Concur Overview
What is Concur?

- The Texas A&M University System has contracted with Concur to provide travelers with a best-in-class end to end travel solution. It allows organizations to book travel and track expenses from booking to reimbursement. Therefore, allowing TAMUS to better manage the travel and the reimbursement accounting process.

- For managers, department heads, and travel approvers, the system will automatically route employee travel requests which will allow for online approval from the pre-trip to post-trip reimbursement cycle. Email notifications will assist with making approvers aware of pending items.

- Corporate Travel Planners (CTP) has been contracted to provide travel agent services to support TAMUS traveler bookings and itinerary changes.
Concur is Accessed Through SSO

Go to sso.tamus.edu. Then using your UIN and password login to get to the Single Sign On (SSO) menu page.
The Chancellor has extended the travel guidelines beyond May 31st as originally outlined in his memo dated 03.10.2020, until further notice. System Risk Management will consider all International travel extreme risk and not approved. The current mandate is in effect until further notice. The only exception to this would be any mission-critical COVID-19 related assistance or health-critical exceptions and these exceptions must be approved in advance by Executive Leadership.

For current information and policies from the airlines, car rental companies, and hotel chains, visit: https://ctp-travel.com/coronavirus/

The Texas A&M University System
Profile

• Click on “Profile” in the upper right

• Select “Profile Settings”

• Once on the Profile Settings page, look at tabs on left side
  (Be sure to scroll down the page to see all choices)
Profile Options

Select one of the following to customize your user profile.

**Personal Information**
Your home address and emergency contact information.

**Company Information**
Your company name and business address or your remote location address.

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

**Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.

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

**Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Concur Mobile Registration**
Set up access to Concur on your mobile device.

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

**Contact Information**
How can we contact you about your travel arrangements?

**E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.

**Request Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Company Car**
Company Car
Profile

• Under Personal Information, verify your name (needs to match your passport / travel document name) and UIN. Complete addresses and contact information if desired.
• Email Address – it will start off like below as “Not Verified.” Click “Verify” and follow the instructions to enter verification code.
Profile

- Travel Preferences and Frequent Traveler Programs
  - Assign Air, Hotel and Car Rental preferences in the event of an agent-assisted booking.
  - Add all of your frequent travel/reward programs to ensure you receive the benefits for using those vendors.
Profile

• The below website has instructions for many tasks within Concur.
  – https://it.tamus.edu/concur/documentation/userguides/
  – Please review the one titled, “Entering Credit Cards into your Concur Profile”.
  – Credit cards entered can be University/Agency cards and/or personal credit cards. The preference is to use the University/Agency cards when possible.
    • Reminder: If a personal card is used then reimbursement for the expenses cannot occur until after the trip.
    • It is recommended that all employees use a University/Agency Travel Card. To request a travel card, click here
Assigning expense delegates allows someone to prepare expense reports, travel requests or book travel on your behalf.

Instructions for setting up an expense delegate can be found under Concur User Guides. Please see “How to Add a Delegate.”
If you have been assigned delegate permissions by another employee, you can switch to that person’s profile for roles such as expense report/travel request creation and travel arrangement.

- While delegates can prepare expense reports, they cannot submit them on behalf of others. The traveler must do that themselves.
- When making reservations for someone else, make sure you are logged in as a delegate for them – otherwise ticket / reservation will be created in your name instead of the traveler.
Delegates

- To act as a delegate (if role has been given to you), under profile “administer for another user…”, select the appropriate user, and click “Start Session.”
Delegates

• Once done acting as the other click on the green box and then click “Done acting for others” to return to your own profile.
Delegate Video

• Many topics throughout this training have short videos created for them. All videos can be accessed on the website:

  https://it.tamus.edu/concur/training/

• Watch video: “How to Delegate Into Another User’s Profile in Concur” for more information.
Travel Requests

Before reviewing the next slides, please watch the two videos below:

How to Create a Domestic Travel Request in the New Concur UI

How to Create a Foreign Travel Request in the New Concur UI
Travel Request

- Depending on policy within your university or agency for domestic travel, a Travel Request may be necessary prior to travel.

