



Concur Travel & Expense Guide

Concur Travel Expense Software

Accounts Payable & Procurement Services

Drexel University

Concur Travel & Expense Guide

TIP: Hold CTRL on your keyboard and click the page number to jump to that page quickly.

TIP: Press CTRL + F to search by keyword.

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What is Concur?

- The SAP Concur Travel & Expense System is a cloud-based tool that integrates travel booking, travel requests, and expense reporting, including P-Card reconciliation. Users can enter travel requests and submit out-of-pocket and non-travel expenses.

Benefits of Concur:

- Easy and efficient travel request and expense submission
- Full transparency of Travel Request, Expense, and approval status
- Quick turn-around of employee reimbursement
- Easier receipt capture and documentation by uploading to the Expense Report
- Email notifications and reminders of submissions and approvals at designated timed intervals
- Minimize out-of-pocket expenses for airfare when booking through Concur Travel
- Convenience through built-in automated features for travel policy compliance, mileage calculation, currency conversion, etc.
- Better reporting of all transaction types

Available Modules:

- Travel Request
- Expense Report
- Approvals
- Travel (To book airfare, car rental, hotel, rail reservations)
- Travel Advance (Available on a case-by-case basis)

Roles:

- **Employee:** An employee in Concur is an individual with an existing Concur profile. Employees can create and submit expense reports, update their profiles, book travel (if applicable), and more.
- **Approver:** An individual authorized to approve/deny travel requests and expense reports. Approvers can add comments and attach supporting documentation.
- **Cost Object Approver (COA):** An individual with authority over a specific cost center.
- **Delegate:** Delegates are employees who can work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request. Delegates cannot submit reports; they can only prepare them.
- **Assistant/Travel Arranger:** An individual authorized to view and modify your profile and book travel on your behalf in Concur Travel. Each traveler can have multiple travel assistants, but only one can be the primary.

Concur CCR100 Approver Authority:

The CCR100 role grants approval authority only within Concur Travel and Expense, specifically for purchasing card transactions and out-of-pocket travel reimbursements. It is important to note that each fund or org is restricted to having only one CCR100 role. The CCR100 role will not provide access to approvals in any other system outside of Concur Travel and Expense.

To request the addition of approvers for new or existing funds (**except externally sponsored research funds**) and orgs utilize the following forms:

- [Fund Request Form](#)
- [Org Request Form](#)

For new externally sponsored research funds, the Principal Investigator will automatically be granted the CCR100 expenditure authorization upon Research Accounting Services setting up the fund.

To change the Concur Travel and Expense approver of an existing externally sponsored research fund, send a request from the principal investigator on the award to fundnumber@drexel.edu







Links to Policy and Guidelines:

To view changes in University policy, please visit [Policy and Guidelines](#).















- All University travel must first follow an approval process. This process requires completing and submitting a Concur Travel Request Report (CTRR). The CTRR identifies what travel costs can be paid or reimbursed to the traveler using University funds. Travel Requests must be approved before making travel arrangements and completing a Concur Travel Expense Report (CTER). Individuals traveling for University business who have not submitted the proper travel request may not be covered by University insurance policies and may be traveling at their own risk.
- By submitting and approving the CTER, the Traveler and the Expense Approver certify that the CTER is complete and accurate. A complete CTER includes all required receipts, documentation, and pre-approvals/ Reimbursement of Business Travel Expenses that will be delayed or denied due to an incomplete, inaccurate, or unapproved CTER. Reimbursements will only be processed for completed travel occurrences. Drexel University will not reimburse business travel expenses for trips that have not yet occurred.
- Travelers enrolled in payroll direct deposit will receive reimbursement through it. For faculty and professional staff members not enrolled in payroll direct deposit, a paper check will be mailed to the Traveler's home address. The Human Resources department must update your home address so that your expense reports can be properly processed.
- Only Allowable Purchases may be charged to the P-Card. Prohibited Purchases are forbidden. It is the Cardholder's and Approvers' responsibility to ensure that all purchases made with the P-Card are Allowable Purchases. Exceptions for Prohibited Purchases must have written pre-approval from Procurement Services. The P-Card Guidelines set forth non-exhaustive lists of Allowable Purchases and Prohibited Purchases. [Purchasing Card Guidelines](#).

