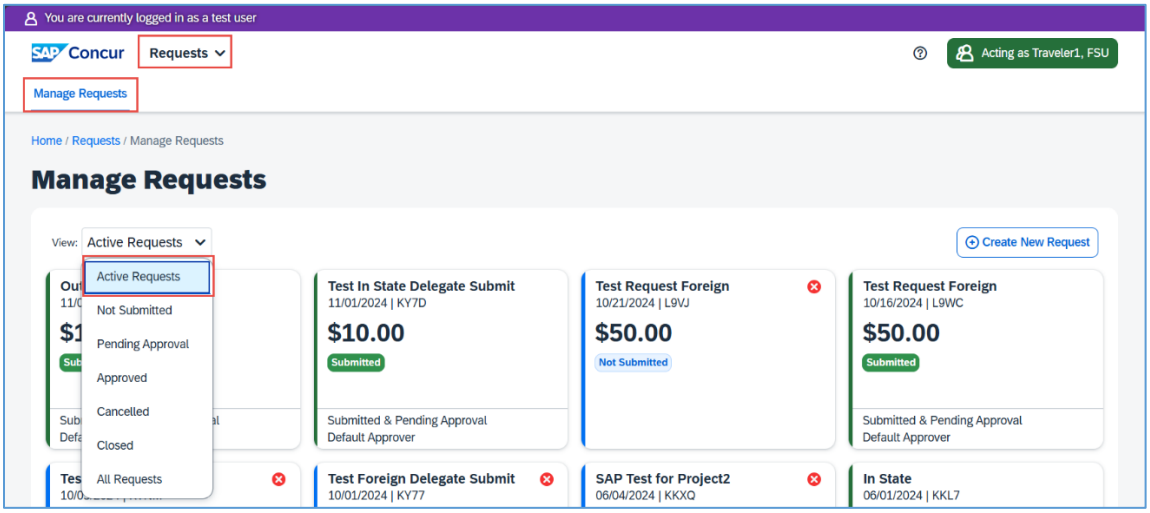
Create estimated expenses, see Adding Expenses for instructions. Review and then Submit the guest travel request for approval.

# Determining Travel Request Status

**Purpose**: Users may wish to check on the status of their travel request as it proceeds through workflow. For additional information on approvals and workflow in Concur see our Concur Approvals page.

## Access the Travel Request

1. Log into my.fsu.edu and access Concur.
2. Click on Home and then Requests under Applications. (Delegates should act as their traveler first).
3. Travel requests in a variety of statuses appear under Manage Requests. The default view for this page is "Active Requests". Requests are considered active if they were created within the last 90 days.




### Travel Request Statuses

| | |
|---|---|
| **Submitted & Pending Approval** | In immediate Supervisor's queue |
| **Pending Cost Object Approval** | At Budget Manager, Project Approver, Sponsored Research Approver, or Research Foundation Approver |
| **Pending Request Administrator** | At Office of Compliance and Ethics for international travel review |
| **Approved** | Request fully approved and user can begin making travel arrangements |

### Accessing Comments

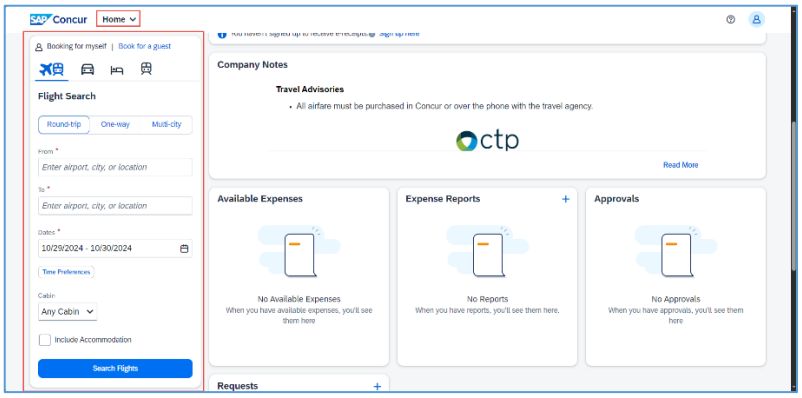
Occasionally a request can be returned to the user. Typically, a user will receive an email from an auditor or approver informing them of this, along with a request for additional documentation or information. A user can also find comments on the travel request by opening the report and clicking **Request Details > Request Timeline**.

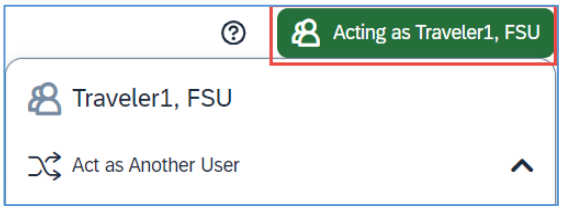
# Making a Travel Reservation

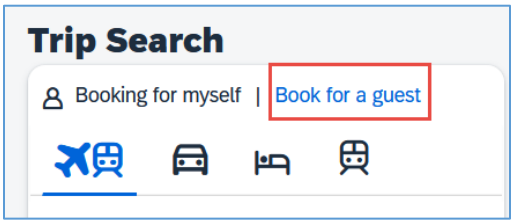
**Purpose**: The purpose of this guide is to assist the user in booking a trip in the Concur travel module.
**Important**: FSU travel policy requires a completed and fully approved travel request prior to booking any travel to comply with rules and regulations of the state. Please see instructions on Creating a Travel Request if necessary.

## Accessing the Travel Module

Click **Home** in the top left corner, then the **Travel** application or select from any of the available options in the **Travel Search** area if you are booking travel for yourself. If you are booking for another profiled user, verify you have delegated in as them and their name appears in the upper right corner. If you are booking for a non-profiled user (Guest), ensure you select the "Book for a guest" option prior to initiating your search.

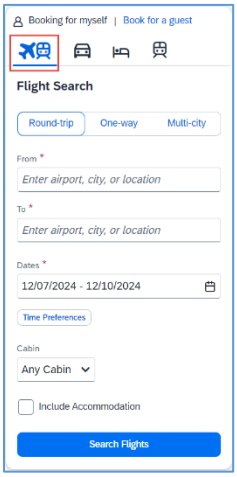


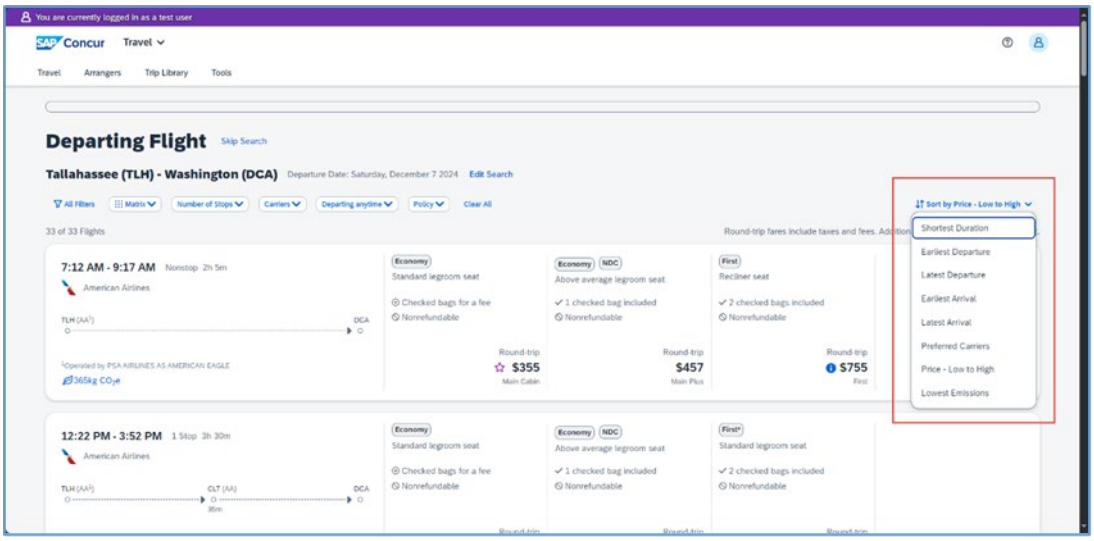




### Airfare

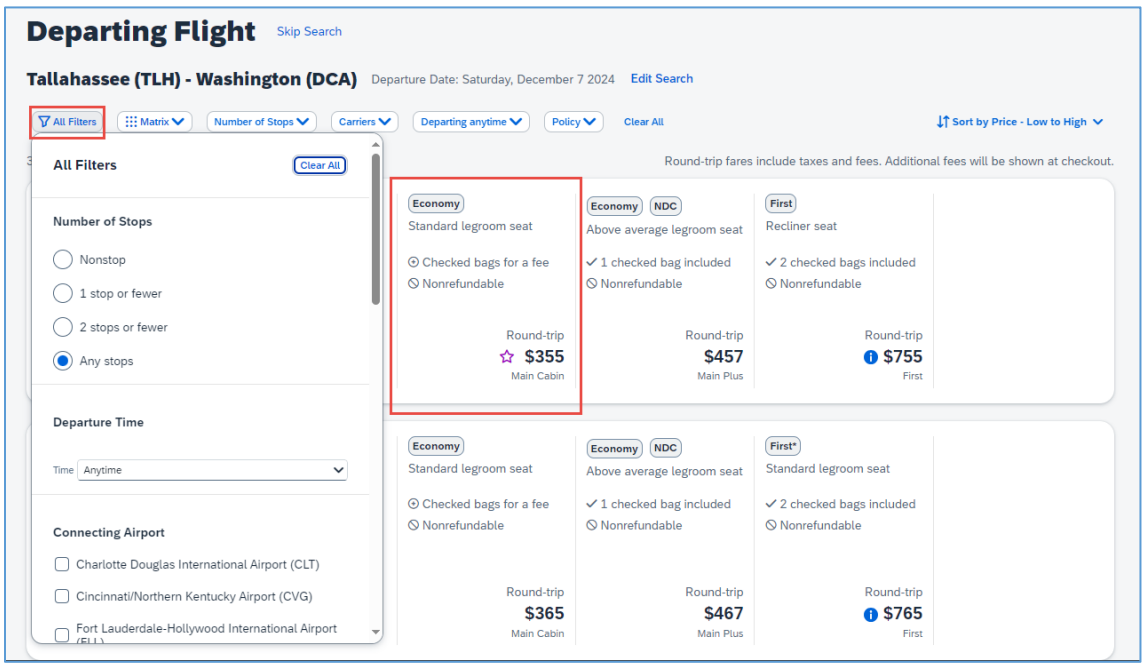
1. Click on Flight Icon. Select **Round Trip**, **One Way**, or **Multi City**, enter the **From**, **To** destination, and **Dates**. Click **Search Flights**. **Optional**: Using **Time Preferences or Cabin** can further narrow down a window for your **Departing/Returning Travel** days and Cabin class.



2. Review the flight availability and select a flight. Flights can be viewed by Fares, or by Schedules, and can be filtered using the **Sort By** options. **Note**: "Sort by Shortest Duration" will give the flights with shortest layovers.

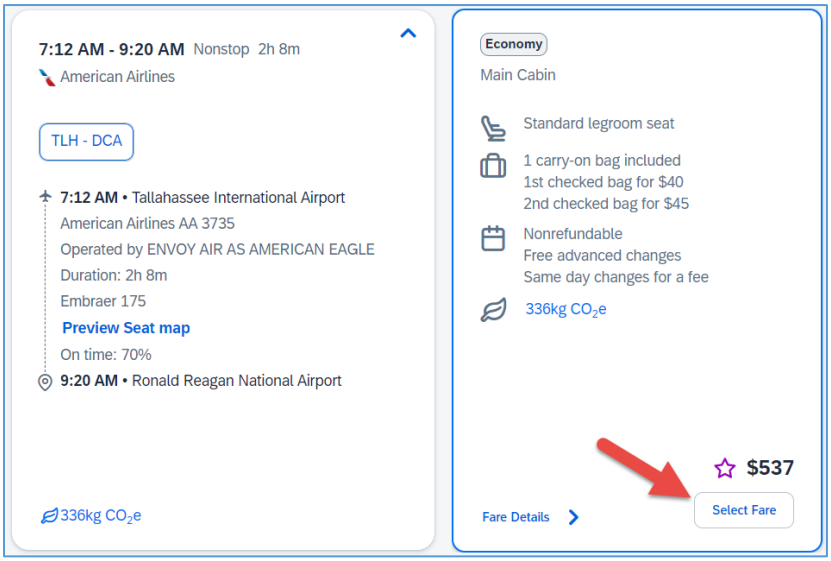


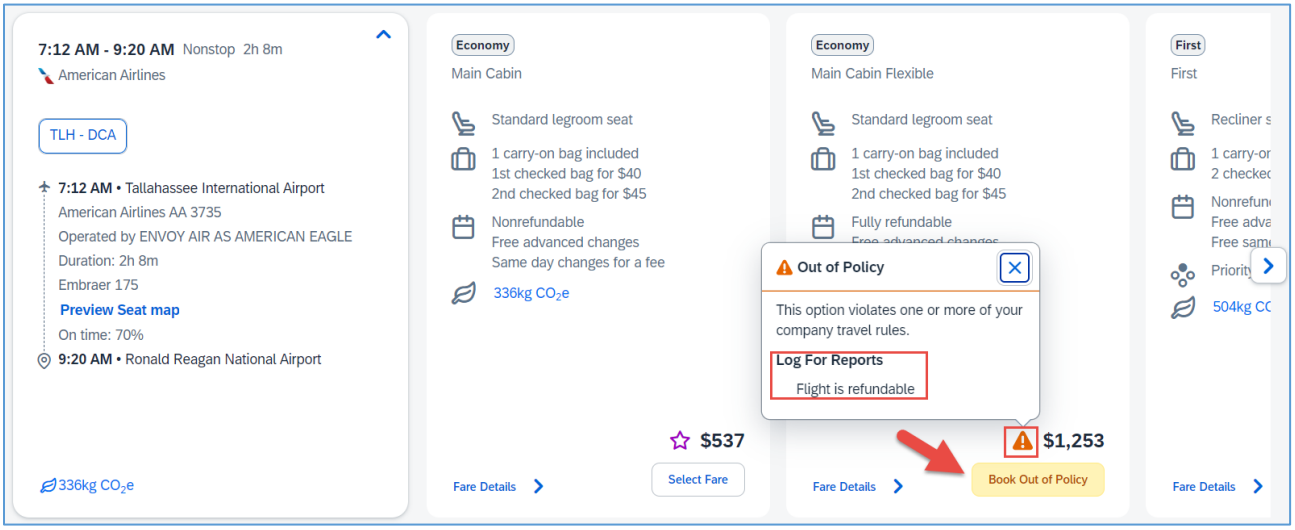

3. On the left of the screen is an **All Filters** option to filter search results by number of stops, departure time, connecting airport, etc. **To select your flight, click on the area that contains the price and class of the flight**.




4. Review the Departing Flight details and traveler information. If this is the flight you wish to book, you may continue by clicking **Select Fare.**

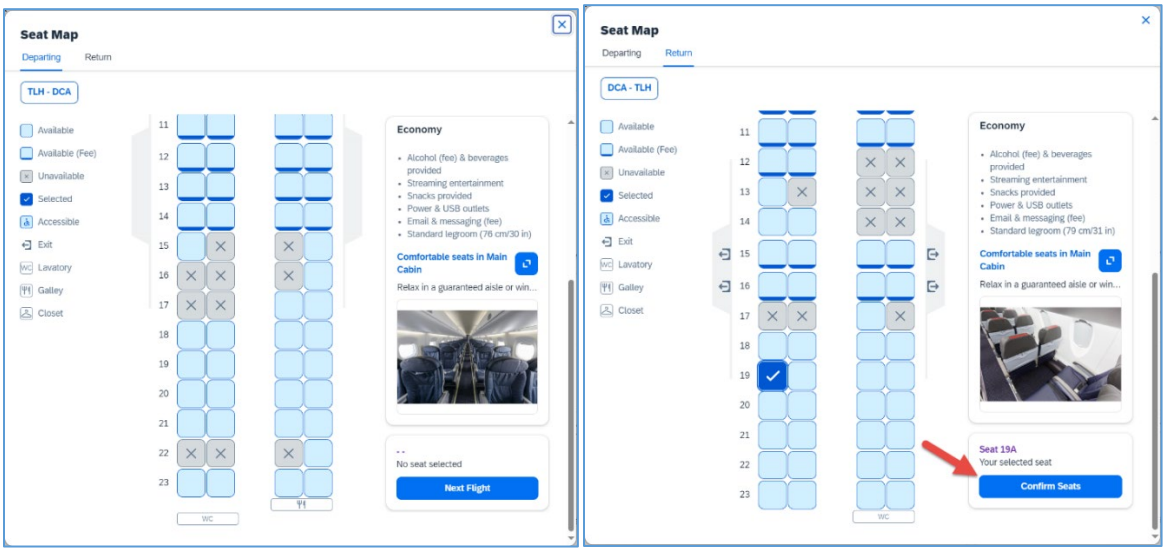
a. **Note:** If Travelers are viewing fares that violate company Travel Policy the option will appear as **Book Out of Policy**. **Please note that FSU will not reimburse any fees associated with seat selection. Fees, if any, vary by airline.**



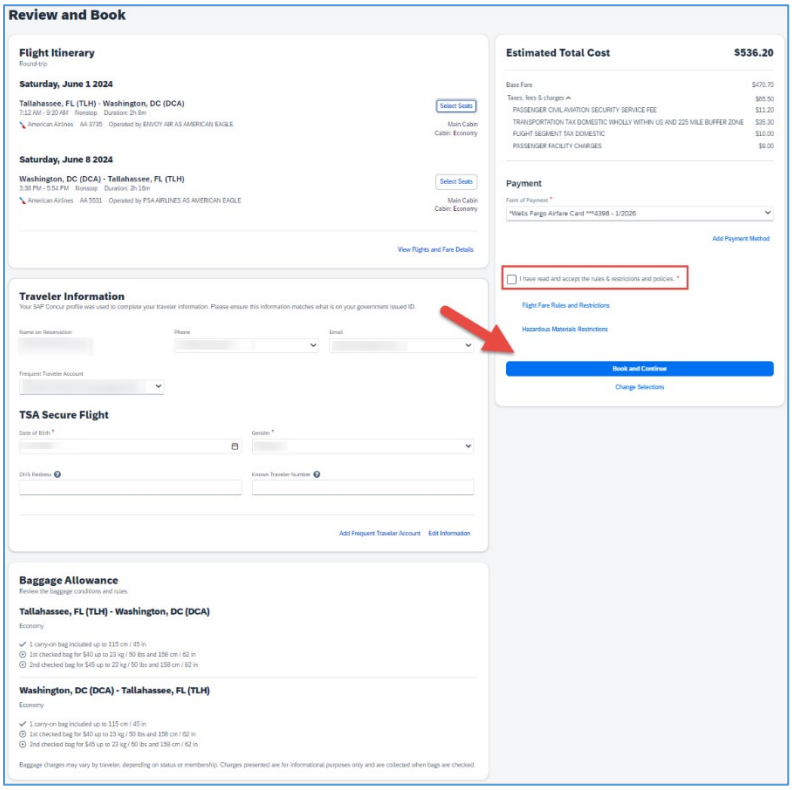




5. Review the Return Flight details and traveler information. If this is the flight you wish to book, you may continue by clicking **Select Fare.**
    a. **Note:** If Travelers are viewing fares that violate company Travel Policy the option will appear as **Book Out of Policy**. **Please note that FSU will not reimburse any fees associated with seat selection. Fees, if any, vary by airline.**
6. On the Review and Book page, verify all information is correct before proceeding. If seat selection is available, you can click the **Select Seats** button and make your selection. Then click **Confirm Seats**.

7. Review the method of payment and make any necessary changes to Traveler Information or Payment.
    a. **Note:** Method of payment should be your university travel card. For instructions on setting up your university card see here.




8. It is recommended you review the **Flight Fare Rules and Restrictions** then agree to the terms. This is required to complete booking, when ready select **Book and Continue**.



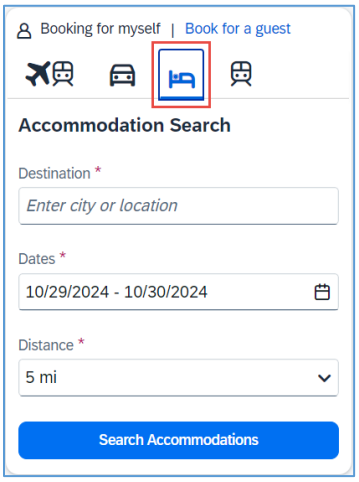
Frequent next steps:

- Hotel
- Rental Car
- Placing University Card Charges on an Expense Report

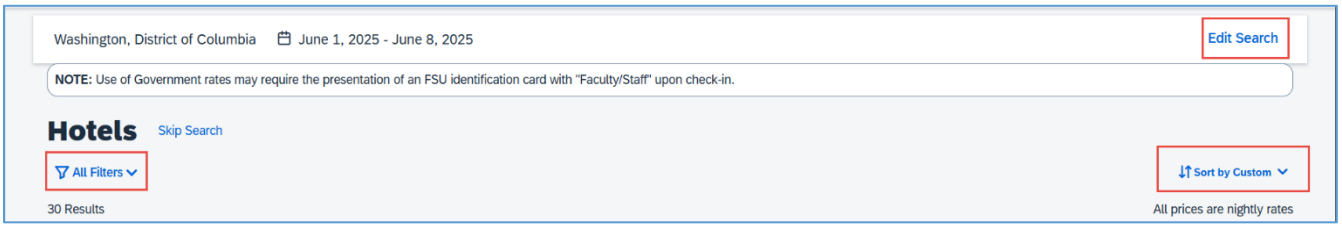
## Hotel

**Important**- If the conference hotel has a special conference rate, do not book your hotel through Concur. Book directly through the hotel or conference website to obtain the conference block room rate.
**Note**: FSU is allowed to use the state government rates available in Concur. Rates may be comparable or better than the conference hotel rates. If FSU Travelers select the state government rate, they should take their FSU card with them while traveling to verify state government employment at the hotel.

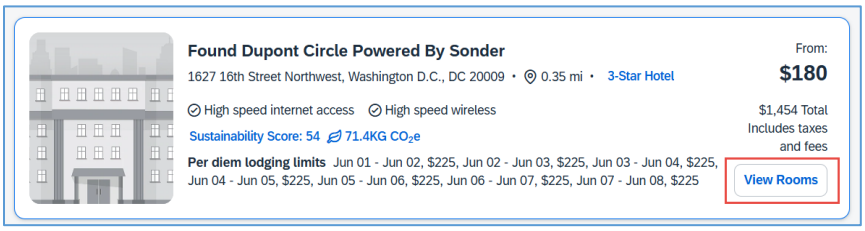
1. Click the Hotel icon. Enter **Destination, Dates,** and **Distance.** click the **Search** button.

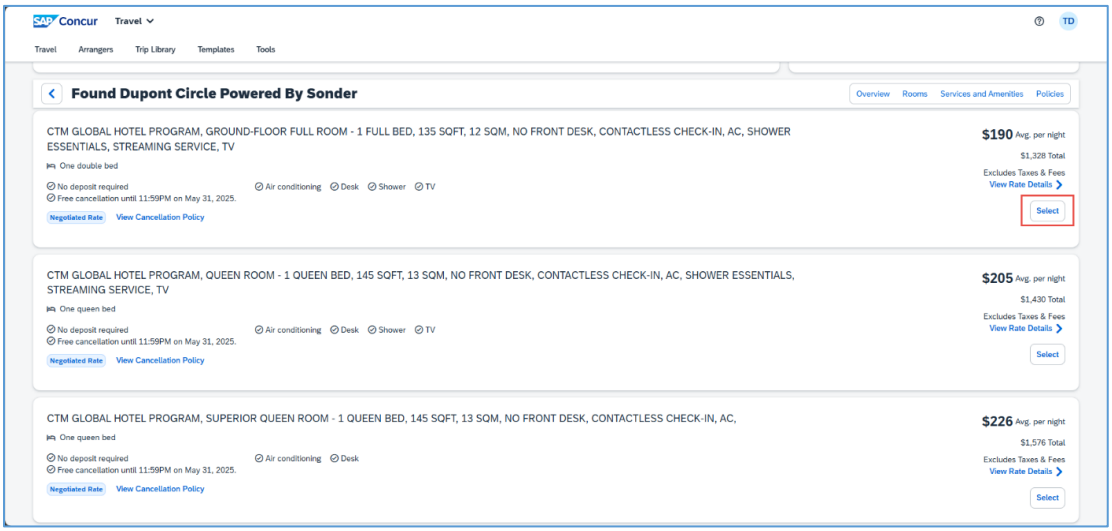


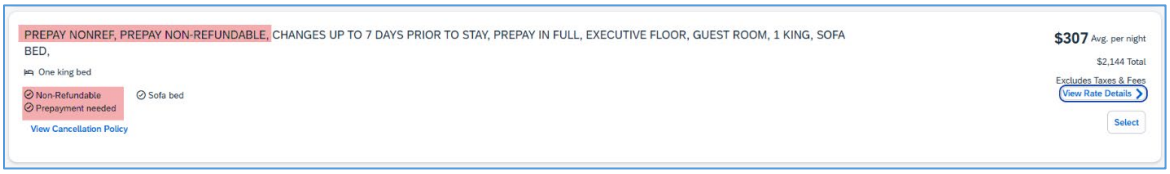

2. Review the available options to locate a hotel that meets your needs. You can filter and organize your search to assist in finding the right hotel.



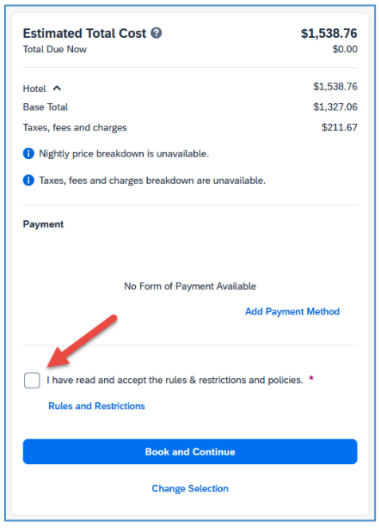

3. When you are ready to reserve your hotel room, click the **View Rooms** button, and then locate the rate and option that matches your expectations and **click on the price button**.
    a. **Note:** FSU recommends avoiding room rates that require advanced payments ("Deposit required", "Non-Refundable", or "Prepayment needed") when possible. Hotel reservations will also have the maximum lodging limits for that location listed as a guide to use when reserving a room.




4. On the Review and Book page, read and verify all information and if agreed, check the box "*I have read and accept the rules & restrictions and policies.*"



5. When ready click the **Book and Continue** button.

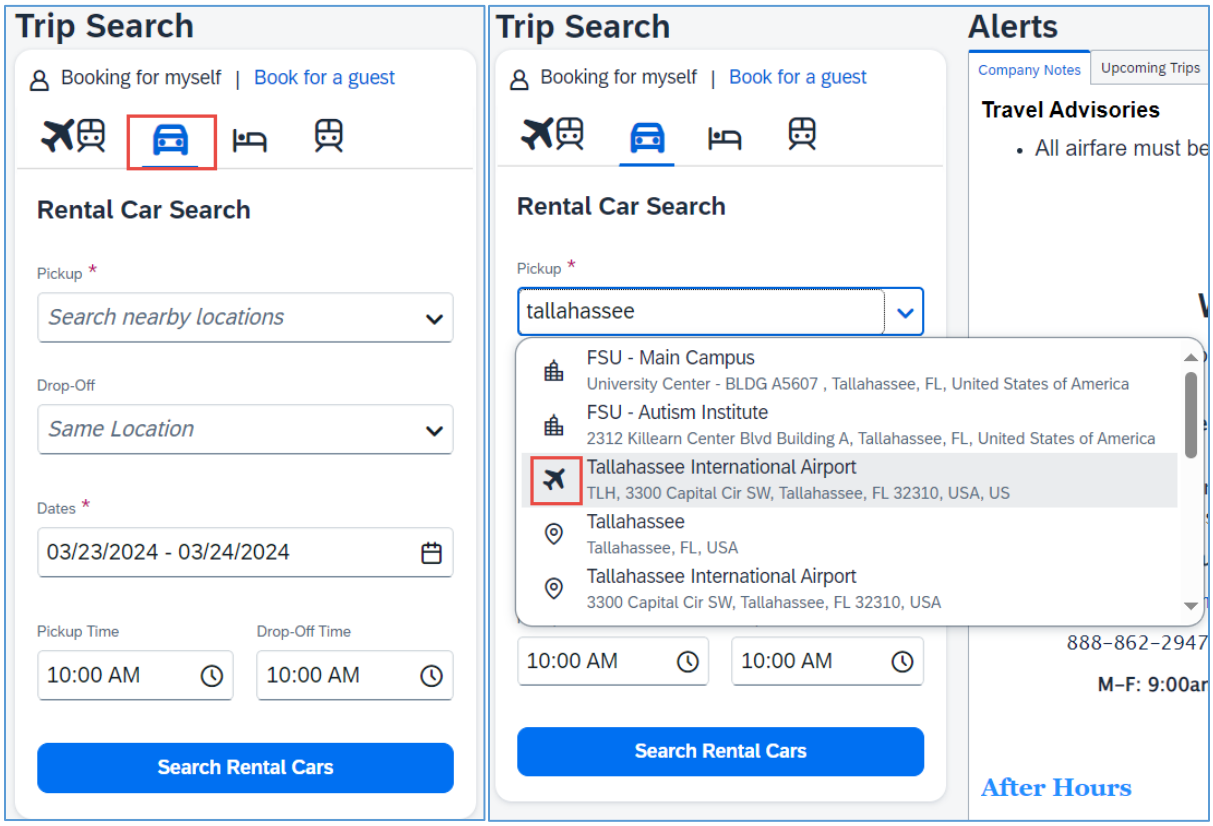
Frequent next steps:

- Airfare
- Rental Car
- Placing University Card Charges on an Expense Report

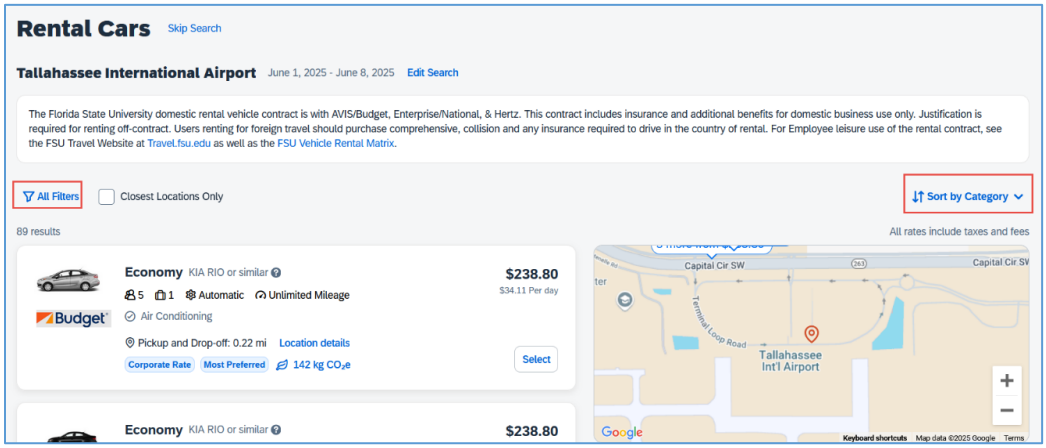
## Rental Car

**Note**: Do not use Concur to book a rental car if using an Avis/Budget billing number. Use the link at FSU Ground Transportation.

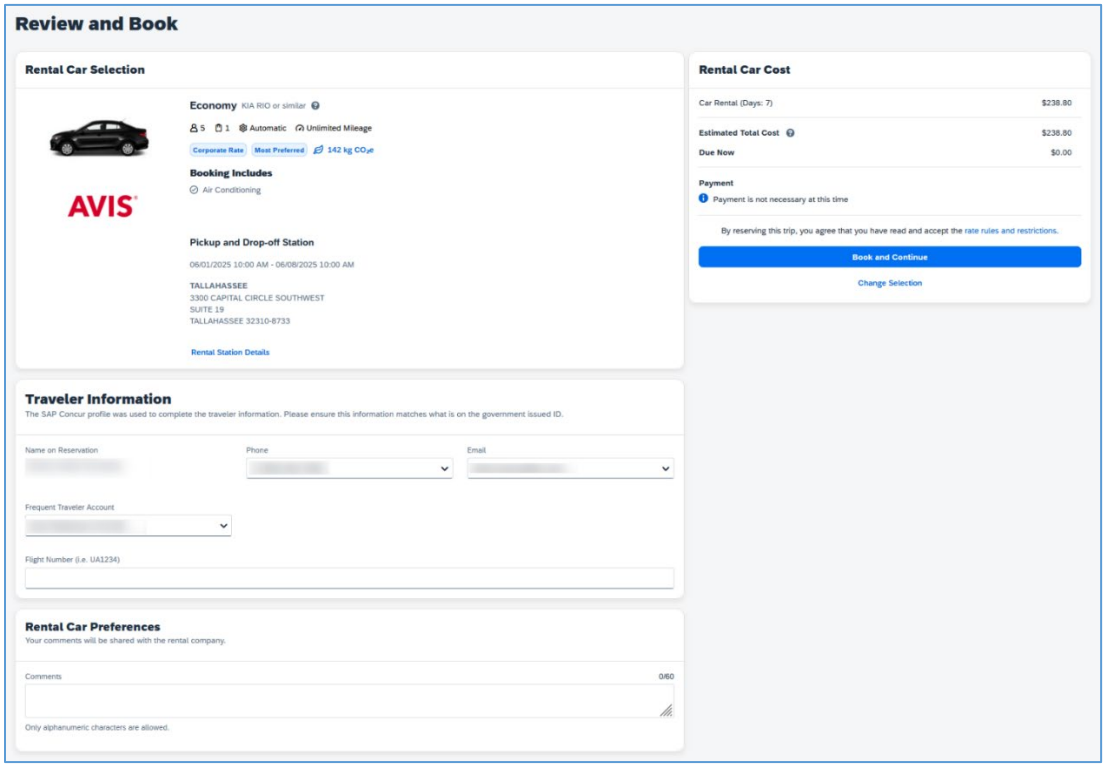
1. Click on the Car Icon. Concur requires users to provide a **Pickup** location and **Dates**. Other fields can be provided to further narrow your search or indicate if **Drop-Off** will be at a different location than pickup. **Note:** Additional fees may apply if **Pickup** and **Drop-Off** location are not the same.
2. If traveler is not flying, it is recommended to choose an off-airport option to avoid any additional convenience fees associated with the vendors airport facility. To find a list of vendors:
   a. If picking up car at Airport Terminal, provide the Airport location.
   b. If picking up car at Off-Airport, avoid using a location with a plane symbol next to it or that list the airport in the address. Example:




3. To review the available vehicle options and rates, click the **Search Rental Cars** button.
4. A list of rates and vehicles will be provided. Price will display a total for rental and breakdown price per day. Search results can be filtered and sorted to user preference. Review and locate the rate and vendor that matches your expectations and **Select** button.
   a. **Note**: Bookings that are Out of Policy will display a ⚠ icon and when expanded will provide an explanation on why the booking is a violation of travel policy.




5. On the Review and Book page, verify all information is correct make any adjustments to Traveler information. When ready select **Book and Continue**.




Frequent next steps:

- Airfare
- Hotel
- Placing University Card Charges on an Expense Report

## Completing the Travel Reservation

**Note**: When booking in Concur please ensure that you follow through to each screen until you reach the final reserve and continue screens. Travelers that are booking travel can create a reservation piece by piece or using all the options available in Concur at once. When booking all at once this creates a travel reservation, to complete the reservation follow the steps below.