- All system members require a Travel Request be submitted and approved prior to foreign travel. This type of travel requires further evaluation through export control and risk management review and approval. This can depend on the country and risk of traveling to that country determined by System Risk Management.
To start a Travel Request hover over “New” and then click “Start a Request”
Travel Request

Fill in the required fields (red lined) and hit save.
Travel Request

Add estimated expenses if required by system member or department.
Travel Request

Click “Submit Request” in the top right-hand corner of the screen and then “Accept & Submit”.

Final Review

FAMIS Request Submit Confirmation
By submitting this request, I acknowledge the purpose of this travel is for university business and is explained in further detail in purpose and benefits. If foreign, I further acknowledge and understand the conditions and potential risks associated with foreign travel and have been briefed on the current Travel Warning (if applicable) posted by the U.S. Department of State at http://travel.state.gov/travel/cis_pa_tw/tw_1764.html

In addition, I have updated my profile’s contact information, emergency contact information, international travel information, and indicated all countries entering.

Accept & Submit  Cancel
Travel Request

• Some members/departments require an amount, while others will accept a zero dollar amount.

• If you do estimate expenses on the Travel Request, when it feeds to FAMIS (accounting system), it will encumber against the account listed on the expense report.
If you would like Travel Requests to route to additional approvers outside of the pre-defined approval path, you can manually add them to the approval flow.

To learn about this topic, please watch the video:

How to Add an Approver to Request Routing in New Concur UI
Booking Travel through Concur

• Concur’s booking tool is similar to other reservation tools (Expedia, Orbitz, etc.). Travelers are not required to book reservations through Concur. However, it is strongly encouraged as it is the most seamless way to use Concur.

• Concur provides contract rates which will be equal to or less than rates found outside Concur (conference hotel registration rates is an exception).
  • TAMUS has negotiated airline discounts that are automatically applied if booked through Concur. Contracts with the below airlines are not available if booking outside of Concur/CTP.
    • United Airlines
    • American Airlines
    • Southwest Airlines
Booking Travel through Concur

- TAMUS car rental contracts are also easily accessed through Concur.
  - Enterprise
  - National
  - Hertz
  - Avis
  - Budget
Booking Travel through Concur

- Rental car contracts are applied automatically when making reservations through Concur.
- Contracts include CDW/LDW and Liability insurance built into the rate you see.
- If a contract rental is unavailable and you must rent off-contract, please accept the CDW/LDW and Liability insurance offered by the rental company.
- Contracts do not extend to foreign countries.
  - If traveling to a foreign country you should accept all insurance coverages offered.
Booking Travel through Concur

- On the Concur Home Screen choose your funding source (Local, Federal or State)
Booking Travel through Concur

• Enter your travel search parameters
  – If only booking car rental, click on the car tab
  – If only booking hotel, click on the hotel tab

• If you do not already have a card in your profile, you will be prompted to provide a card number when checking out

• When checking out, make sure to proceed through the final checkout screens until Concur displays “Finished” on the screen with your itinerary
  • Your trip will be automatically cancelled within 72 hours if this step is not completed.

• For further guidance on booking in Concur please see: 
  https://it.tamus.edu/concur/documentation/userguides/
Expense Reports

• An expense report is submitted after the trip to post expenses to accounts

  • If the employee is out of pocket for any expenses this will generate a reimbursement payment.

  • If the University/Agency travel card was used, expenses will be properly allocated.

  • Expense reports should be submitted within 30 days of the end date of travel (remember, taxation starts at 90 days).

• The expense report should be created as soon as the trip incurs expenses. This can be prior to travel, such as conference registration or airfare purchased prior to the departure date.
Expense Reports

• An expense report is created differently depending upon whether a travel request was created first.

Watch these videos for instructions:

How to Create an Expense Report without a Request

How to Create an Expense Report from an Approved Request
Expense Reports

• To create an expense report without an approved request
  – On the Concur Homepage, hover your cursor over “New” and click “Start a Report”
Expense Reports

- To create an expense with an approved request attached
  - Locate the request under the “Request” tab
  - Click “Expense”
  - Concur will create the expense report header
Expense Reports

- As the video explained, fill out all fields marked in red and then select next.
  - Can also create an expense report by clicking on the Travel Request as well or select the “add” button to add the Travel Request to the Expense Report.
Expense Reports