Concur Icons:






General:

Icon	Name	Description
	Exception	Indicates an exception must be resolved before submission.
	Question	Indicates a question that does not prevent submission.
	Information	Indicates an exception that does not prevent submission.
	Alert	Indicates an exception that does not prevent submission.
	Calendar	Indicates that the user can click the icon to access the calendar popup.
	View Image	Indicates that the user can click the icon to view an image.










Concur Travel:


















Icon	Name	Description
	Fly America Act Compliant	Indicates the flight is compliant with the Fly America Act.
	Gogo Wi-Fi	Indicates Gogo Wi-Fi is available.
	Mixed Flight/Train Search	Indicates that the user can click the icon to access the mixed flight/train search window.
	Hotel Search	Indicates that the user can click the icon to access the hotel search window.
	Car Search	Indicates that the user can click the icon to access the car search window.
	Train Search	Indicates that the user can click the icon to access the train search window.
	Flight Status	Indicates that the user can click the icon to view the status of your flights.
	Finalize Trip	Indicates finalization of trip.
	Flight Itinerary	Indicates flight itinerary information.
	Hotel Itinerary	Indicates hotel itinerary information.
	Car Itinerary	Indicates car itinerary information.
	Add Itinerary	Indicates a user can add itinerary to their trip.
	Warning Exception	Indicates that travel policy will be applied after the user selects the flight.
	Quiet Car	Indicates that the rail car has noise restrictions.

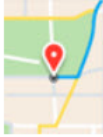
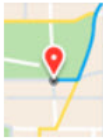











Concur Request:

Icon	Name	Description
	Exception	Indicates that a request exception must be resolved before submission.
	Warning	Indicates that the request has an exception that does not prevent submission.
	Budget Item	Indicates that the item is allocated to a budget you manage and requires your budget approval.
	Segments	Indicates the flight, train, car and hotel trip segments that the user can add to a request.
	Report Sent Back	Indicates that the approver sent a report back to the submitter with comments.

Concur Expense:

Icon	Name	Description
	Attendees	Indicates that an expense entry has associated attendees.
	Comments	Indicated that the expense or report contains a comment.
	Trip Data	Indicates trip information from an itinerary.
	Ground Transportation	Indicates that the expense entry originated from a ground transportation itinerary.
	Personal Expense	Indicates that an expense entry was marked as personal.
	Credit Card Transaction	Indicates that an expense entry originated from a credit card transaction.
	Credit Card Transaction	Indicates that a credit card transaction includes additional data.
	Warning Exception	Indicates that an expense entry has an exception that does not prevent submission.
	Exception	Indicates that an expense entry exception must be resolved before submission.

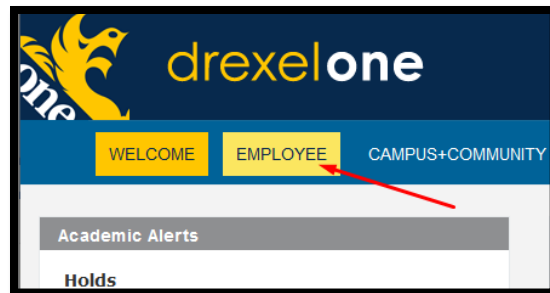
	Full Allocation	Indicates that the expense entry has been fully allocated.
	Partial Allocation	Indicates that the expense entry has only been partially allocated.
	OCR Receipt	Indicates that an expense entry has an Optical Character Recognition (OCR) receipt (for example, Expenselt).
	Receipt Image Required	Indicates that an imaged receipt is required for this expense.
	Paper Receipt Required	Indicates that an expense requires a paper receipt.
	Missing Receipt Affidavit	Indicates that a missing receipt affidavit has been attached to the expense.
	E-Receipt Available	Indicates that an e-receipt is available in Available Expenses.
	XML Receipt Attached	Indicates that an XML receipt is attached to the expense.
	Report Ready for Review	Indicates that the expense report has been reviewed by a delegate and is ready for delegator review and submission.
	Budget Item	Indicates that the item is allocated to a budget you manage and requires your budget approval.
	Success	Indicates that all required approvals have been processed.
	Cost Object Approval	Indicates that a cost object has been approved by the approver.
	Acting as others	Indicates that the user is acting as a delegate for another user.
	Acting as other user	Indicates that the user is acting as a delegate for another user.
	Mobile Phone	Indicates that the user can add a mobile device to their Expense Profile.
	Profile Picture	Indicates that a user can add a profile picture to their Expense Profile.
	Personal Car Mileage Calculator	Indicates that the user can click the icon to access the personal car mileage calculator.