1. On the Travel Details page, review the details of your reservation and the Total Estimated Cost, then click **Next**.
2. Trip Name and Description must be completed.
3. Click **Next** if you are ready to purchase the trip or select **Hold Trip** if you are not ready to purchase the trip.
4. Click **Confirm Booking**.

# Starting an Expense Report

**Purpose**: Users must create expense reports to be reimbursed for out-of-pocket expenses incurred during travel and to settle travel card transactions. Concur requires an approved travel request is attached to each expense report.

- **An expense report must be associated with an approved travel request.** Reports containing only non-travel expense type line items are referred to as a Non-Travel Expense Report and do not require a travel request.
- The easiest way to start an expense report is from a fully approved travel request.
- Expense Reports can be created by a Delegate but can only be submitted by the individual seeking reimbursement. Please ensure Expense Report totals are correct before submitting.

## Start an Expense Report

### Fully Approved Travel Request

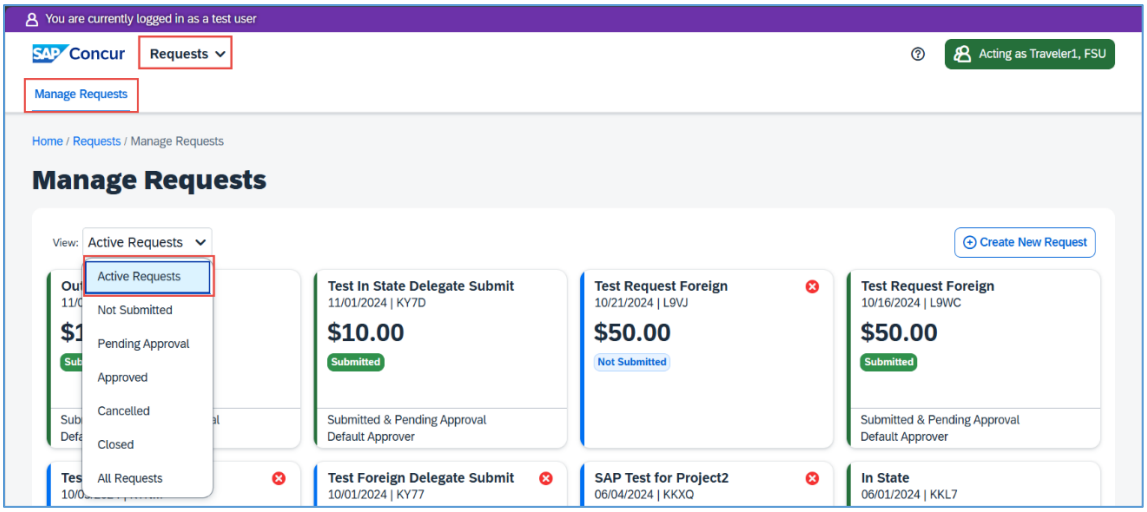
**A fully approved travel request must receive approval from the Default Approver*, and all required Cost Object Approver(s)**. Once you have a fully approved travel request, you can create your expense report.**

*Default Approver – This would be your Supervisor.

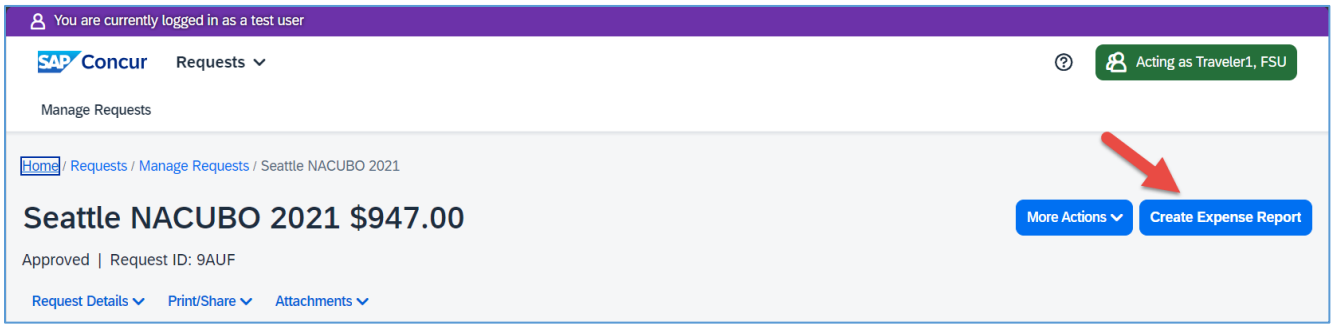
** Cost Object Approver(s) – This would be a Budget Manager, Project Approver, SRA Approver, or Research Foundation Approver.

Number of approvals and responsibilities vary based on department, funding, and project/activity. Please see Concur Approvals page for additional information.

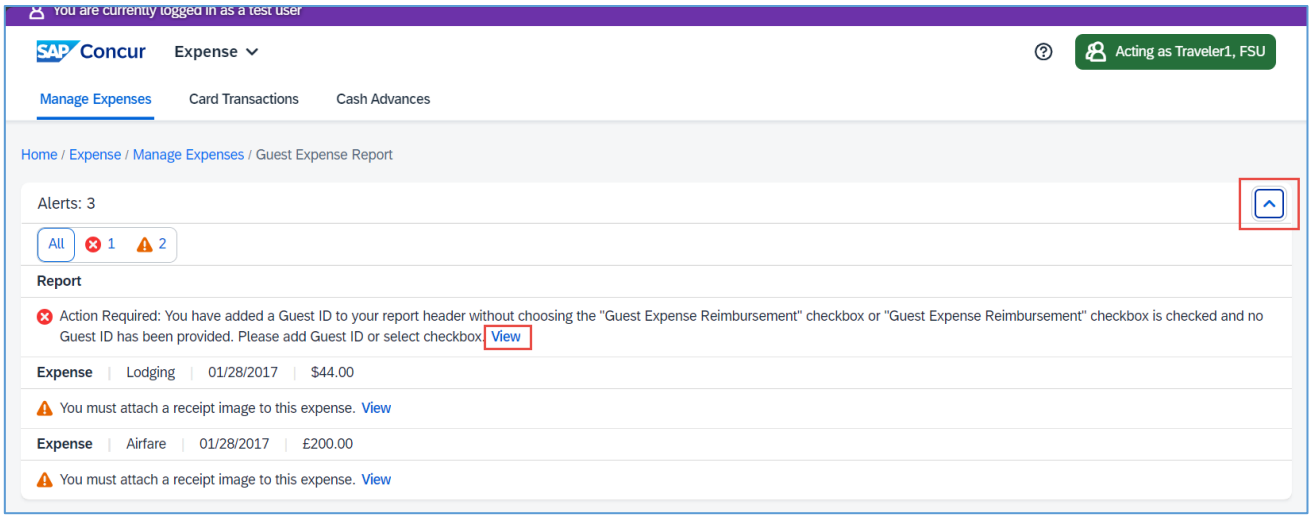
1. Navigate to and open your fully approved travel request. Concur shows items created in the last 90 days, if you don't see the request you are looking for, change your view to show "Approved" requests.



2. In the top right corner select **Create Expense Report**. Screen will transition to a new expense report.




3. Expand audit rule alerts, address any required fields missing from expense report header by clicking **View**, or **Report Details** > **Report Header**. Required fields are marked by a red asterisk *.




4. **Save** report header. Begin adding necessary expenses and transactions.

Frequent next steps:

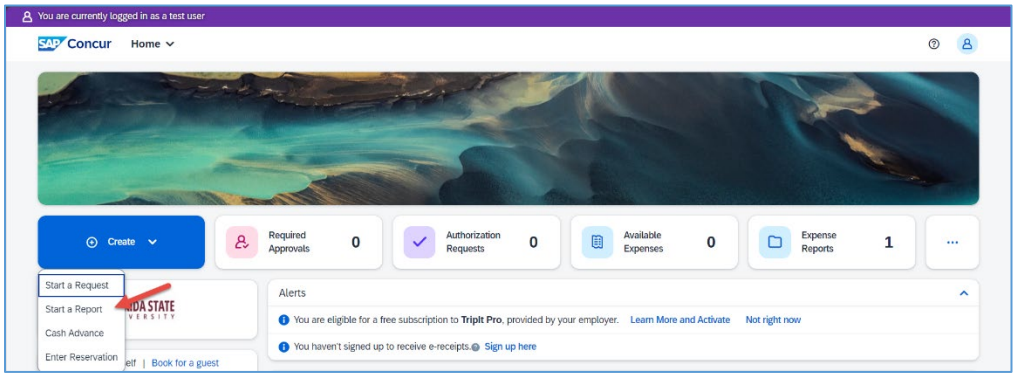
- Meal Allowances & Itineraries
- Processing University Travel Card Charges
- Adding Out-of-Pocket Expenses
- Attaching Receipts
- Itemizing Personal Expenses on the Travel Card

## Create a New Expense Report

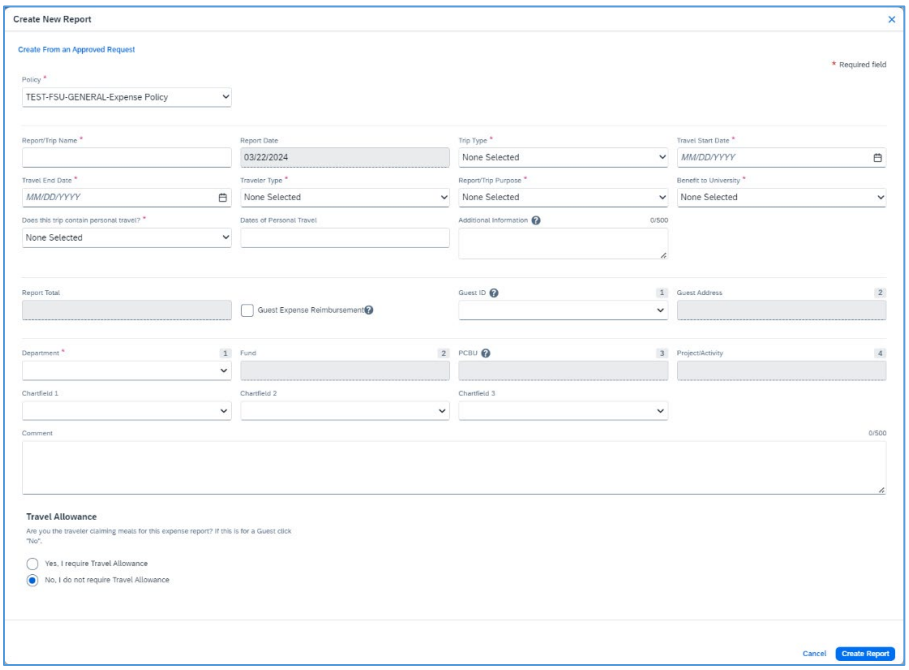
Users can create a new expense report in Concur at any point, when possible, it is recommended to move all related expenses to a single expense report and submitting once the trip is completed. University card charges and personal reimbursements can be included on the same expense report for relevant trips. **Example**: Grouping travel expenses (airfare, lodging, rental car) and reimbursements (parking, meals, baggage fees) for a conference on the same expense report.

**Reminder: All airfare for FSU Business must be booked in Concur or over the phone with the University Travel Management Company (TMC). Additional information can be found on the Concur Travel page.**

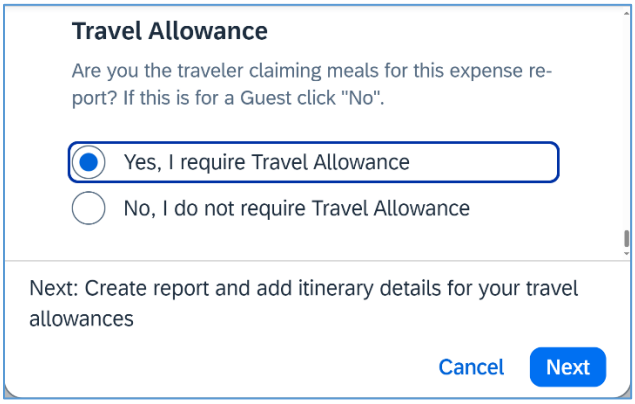
1. From the Concur home page click on **New** in the Quick Task Bar. Click on **Start a Report.** See below.




2. Fill out all required fields marked by a red asterisk *.



3. Provide a response to the following question:




   a. FSU Travel Policy indicates that travel which is overnight and more than 50 miles away from the traveler's headquarters is eligible for a Travel (Meal) Allowance. See Travel Meals page.
      i. If response is "Yes, …"; Creates report and you can begin to add itinerary details for your travel allowances. See Meal Allowances & Itineraries. Begin adding necessary expenses and transactions.
      ii. If response is "No, …"; Proceed to Step 4.
4. Click **Next**. Begin adding necessary expenses and transactions.

Frequent next steps:

- Processing University Travel Card Charges
- Adding Out-of-Pocket Expenses
- Attaching Receipts
- Adding Attendees
- Allocating Transactions
- Itemizing Personal Expenses on the Travel Card

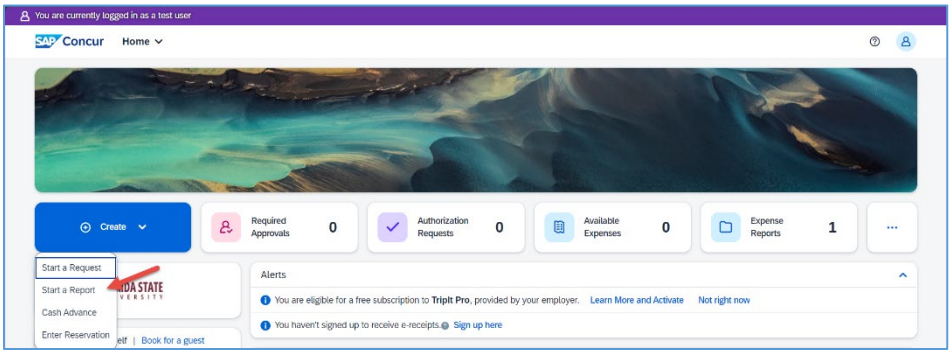
## Non-Travel Expense Report

Non-travel expense reports are a subset of expense reports, created for FSU Foundation, FSU Research Foundation and out-of-pocket reimbursements using Education & General (E&G), Auxiliary, and Carryforward funds where a P-Card or Purchase Order (PO) are not an option.

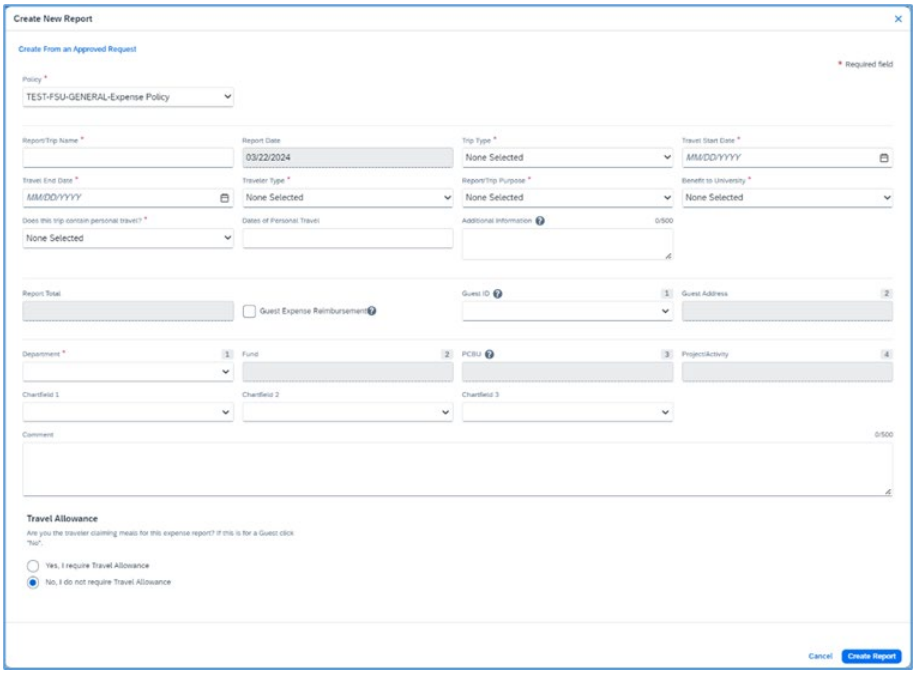
- Travel expense reports using E&G, Auxiliary, and Carryforward funds can contain nominal non-travel expense lines, but Non-travel expense reports cannot contain travel-based expense lines (e.g. Airfare, Hotel, Rental Car).

For questions regarding the use of specific FSU Foundation or FSU Research Foundation funds and appropriate expenses, please reach out to the relevant contacts in their departments.

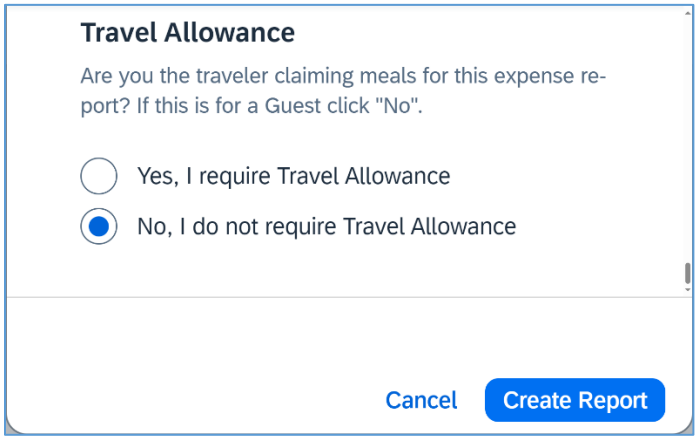
1. From the Concur home page click on the New in the Quick Task Bar. Click on **Start a Report.** See below.




2. Fill out all required fields marked by a red asterisk *.



3. Provide a "No, …" to the following question (see screenshot below):




4. Click **Create Report**. Begin adding necessary expenses and transactions.

Frequent next steps:

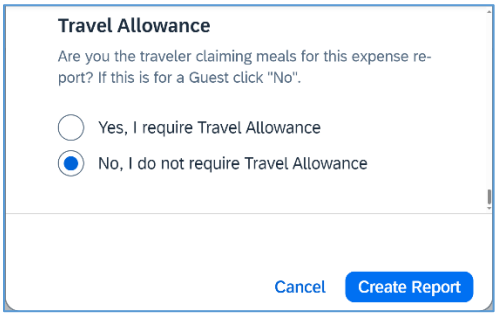
- Adding Out-of-Pocket Expenses
- Processing University Travel Card Charges
- Attaching Receipts
- Adding Attendees
- Allocating Transactions
- Itemizing Personal Expenses on the Travel Card

# Meal Allowances & Itineraries

**Purpose**: This guide instructs the user on entering itineraries and selecting or removing eligible meals. A traveler's itinerary is how Concur calculates amounts for meal allowances. There are two main ways to create an itinerary, manually and through an import process.

**Note**: When traveling on university business, travelers may be eligible for meals while on official business. Travel must be overnight and more than 50 miles away from the traveler's headquarters to claim meals.

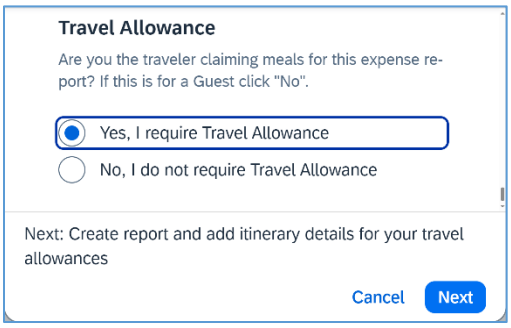
- Itineraries can be imported from available trips booked in Concur or manually created.
- When an itinerary is created or imported, you cannot create or import another itinerary for the same time and date.
- You can create, edit, and delete rows for each itinerary stop or delete the itinerary and start again.
- If you are creating an expense report for a guest traveler, always answer "No, …" to the question (see screenshot below) regarding Travel Allowance on the report header. **Do not use the Travel Allowance option or Daily Meal Allowance. Guest travelers have a "Guest Daily Meal Allowance" expense type for this**.
- State of Florida meal allowance is the same for guests as for employees. Those rates are $6 for breakfast, $11 for lunch, $19 for dinner, domestically. Foreign meal rates will vary by location.
- **Daily Meal Allowance and Travel Per Diem (Max $80) cannot be used on the same day.**




## Import an Itinerary

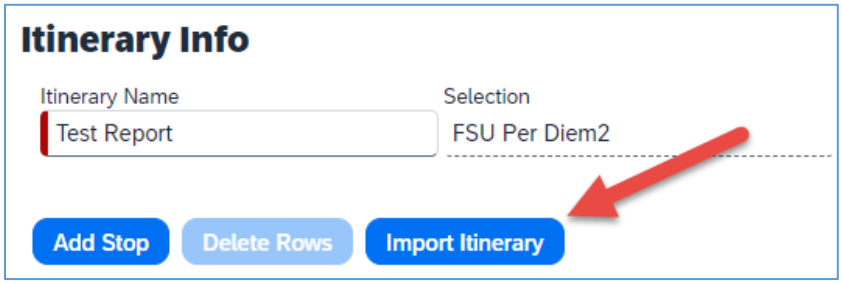
When a trip is booked in Concur an itinerary is automatically associated with your profile and can be imported to your expense report. To import an itinerary, you'll need to Start an Expense Report. Once you have started your expense report and filled out the required fields you are ready to create your itinerary.

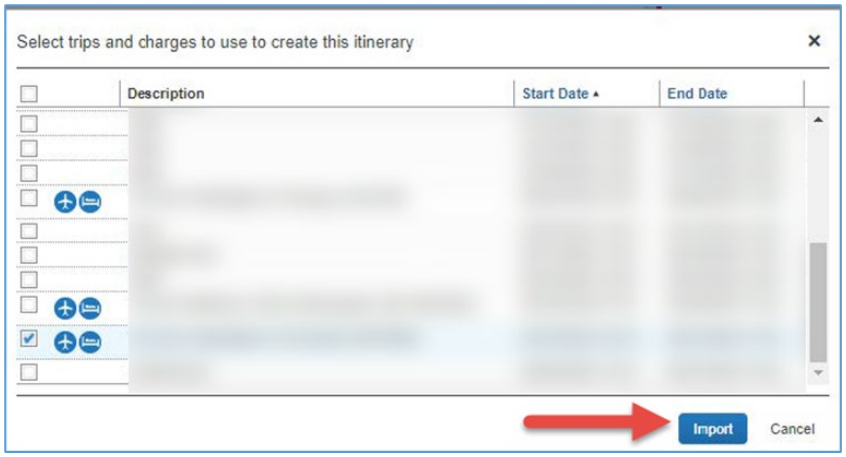
1. You can import an itinerary by navigating to the bottom of the Expense Report Header selecting "Yes, …" and then select **Next**.




a. You can also navigate to the **Manage Travel Allowance** page and then clicking on **Create New Itinerary** in the top left corner.

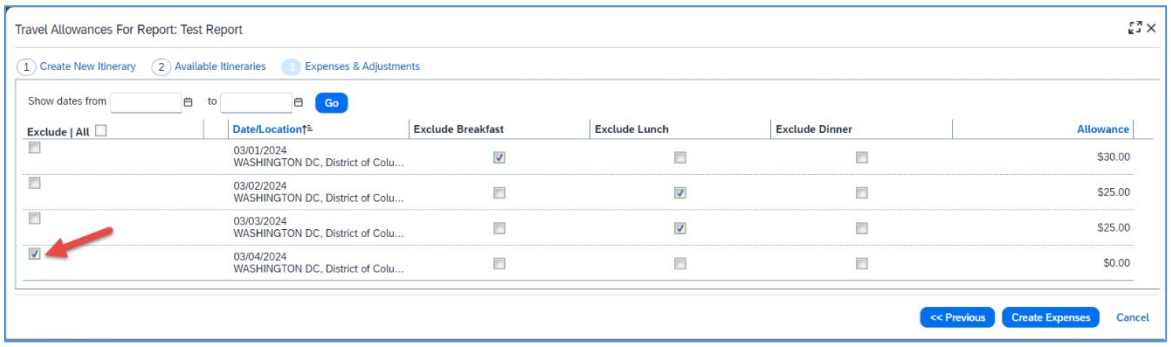
2. Once on the create new itinerary page, you can use the **Import Itinerary** button to bring up a list of available itineraries you can import, check the box next to the itinerary you need and then click the **Import** button.




3. If itinerary stops are accurate and match expectations, click **Next** to proceed to Expenses & Adjustments. **Note:** the imported itinerary may be based on airfare departure/arrival times. Adjust these to reflect the time the traveler left home on the first travel date and the time the traveler returned home on the final travel date.
4. Review the dates of travel and use the checkboxes to indicate which meals are ineligible, i.e. provided by the conference or which the traveler is claiming Per Diem for that day instead of a Meal Allowance.

a. **Example**: Conference or sponsor provides breakfast, lunch, or dinner on certain days.
b. **Example**: Travelers can claim Per Diem on the last day of travel instead of meals.
    i. Using the exclude checkbox on the left for a specific date will exclude the entire day. See below.

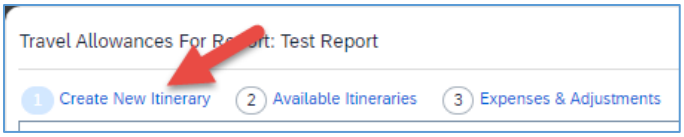



5. When done with adjustments, click **Create Expenses**.

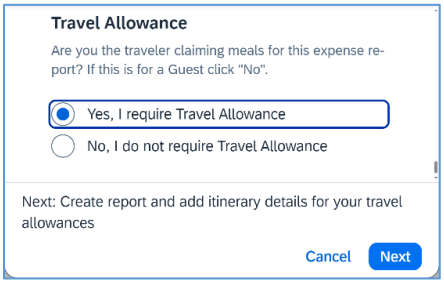
## Create an Itinerary

To manually create an itinerary, you'll need to Start an Expense Report. Once you have started your expense report and filled out the required fields, you are ready to create your itinerary.

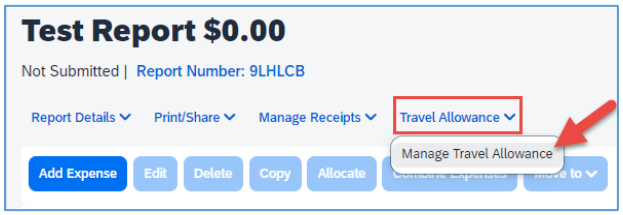
**Note**: An itinerary is only required to receive meal allowance for employees.



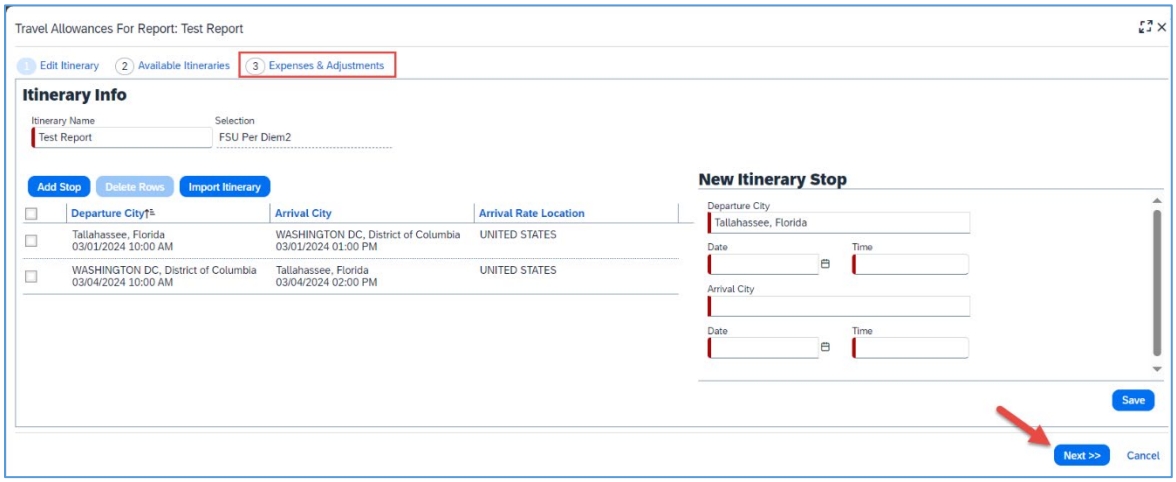

1. You can create an itinerary by navigating to the bottom of the Expense Report Header selecting "Yes, …" and then select **Next**.




a. You can also navigate to the **Manage Travel Allowance** page and then clicking on **Create New Itinerary** in the top left corner.



2. Enter the date and time for where your trip started and then for your arrival city. Click **Save**.
    a. **Note**: You do not need to enter a stop for indirect travel (layovers), only add a stop if you will be staying for a prolonged period i.e. where you lay your head at night.
3. Now complete an itinerary stop for your return home. Click **Save**. Ensure dates and times match expectations. Click **Next** or **Expenses & Adjustments**. **Note**: Arrival date and time should be when the trip ended.

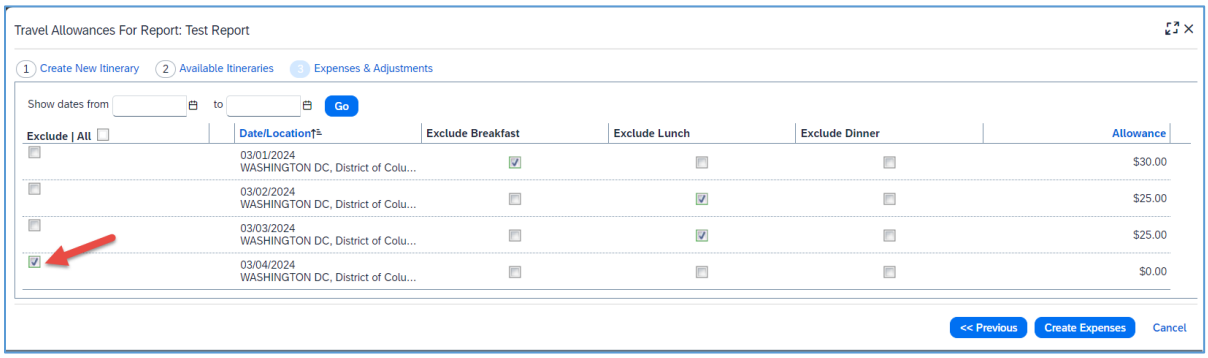



**Note**: When entering a foreign travel itinerary, if paying meals instead of per diem on the last day of travel, include a stop from foreign destination to the point of entry in the United States, and then a stop from that entry point to the final return destination. Doing this will allow Concur to display the domestic meal allowance.

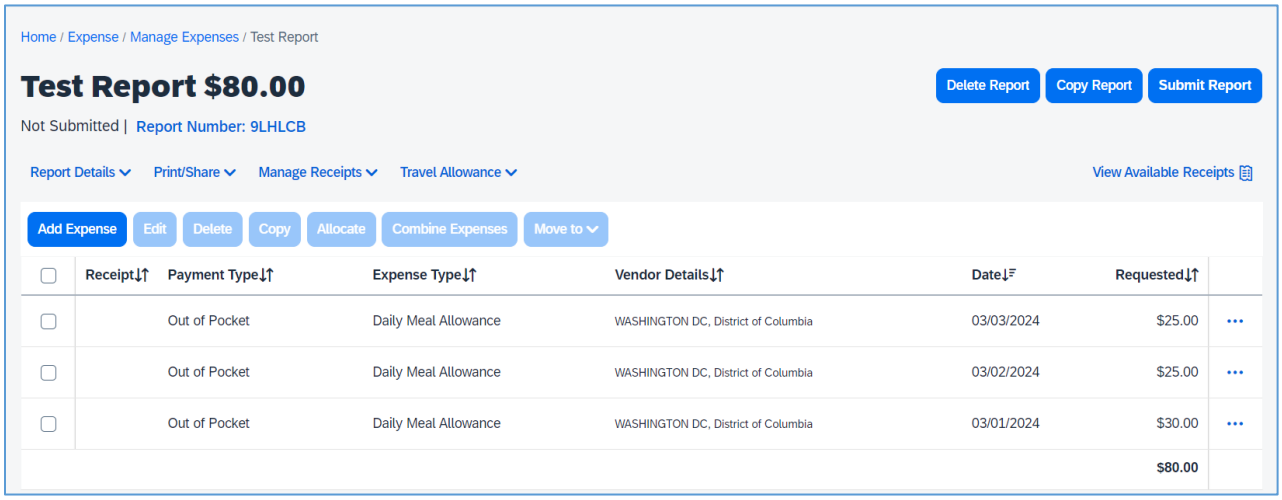
**Example**:

- **Departure City** - London, UK -> **Arrival City** - Atlanta, GA (changes meal allowance to domestic)
- **Departure City** - Atlanta, GA -> **Arrival City** - Tallahassee, FL (domestic entry point to return destination)

4. Review the dates of travel and use the checkboxes to indicate which meals are ineligible, i.e. provided by the conference or which the traveler is claiming Per Diem for that day instead of a Meal Allowance.
    a. **Example**: Conference or sponsor provides breakfast, lunch, or dinner on certain days.
    b. **Example**: Travelers can claim Per Diem on the last day of travel instead of meals.
        i. Using the exclude checkbox on the left for a specific date will exclude the entire day. See below.



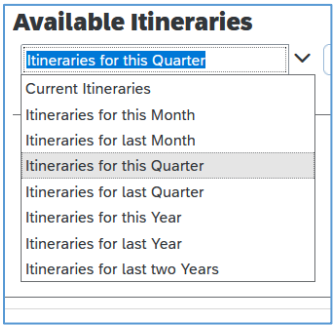

5. When done with adjustments, click **Create Expenses**. Expenses will be added as a "Daily Meal Allowance"



## Managing Itineraries, Expenses & Adjustments

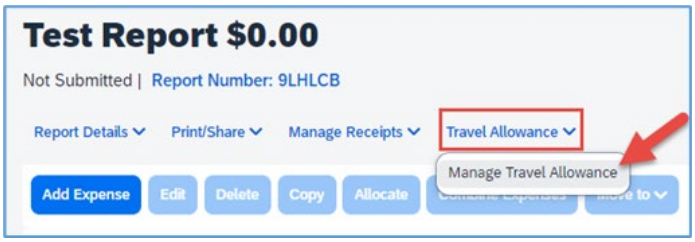
Once an itinerary is created it will become part of your assigned itineraries. You can edit or unassign an itinerary at any point before your expense report is submitted. If a manually created or imported itinerary is unassigned, it will be added to your available itineraries list and can be assigned to another expense report later.

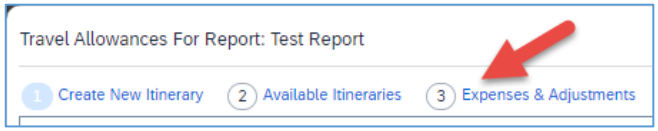
- If you unassign your itinerary or delete your expense report with an itinerary assigned, your manually created itinerary will not be deleted. It will be added to your list of Available Itineraries, but you may need to change the filter to see it depending on the time frame of the itinerary.