• While the “GSA Meal Rate” field is not marked as required, if you are expensing meals this field must be populated.
  – The amount entered should only include the meal rate from the GSA website, not the hotel amount.
  – For local funds, when meals on a single day exceed the GSA rate for that location, all meal expenses for that day must be substantiated.
    • Substantiation includes an imported Travel Card charge or a receipt.
    • If meal expenses for a single day do not exceed the GSA rate then no further substantiation is required.
Expense Reports

• Each expense, card transaction or out of pocket, must be listed as a separate line item on the expense report.
• Out-of-pocket meals may be summarized by day.
• Use the mileage calculator for miles driven or upload your point to point as a receipt (i.e., attach it to your mileage claim).
• Hotels must be itemized by nightly rate and by hotel tax for each day. This can be done with the “nightly lodging expense” tab.
Expense Reports

• Attaching Receipts to Expenses
  • Concur Mobile should be used to capture receipt images as expenses are incurred
    • These images will automatically generate expense entries and be loaded into your Concur profile as available expenses
  • Other options for loading receipts are:
    • Email the receipt image into Concur
    • Manually scan and attach receipt image to expense entry

Concur Mobile App Receipt Capture and Report Creation

The Texas A&M University System
Expense Reports

- There are several more videos that you need to watch to understand preparation of expense reports.

  **How to Itemize an Expense**

  **How to Mark an Expense as Unallowable**

  **How to Allocate an Expense**

  **How to Reimburse a Guest**
Expense Reports

- Once all expenses are added and the required receipts attached, you are ready to click the “submit” button. You’ll find it at the top right of your expense report.
Expense Reports

• If you are creating this report as a delegate on behalf of another traveler then you will see the “notify employee” button. The traveler must submit the expense report themselves.

• Each traveler should submit their expenses on a report within their own Concur profile.
Expense Report Routing

• The report will route to the appropriate department approvers for approval before arriving in the back office for review and processing.

• If an SRS account was used on the expense report, it will route to SRS for approval prior to arriving in the back office.
Expense Report Routing

If you would like an Expense Report to route to other approvers, in addition to the ones defined in FAMIS, you can manually add them to the workflow.

To learn about this topic, please watch the video:

[How to Add Approvers to an Expense Report]
• To approve a request or report, access the Approval Queue by clicking on the “Approvals” tab at the top of the page or on the “Required Approvals” tile. The approval queue is separated into Requests and Expense Reports and each tab will indicate how many are awaiting approval.
Approval

- The approval queue can also be accessed within Concur Mobile.
How to Approve a Travel Request

• Request approvals may be completed through Concur Mobile or by logging into Concur through SSO

To learn about this topic, please watch the video:

How to Approve an Authorization Request in New Concur UI
How to Approve an Expense Report

- Expense Report approvals may be completed through Concur Mobile or by logging into Concur through SSO.

To learn about this topic, please watch the video:

How to Approve an Expense Report in Concur
Mobile Apps

- **Concur Mobile Allows**
  - Travelers to capture receipt images which will automatically generate expense entries
  - Full report creation
  - Approvers to approve both expense reports and requests
  - Mobile travel reservation booking platform

- **Your LoginID for Concur Mobile** will be the verified email address you set up in your Concur profile
Mobile Apps

- It is important to download and use the Concur Mobile app to assist travelers with the travel and report creation process.
- For additional information on how to download and use Concur Mobile please click the link below.

Concur Mobile Receipt Capture and Report Creation
• Can a delegate use Concur Mobile on behalf of another traveler?
  – Not directly. However, a delegate can email a receipt image from their verified email address to receipts@expenseit.com and use the traveler’s verified email address as the subject. Concur will process the image and will send it to the traveler’s profile.
  – Both the delegate and the traveler must have a verified email address in their profile.
Mobile Apps

• **TripIt**
  – Syncs with Concur to pull all travel reservations into one seamless itinerary
  – Provides updates while on trip
    • Gate changes, flight cancellations
    • Directions to hotel

• Download the FREE version of TripIt from the AppStore or Google Play. Once you connect to your Concur profile, you will be upgraded to TripIt Pro for free.
Mobile Apps

- Other 3(rd) party applications can connect directly with Concur to enable automatic import of expenses into your Concur profile.
- Visit the “App Center” tab in Concur to view these other applications and connect your account.
Below are additional resources available.

- **System Concur Information**
- **Travel Office Contact Information**
- **Tutorials**
- **Other Resources**
- There are also resources available in the “Company Notes” box of the Concur Homepage