	Drive	This icon indicates that this is a Drive expense.
	Mileage (Calculated)	This icon indicates when there is no location and only distance is provided.
	Mileage (Manual)	This icon indicates when there is no location and only distance is provided.
	Report Sent Back	Indicates that the approver sent a report back to the submitter with comments.
	View Image	Indicates that the user can click the icon to view an image.
	Mobile Expense	Indicates that the expense entry was created in Mobile.
	Commuter Pass	A commuter pass was used for this (portion of) travel.
	Created Manually	The route was added using the manual route search function, and all aspects, including the route itself, may be edited by the user.
	Created Using Route Search	This route was created using the Route Search feature, and the route information cannot be edited, only selected items such as the Business Purpose. TIP: Hover over this icon to note attributes of the selected route.
	IC Card Fare	In Available Expenses, or within the route search results window, the route was returned with an IC card fare.
	Round Trip	This route included round-trip travel.
	Receipt Attached	Like other expense report entries, this entry has a receipt image attached to it.
	Document Compliance	Indicates that the receipt has been certified according to one of our supported document compliance solutions which includes: <ul style="list-style-type: none"> ▪ GRDC – France and Spain ▪ Fapiao – China

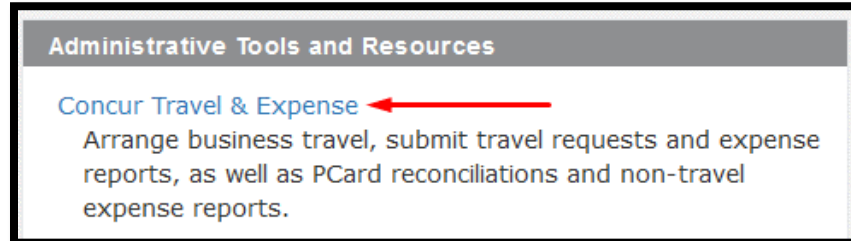
Logging In and Profile Setup:

Logging In:

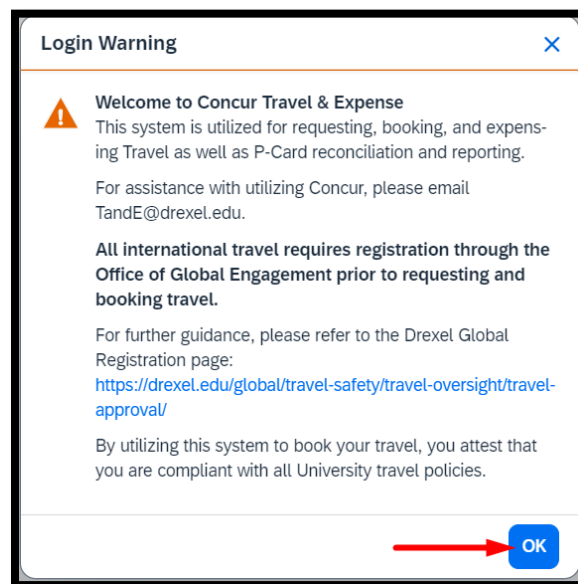
- **Step 1:** Navigate to **DrexelOne**.
- **Step 2:** Click the tab labeled **Employee**.



- **Step 3:** Click the Concur Travel & Expense link to access your SSO.



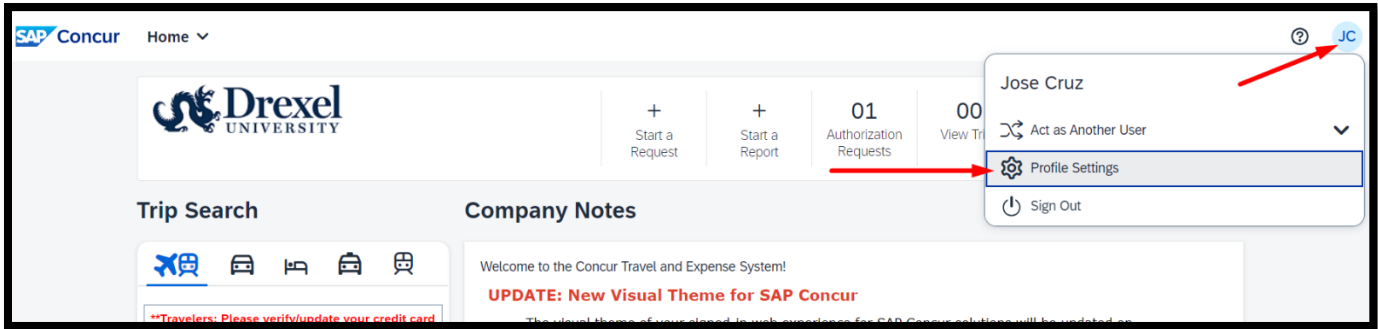
- **Step 4:** Review the **Login Warning** and click **OK**.