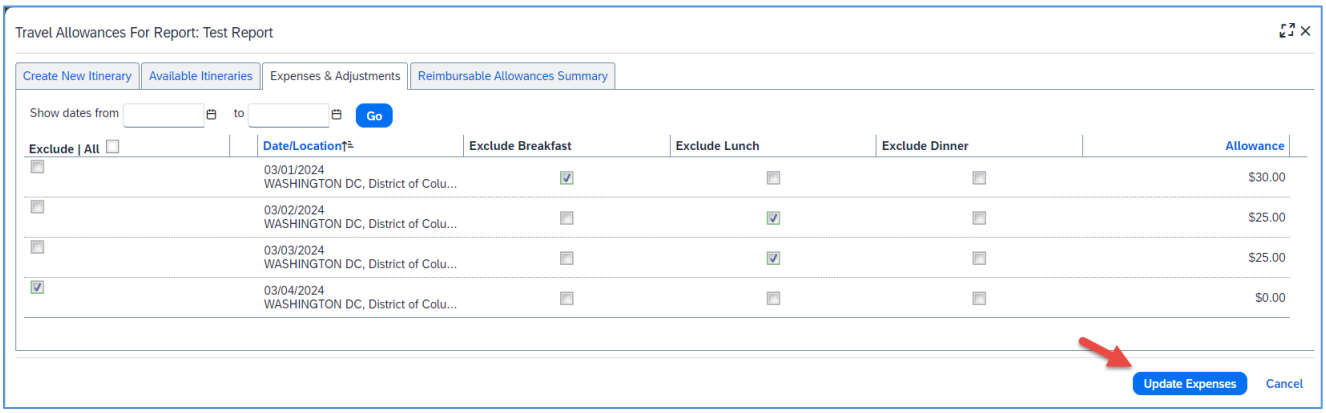

To access your available itineraries, or make changes to your Travel Allowance follow these steps:

1. Open your expense report and click on **Manage Travel Allowance**. Review assigned itineraries if necessary or proceed directly to **Expenses & Adjustments**.




2. Adjust Travel Allowance using check boxes to indicate meal exclusions. Then click **Update Expenses**.


Travel Allowances For Report: Test Report
Create New Itinerary
Available Itineraries
Expenses & Adjustments
Reimbursable Allowances Summary
Show dates from
to
Go
Exclude | All
Date/Location
Exclude Breakfast
Exclude Lunch
Exclude Dinner
Allowance
03/01/2024
WASHINGTON DC, District of Colu...
$30.00
03/02/2024
WASHINGTON DC, District of Colu...
$25.00
03/03/2024
WASHINGTON DC, District of Colu...
$25.00
03/04/2024
WASHINGTON DC, District of Colu...
$0.00
Update Expenses
Cancel

## Placing University Card Charges on an Expense Report

**Purpose**: In Concur, a university card transaction enters Concur as an available expense on the profile of the T-Card or airfare cardholder or person responsible for the transaction. Users may have both out of pocket and university card expenses and these may both be placed on the same expense report.

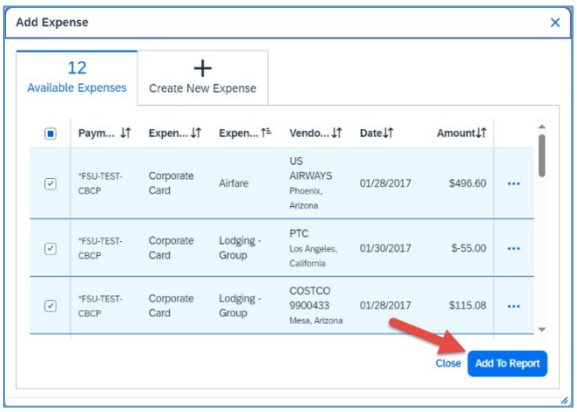
- University card transactions cannot be deleted. Please contact the Travel Office – Travel@fsu.edu if you have questions regarding specific transactions.
- University card transactions should be placed on the related expense report as soon as possible. Email reminders in Concur will notify the cardholder to assign the transactions to an expense report for processing at intervals of 8, and 15 days. **Note: Travelers who fail to submit an ER with all related charges within 30 days after their trip are at complete risk of having their travel card terminated and being held personally liable for these charges.**
- University card transactions cannot be submitted as an undefined expense type.

### Add Expense

If you have available card charges you can add them to an expense report that has already been created and not submitted using the add expense function. Please see our guide on Starting an Expense Report if one has not been started yet.

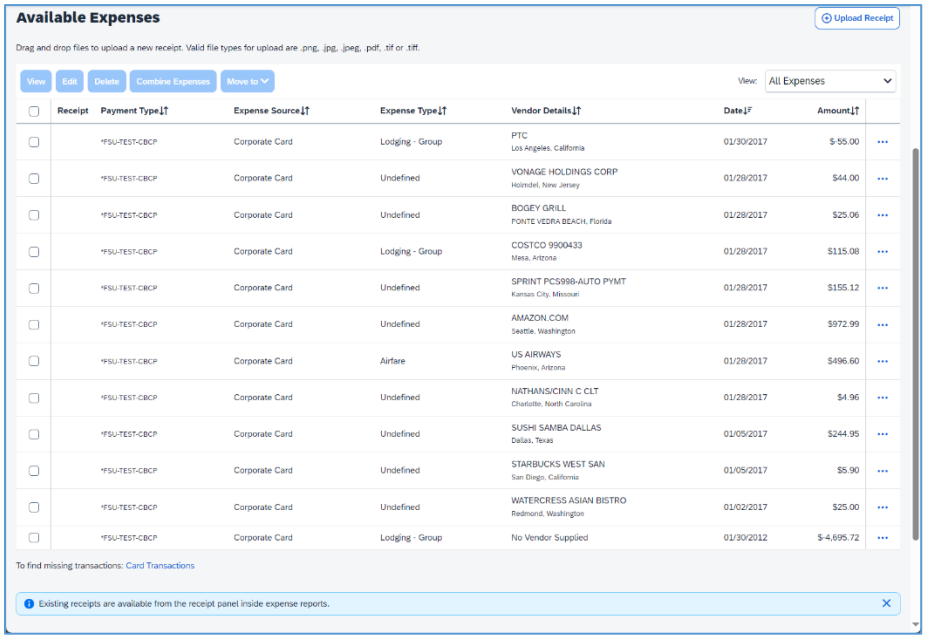
1. Click on the **Add Expense** button.


2. Select the necessary transactions that are needed for the current expense report from the list of available expenses using the checkboxes.
3. Once all transactions needed are selected, click **Add to Report**.

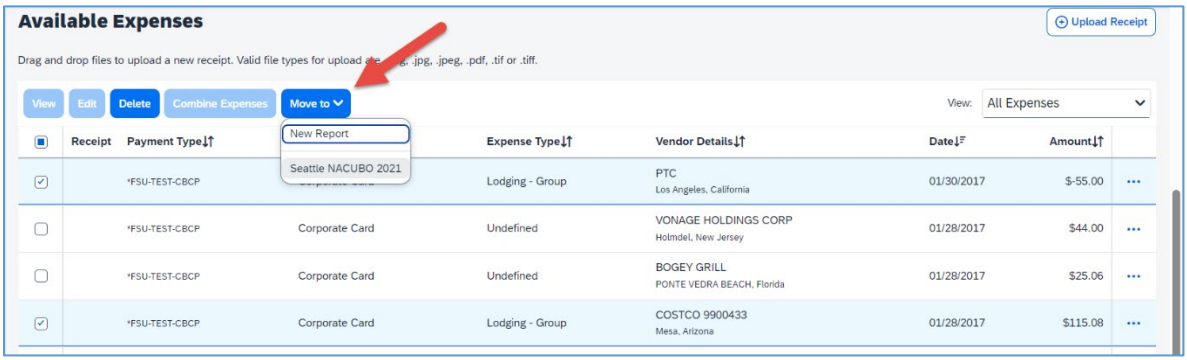


## Available Expenses

Users' travel card and airfare card charges will populate the Available Expenses section of their Concur homepage. This list can be found on the Concur homepage, or under the Report Library on the Expense application.




1. Select the checkbox next to the expense(s) you will be processing. Then click on the **Move to** button.
2. If no report exists yet you can create a **New Report**. Otherwise click on the listed expense report related to the expense.

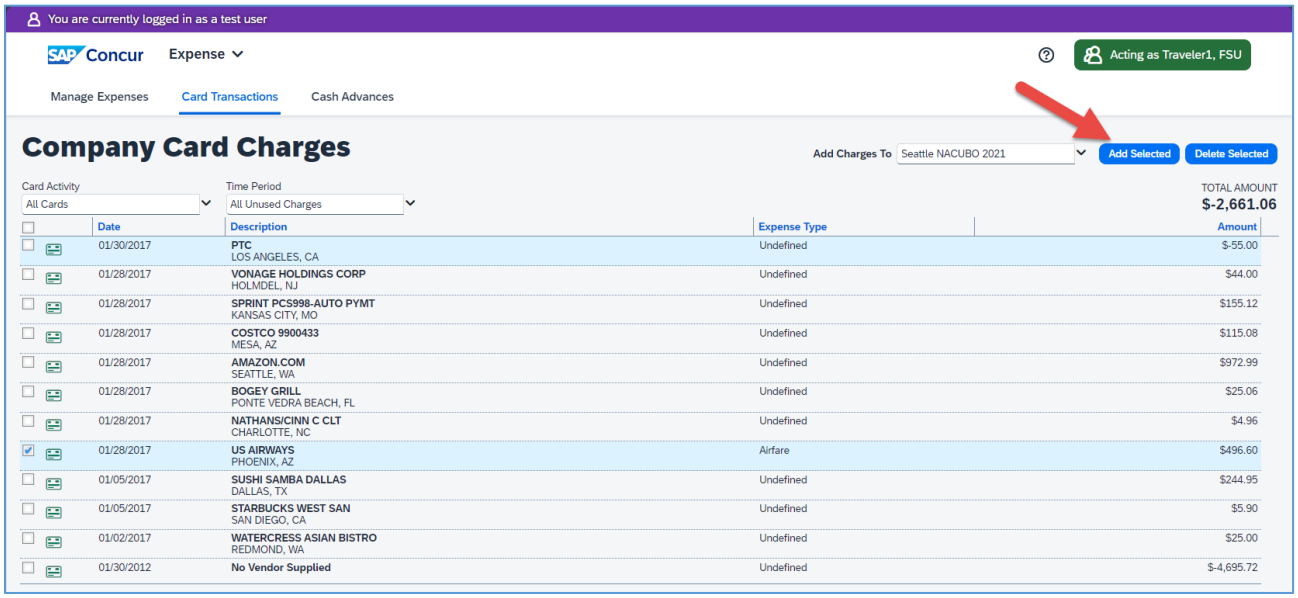



Your screen will transition to the expense report and the expenses will now be added to the selected expense report to begin processing additional expenses and attach receipts as necessary.

## View Transactions

While in the Expense module you can review and assign any active Company Card Charges from the **Card Transactions** page. On this page exists options to sort or filter based on card activity and time period.

1. Select the checkbox next to the expense(s) you will be processing. In the **Add Charges To** selectable field, indicate if the expense will be going to a new or preexisting report.
2. Click on **Add Selected**



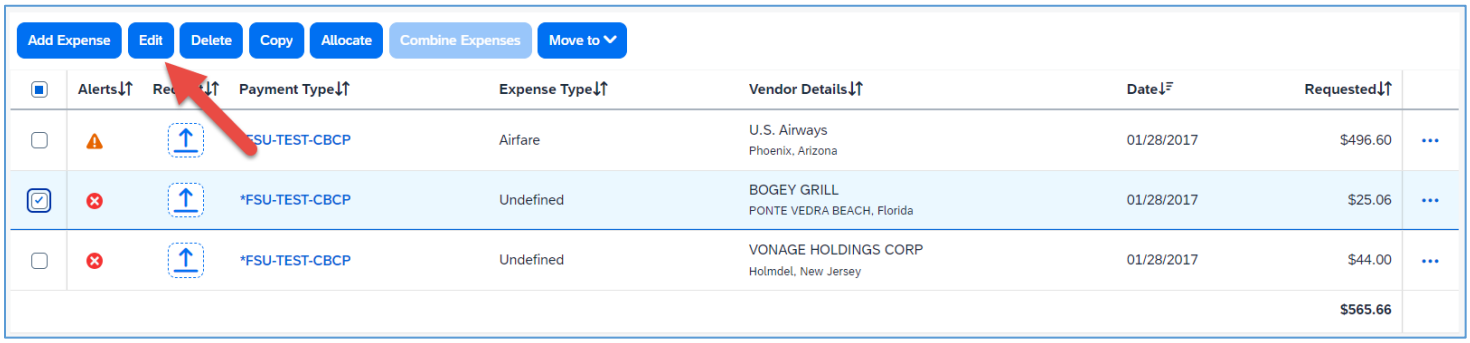

Your screen will transition to the expense report and the expenses will now be added to the selected expense report to begin processing additional expenses and attach receipts as necessary.

## Processing Expenses

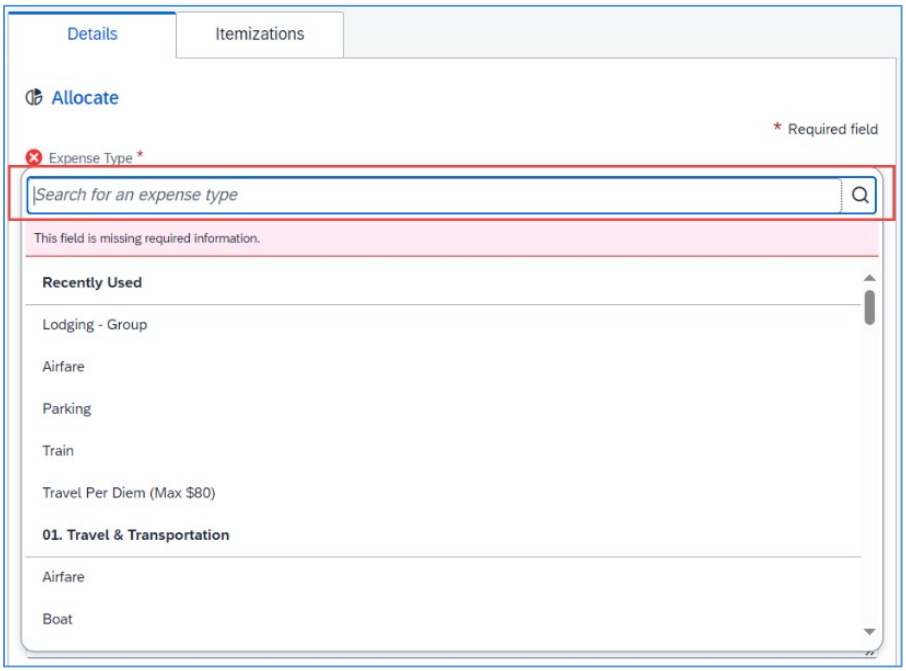
Once a university card transaction is assigned to a report, it may require manual updates or changes to prepare the expense or define the expense type before you can submit the expense report.

- If an expense type is undefined or enters the Concur system categorized as an incorrect expense type, it can be updated from the available list as needed.

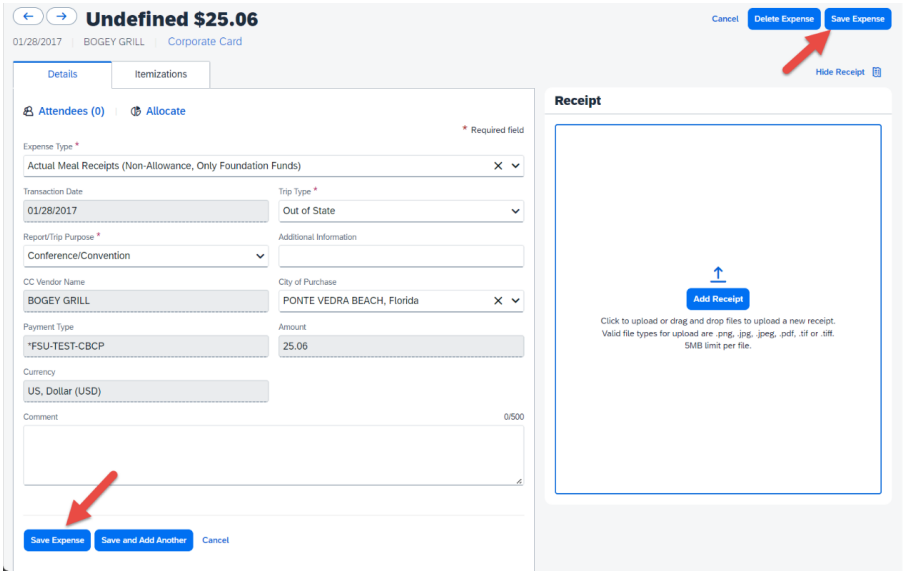
1. Locate and select the checkbox next to the expense, then click **Edit**. This will transition the page to editing the selected expense.




2. Using the Expense Type drop-down field, you can search for or begin typing the name of the expense type you are looking for.




3. Fill out all required fields marked by a red asterisk *, attach a receipt image, review data, then **Save Expense**.




If additional university card expenses remain, repeat steps 1 – 3 until each expense has a defined expense type.

Frequent Next Steps:

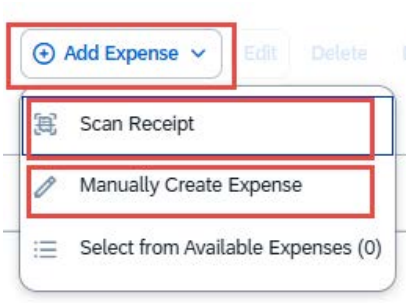
- Non-Travel Expense Report
- Itemizing Personal Expenses on the Travel Card

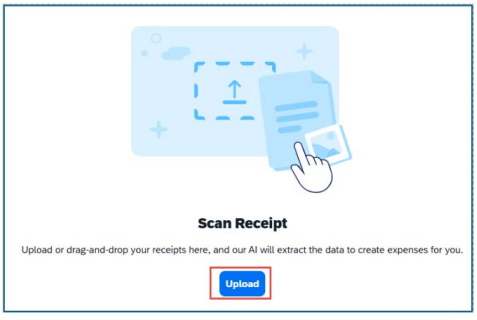
## Scan Receipt to Create Expense

Before you attempt to upload:

- Files should be saved as .png, .jpg, .jpeg, .pdf, .tif or.tiff
- 5MB limit per file
- File names should be short to prevent issues with file upload character limits

1. From the relevant expense report, select Add Expense. Then click Scan Receipt.
2. Users can drag and drop receipts directly into the expense report, or upload a file directly.
3. AI is used to extract and instantly create and itemize new expenses. Be sure to review AI extracted information for accuracy.
4. If User does not want to use AI feature, they can select **Manually Create Expense**



## Lodging Expense Types

**Purpose**: A hotel bill typically contains a variety of charges including room fees, taxes, parking, meals, etc. Itemizing daily lodging charges is only required when a non-reimbursable personal expense is included with the Lodging expense type. If lodging was charged to a university card, itemization may be auto-populated if the vendor provides the information to Visa.

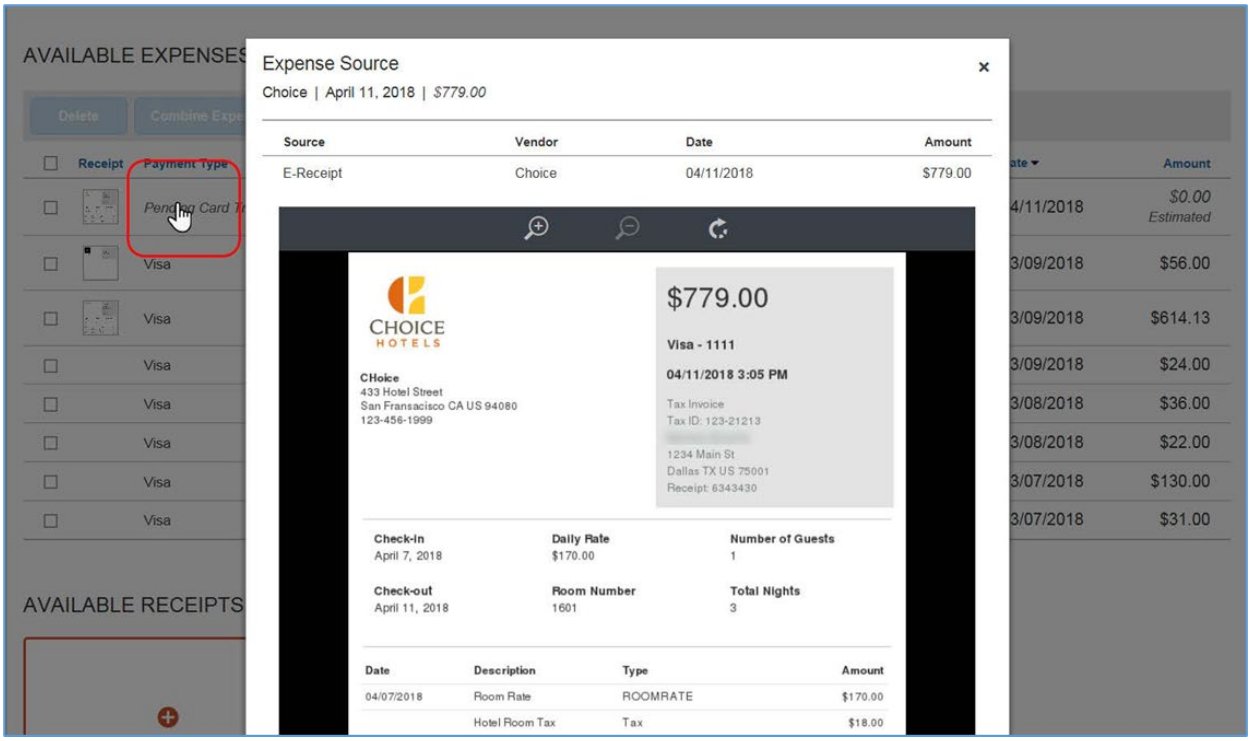
There are a few different Lodging expense types in Concur.

- Lodging
- Lodging – Advance Deposit
- Lodging – Group
- Lodging – Other Accommodation Types

Each contains its own set of rules and requirements. The instructions below will explain how to itemize the nightly lodging expense for our Lodging expense type including the base rate, additional taxes, and applicable fees.

### Auto-Itemization

Expenses that are university card charges or supplied by an e-receipt (example below) may automatically create an itemization depending on the hotel charge details provided by the vendor. If the expense was processed on a university card, you can combine the e-receipt and the transaction once it enters your available expenses. Otherwise, follow the steps to itemize nightly lodging expense in the section below. You can enable e-receipts by clicking here.



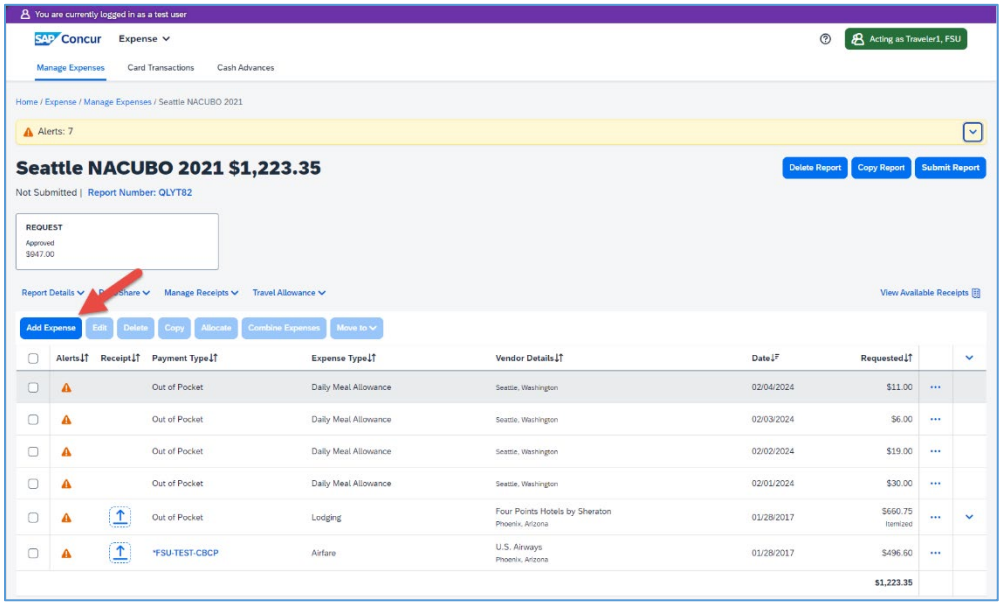
# Adding Out-of-Pocket Expenses to an Expense Report

**Purpose**: This guide is intended to assist users in adding out-of-pocket expenses to a report. Out-of-pocket expenses are expenses not charged to a travel card or the airfare card.

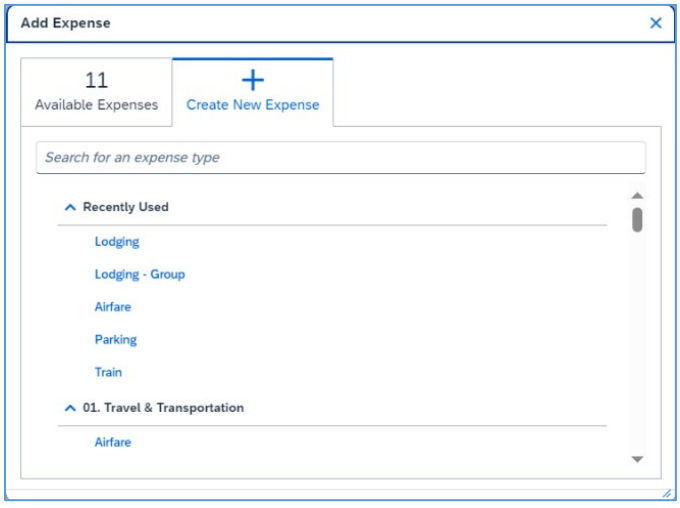
## Add Expense

After an expense report has been created, you can begin to add expenses from the main expense page.

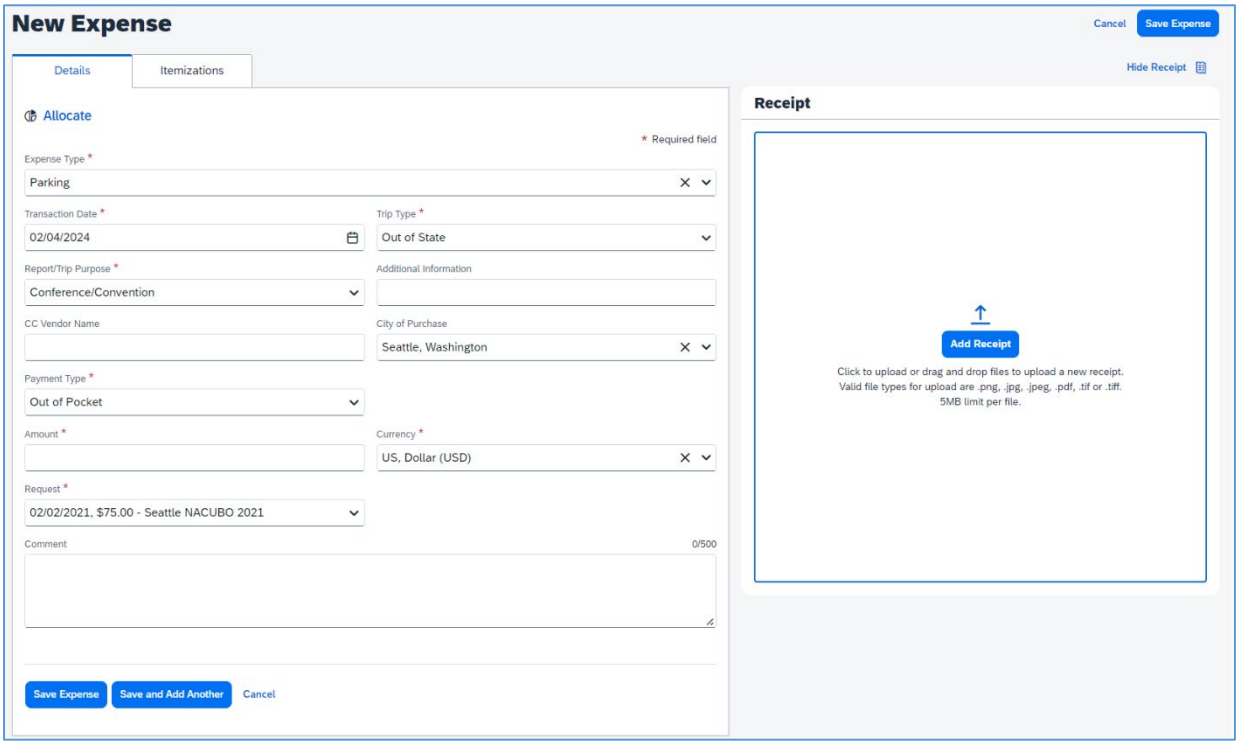
1. Click on the **Add Expense** button, select the **Create New Expenses** tab




2. Search for the desired expense type by scrolling through the list or typing in the "Search for an expense type" area.



3. Fill out the required fields marked with asterisk *. Ensure the Payment Method field is marked out of pocket. **Do not modify the Payment Type field unless directed to do so by the Travel Office. Manually created expenses should always be listed as out-of-pocket.**
4. Use the **Attach a Receipt Image** button to attach a receipt for the out-of-pocket expense.
5. Click **Save Expense** or **Save and Add Another**, if necessary. Repeat steps 2 – 5 as needed.



# Processing Personal Expenses on a University Card

**Purpose**: If a personal purchase is placed on a university card during business travel, the personal purchase must be included in as an Itemization. For example:

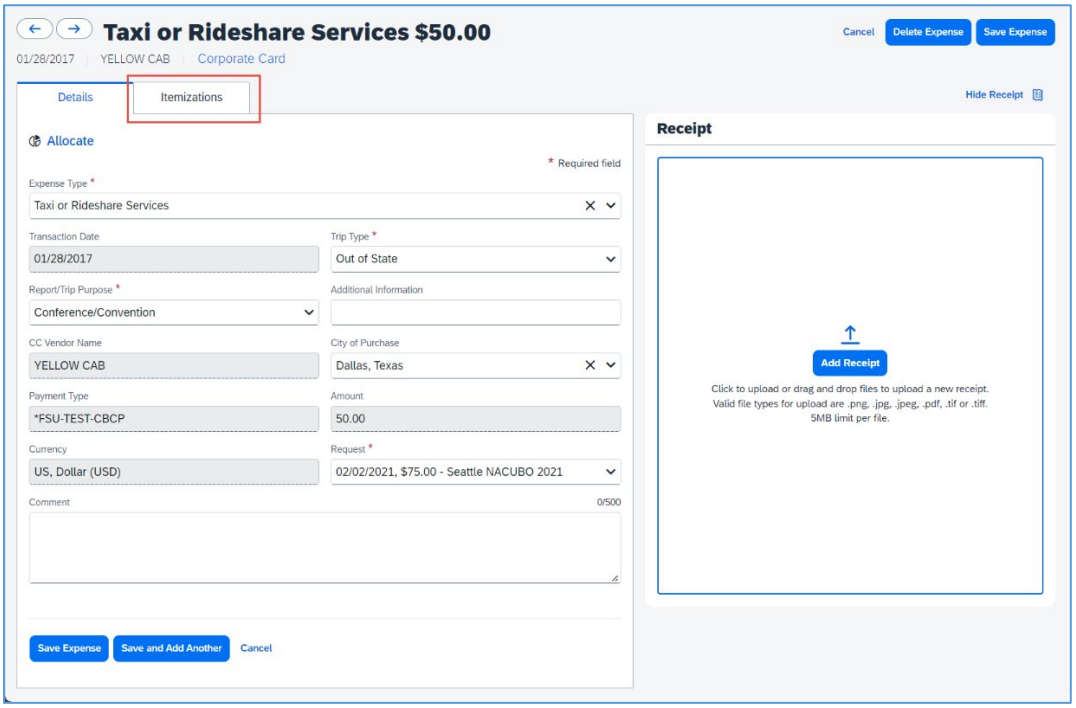
- Taxi/Rideshare where the tip is over 20%
- Fuel charge that includes some snacks or other unallowable purchases at the gas station
- Rental vehicle where you rented a larger class vehicle without a justification

Non-reimbursable, unallowable, out-of-policy, or personal expenses should only be included or itemized if they were placed on the travel card or airfare card. An audit rule prevents this expense type from being used for an out-of-pocket expense.

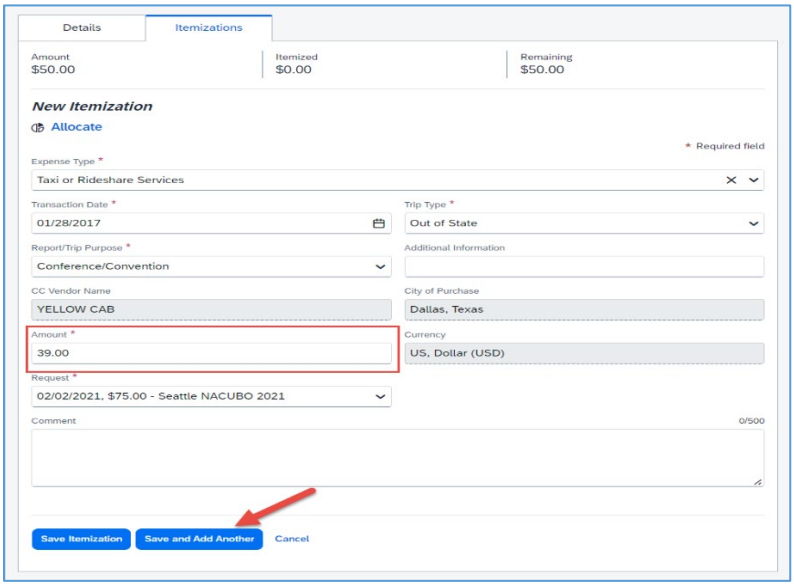
## Itemizing Personal Expenses on a University Card

In this expense report example, we will be itemizing the Taxi/Rideshare Services expense type where we tipped over 20%.

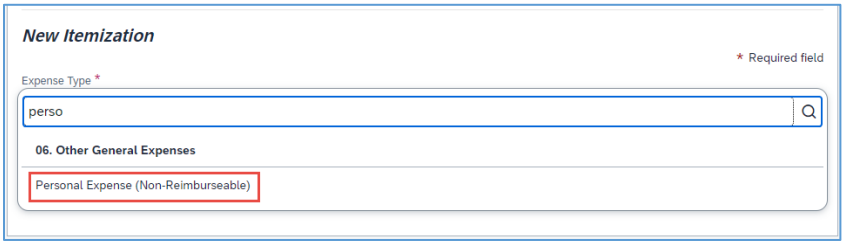
- Total Taxi/Rideshare Services Expense = $50
- Itemization = $39
- Personal Expense (Non-Reimbursable) = $11



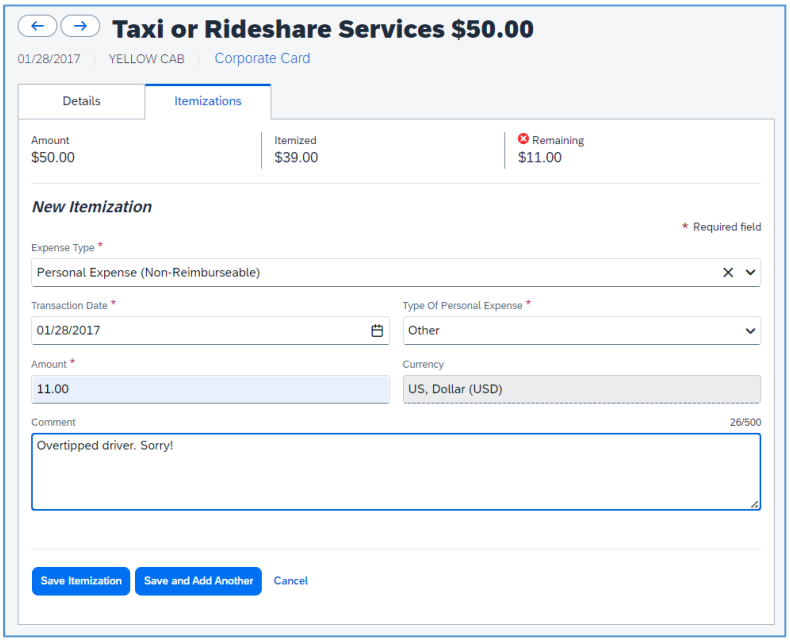

1. Click on the Itemizations tab, then **Create Itemization**.
2. Select the Expense Type **Taxi or Rideshare Services**. Provide the amount of the expense allowable within the policy.




3. Click **Save and Add Another**
4. Select the Expense Type **Personal Expense (Non-Reimbursable)**.

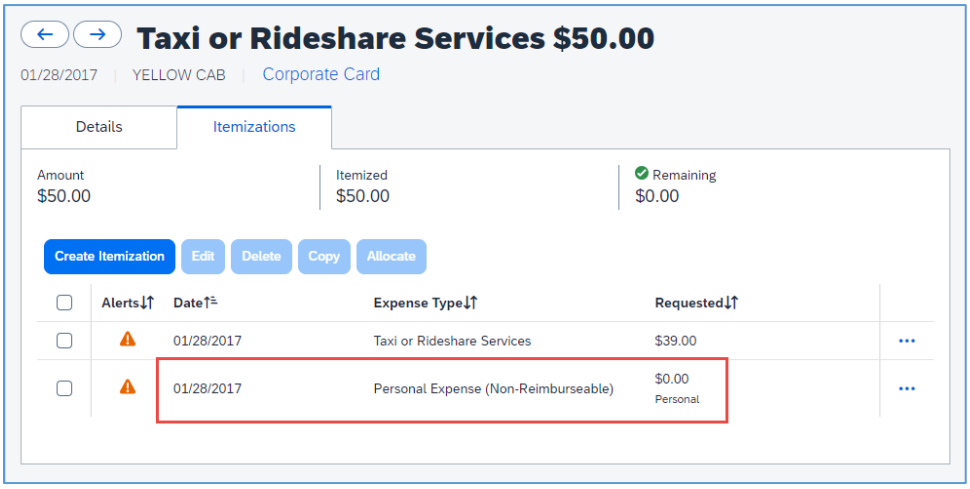



5. Enter information in the Type of Personal Expense, Amount, and Comment fields. **A comment explaining the reason for the charge is required for this expense type.**



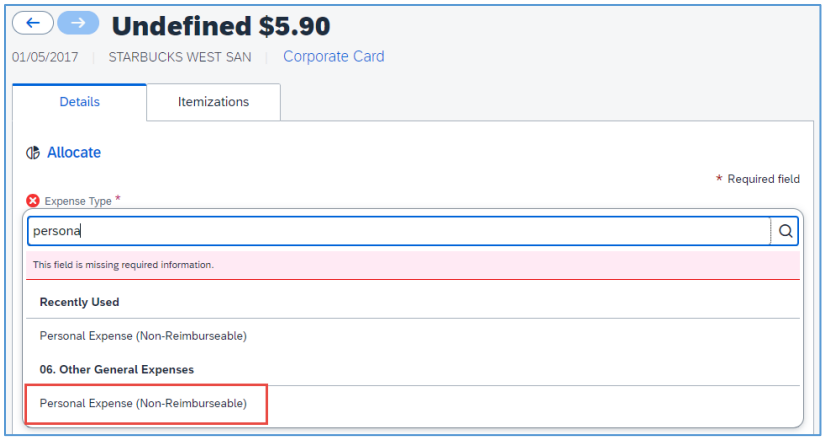
6. Click **Save Itemization**.

**Note**: The total Amount and total Requested are now different, reflecting the amount of the personal expense.

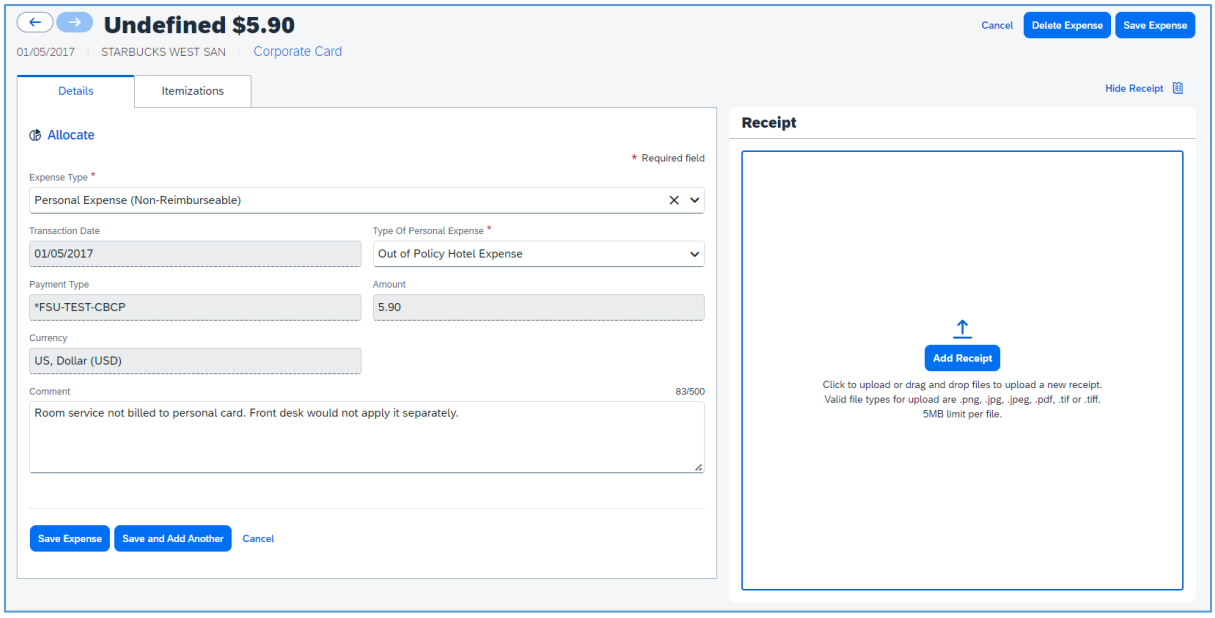


## Processing a Personal Expense on a University Card

1. Add the travel card expense from **Available Expenses** to an expense report.
2. Change the Expense Type to **Personal Expense (Non-Reimbursable).**




3. Select the type of personal expense. If none of the selections are applicable, choose **Other**.
4. Add a comment **(It is required when expense type is Personal Expense (Non-Reimbursable)).**




5. Click on the **Save Expense** button.

The Personal Expense Itemization displays along with the other expense items. Total Amount and Total Requested amount differ by the amount of the personal non-reimbursable amount.

**Personal amounts are first deducted from reimbursable expenses, and then if no reimbursable expenses are left, the traveler must reimburse the university.**

## Reimbursing the University for a Personal Travel Expense

Locate and complete the Departmental Deposit Form – Controller's Website > Forms > Travel Forms > Departmental Deposit Form

**Required Information:**

A. Travel Reimbursement

B. Amount owed

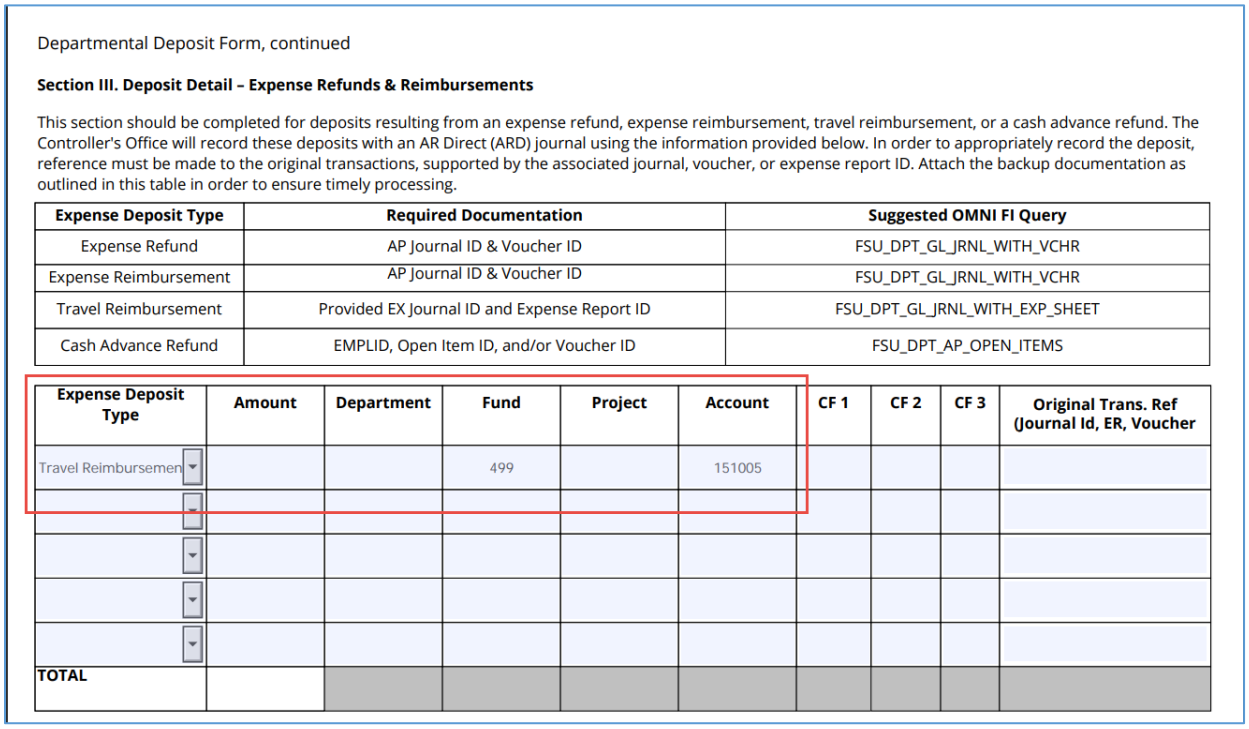
C. Employee's Home Department ID

D. 499

E. If applicable

F. 151005

Original Trans Ref – Include the 6-digit "Report Key" found in the Concur Report header



Departmental Deposit Form, continued

**Section III. Deposit Detail – Expense Refunds & Reimbursements**

This section should be completed for deposits resulting from an expense refund, expense reimbursement, travel reimbursement, or a cash advance refund. The Controller's Office will record these deposits with an AR Direct (ARD) journal using the information provided below. In order to appropriately record the deposit, reference must be made to the original transactions, supported by the associated journal, voucher, or expense report ID. Attach the backup documentation as outlined in this table in order to ensure timely processing.

| Expense Deposit Type | Required Documentation | Suggested OMNI FI Query |
|---|---|---|
| Expense Refund | AP Journal ID & Voucher ID | FSU_DPT_GL_JRNL_WITH_VCHR |
| Expense Reimbursement | AP Journal ID & Voucher ID | FSU_DPT_GL_JRNL_WITH_VCHR |
| Travel Reimbursement | Provided EX Journal ID and Expense Report ID | FSU_DPT_GL_JRNL_WITH_EXP_SHEET |
| Cash Advance Refund | EMPLID, Open Item ID, and/or Voucher ID | FSU_DPT_AP_OPEN_ITEMS |

| Expense Deposit Type | Amount | Department | Fund | Project | Account | CF 1 | CF 2 | CF 3 | Original Trans. Ref (Journal Id, ER, Voucher |
|---|---|---|---|---|---|---|---|---|---|
| Travel Reimbursemen | | | 499 | | 151005 | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| TOTAL | | | | | | | | | |

Attach a .pdf of the Deposit form and OMNI receipt to the expense report.

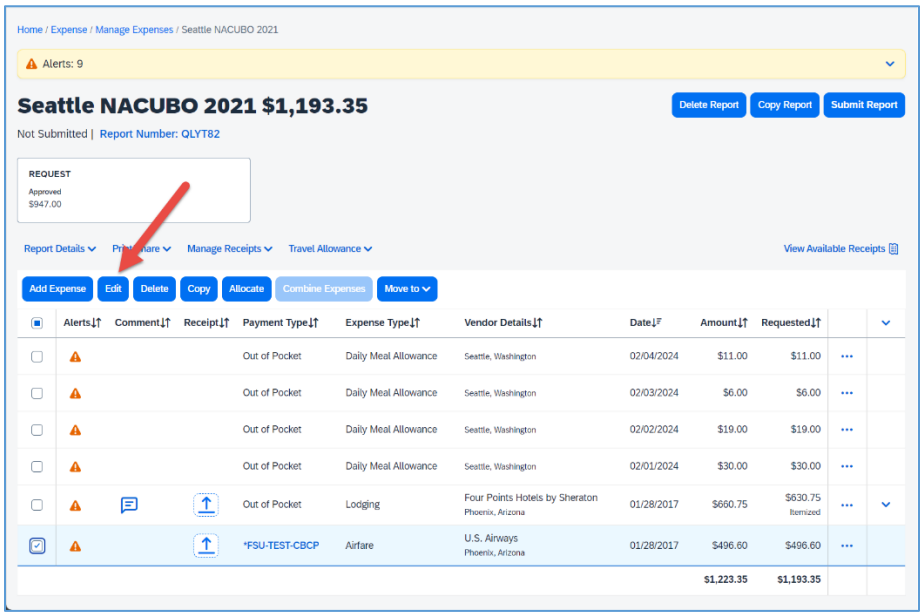
# Adding Attendees to an Expense Report

**Purpose**: Use the Attendee field any time someone purchases something on behalf of someone else. Adding an attendee(s) to expense types allows for transparency when booking on others' behalf such as when a travel cardholder purchases a plane ticket for another employee. If there are more than five attendees (i.e., group travel), the user may attach a roster of travelers instead of listing them individually using the Attendee fields.

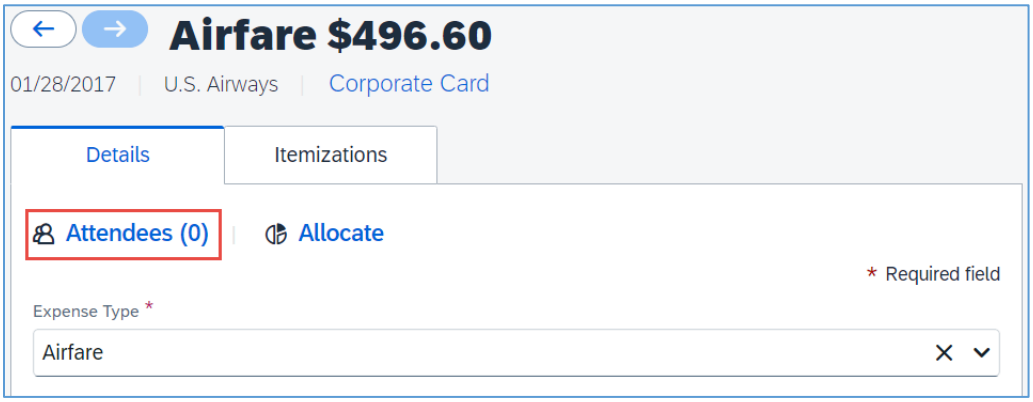
## Add an Attendee

After an expense report has been created, you can begin to add expenses and attendees from the main expense page.

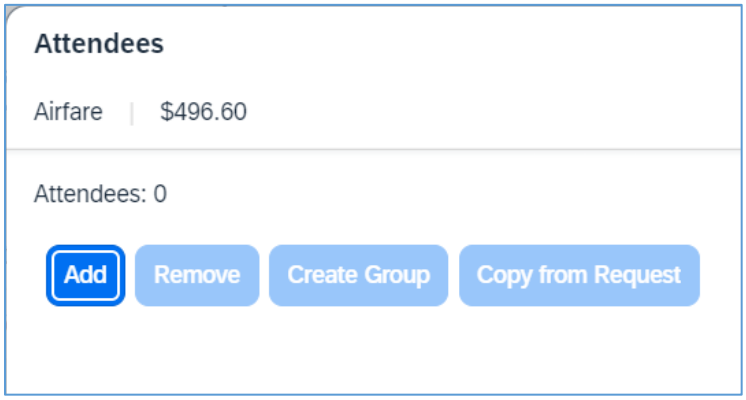
1. Select the check box of the expense you wish to add attendees to then click **Edit**.



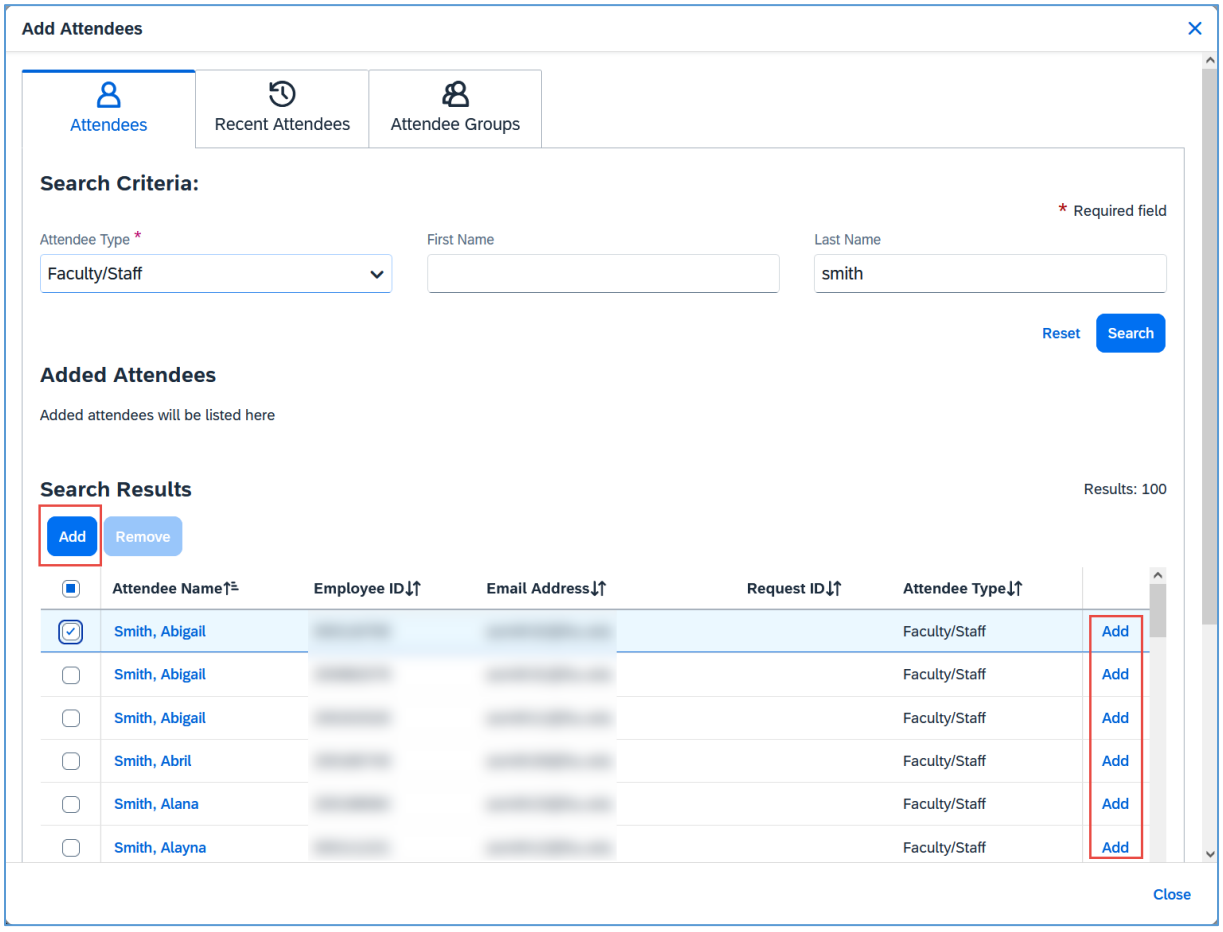

2. On the Expense Details page, click on **Attendees** (0). **Note**: The number may vary based on attendees already associated with the expense or if any were previously added.



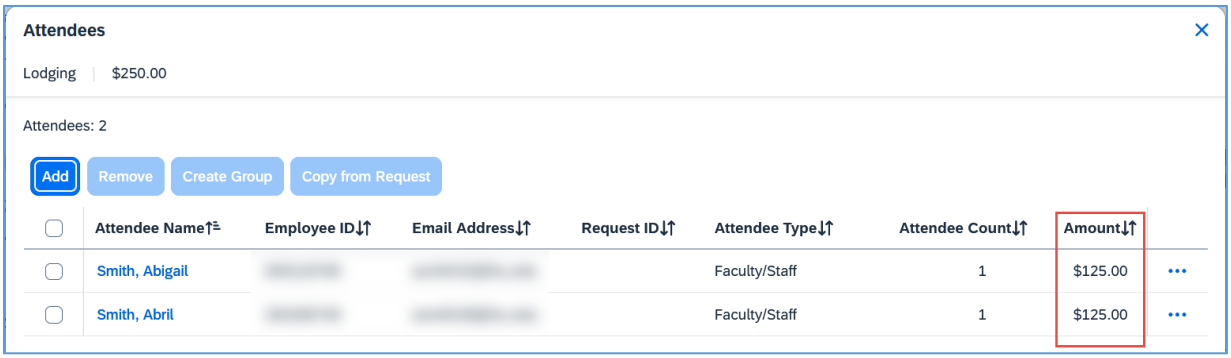
3. Click on **Add.** Then, navigate to the **Attendees** tab.



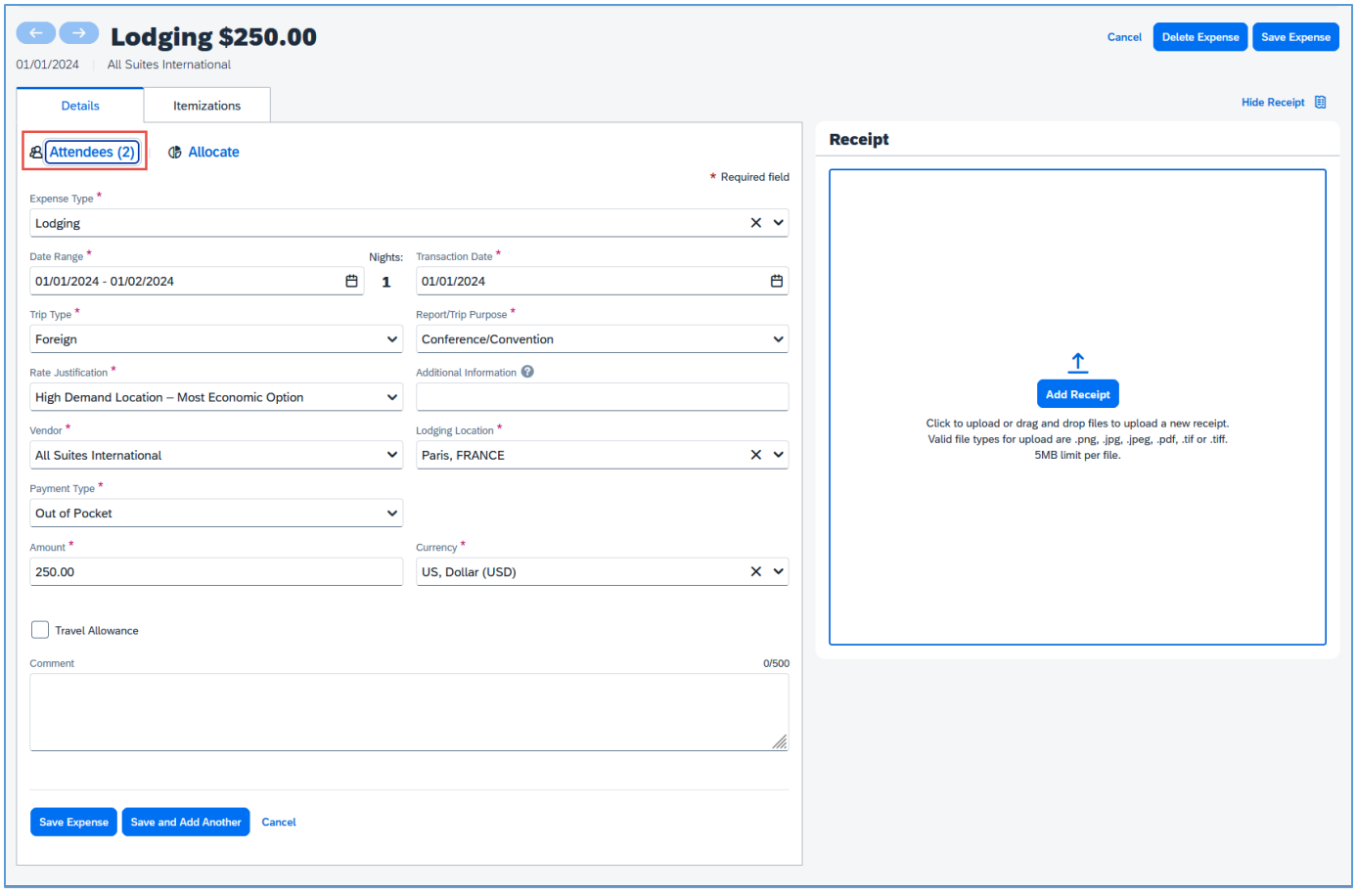

4. Choose an "Attendee Type" and enter the attendee's first and last name. Then, click **Search**. A list of attendees matching the search criteria will be shown. Attendees can be added by selecting the checkbox next to their name and clicking **Add** under "Search Results" or the **Add** button in the column to the right. If multiple attendees exist, continue adding as necessary.



5. Click **Close** when done adding attendees and then **Save** to update the expense. **Note**: Concur will automatically adjust the expense amount based on the number of attendees.




6. The number of attendees will update in the top-left corner under details. Click **Save Expense** when done.



# Allocating Transactions

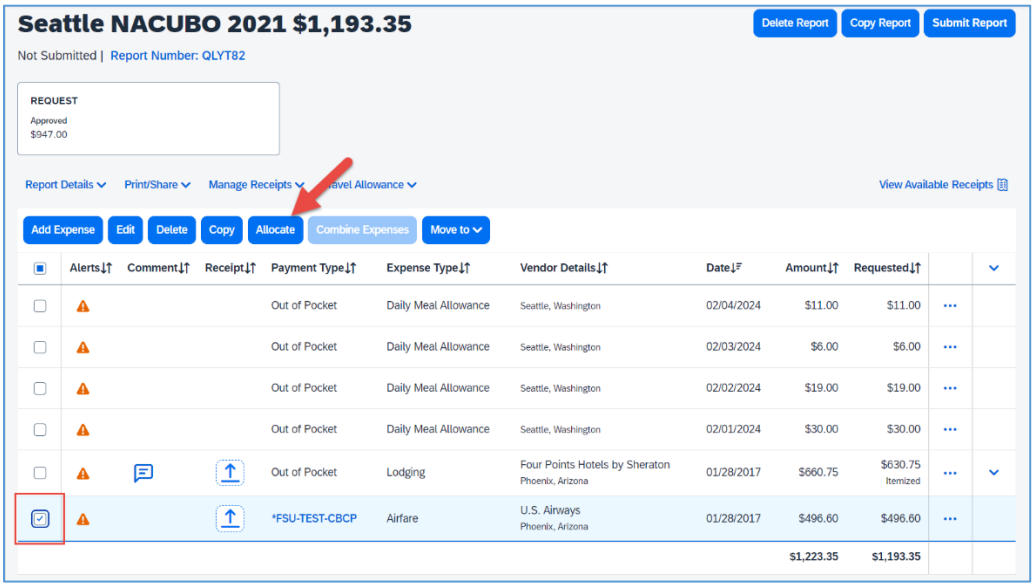
**Purpose**: Allocations (also known as split-funding) allow users to allocate expenses to multiple department-fund-project combinations. Allocation can be done on either travel requests or expense reports. The process is the same for both.

Users can allocate to any account by single, multiple, or all expense lines. Users can also split charges into multiple accounts. By default, if no allocations are made all expenses will be charged to the department-fund-project combination that is entered in the Travel Request or Expense Report Header.

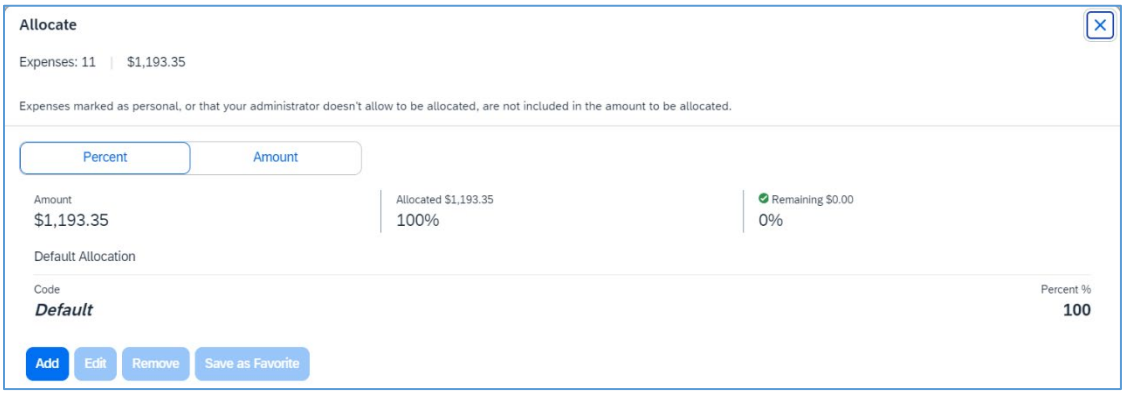
## Allocate an Expense

**Important Tip!** Enter all expenses before beginning allocation. If you allocate before entering all expense lines, some or all allocations will be lost.

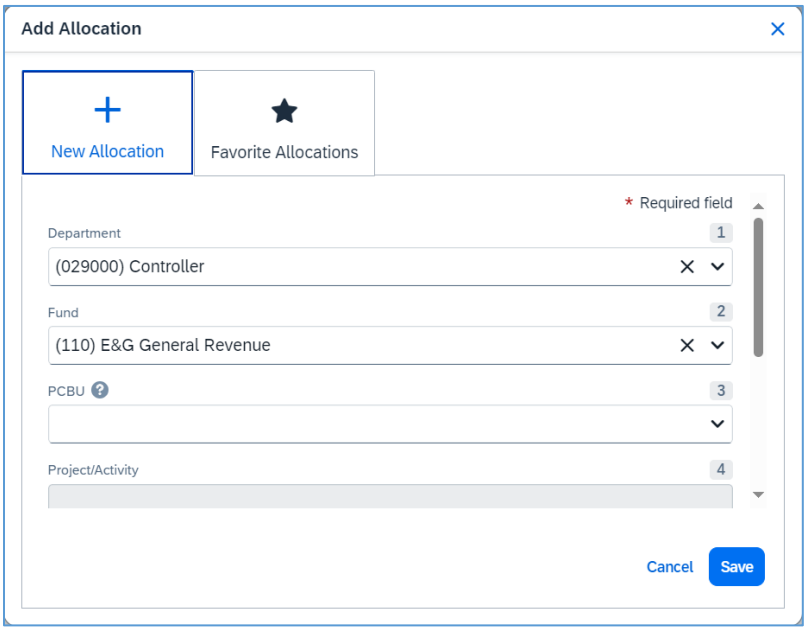
1. Select the check box of the expense (or expenses) on the main expense page. Then click **Allocate**.



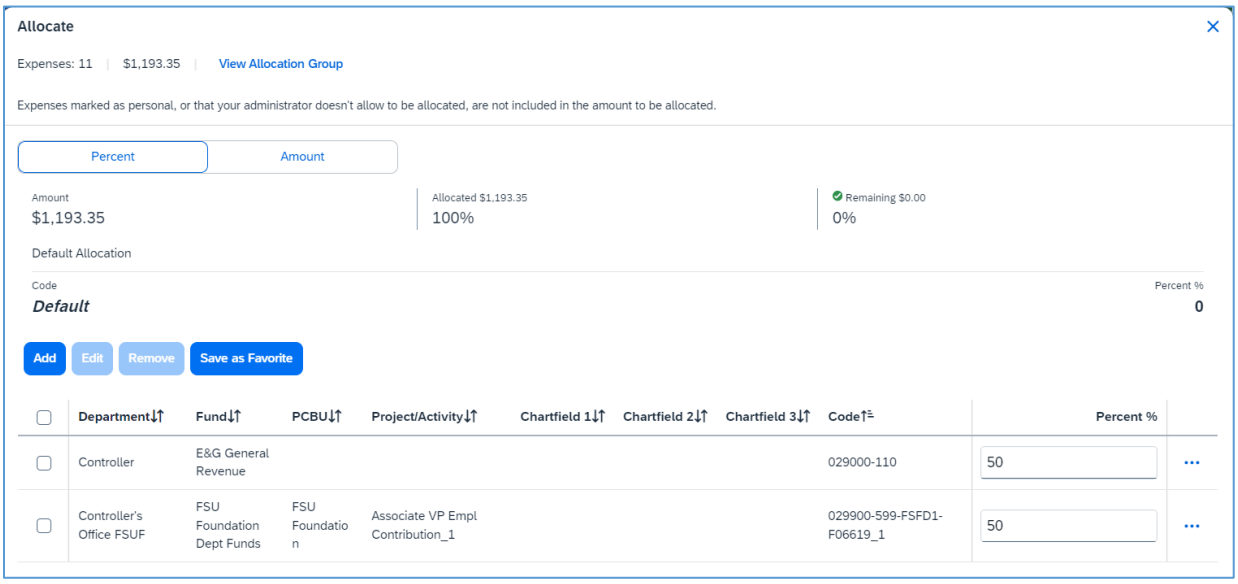

2. Choose between Percent or Amount. The situation can vary depending on allocation requirements and funding sources. Click **Add**.



3. Provide the first allocation by typing the information in the Search field, including Department, Fund, PCBU (if applicable), Project/Activity (if applicable). Click **Save**.

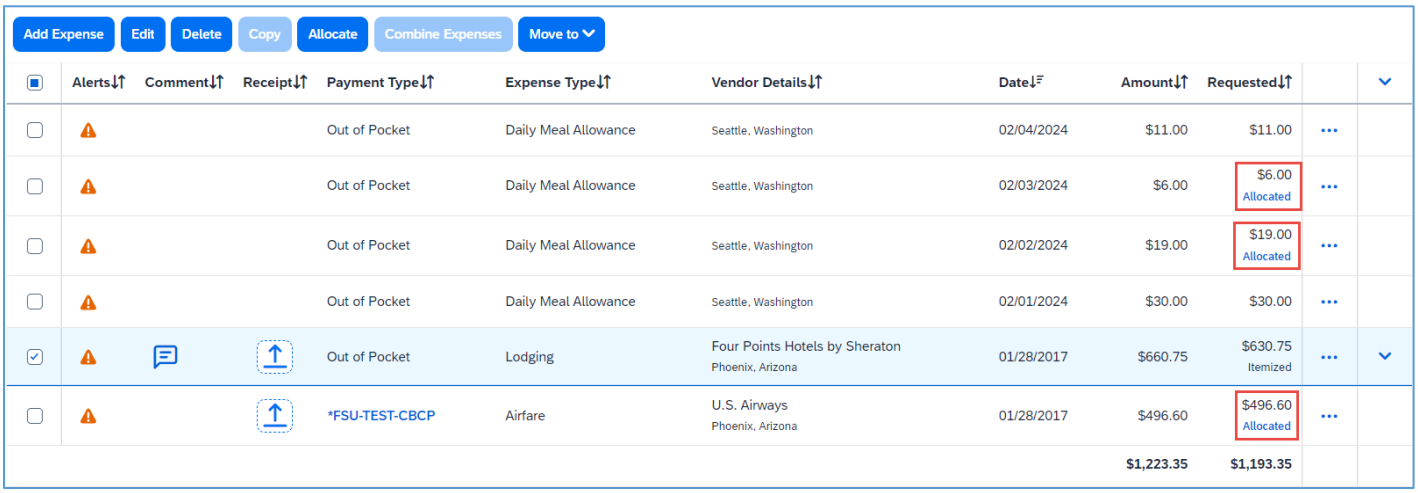



4. Provide any additional allocations as needed using the same process in steps 2 – 3 for any alternative funding sources. Once all necessary allocations are added, you can adjust the percentage or amount as needed.
    a. Concur will attempt to split the percentages or amounts evenly, however, they can be changed as needed.
    b. **Note**: The total amount must be allocated 100%. Otherwise, an audit rule will appear and the user will not be able to submit the report.