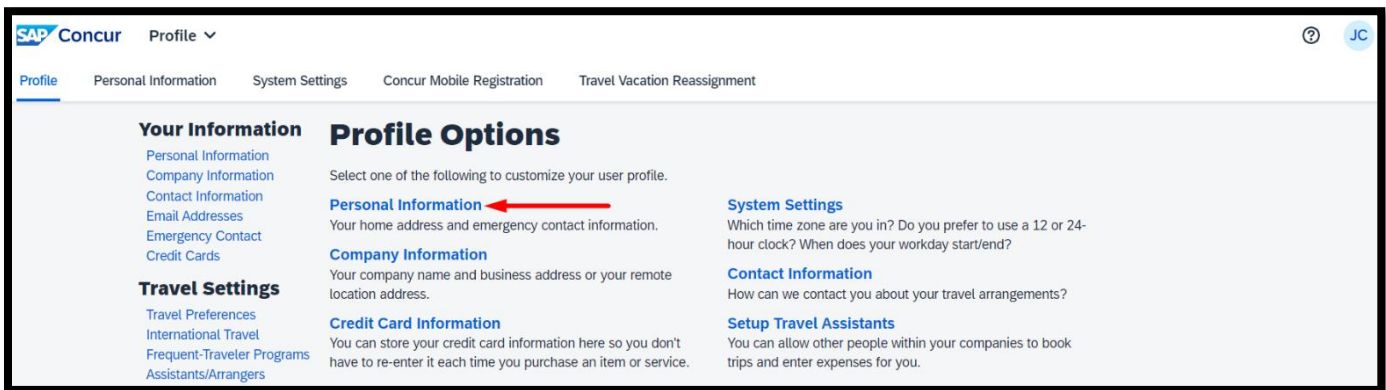
Updating User Profile Settings:

Note: Completing the profile fields will allow Concur to auto-populate information when booking travel, saving you time. Clicking **Save** once will save all profile information.

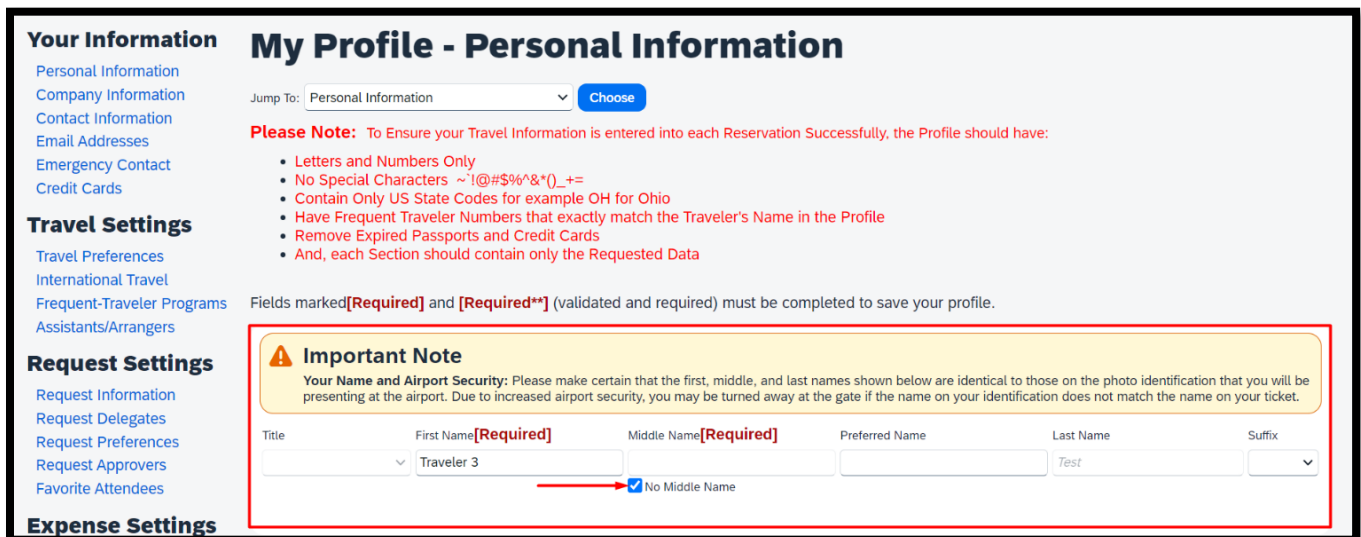
- **Step 1:** From the Concur homepage, click the **Profile** icon and select **Profile Settings**.