5. When adjustments are complete and you are satisfied with allocations, click **Save.**

Allocated expenses will display the words "Allocated" underneath the specified expense.




Frequent next steps:

- Reviewing Expense Report Totals
- Attaching Receipts & Receipt Handling

## Entering Personal Vehicle Mileage

**Purpose**: Concur provides a Google Maps mileage calculator within the Mileage (Personal Vehicle Only) expense type for tracking mileage when using a personal vehicle for business. FDOT mileage tables, MapQuest, etc. will no longer be acceptable documentation for the Mileage (Personal Vehicle Only) expense type.

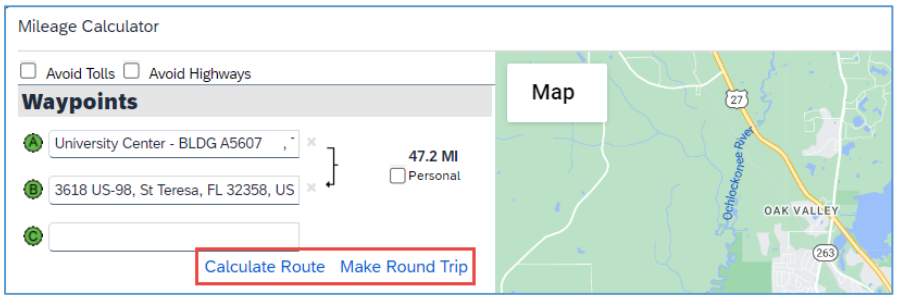
- The mileage calculator will calculate mileage based on your point-to-point routes
- Please see Entering Documented Miles for how to handle mileage logs.

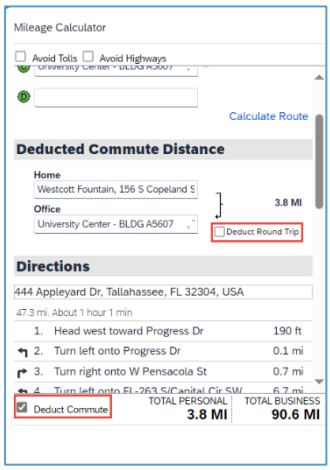
The most accurate way to calculate mileage when using your personal car for business travel is to set up your waypoints as:

1. **Waypoint 1:** Your home or work location as the starting point (or wherever you "lay your head at night," when already in travel status). Your starting point should be from where your business travel began. For example, if you left from home, do not put your work location as the starting point.
2. **Waypoint 2:** Your destination.
3. **Last Waypoint:** Your home or work location (or wherever you "lay your head at night", when in travel status). The user may click Make Round Trip if the return point is the same as the starting point.

### To Create a Personal Vehicle Mileage Expense Line:

1. With the expense report open, select **Mileage (Personal Vehicle Only)** on the **New Expense** tab.
2. The Google Maps-powered Mileage Calculator window automatically displays. Enter the waypoints (home, office, or possibly hotel location (if already traveling), destination, etc.) adding as many locations as necessary.
    a. Click **Make Round Trip**, only if your endpoint is the same as your starting point.
    b. If needed, the Google Maps display can be adjusted to reflect the actual route taken. Click **Deduct Commute** (if starting travel from home, on a normal workday).
        i. Enter the Home and Office location. You only need to do this once, or if your address changes.
        ii. Click **Deduct Round Trip**, if applicable.




3. Click **Calculate Route**.

4. If the calculated route appears accurate, click **Add Mileage to Expense**. Make sure all required fields are completed, including Transaction Date.
    a. Note: Users are not required to attach a receipt or any other attachment for this expense type.
5. Click **Save Expense**.

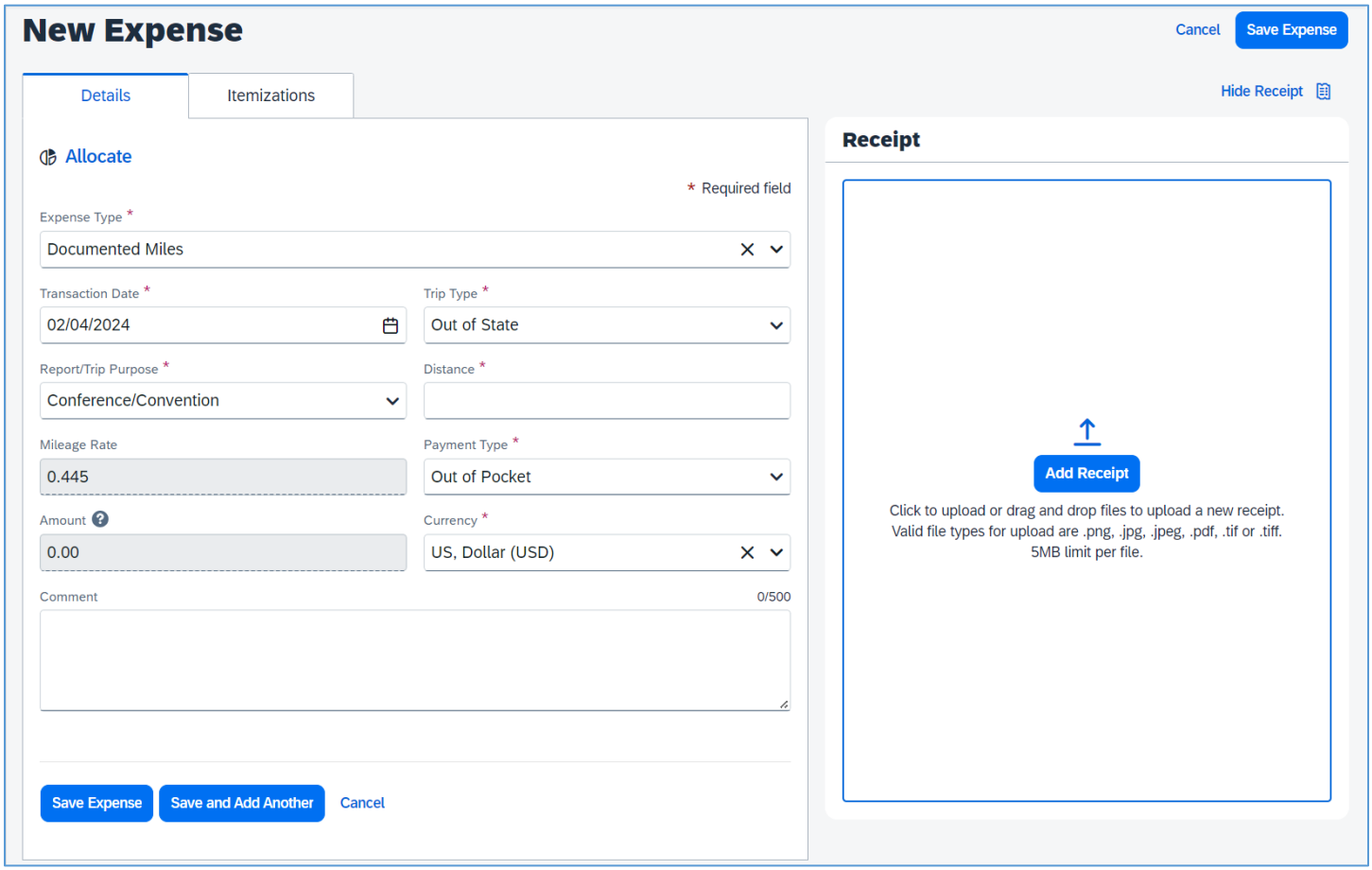
Frequent next steps:

- Meal Allowances & Itineraries
- Processing University Travel Card Charges
- Adding Out-of-Pocket Expenses
- Attaching Receipts
- Itemizing Personal Expenses on the Travel Card

## Documented Miles Expense Type

**Purpose**: This expense type is for personal vehicle mileage that cannot be accurately represented via Google Maps (i.e., many laps of a looped route, off-road fieldwork, home/site visits that are documented via mileage log and submitted at a regular interval).

1. Click **Add Expenses** to start a new expense line.
2. Select the **Documented Miles** expense type by clicking on it or by typing it into the search box.
3. Enter the number of miles claimed.




4. Click **Add Receipt** and attach the mileage log (**Required**).
5. Click **Save**.

## Receipt Handling & Submission Methods

**Purpose**: Most expenses incurred during travel require a receipt for reimbursement. Concur has many tools and methods to facilitate receipt handling. Below is an overview of the general policies that determine how receipts should be handled along with their requirements.

**Does Not Require Receipts**

The following expense types:

- Daily Meal Allowance
- Per Diem
- Mileage
- Agent/Booking Fees

Also, the following expense types, **if less than $40.00 and paid out-of-pocket:**

- Baggage
- Parking
- Portage
- Tolls
- Taxi or Car Service

**Requires Receipts**

- All university card (travel card, lodge card/airfare card, etc.) transactions
- All other expense types, regardless of dollar amount

### Submission Methods

Concur has multiple methods of uploading receipts into the system to fulfill any receipt requirements necessary based on the method of payment, expense type policy, and amount limits specified above. Receipts can be added from Available Expenses, Available Receipts at the expense level, report header level, or from Concur Mobile.

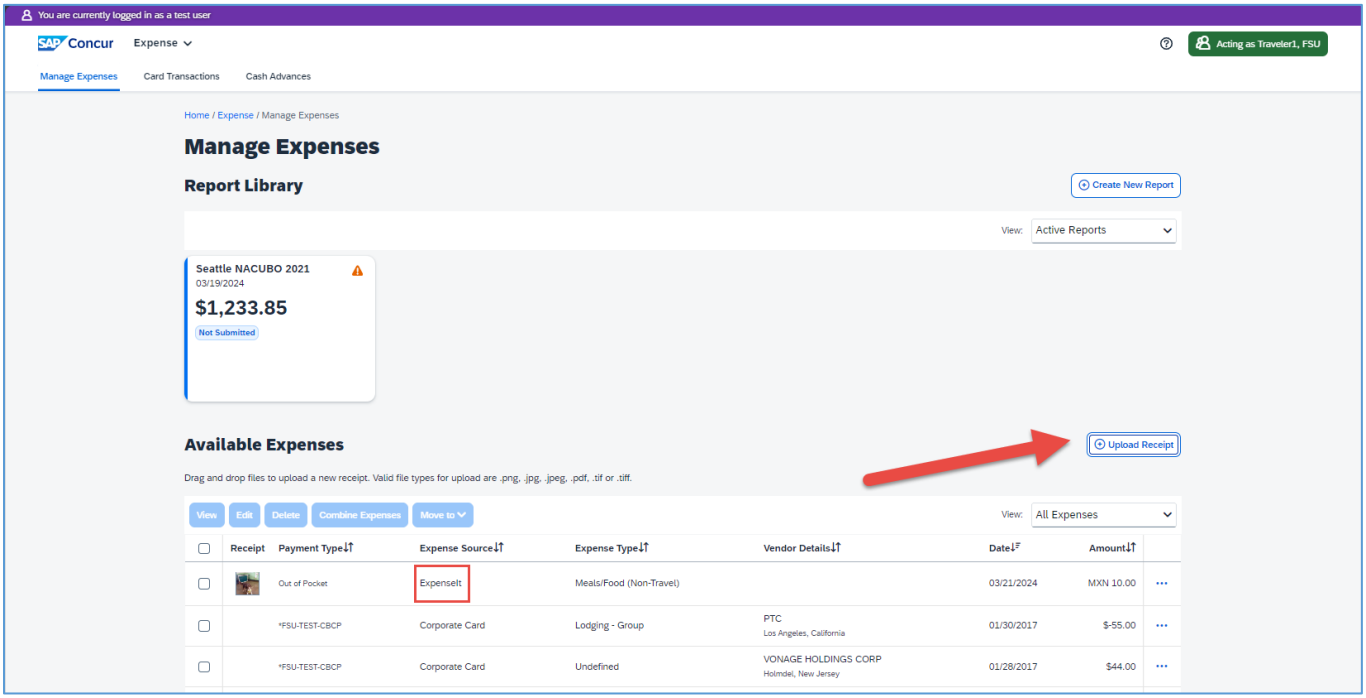
If the receipt applies to the entire report, it would be appropriate for the report header. However, if the receipt is related to a specific expense, it would be suitable to apply the receipt to the specific expense rather than the whole report.

## Available Expenses

Before you attempt to upload:

- Files should be saved as .png, .jpg, .jpeg, .pdf, .tif or.tiff
- 5MB limit per file
- File names should be short to prevent issues with file upload character limits

1. Save the file on your local computer in a location you can access.
2. Navigate to the Expense application and select "Available Expenses." Then, click on **Upload Receipt**.




- **Expense Source: ExpenseIt** – Uses Optical Character Recognition (OCR) to turn images, and paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. The information captured using this application can be modified either from the "Available Expenses" area within the Expense application.

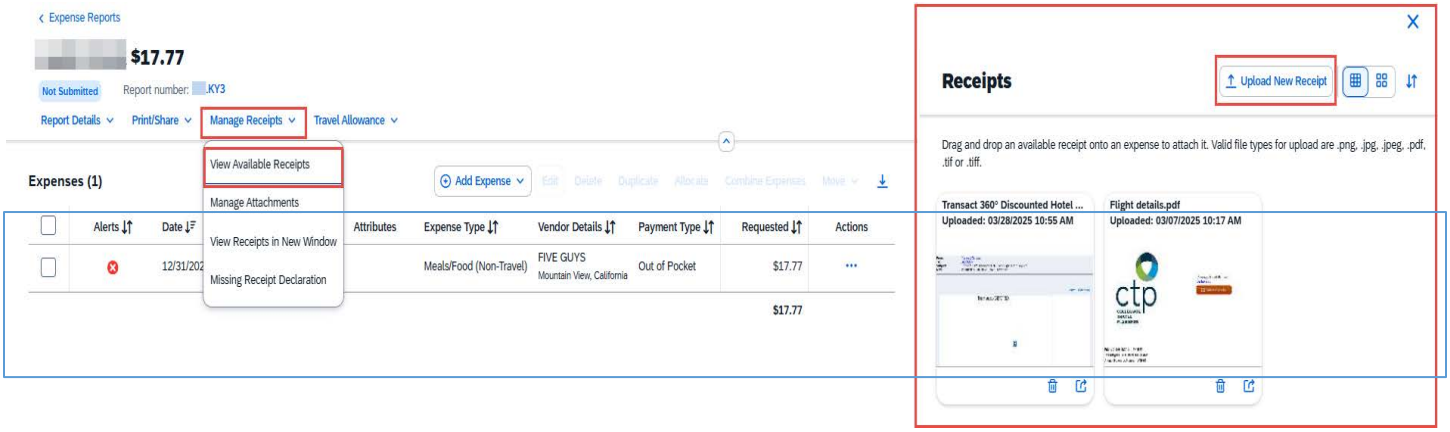
3. Click **Browse** to locate the file on your computer, then **Attach**.
4. Repeat steps 1 – 3 as necessary.

## Available Receipts

Before you attempt to upload:

- Files should be saved as .png, .jpg, .jpeg, .pdf, .tif or.tiff
- 5MB limit per file
- File names should be short to prevent issues with file upload character limits

1. Save the file on your local computer in a location you can access.
2. Navigate to the Expense application and open the relevant expense report. Then, click on the **Manage Receipts** dropdown menu. Select **View Available Receipts**.
3. Users can view previously uploaded receipts or upload additional receipts.



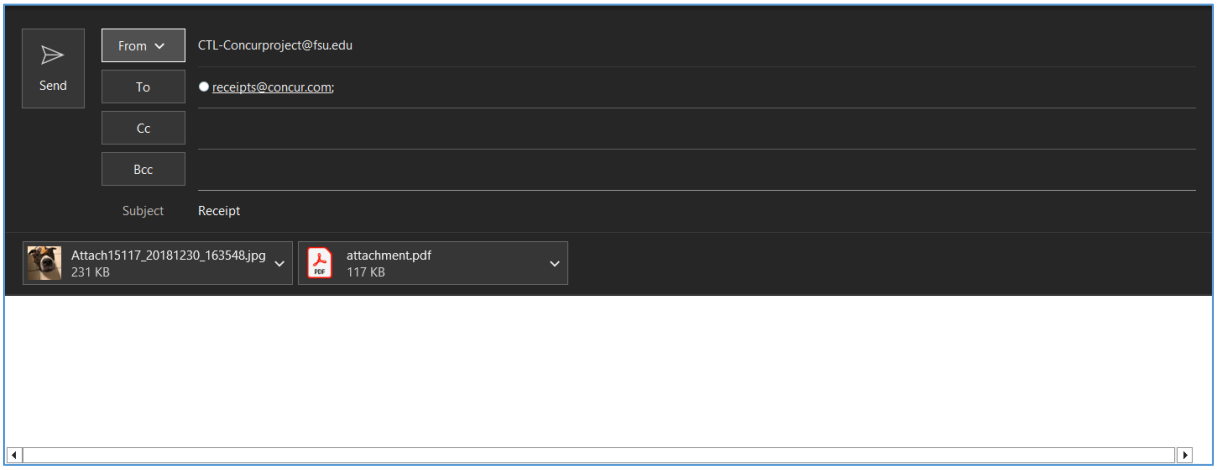
## E-Mail

Before you attempt to upload:

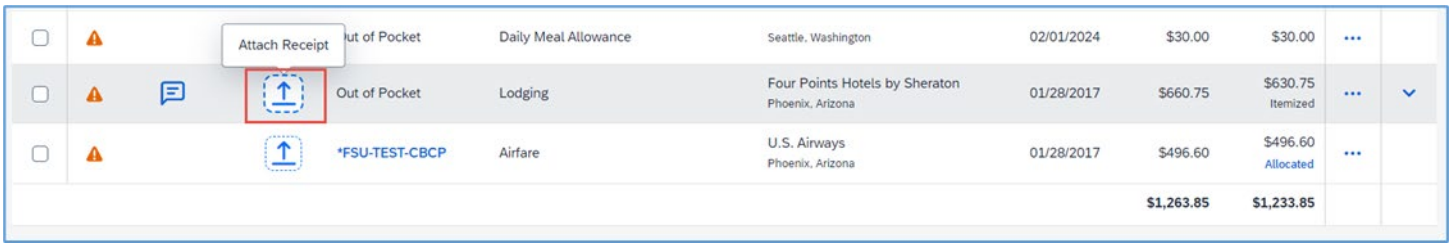
- Files should be saved as .png, .jpg, .jpeg, .pdf, .tif or.tiff
- 5MB limit per file
- File names should be short to prevent issues with file upload character limits

**Note: To email receipts from your email address, you must first verify your email address in your Concur profile. See Updating your Profile – "**Email Addresses" section.

1. Email your e-receipt or receipt images as attachments to receipts@concur.com. The receipt will be added to your available receipts.




2. Navigate to the Expense application, then the relevant expense report.
3. Select the expense item that requires a receipt, then click **Attach Receipt**.

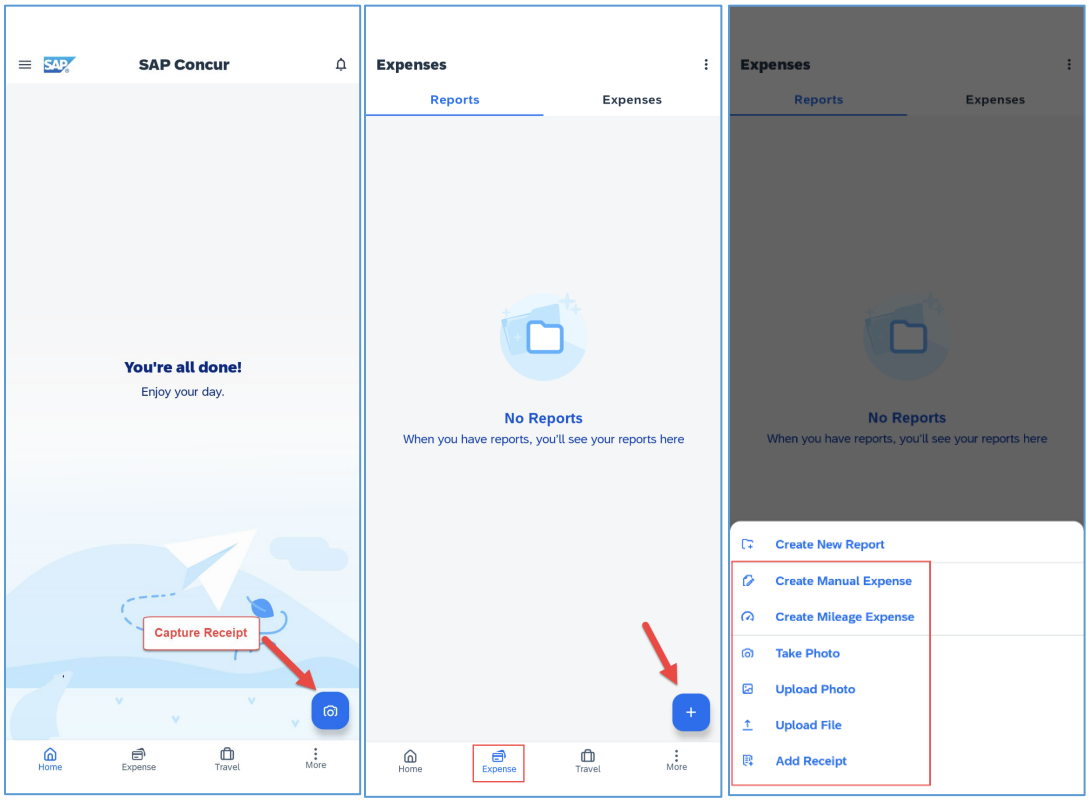



4. Locate the file in your list of "Available Receipts." Click **Attach**.
5. Repeat steps 1 – 4 as necessary.

## Mobile App

See Concur Mobile Registration for directions to install the Concur application on a mobile device. This must be done before receipt images can be uploaded from a cell phone or other mobile device.

There are a few options in Concur Mobile when you navigate to "Home" or "Expenses" and click on the blue icons. (See screenshots below). Many options below can be used for uploading receipts directly from your mobile device.



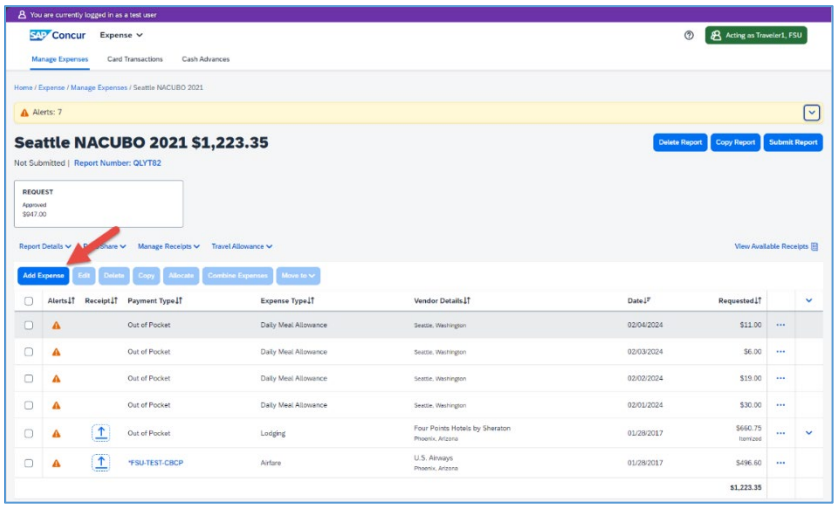

- **Capture Receipt** – Uses Optical Character Recognition (OCR) from ExpenseIt to turn images, and paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the "Expenses" area on the mobile app or once you add the expense to an ER.
- **Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since it requires a lot of manual entry on the phone. **(Does not count as a receipt)**
- **Create Mileage Expense** – Provides quick access to creating the Mileage (Personal Vehicle Only) expense type while traveling but is not ideal since the integrated map may not list all results. **(Does not count as a receipt)**
- **Take Photo –** Uses a device camera to quickly take and upload an image.
- **Upload Photo –** Allows Concur to access local images to upload an image.
- **Upload File –** Allows Concur to access local file storage to upload a file.

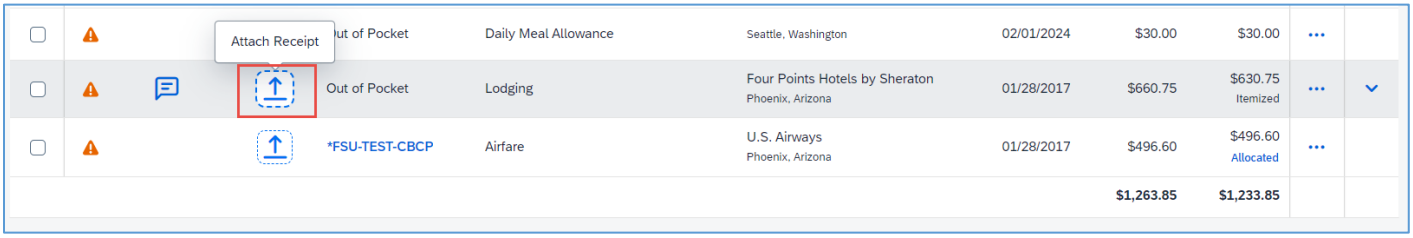
- **Add Receipt –** Add a receipt using the Take Photo, Upload Photo, and Upload File options.

For the best experience while uploading receipts, it is recommended to use a strong and stable internet connection for the entirety of the upload process. If the process fails, you can retry the upload until it succeeds.

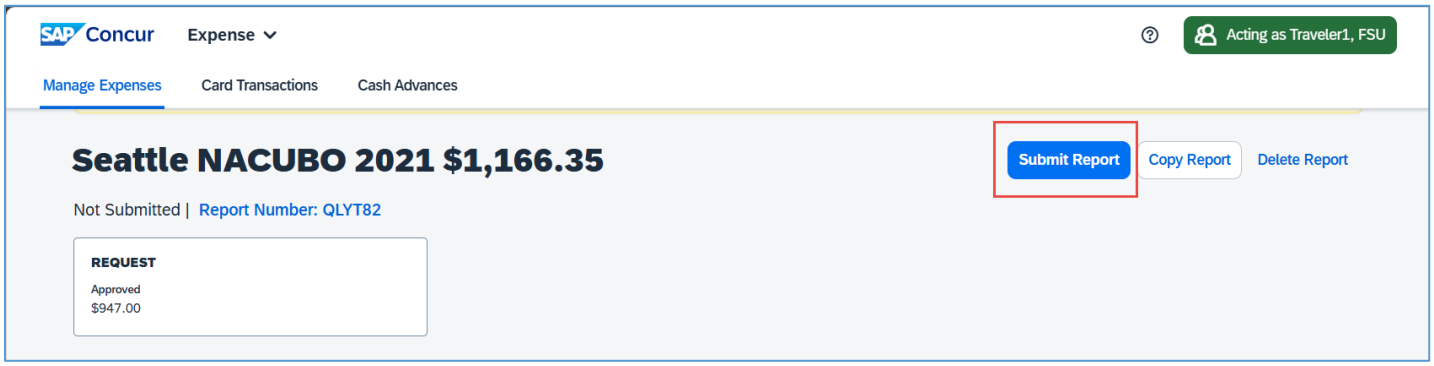
## Submit an Expense Report

**Purpose**: Expense reports are required to be reimbursed for out-of-pocket expenses incurred during travel and to settle travel card and airfare card transactions. To submit an expense report, users must ensure all expenses are accurate, contain receipts where necessary, and have cleared all necessary audit rules.




1. After reviewing all expenses for accuracy, uploading receipts where necessary, and clearing all necessary audit rules your expense report should be ready to submit.
2. Click on **Submit Report.**




3. Review the Official Business Certification of the User Electronic Agreement and if you agree, hit **Accept & Continue**.

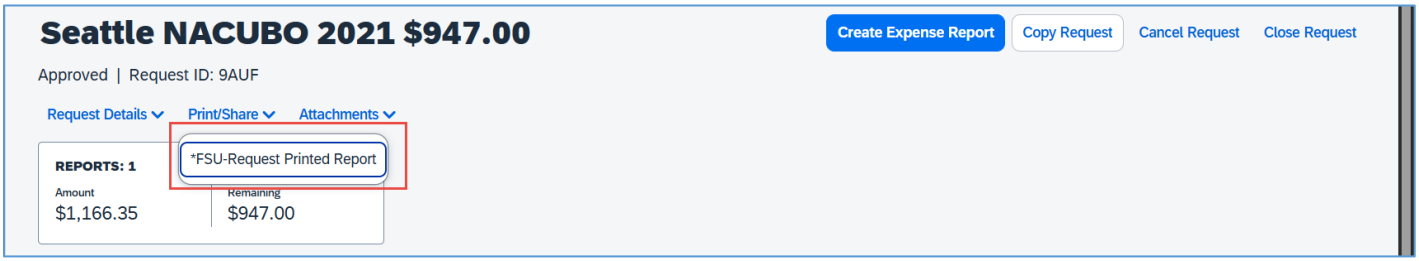
a. **Note**: Delegates can use the **Submit Report** button to review and clear any audit rules of the expense report; however, only the traveler will be able to submit the expense report into the workflow.

# Printing Travel Requests and Expense Reports

**Purpose**: From time to time, a printed or .pdf copy of a report may be necessary. Users can print or save a .pdf copy of travel requests and expense reports when needed.

## Travel Request

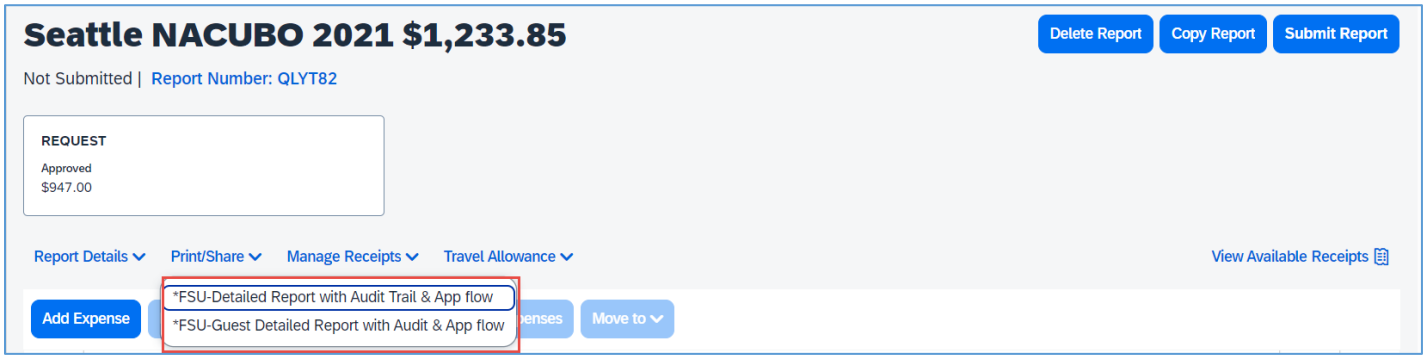
1. Click **Print/Share** and select **FSU-Request Printed Report.**
2. Choose whether to print, save a .pdf, or email.




## Expense Report

To preview and print the expense report:

1. On the Expense Report page, click **Print/Share**.
2. Click on **FSU – Detailed Report with Audit Trail & App flow** for employee expense reports or **FSU- Guest Detailed Report with Audit & App flow** for guest reports.
3. Choose whether to print, save a .pdf, or email.




The Concur system generates a report that includes all report-level information as well as a summary of the report.

# Reimbursing Guests in Concur

**Purpose**: This document describes the steps needed to complete an expense report on behalf of a traveler who is not an FSU employee. All expense coverage must follow FSU guidelines. In order to approve reimbursement, users must attach a signed copy of the expense report by the guest traveler prior to submitting for approval.

**Before entering guest travel, the user should be familiar with navigating Concur, entering travel requests and entering expense reports.**

Expenses can be entered in Concur for individuals who are not university employees. The following are examples of non-employee payments:

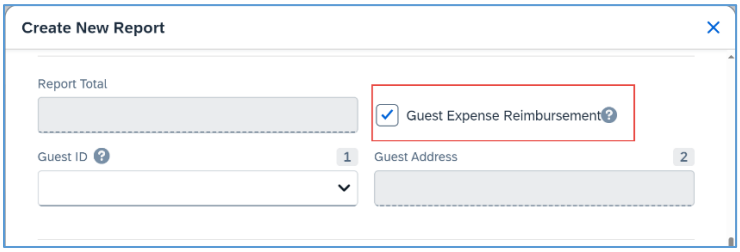
- A student who will be reimbursed for out-of-pocket expenses while attending a conference
- A job candidate who will be reimbursed for expenses incurred while traveling to the university for interviews
- A speaker outside of the university visiting the campus

In these examples since the payees are not university employees. You must complete a Guest Traveler Profile form and have a Guest ID number issued.

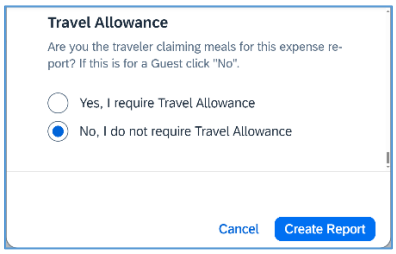
**Important note: Travel reps do not act as delegates to enter guest travel. Guest travel is entered under the travel rep's own profile.**

## Enter an Expense Report for a Guest Traveler

1. Create an expense report from an approved Guest travel request. **Note**: Travel requests must be fully approved before they can be used to create an expense report.
2. Click the box labeled **Guest Expense Reimbursement** (an audit rule will be triggered if this box is not checked). **Note**: The combination of Traveler Type (Guest), Guest ID and Guest Address fields, and the Guest Expense Reimbursement checkbox is what ensures payment goes to the guest traveler identified on the expense report.




3. Complete all required fields. In the area, near the bottom of the expense report header page there will be a section asking, "Are you the traveler claiming meals for this expense report?" Select **No, I do not require Travel Allowance**.




4. Click **Create Report** and Concur will advance to the next screen.
5. Using the **Add Expense** option you can add any necessary available expenses or create a new expense type.
    a. The expense type "**Guest Daily Meal Allowance**" should be used for any necessary meal allowance for the traveler.
    b. Complete one Guest Daily Meal Allowance expense line for each day of the trip necessary.
        i. State of Florida meal allowance is the same for guests as for employees. Those rates are $6 for breakfast, $11 for lunch, and $19 for dinner, domestically. Foreign meal rates will vary by location.
6. In the comment box, elaborate on what meal allowance is being paid, i.e. breakfast, lunch, dinner, etc.
7. Add additional expense lines for per diem and any out-of-pocket reimbursements the guest traveler is entitled to.

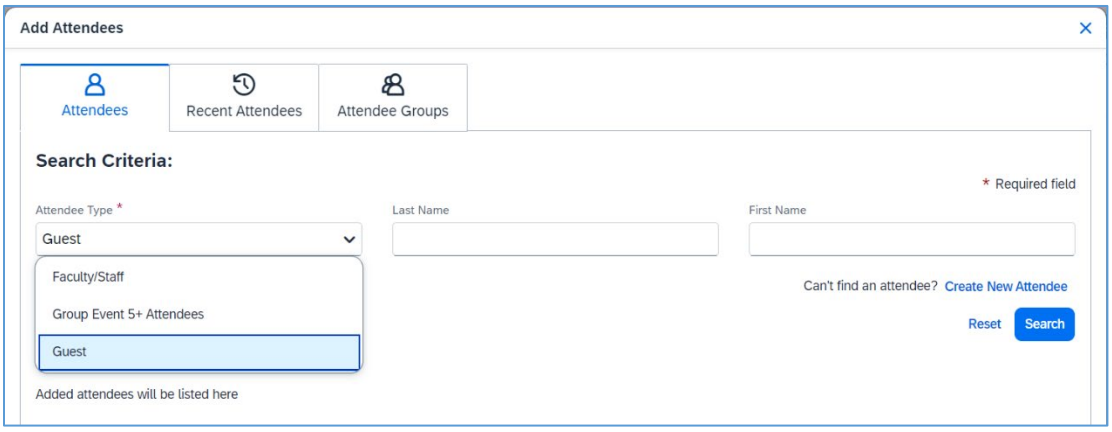
Frequent next steps:

- Adding Out-of-Pocket Expenses
- Attaching Receipts
- Itemizing Personal Expenses on the Travel Card

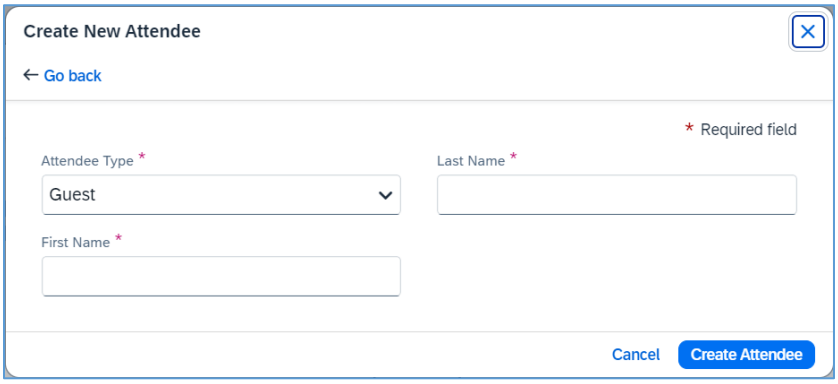
## Entering Travel Card Charges Made on Behalf of a Guest Traveler

Travel Reps frequently book travel with their t-card on behalf of guests. To associate these charges with the guest's trip, the travel rep must list the guest traveler as an attendee for any expense line created on behalf of the guest. **You may include these charges on the guest traveler's expense report.**

1. From an open expense related to the guest's travel, click on **Add Expense**.
2. Select the expenses associated with the guest's trip and click **Add to Report** to add them to the expense report.
3. Select the travel card expense and click on **Attendees (0).** Then, click **Add.**
4. Navigate to the Attendees tab and choose Attendee Type "**Guest**."




5. Search for your guest by last name and first name. If the guest's name does not appear, click **Create New Attendee**.
    a. **Create New Attendee**: Select the attendee type "**Guest**" and enter your traveler's last name and first name. Click **Create Attendee** and **Save**.



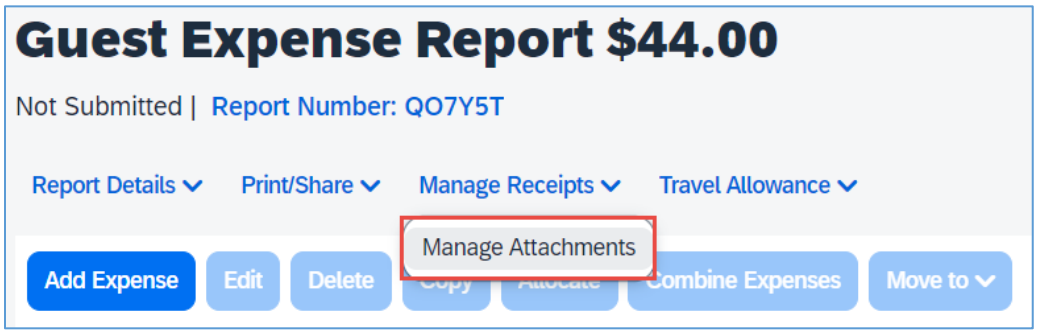

Note: The guest traveler's name will be associated with that expense line; however, the line is paying the travel card.

6. Click **Save**, then **Save Expense** to finish the expense line entry. Repeat the steps above for any additional expenses.

## Obtaining Guest Signature/Review

1. Once all expense lines are entered and the expense report is ready for submission, click on **Print/Share** and select ***FSU-Guest Detailed Report with Audit & App flow.**


2. Print or email the report to the guest traveler for their signature. **Note:** A Docusign or other secure e-signature is acceptable.
3. When you've received the signed expense report, attach it in Concur by opening the expense report, clicking **Manage Receipts** and selecting **Manage Attachments**.
    a. Note: If any receipts are already attached, use **Append** to attach the signed detailed report.



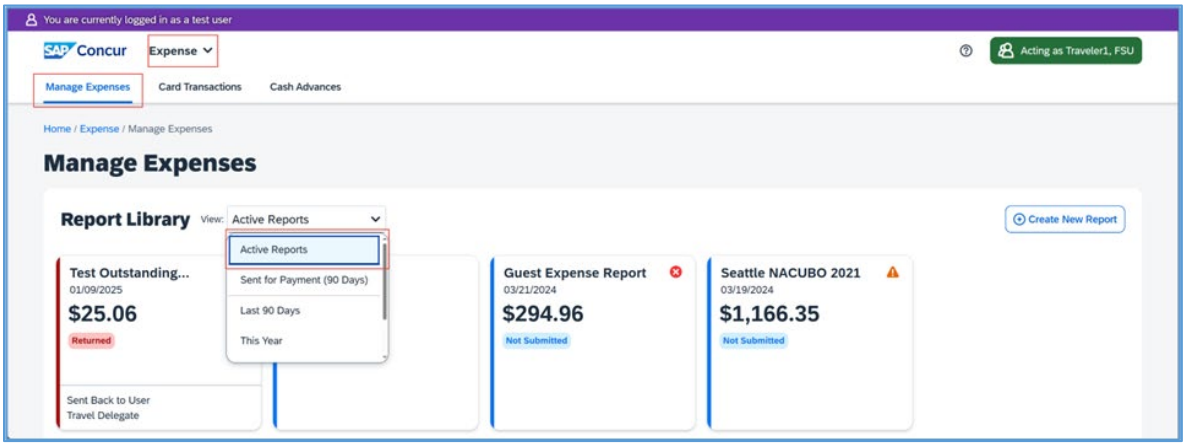

4. Once the signed expense report is attached and all audit rules are cleared, you may submit the expense report for approval.

## Correcting and Resubmitting an Expense Report

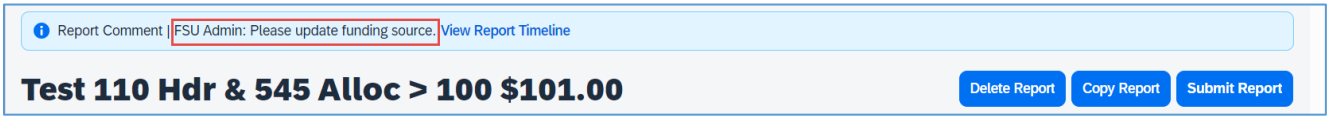
**Purpose**: Expense approvers and pre-pay auditors can send an expense report back if an error is found. The approver will include a comment explaining why the report was returned.

### To Identify and Correct a Report Requiring Resubmission:

1. The report will appear on the Expenses homepage under "Manage Expenses" and filter to "Active Reports."The report appears in red with "**Returned**" on the Report tile.




2. Click the Report tile to open the report.
3. Check the **Comments** to determine why it was returned or view the **Report Timeline**.




4. Make the requested changes. Click **Submit Report**.

**Delegates and Returned Reports**

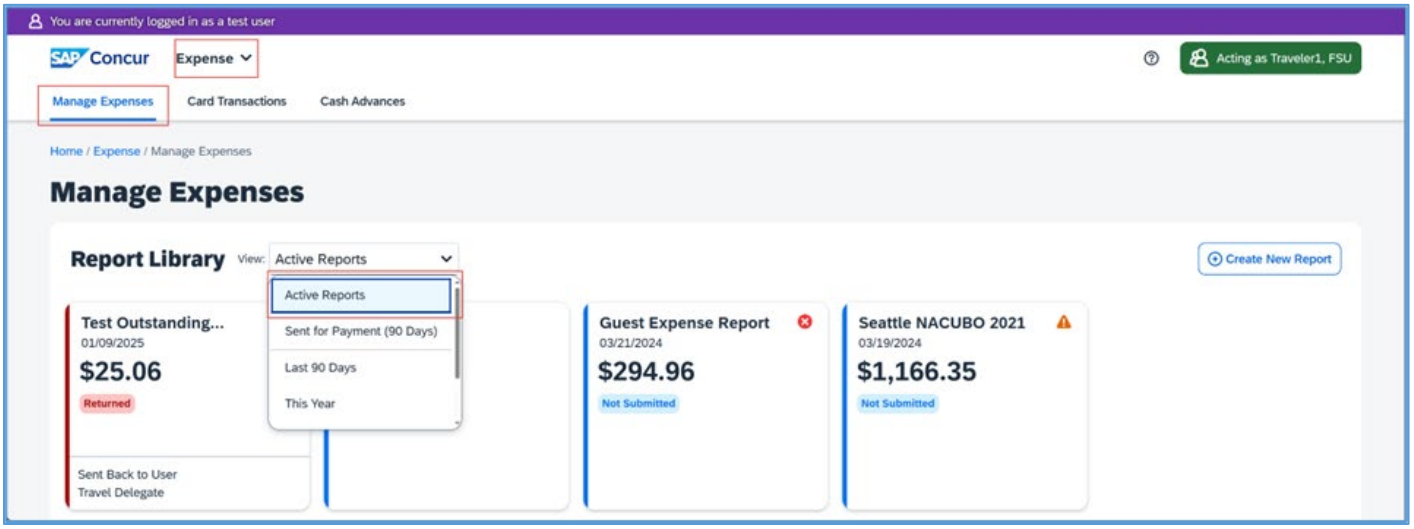
- If an expense report was entered by a delegate, and is returned by the approver, both the employee and the delegate will receive email notification.
- Both the delegate and/or the employee will be able to modify the returned report.
- Returned reports, if being modified, must be resubmitted for employee approval.
- Resubmitted reports must go through the entire approvals process.

## Determining Expense Report Status

**Purpose**: Users may wish to check on the status of their expense report as it proceeds through workflow. For additional information on approvals and workflow in Concur see our Concur Approvals page.

### Access the Expense Report

1. Log into my.fsu.edu and access Concur.
2. Click on the Expense tab. (Delegates should act as their traveler first).
3. Expense reports with a variety of statuses appear under Manage Expenses. The default view for this page is "Active Reports". Reports are considered active if they were created within the last 90 days.




**Expense Report Statuses**

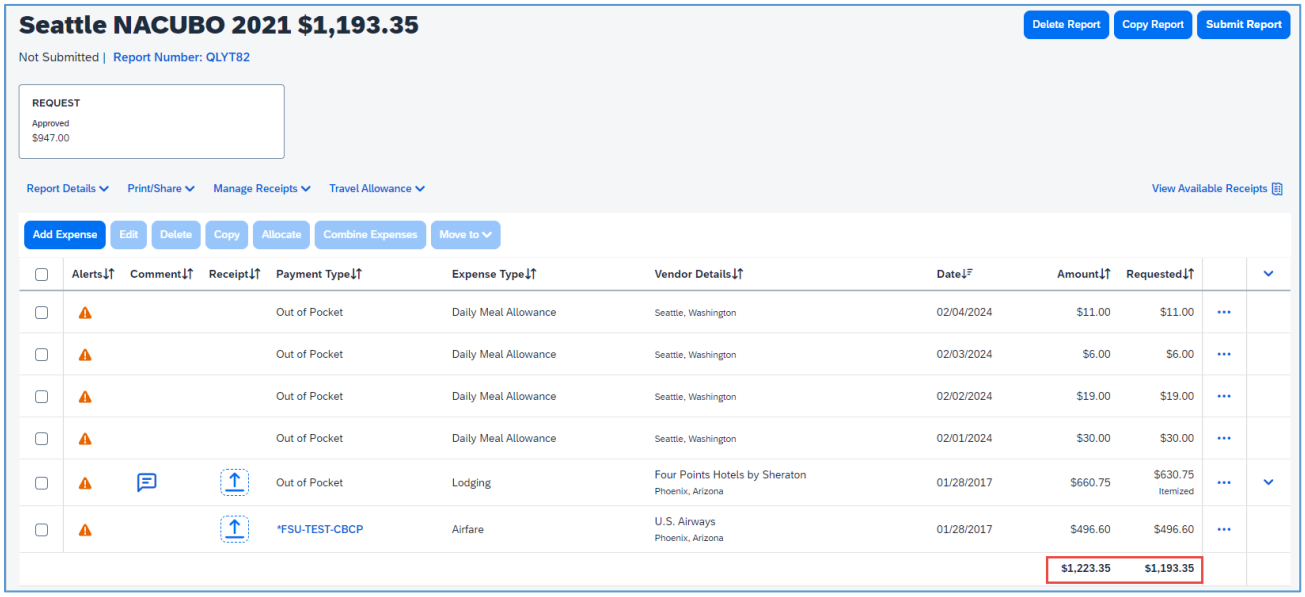
| | |
|---|---|
| **Submitted & Pending Approval** | In immediate supervisor's queue |
| **Pending Cost Object Approval** | At budget manager, Sponsored Research, or Research Foundation |
| **Approved & in Accounting Review** | At FSU Foundation for approval or Compliance (Athletics) |
| **Approved and Pending Processor Manager** | At central Travel Office for prepay audit |
| **Sent for Payment** | Approved for payment |

**Accessing Comments**

Occasionally, a report is placed on hold. In these cases, a user will receive an email from an auditor or travel rep informing them of the hold and requesting additional documentation or information. Users can also view comments on the expense report by opening the report and clicking **Report Details > Report Timeline**.

## Reviewing Expense Report Totals

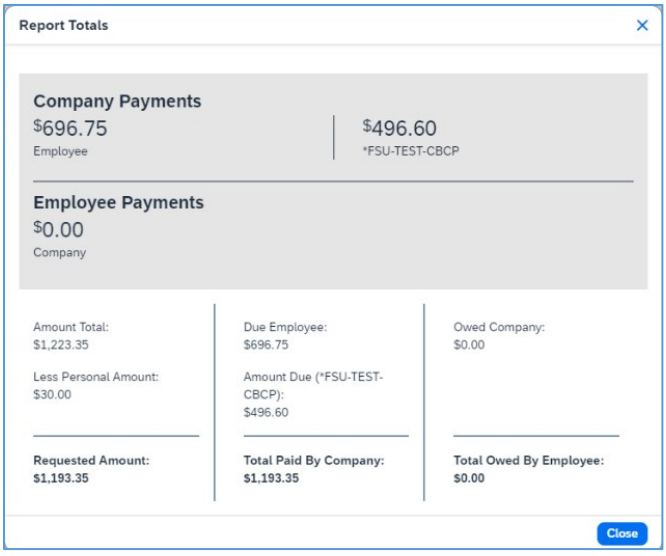
**Purpose**: Before submitting an expense report, users should review report totals to ensure the amounts being paid to the university, traveler, or guest is correct.




**Note**: Total Amount and Total Requested located at the bottom right of the screen are not necessarily the amount due the traveler.

To review a breakdown of the expense report totals:

1. From an open expense report, click on the **Report Details**.
2. Click **Report Totals.**




Expense Report **Amount Total** is $1,223.35

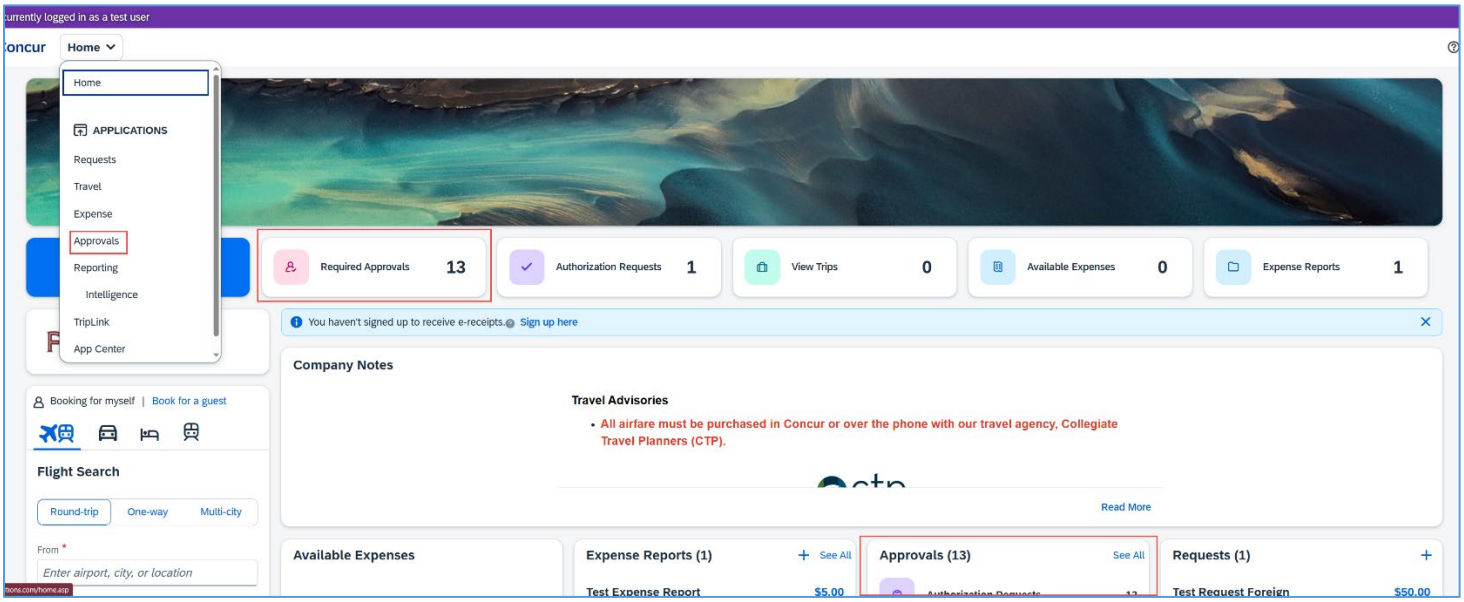
- **Total Paid By Company** is $1,193.35, $1,223.35 subtracted by **Less Personal Amount** of $30.00 (from a Personal Non-reimbursable expense).
- $496.60 was charged to the FSU Travel Card (FSU-Test-CBCP) This amount is deducted from the **Amount Total**.
- **Amount Total** subtracted by **Amount Due** is $726.75, **Amount Due** of $726.75 subtracted by **Less Personal Amount** of $30.00 (employee owed from a Personal Non-reimbursable expense) results in an **Amount Due Employee** of $696.75.

# Reviewing and Approving Requests & Expenses

**Purpose**: This section is for individuals who are responsible for approving requests or reports submitted by users. Expense reports pending approval can be accessed from multiple links on the Concur Home page. For additional information regarding approvals in Concur, please visit our Concur Approvals page.

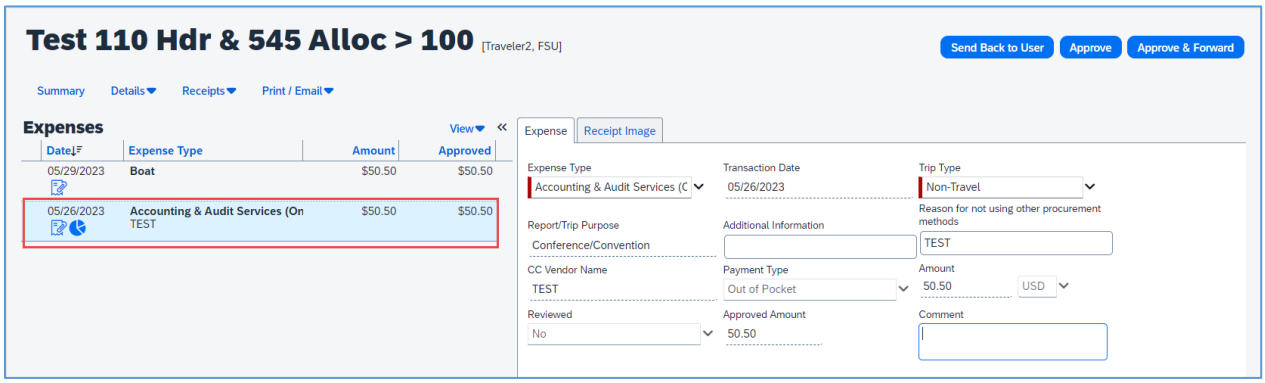
## Accessing Approval Items

- Approvals link in Navigation Menu
- Required Approvals link on the Quick Task Bar
- Approvals link found under Activity Cards

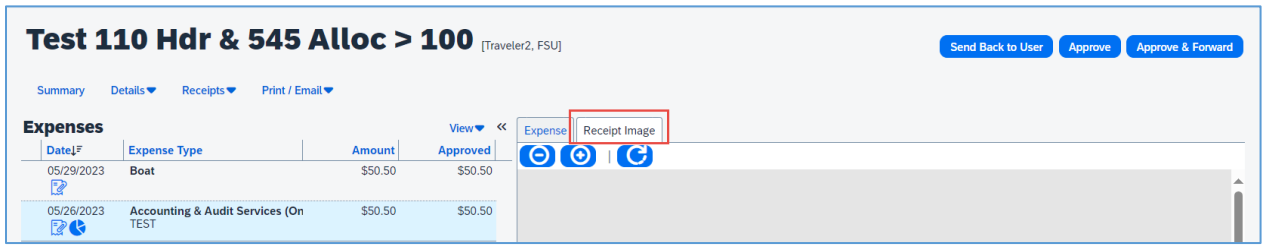


## Approve Submitted Requests or Reports

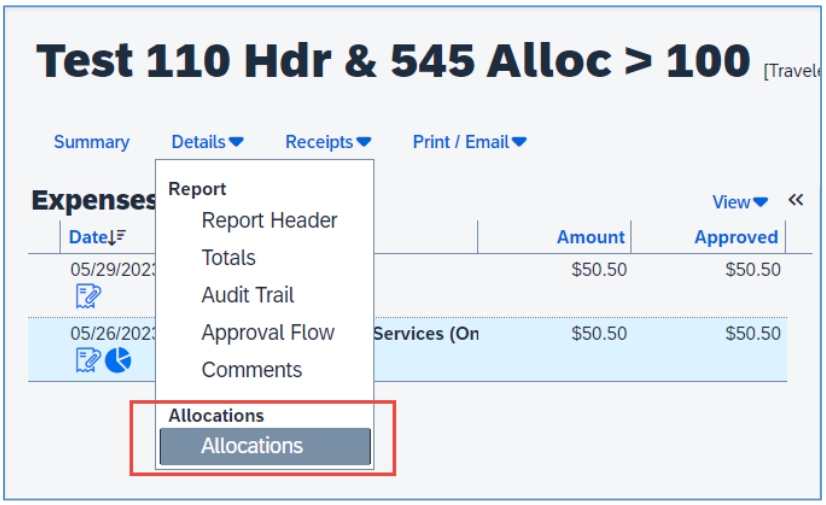
1. Click the name of the request or report you want to open.
2. Review each line item for compliance, and to ensure any required receipts and itemizations have been provided. **Note**: Approvers can change allocations, some expense types, and transaction dates for out-of-pocket expenses. They can also add comments and receipts. They cannot add or delete lines or change amounts.
    a. Click the expense on the left-hand side to display itemization details including account allocations, comments, missing receipt affidavits, and exceptions.



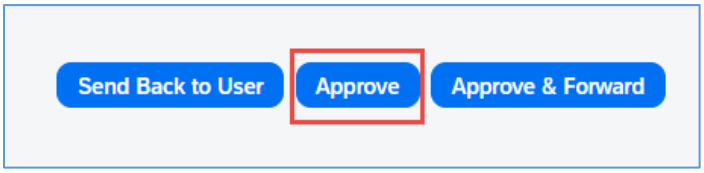

    b. Receipt images can be viewed in the **Receipt Image** tab.




3. Click **Details**, then **Allocations** to view account allocations for the entire report.



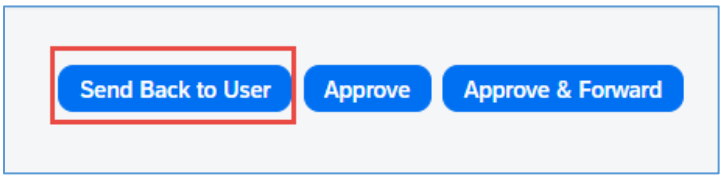
4. If all items are in compliance, click **Approve**.
    a. **Note**: If allocations are changed, clicking **Approve** will update the workflow to send the report to any newly added cost object approvers (budget manager).



## Send a Submitted Request or Report Back to the User

To return the entire expense report to the preparer for correction:

1. Open the desired request or report and click **Send Back to User**.
2. In the window that opens, use the Comment field to explain the reason the item is being returned. Then, click **OK**.



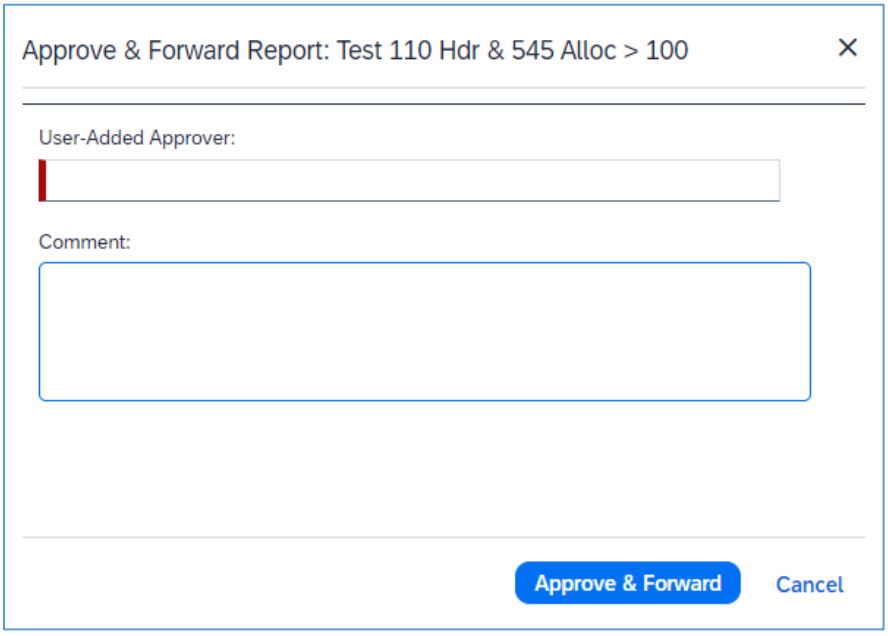
## Adding an Additional Review Step

Approvers have the option to forward transactions in their queue to additional approvers as needed.
**Note**: This is a one-time process and if necessary, will need to be repeated for each request/report.

**To approve and forward a request or report:**

1. Select the report you want to open
2. Review the report, and then click **Approve & Forward**

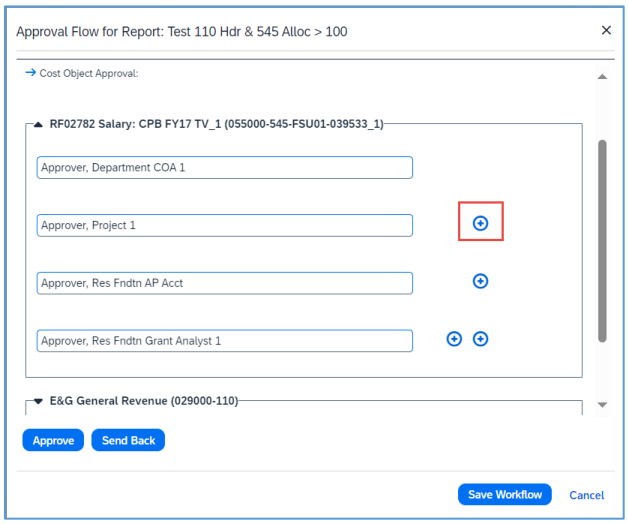

3. In the User-Added Approver field, click the drop down and use an option such as Last Name or Email Address for the search method
4. Search for, then select the appropriate individual



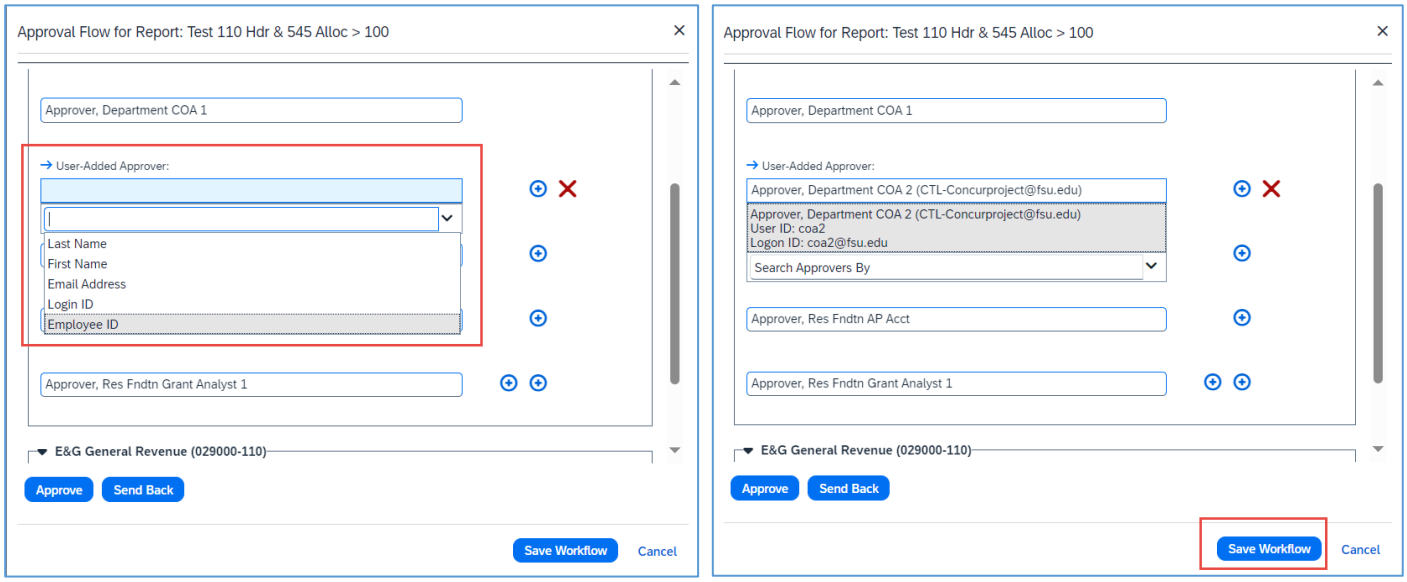

5. Click **Approve & Forward**

**If you received the approval as the Cost Object Approver (Budget Manager), to forward to another approver:**

1. Click **Details**, and then **Approval Flow**
2. Click the "+" icon to add an approver to the workflow, this will insert the approver in the workflow before it routes to the next systematic approver




3. Click the drop down and use an option such as last name or email address for the search method

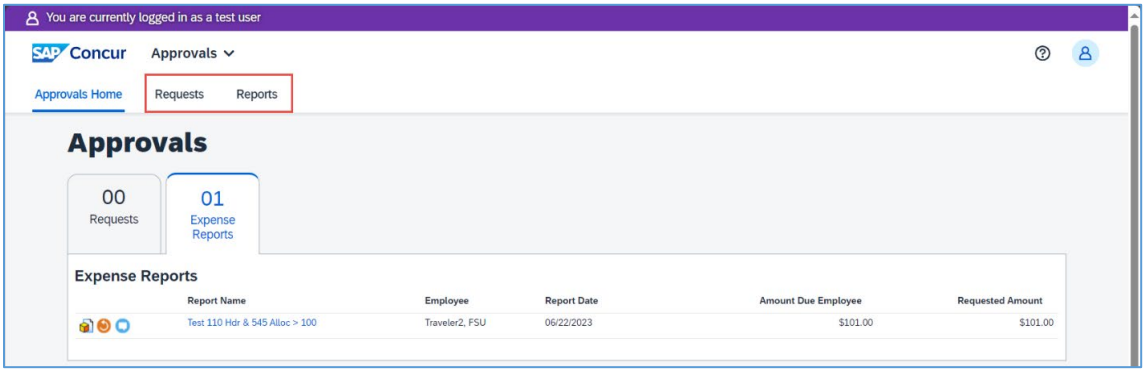



4. Search for, then select the appropriate individual
5. Click **Save Workflow,** then **Approve**

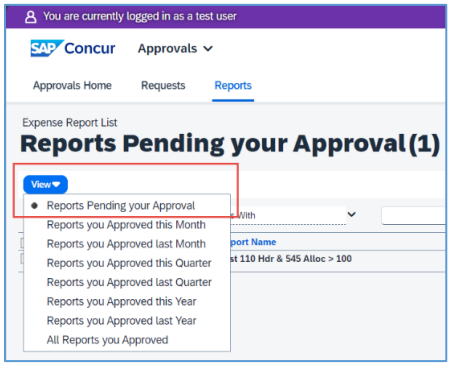
## Accessing Past Approvals

**Purpose**: From time to time an approver may wish to look at past requests and expense reports that they approved.

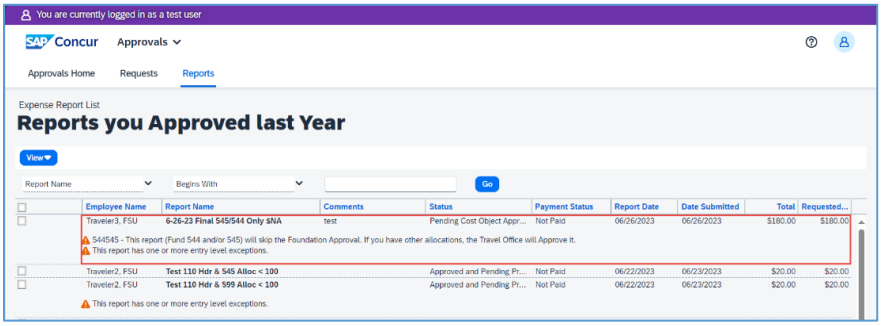
1. Log into Concur and, if needed, act on behalf of the approver whose transactions you wish to view. Approver delegates may view past approvals for someone else if they are an approval delegate for that person.
2. Click on **Approvals**.
3. Click either **Requests** or **Reports**.




4. Concur displays "Reports/Requests Pending Your Approval" by default. Both tabs work identically. Users should click the filter next to **View** to select a different range of past approvals.




5. Click on the request or report name to view it.

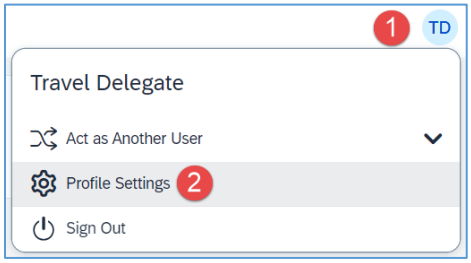


# Request /Expense Delegates

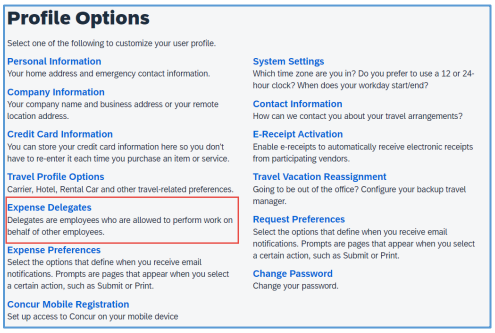
**Purpose**: Delegates are employees who are allowed to perform work on behalf of other employees. Delegates can prepare and submit travel requests, book travel, and prepare, **but not submit**, an expense report on behalf of the traveler. It is the responsibility of the traveler to add/delete Delegates. Request Delegates & Expense Delegates are linked, changes to one, will impact the other. Users can contact the Travel Office to be added as a delegate for 10 or more people at a time.

## To See Who You Are a Delegate For

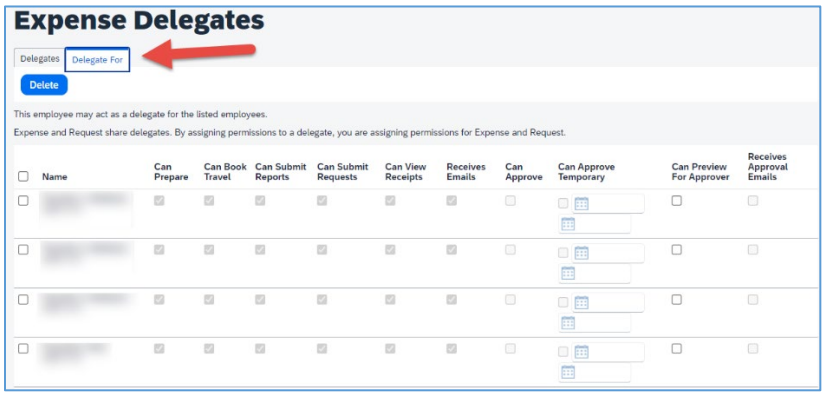
1. Login to Concur.
2. From the Concur home screen, click **Open Profile (1)** icon.
3. Click **Profile Settings (2)**.




4. Navigate to **Profile Options > Expense Delegates.**




5. Click **Delegate For**.

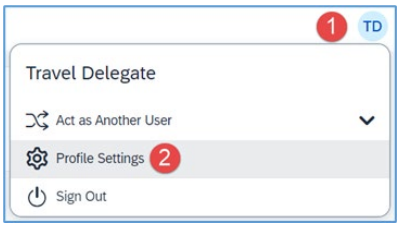


## Remove Unneeded Travelers or Delegates in Concur

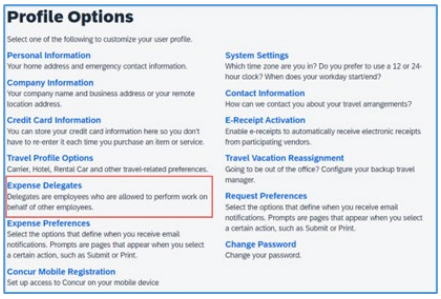
Delegates can work in Concur on behalf of travelers. They can also elect to receive email notifications that are intended for the traveler. This can cause users to receive Concur emails when any of those travelers have activity in Concur. Removing unneeded travelers will reduce unnecessary emails.

**Note**: Once you remove yourself as a delegate you will need to communicate with that user to be added back as a Delegate in the future using the instructions here.

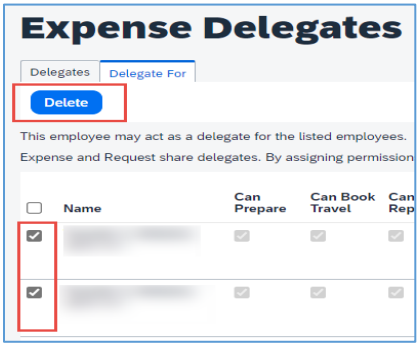
1. Login to Concur.
2. From the Concur home screen, click **Open Profile (1)** icon.
3. Click **Profile Settings (2)**.




4. Navigate to **Profile Options > Expense Delegates.**




5. Select the check box to the left of the individual(s) and click **Delete**.



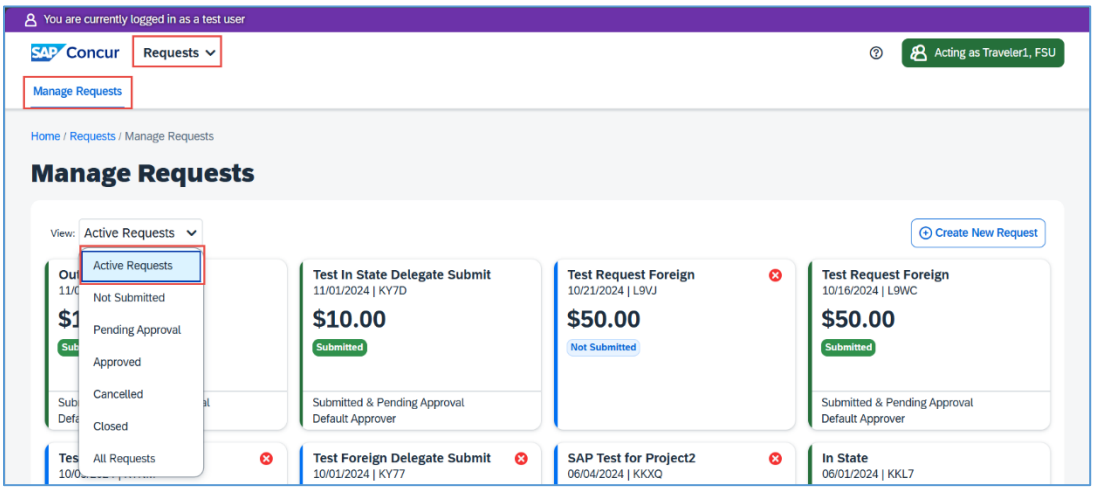

**Note**: If you do not act as a delegate (travel rep) for any users, select the checkbox at the top to select all users on your list, then click **Delete**.

# Accessing Past Travel Requests & Expense Reports

**Purpose**: There are many reasons a traveler or delegate may need to access a report/request from the past. The report or request library allows a user to view past items. Travel representatives (Travel rep) may view reports and requests for any traveler they are a delegate for. Budget managers should request the Request & Expense Processor (Read Only) roles from the Travel Office.

## Manage Requests

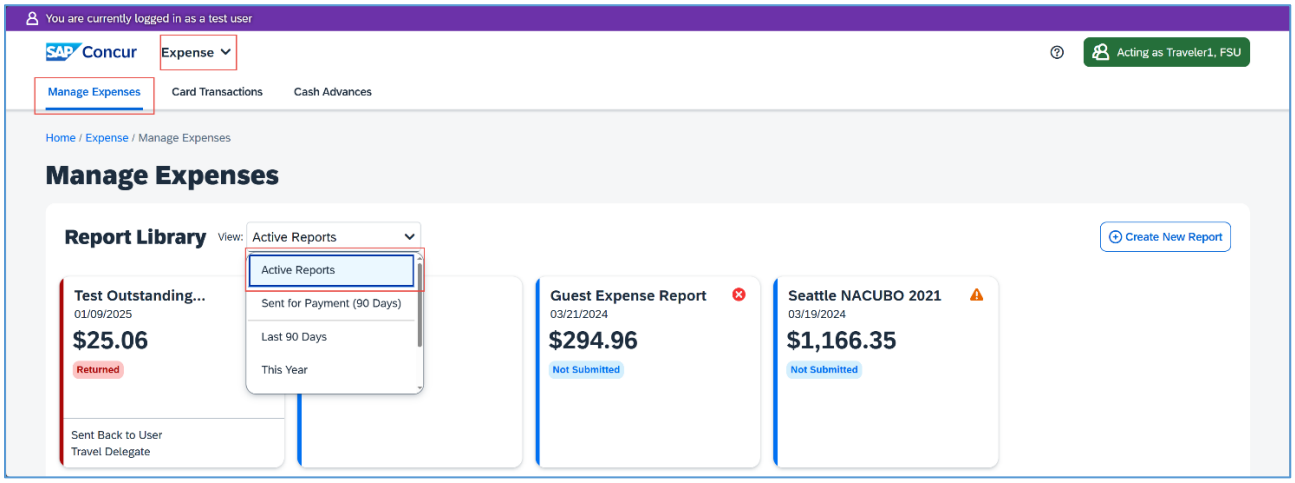
1. Log into Concur and, if needed, act on behalf of the traveler whose request you wish to view. Delegates may view requests of any user they are a delegate (travel rep) for.
2. Click on the **Request** application




3. Active requests will display by default. Users may view other requests by clicking **View "Active Requests"**.
4. Click on a request name to view it.

## To Access the Report Library

1. Log into Concur and, if needed, act on behalf of the traveler whose report you wish to view. Delegates may view reports of any user they are a delegate (travel rep) for.
2. Click on the **Expense** application
3. Active reports will display by default. Users may view other requests by clicking View **"Active Reports"**.




4. Click on an expense report name to view it.

# Concur Connected Applications

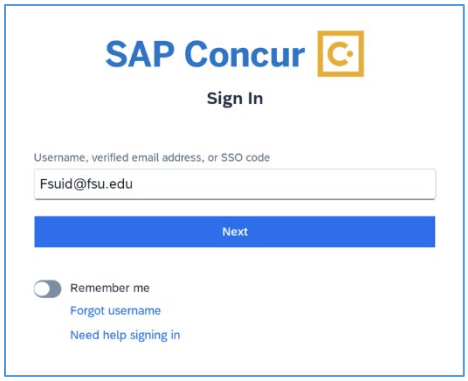
**Purpose**: To take full advantage of the functionality in the Concur application, we recommend that you download two applications onto your smartphone or mobile device. These are optional and provide convenience to users.

- **Concur Mobile** allows a user to manage trips and expenses. Users can collect data for an Expense Report and submit it, or approve an employee's Expense Report.
- **Tripit Pro** organizes travel plans putting all trip information in one place. The app provides users with updates during travel on things like gate changes, cancellations, etc., and provides the ability to select alternate flights when plans change or a flight has been cancelled. Family members can be provided visibility to travel plans by including them as part of the user's 'inner circle'. Consider it a personal travel assistant while on the road.

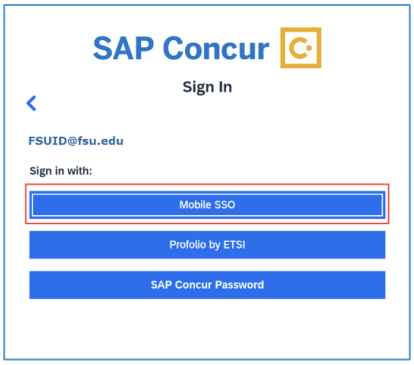
## Concur Mobile & Registration

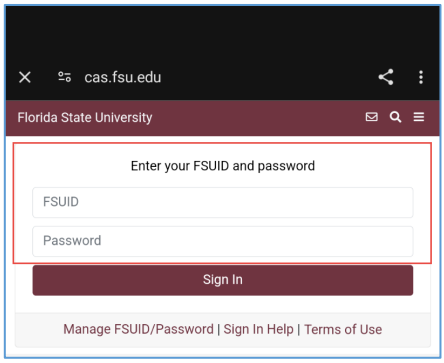
Use this guide to set up your own mobile phone to capture receipts, submit expense reports, and address approvals.

1. Download the Concur application to your phone **Note**: If you've already downloaded the app, open it from your mobile device, and proceed to step 2.
2. Enter your FSUID@fsu.edu and click **Next**

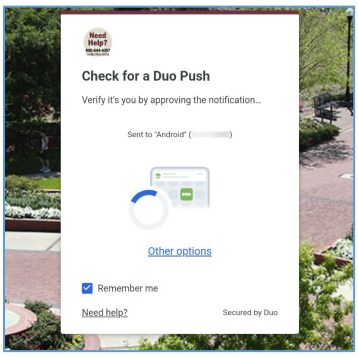


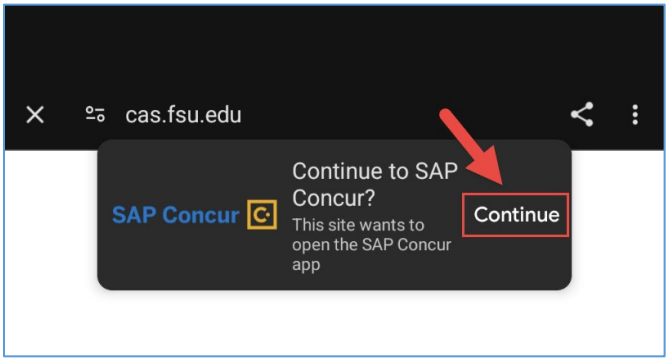

3. Click **Mobile SSO.** Page should transition to the cas.fsu.edu authentication link



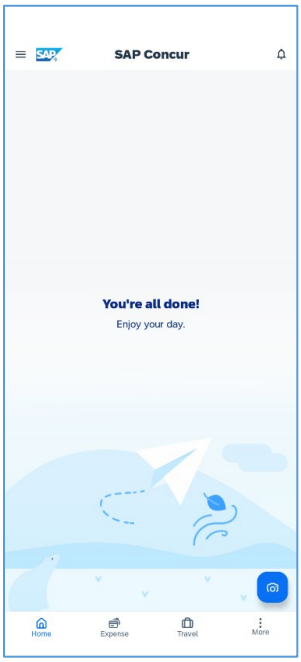



4. Provide your FSUID and Password as you do to login to the myFSU website
5. If you enter your FSUID and Password correctly, your page will transition to the 2-factor authentication (2FA) screen requiring you to use Duo to verify your identity via the Duo application.
    a. **Note:** FSU implemented 2FA as an additional security measure on top of the traditional password to help combat cybersecurity threats. Depending on your mobile device you may receive a prompt to open the SAP Concur app. Click **Continue** to access the mobile application.




6. Once verified and access is granted, you should be transitioned to the Concur mobile Home
    a. Note: It is recommended to allow Concur to send Notifications concerning approvals, expenses, etc. This can be customized later.




You are now registered for access to Concur Mobile. **Note**: To protect your account, Concur Mobile will require a password or lock is used to unlock your mobile device if one is not already created.

## Booking Travel with Concur Mobile

In addition to monitoring and verifying current or past Travel Request (Requests) or Expense Report information, the Concur Mobile app can be used to find and confirm current or future travel.

**Note**: For Flight and Hotel reservations a method of payment is required before the reservation is booked. Please set up your method of payment (FSU T-Card and/or personal credit card) before attempting to book travel. FSU recommends using the university travel card for all travel related purchases. **Using "Reserve" will place a hold on the flight, and it should be processed by Travel Management Company (TMC) within 24 hrs. Air reservations cannot be cancelled in Concur Mobile.**

Refer to the Updating Your Profile section of the Concur Guide for instructions on how to add a method of payment to your profile. Concur Mobile may ask to enable location services to provide updated data and options based on location.

Please refer to our Concur Travel page for information on contacting Travel Management Company (TMC) for assistance and any associated fees.

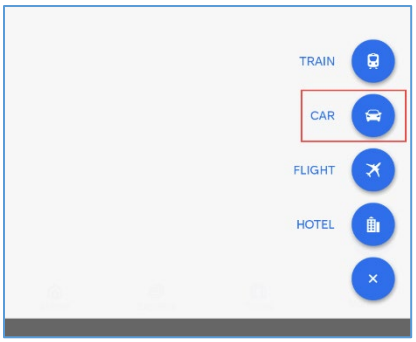
**Concur Travel** - https://controller.vpfa.fsu.edu/concur/travel

Get started by choosing one of the following options: Click "**Book**" on the bottom menu bar or "**Trips**" from the main menu and using the blue plus sign. From either menu, you can choose between different types of travel: rental car, hotel, train, airfare.

### Rental Car

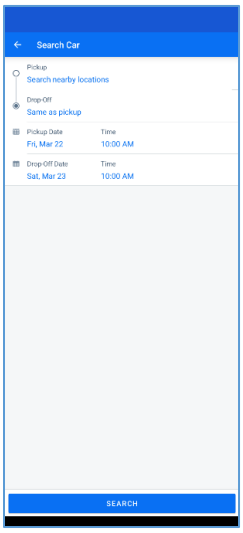
**Note**: Booking Rental Car through the Concur mobile app will only book rental cars for the profiled user. If needing to book on behalf of someone else such as a guest, it is recommended to use the web version of Concur for Travel booking.

1. Select **Car**

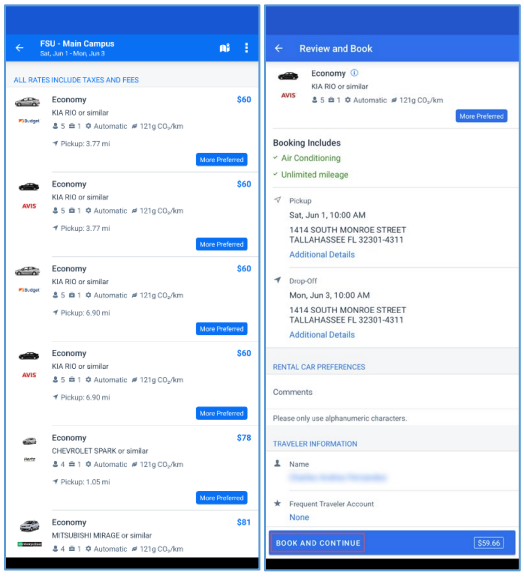



2. Provide Pickup and Drop-off (Default is Same as Pickup), Pickup and Drop-off Dates/Times
3. **Search**.

a. **Note:** The university will only reimburse for the rental of compact size vehicles unless justification is provided detailing the necessity for a larger vehicle.




4. Review available car choices (Options will be presented beginning with contracted and preferred vendors AVIS/Budget, Enterprise/National, and Hertz).
    a. **Note**: Reimbursement for non-contracted vendors will require a justified explanation.
5. Review the car details to ensure the car matches your expectations, confirm times, dates, rates, and **Book and Continue**.

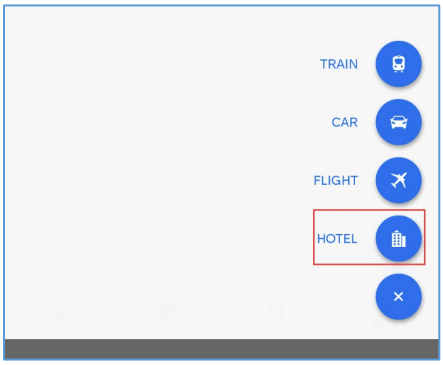



**Note:** When a rental car is reserved it will place a hold on the car and it should be processed by Travel Management Company (TMC) within 24 hrs. Car reservations can be cancelled by accessing your car segment and clicking "**Cancel Car**".

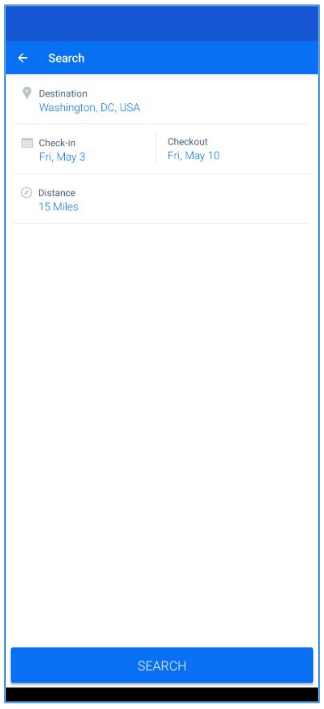
## Hotel

**Note**: When using the mobile application to book a hotel for the first time. Concur may ask for you to enable location access on your device.

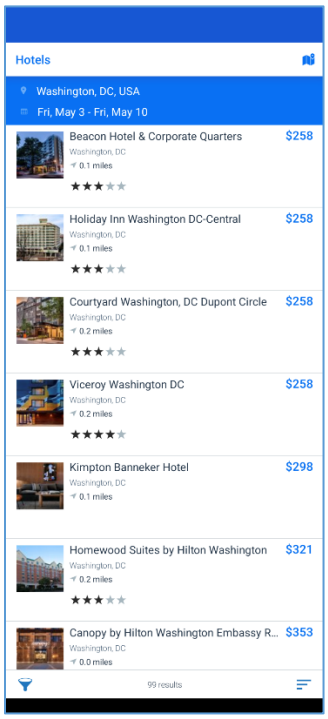
1. Select **Hotel**



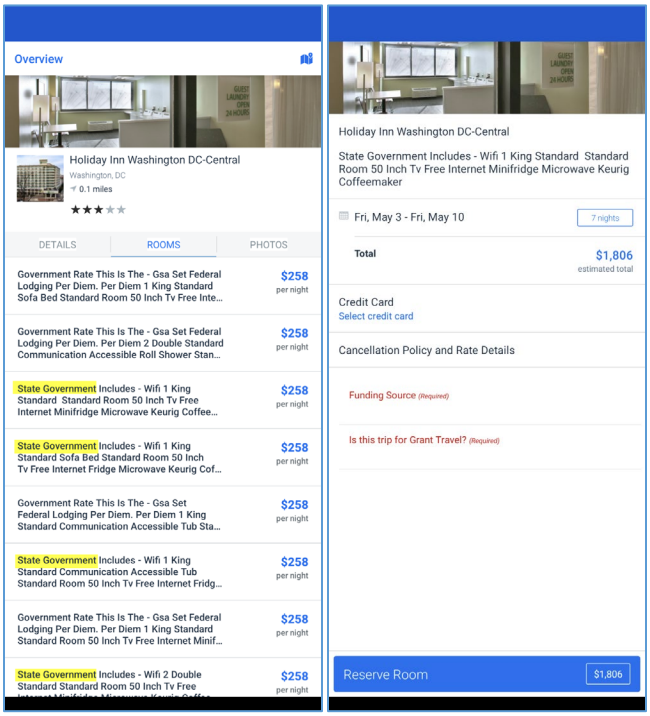

2. Provide a Destination, Check-in, Checkout, and Distance as criteria, press **Search**




3. Evaluate available options for hotels, data can be filtered or sorted based on preferences and available options




4. Review details on hotel booking to ensure room Cancelation Policy and Rate Details match expectations and the requirements are applicable to your situation



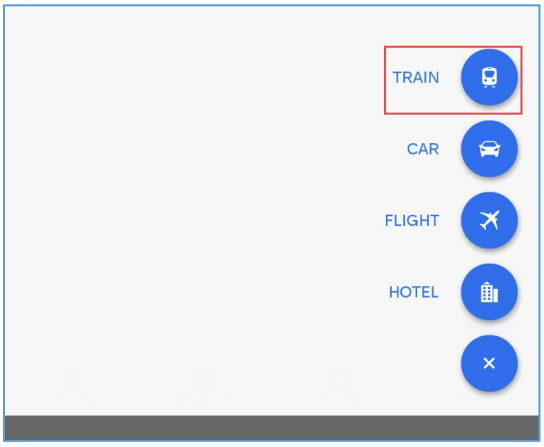
5. Provide the information needed for the required fields and confirm credit card. Click **Reserve Room** to confirm method of payment and reserve room
    a. **Note**: Using Reserve Room will place a hold on the selected option and it should be processed by Travel Management Company (TMC) within 24 hrs. Room is not confirmed until you receive confirmation of the reservation. Hotel reservations can be cancelled by accessing your hotel segment and clicking "**Cancel Hotel**" in the bottom left corner.

**Note**: If a hotel reservation is cancelled on the Concur Mobile app an email will not be generated.

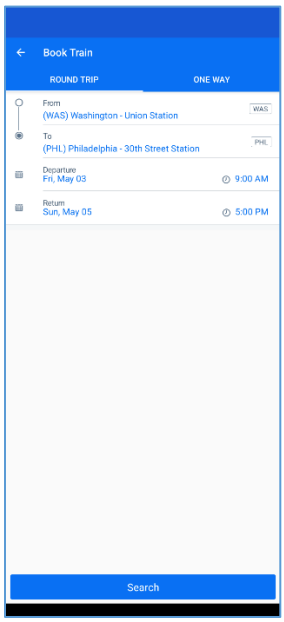
## Trains

**Note:** Not all cities with have access to train locations when booking through Concur.

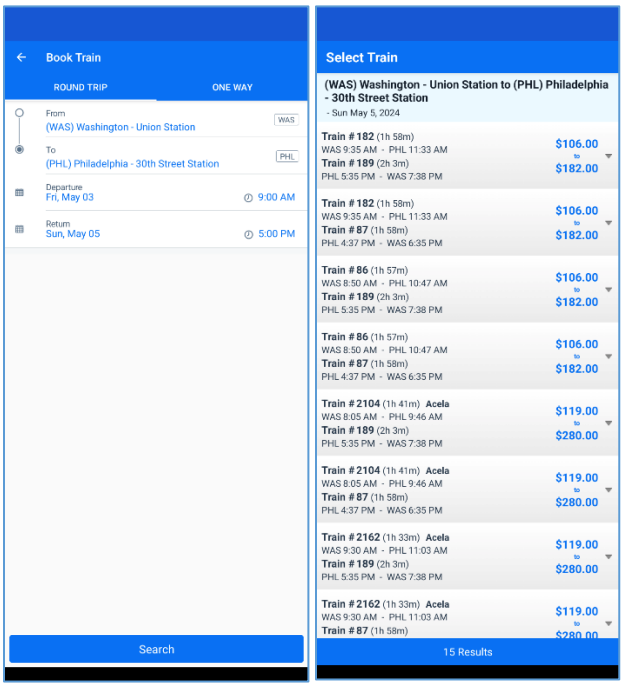
1. Select **Train**



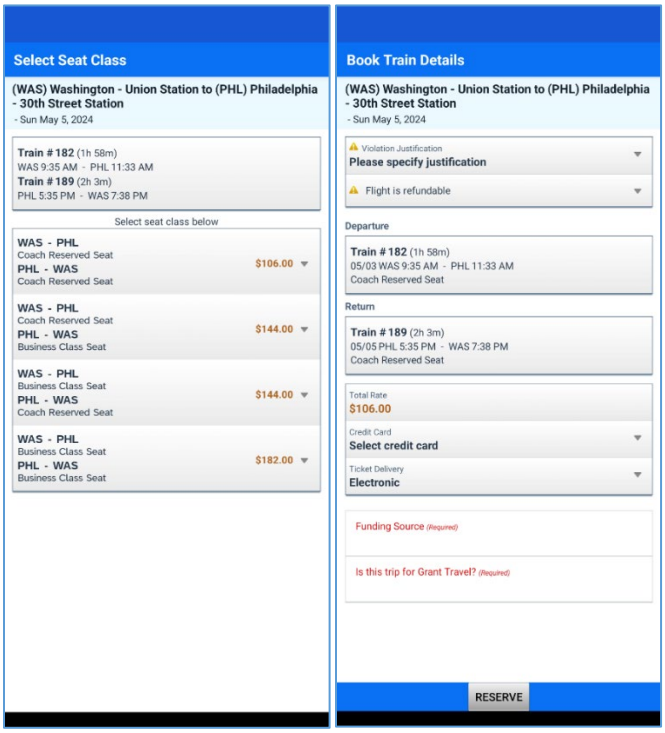

**5.** Select your trip type. Concur may default to One Way or Round Trip. Provide Departure City, Arrival City, Departure Date and Return Date
   a. **Note:** Departure Time and Return Time will further define results, if no results are returned try to alter your dates or times.




**6.** Click **Search**

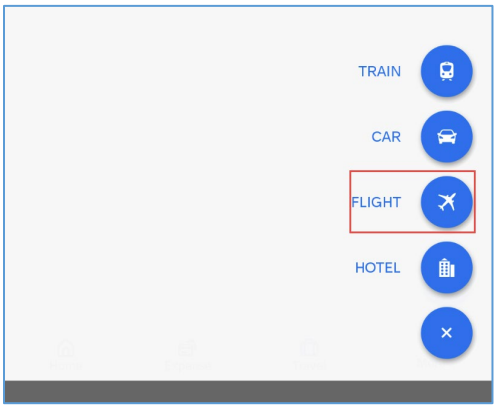



**7.** Review the train details and confirm your seat class to ensure the trip matches your expectations, confirm the method of payment, provide the required fields and click **Reserve** when ready.

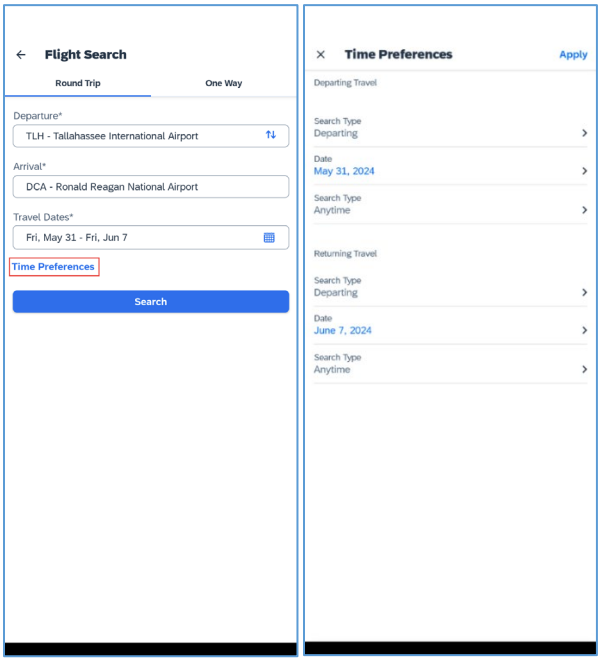


## Airfare

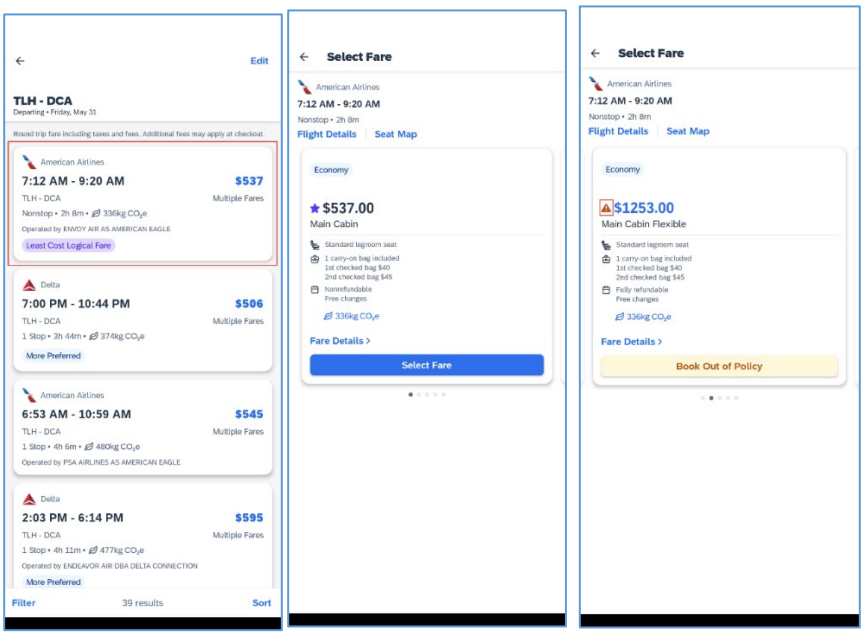
1. Select **Flight**




2. Select your trip type. Concur may default to One Way or Round Trip
3. Provide Departure, Arrival location, and Travel Dates.
    a. Note: Users can include "Time Preferences" to further define results, if no results are returned try to alter your dates or times.

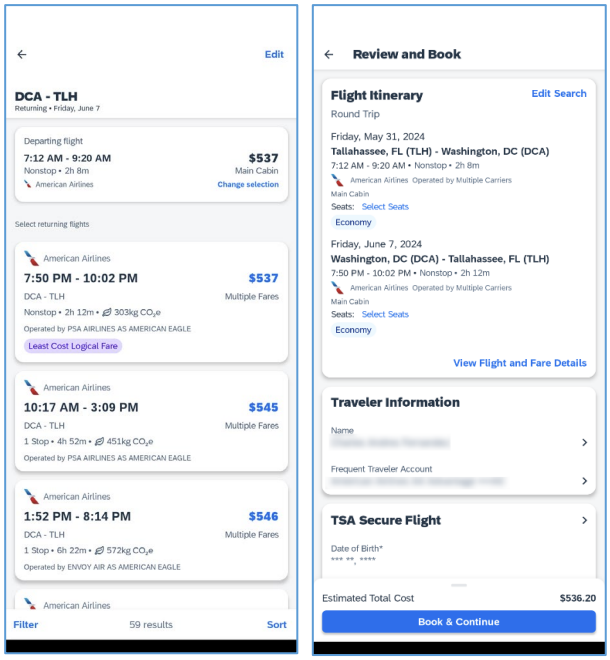



4. Click **Search** when ready




**Note**: You will be provided a Results Summary page to review options. Click on one of the results will allow you to review the price and Fare Details for the selected choice. Items considered Out of Policy will provide additional information if you click on the ⚠ icon as see above.

5. Review the Flight Details to ensure the flight matches your expectations. Click **Select Fare** for the Departing flight.

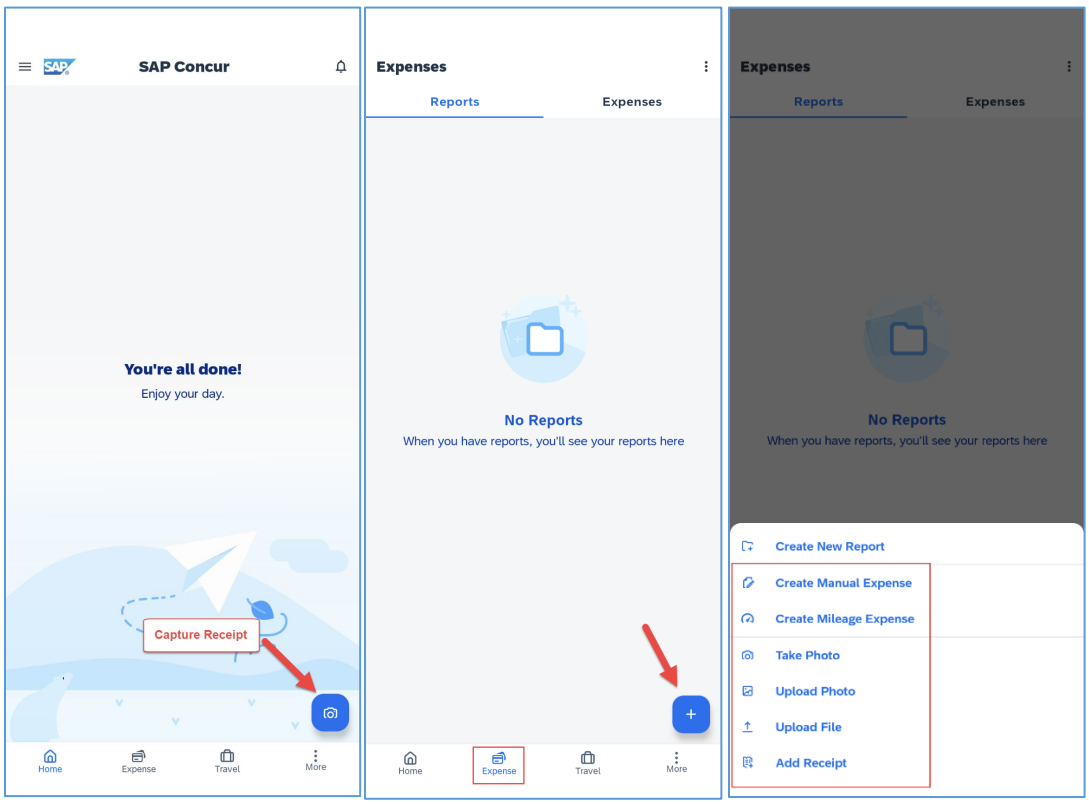


6. Review the Flight Itinerary to ensure both flights match your expectations. Confirm the method of payment and click **Book & Continue** when you are ready to finalize booking.

## Mobile Upload Options

See Concur Mobile Registration for directions to install the Concur application on a mobile device. This must be done before receipt images can be uploaded from a cell phone or other mobile device.

There are a few options in Concur Mobile when you navigate to "Home" or "Expenses" and click on the blue icons. (See screenshots). Many options below can be used for uploading receipts directly from your mobile device.



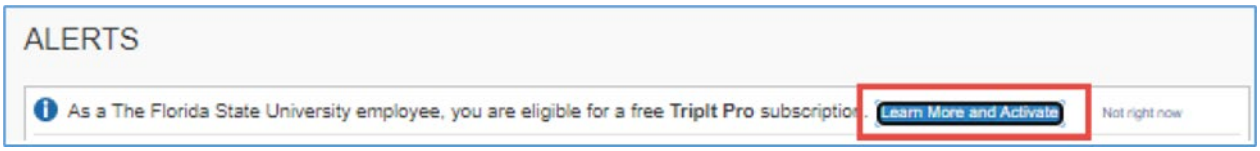

- **Capture Receipt** – Uses Optical Character Recognition (OCR) from ExpenseIt to turn images, and paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the "Expenses" area on the mobile app, or once you add the expense to an ER.
- **Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since requires a lot of manual entry on the phone. **(Does not count as a receipt)**
- **Create Mileage Expense** – Quick access to creating the Mileage (Personal Vehicle Only) expense type while traveling but not ideal since the integrated map may not list all results. **(Does not count as a receipt)**
- **Take Photo –** Uses device camera to quickly take and upload an image.
- **Upload Photo –** Allows Concur to access local images to upload an image.
- **Upload File –** Allows Concur to access local file storage to upload a file.

- **Add Receipt –** Add a receipt using the Take Photo, Upload Photo, and Upload File options.

For the best experience while uploading receipts it is recommended to use a strong and stable internet connection for the entirety of the upload process. If the process fails, you can retry the upload until it succeeds.

## Tripit Pro

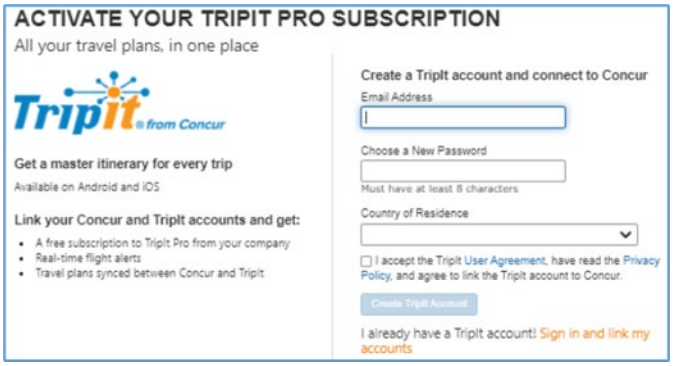
On the Concur home page, under Alerts, you may see a message regarding eligibility for a free Tripit Pro subscription from time to time. Click "**Learn More and Activate"**.



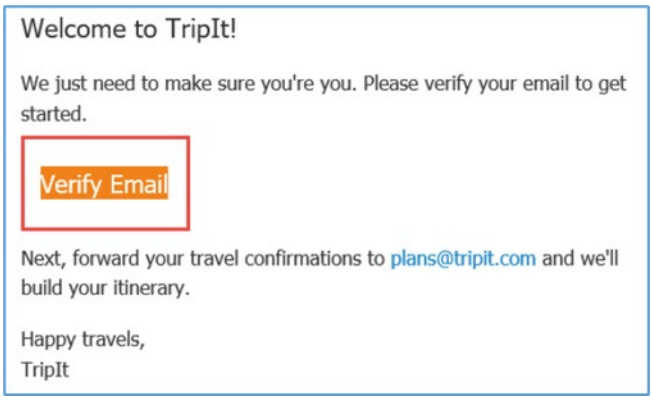

**Note**: Tripit can also be initialized by proceeding to 1) Profile, 2) Profile Settings 3) Connected Apps.

1. Activate your TripIt Pro Subscription
    a. Enter your FSU email address
    b. Choose a password (This password should be different from your university account password.)
    c. Enter your Country of Residence.
    d. Click to accept the User Agreement and Privacy Policy 3. Click **Create TripIt Account**

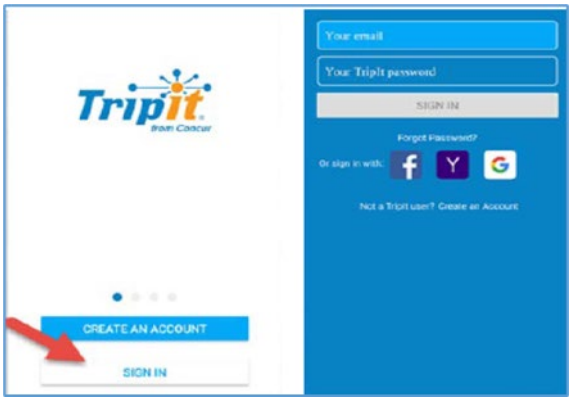
**Note**: Tripit passwords are not managed by the university; protect your account by using a different password




2. Tripit will send a verification email to your "@fsu.edu" email address. Click the link in the email to verify the account.
3. Click **Verify Email**




4. Install Tripit from your device application store
5. Open Tripit
6. Login with your previously created and verified username and password




**Note**: Tripit users can forward confirmation emails to plans@concur.com from any verified email address and can view itinerary information from Tripit while traveling for status updates, gate changes, and more. You can add additional email addresses by going to **Open Profile > Profile Settings > Personal Information > Email Addresses**.

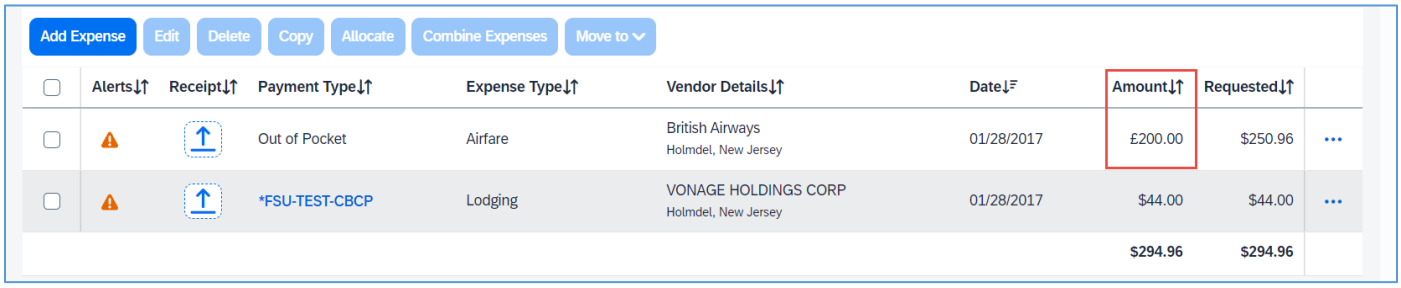
# Converting Foreign Currency Transactions

**Purpose**: Concur can convert transactions made in foreign currencies to US dollars, increasing the efficiency and accuracy of processing foreign travel expenses.

## To Convert an Expense Incurred in Another Currency:

1. With the report open, click **Add**, and choose the expense type, then enter the appropriate information in the required and optional fields (required fields are indicated with a red asterisk *).
2. Enter the City of Purchase
3. Enter the expense Amount
4. Choose the currency type from the drop-down menu, the Concur system calculates the amount in US Dollars
    a. **Note:** If the traveler incurs an expense in a currency different than that of the city/country they're visiting (i.e., receipt is in US Dollars for an expense in Mexico), select US Dollars from the dropdown menu.
5. Complete the remaining fields as appropriate. Then click **Save**.

**Note**: The currency will be updated on the expense page after you click **Save**.

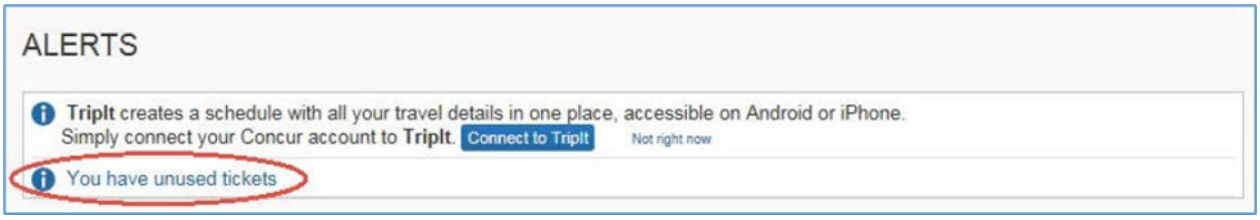


# Exchange your Unused Tickets

**Purpose**: When booking travel through Concur, canceled nonrefundable tickets may be listed on your profile and can be used as a credit towards future business airfare. This can only be done for tickets booked through Concur and restrictions may apply.

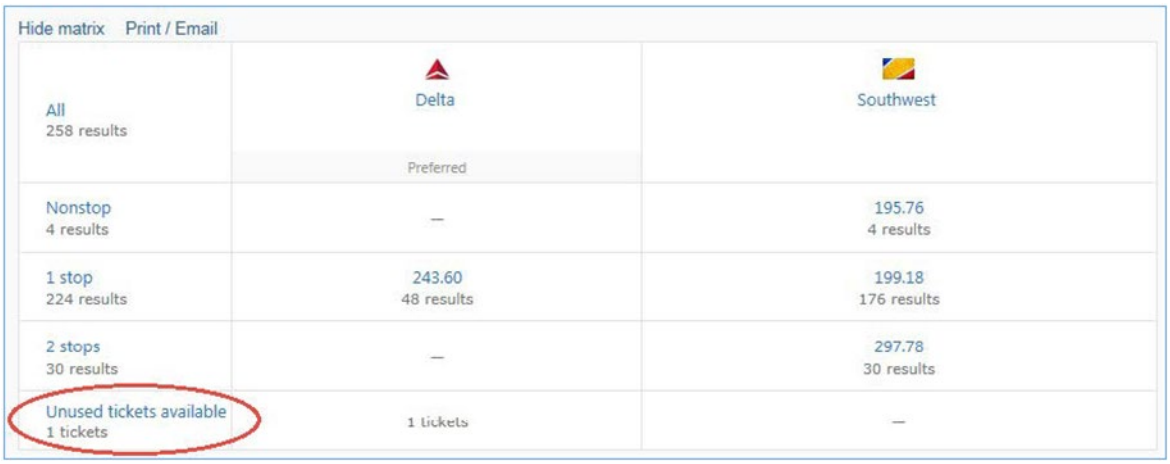
## Traditional Exchange

While navigating Concur Travel, you may be alerted to unused tickets associated with your profile:

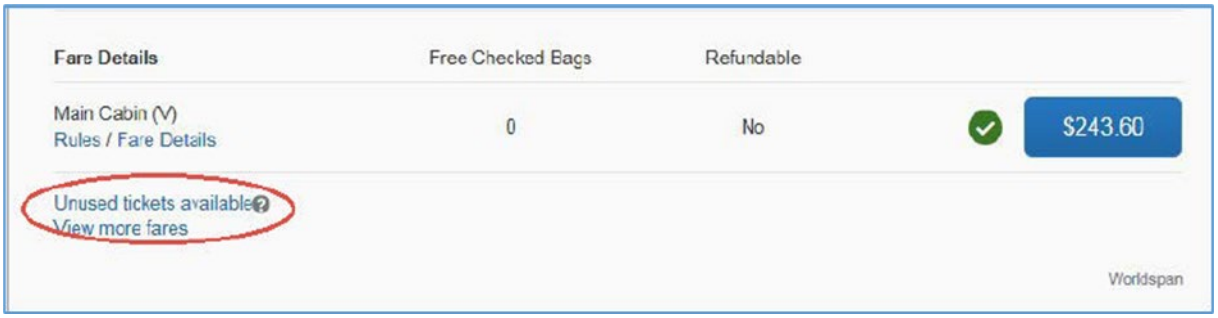



Clicking on the hyperlink will direct you to any unused tickets in the Concur Travel system. Users may also navigate to their Concur profile and look under the Travel Preferences section. Users can review the Carrier, Credit amount, and Expiration Date for specific information.


When searching for available flights, if Flight Search Results meets the requirements for an unused ticket, an option of "**Unused tickets available**" is indicated by an additional row under the airline carrier's column.



The "**Unused tickets available**" area will also appear when looking at the details page of each fare option as seen below:

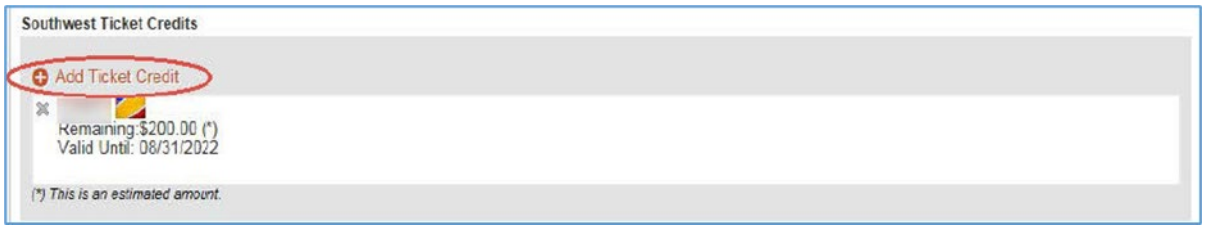



Traditional carrier bookings do not need to specify that an unused ticket can be used on your new reservation. As long as the selected fare meets the requirements of an unused ticket, the credit will be applied by a Travel Management Company (TMC) agent once the transaction is complete and they receive your reservation. **The reservation is not complete until you receive confirmation that the flight is booked.**

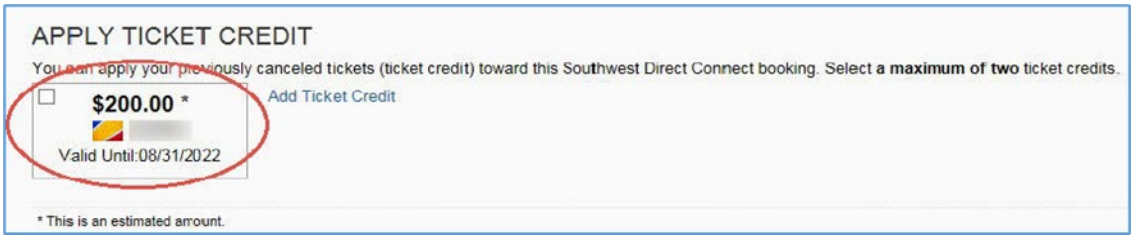
## Non-Traditional Exchange (Southwest Airlines, et. al.)

Non-Traditional airline reservations (Southwest, et. al.) can vary depending on how the reservation is cancelled:

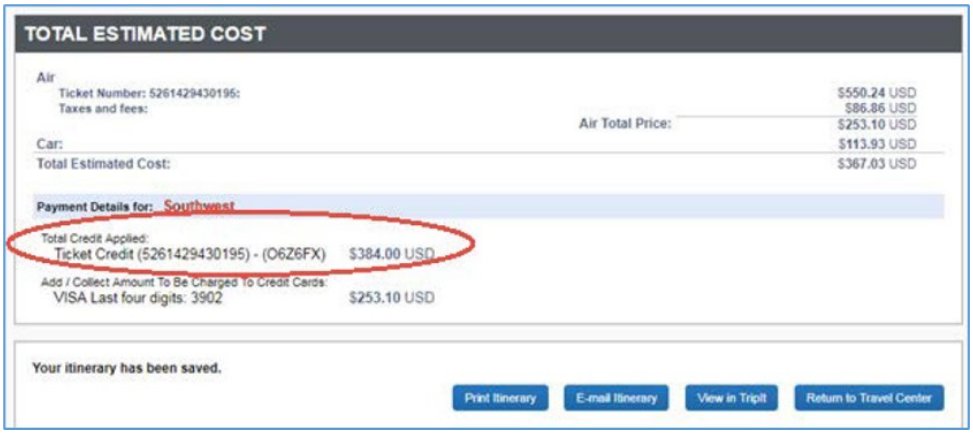
- **Scenario 1:** If a reservation is cancelled in Concur or with a Travel Management Company (TMC) agent the credit will automatically be added to the user's profile
- **Scenario 2:** If cancelled directly with the airline (Southwest, et. al.) the credit will need to be added to the user's profile by using the "**Add Ticket Credit**" function under the ticket credits area before it can be applied to a future reservation.




Once a credit is available based on the above scenarios, when booking with the carrier you will need to select the credit and apply it to the new booking on the Review and Reserve Flight page.




The credit must be selected as an option before booking in order to apply to the new reservation. However, the reservation will not be fully processed until you have reached the final booking page. The final booking page provides details on the Total Estimated Cost and can verify the applied credit and any amount charged to any additional method of payment.



Your credit will be applied by a Travel Management Company (TMC) agent once you complete your transaction and they receive your reservation. **The reservation is not complete until you receive confirmation that the flight is booked.**

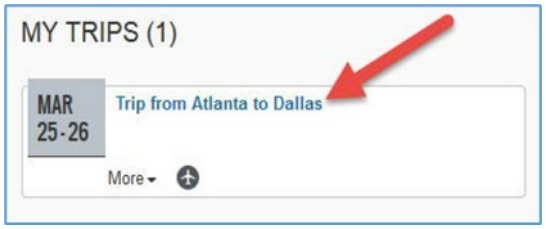
## Changing an Existing Reservation

Flights booked through Concur can be modified through Concur as long as the trip has not already occurred or is currently happening.

Changes during active travel can be coordinated with Travel Management Company (TMC)s via their normal business hours, or after hours emergency line. **Please see Concur Travel page for information on their available services and fees.**

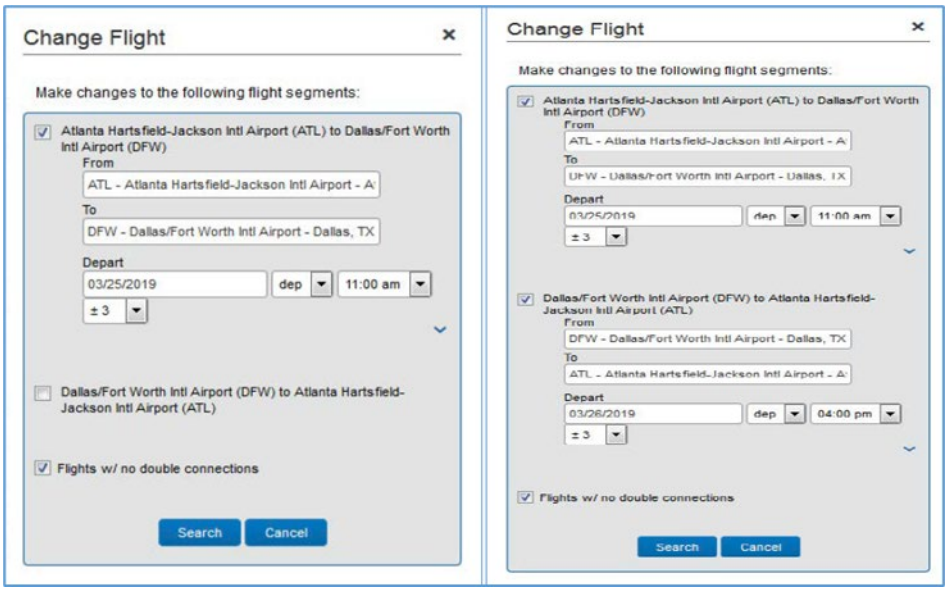
**Concur Travel** - https://controller.vpfa.fsu.edu/concur/travel

Once logged in to Concur, navigate to Travel and find your active reservations under My Trips or Upcoming Trips, click on the trip name.



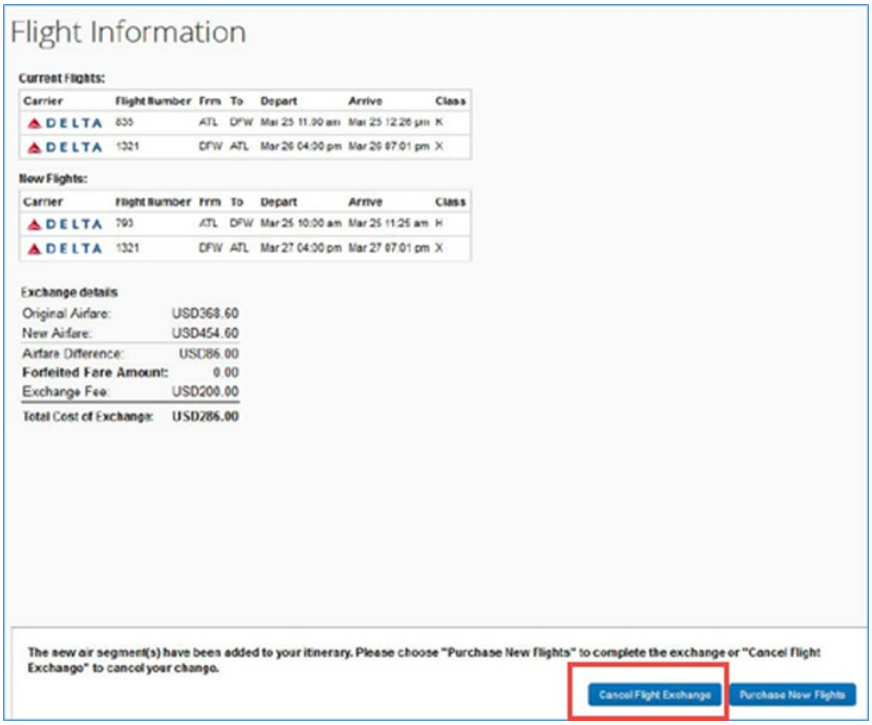

This will direct you to the travel details page, and you should notice a "**Change**" link in the upper right hand corner for the flight portion of your travel.


A popup for an option to "**Change Flight**" should appear. Ensure that you have selected the correct flight and select all the flight segments that need to change by using the check box next to each segment. Update the departure and arrival cities, dates, and times as necessary.



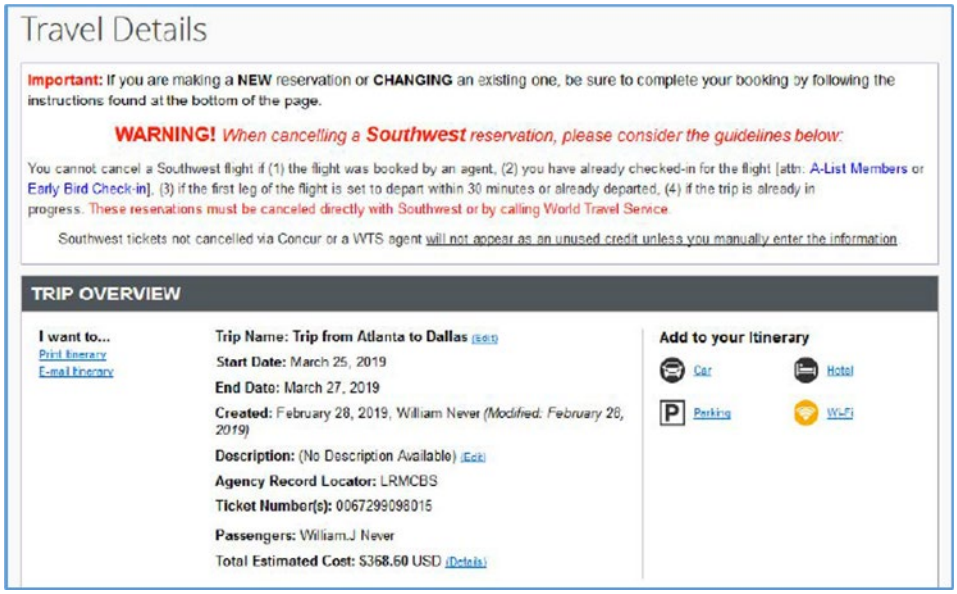

Click **Search** to view options for the airline currently booked on. If no options are available, return to search and try different criteria. Options for other airlines will not be returned as they are not interchangeable between carriers. Select your new departure and returns (if applicable). When ready, using **Get Price** will calculate the total price of the exchange based on any applicable fees and current global rates.

Before proceeding forward with the next steps verify that the exchange details match specified preferences. If you would like to continue with the ticket exchange, click "**Purchase New Flights**".

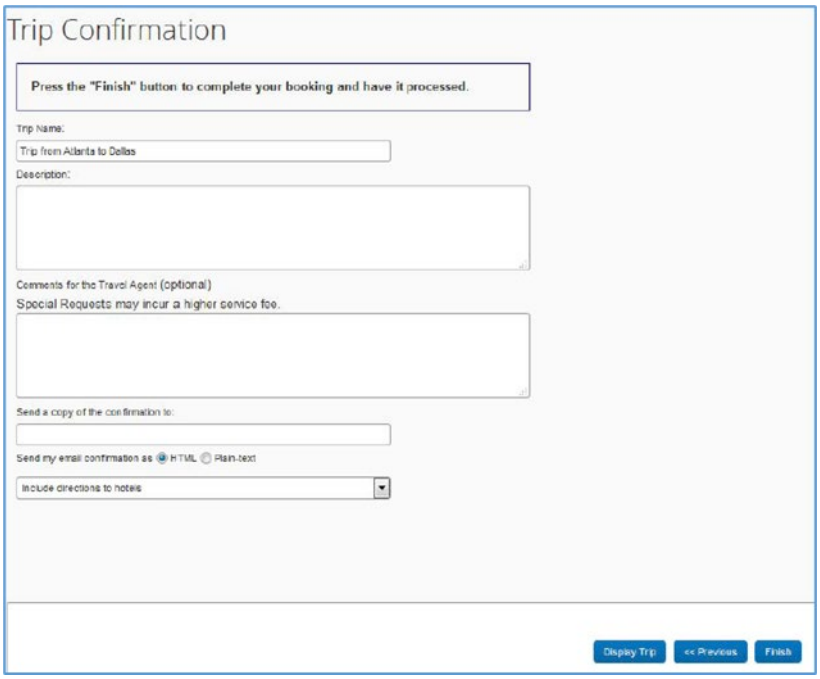


**You must "Cancel Flight Exchange" if you do not want to proceed forward with the exchange.**

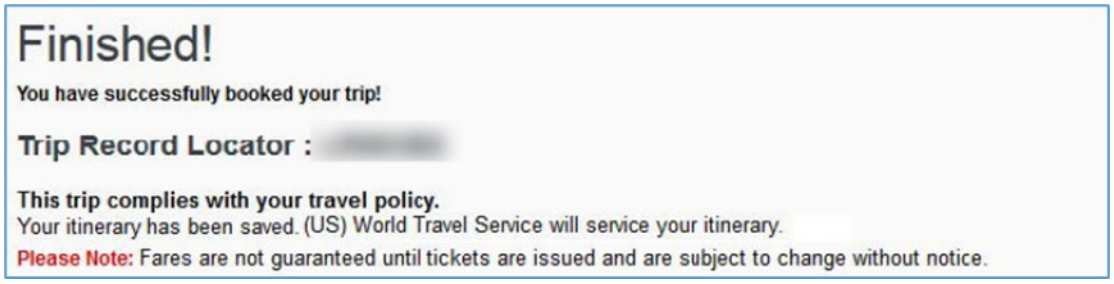
You will then be redirected to the Travel Details page to review the new flights and itinerary for accuracy. Once ready, click on **Next** to navigate to the Trip Confirmation page.




Complete any required fields and click on **Finish** to update booking with Travel Management Company (TMC).



Travel Management Company (TMC) will contact the traveler to resolve any issues prior to final confirmation**. The reservation is not complete until you receive confirmation that the flight is booked.**




## Exchange Restrictions

There are restrictions where an exchange in Concur may not be possible. These include the following:

- Itineraries with multiple carriers
- Any portion of the ticket has been used/changed/checked-in
- Record has more than 4 segments
- The cost of the exchange is higher than purchasing a new ticket
- You are booked for travel on an instant purchase carrier (i.e. Allegiant, JetBlue, etc.)
- Trip is for a foreign destination
- Your trip is for multiple destinations
- Your trip was not originally booked online via Concur Travel
- The credit card address does not match the standards stated in the profile (billing address no longer than 30 characters
- The street address is entered on more than one line or special characters were used in address
- The name on your frequent flyer account and the name listed in your Concur profile do not match exactly

Contact a Travel Management Company (TMC) full-service agent for assistance with your exchange in any of these situations.

**Please refer to Concur Travel page for information on receiving assistance and any associated fees.**

**Concur Travel** - https://controller.vpfa.fsu.edu/concur/travel

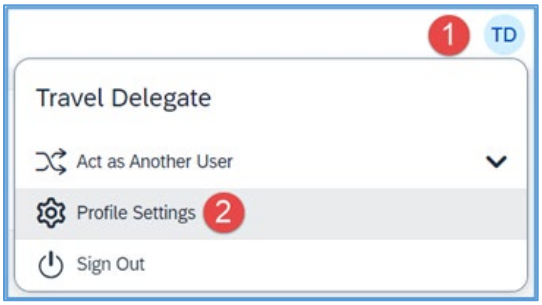
# E-receipt Activation in Concur

**Purpose**: Many vendors provide electronic versions of traditional paper receipts. If E-Receipts are activated in a user's Concur profile, when electronic receipts are available, they will flow directly into the user's Available Receipts.

**Note**: This is highly encouraged by the university as it helps streamline the receipt process.

Enabling E-receipts allows the automatic collection of electronic receipts and folio data (e.g., lodging), or "e-receipts", from participating suppliers.

1. Click on the **Open Profile** Icon
2. Then **Profile Settings.**




3. Under **Other Settings,** click the link **E-Receipt Activation**
4. Review and accept the E-Receipt Activation and Use Agreement
5. You will receive a confirmation that E-Receipts has been activated

When booking travel (airfare, hotel, car rental) in Concur, vendors participating in E-Receipts will display the following Icon

# Concur - Frequently Asked Questions

**Q: What is the difference between a Travel Request and Expense Report?**

A: Travel requests establish the intention and provide the necessary authorization to travel for university business. Expense reports allow for the processing of expenses paid by the university along with necessary reimbursements to the traveler for out-of-pocket expenses.

**Q: Why do I need to complete a Travel Request?**

A: If university travel is occurring a travel request is required to be completed and fully approved before booking travel and incurring expenses. This is to ensure that:

1. Travel is authorized and estimated funding has been agreed upon before expenditure and trip departure
2. University and state guidelines are being followed regarding travel locations, purpose, etc.
3. The university can fulfill duty of care and university employee reporting requirements

**Q: Do I need a Travel Request to submit a Non-Travel Expense Report?**

A: No, Non-Travel expense reports do not require a travel request to be associated with it.

**Q: Do I need to book airfare through the Concur system or with the university Travel Management Company (TMC)?**

A: Yes, all airfare is required to be booked through Concur or over the phone with the university's Travel Management Company (TMC).

**Note**: Additional Concur relevant frequently asked questions can be found here.

# Glossary

| Term | Description |
|---|---|
| Approval Delegate | Users granted the ability to approve on behalf of others in Concur. Approval delegates should be set up by the approver if that approver cannot approve in Concur due to an extended absence, personal leave, etc. |
| Approved & in Accounting Review – Foundation, Athletics Compliance | Authorized approvers from the Foundation Accounting team for FSU Foundation Funding (Fund 599). FSU Athletics has its own approvers that are part of the NCAA Compliance team. |
| Approved & in Process Manager - Central Travel | Authorized approvers from the Travel Office. They maintain oversight of all Education & General (E&G), Auxiliary, and most Contracts & Grants (C&G) funding. They do not review FSU Foundation Funds (Fund 599). |
| Audit Rules | Audit rules typically fall into one of two categories:<br>• (Alert) – These types of audit rules require interaction from the user to address the behavior or action that created the audit rule notification. These will prevent a travel request or expense report from being submitted and need to be cleared before submitting.<br>• (Information) – These audit rules typically serve as a notice of potential conflicts or behaviors that may require close examination by an approver or auditor. These will not prevent a travel request or expense report from being submitted.<br>Exception text is generated when an audit rule detects a potential action or issue requiring further review or action. Users should read the exception text carefully and take the action recommended to address any items requiring attention. |
| Corporate Rate | Discounted rates are available exclusive to FSU employees when booking in Concur or with our TMC. |

| | |
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| Cost Object Approver – Budget Manager, Project Approver | Based on department, fund, and project/activity (if applicable) used in the travel request or expense report when submitted. Ensures funding/budget is available and correct. Ensure fields, comments, and backup documentation are correct, descriptive and follow Florida statute, FSU travel policy, and grant requirements. |
| Default Approver-Supervisor | Based on employee profile data in OMNI HR and their primary active profile in Concur. The approver acknowledges that a direct report will be (or was) out of the office by checking the dates of travel on the travel request and expense report. Each position can only have one supervisor/report to one person. |
| Expense Report | Users must create expense reports to be reimbursed for out-of-pocket expenses incurred during travel and to settle travel card (T-Card) transactions. Concur requires an approved Travel Request is linked before most expense reports can be submitted. |
| Filter by In-Policy | When making travel arrangements in Concur some search results can be filtered to only show results that comply with FSU Travel policy. |
| Fly America Act | The Fly America Act (49 U.S.C. 40118) requires that all federally funded travel (OMNI funds 520 – 524) be on a US flag carrier or US flag carrier service provided under a code-share agreement, except under specific situations. If your travel does not comply with the Fly America Act, the government will not reimburse your airline ticket. |
| Government Rate | Accommodations (Hotels) in Concur will occasionally display a notice that the room is listed as a "Government Rate." These rates can be listed as federal government or state government along with requirements needed to confirm that rate on check-in. **Note:** FSU employees only qualify for the **State Government** rate if they present an FSU identification |

| | |
|---|---|
| | card with "Faculty/Staff" on check-in. FSU employees **do not** qualify for the **Federal Government** rate. |
| Lodge Card/Airfare Card | The lodge card/airfare card is only usable when booking flights in Concur or with the university Travel Management Company (TMC). This method of payment allows users who do not have a travel card to cover the expense of air travel without the need for an out-of-pocket expense. |
| Pending Request Administrator - Compliance & Ethics | If faculty and staff will be leaving the United States at any point during their trip, they must select the "Foreign" option from the Trip Type drop-down menu of their travel request. International travel requests will then route within Concur to FSU's Office of Compliance and Ethics for preapproval as the request administrator. |
| Request/Report Status | The status of a travel request or expense report varies based on the current step of workflow. Some statuses are shared between the two applications while others are exclusive to either Request or Expense.<br>• **Shared** - Submitted & Pending Approval, Pending Cost Object Approval<br>• **Request** - Pending Request Administrator, Approved<br>• **Expense** - Approved & in Accounting Review, Approved and Pending Processor Manager, Processing Payment/Sent for Payment |
| Required Fields | Items marked with a red asterisk (*) in Concur are required fields and must be completed before moving to the next section. Failure to complete a required field, performing an action that is irregular, or not allowed will result in an audit Rule appearing on the header of a travel request or expense report. |
| Travel Delegate | Users granted the ability to act on behalf of others in Concur. They can prepare and submit most travel requests for a traveler, make travel arrangements, and |

| | |
|---|---|
| | prepare expense reports. Travelers must submit their own expense reports. |
| Travel Request | Travel requests are required for all travel. Travel requests must be completed before travel occurs and they are intended to be estimates. The travel request obtains Default Approver (Supervisor) authorization for travel. Travel requests do not reimburse expenses but are required to submit an expense report. |