- **Step 2:** Click the **Personal Information** link under Profile Options.



- **Step 3:** Verify that your name matches what is on your ID/Passport. Please check the **No Middle Name** checkbox if you do not have a middle name.



- **Step 4:** Under **Company Information**, please verify that the employee ID, manager, and position/title fields are correct. If not, please get in touch with your current manager and department administrators to correct this information. For more information, go to the [Employee Information Changes](#) page.

Company Information Go to top

Employee ID
traveler3

Manager Employee Position/Title **[Required]**

Default Approver Test Test, Traveler3

Org/Dept Number ...

Save

- **Step 5:** Verify that your **Work and Home Addresses** are correct. This ensures that direct deposit works correctly and your auto-populated information has the correct addresses. If your home address is incorrect, update this information in your Concur profile and DrexelOne. For more information, go to the [Employee Information Changes](#) page.

Work Address Go to top

Company Name Assigned Location

Drexel University Please choose a company location. ▾

Street

1234 ABC Street Address same as assigned location

City State/Province

Philadelphia PA

Postal Code Country/Region

19104 United States of America ▾

Save

Home Address Go to top

Street

1235 ABC Street

City State/Province

Philadelphia PA

Postal Code Country/Region

19104 United States of America ▾

Save

- **Step 6:** Verify that your **Contact Information** is correct.

Contact Information
[Go to top](#)

Work Phone [Required**] 1234567890	Work Extension 	Work Fax 	2nd Work Phone/Remote Office
Home Phone [Required] 1234567890			
Pager 	Other Phone 		
Mobile Phone Country/Region United States of America (+1) ▼	Mobile Phone [Required] 1234567890		

- **Step 7:** Click the blue hyperlink labeled **Verify**. Concur will send a verification code to the email listed. Enter the code in the box labeled **Enter Code** and click **OK**. You will receive an email confirming that your account has been verified.

Email Addresses
[Go to top](#)

Please add at least one email address.

[How do I add an email address?](#)
[How do I verify my email address?](#)
[Why should I verify my email address?](#)

When you verify your email address, we can associate information forwarded from that email address to your account. This will help you add travel plans and receipts to your SAP Concur account.

Travel Plans:

When you connect a new or existing TripIt account using a verified email address you'll be able to forward confirmation emails to plans@tripit.com. Plans organized in TripIt will then sync to your SAP Concur account. You can connect an account in the App Center.

Receipts

Forward your receipt images to receipts@concur.com to have your receipts uploaded into your **Available Receipts** list.

[Travel Arrangers / Delegates](#)

Email Address	Verify	Contact?	Actions
Email 1 jjc437@drexel.edu	<input type="radio"/> Not Verified → Verify	Yes	<input type="button" value="Add an email address"/>

- **Step 8:** Verify that your **Emergency Contact** information is correct.




Emergency Contact
[Go to top](#)

Name [Required] Jane Doe	Relationship Other ▼	
Street <input type="text"/>		
<input checked="" type="checkbox"/> Address same as employee		
City 	State/Province 	Postal Code
Country/Region United States of America ▼	Phone [Required] 1234567890	Alternate Phone

- **Step 9:** Under **Travel Preferences**, you can select whether you receive travel discounts through memberships and select travel preferences such as seat selection and accessibility needs.
 - You can add frequent travelers or advantage programs by clicking **Add a Program**.
 - You can find unused tickets under the **Unused Tickets** section.
 - To add unused Southwest Airlines tickets, click **Add Ticket Credit**.
 - You can enter your TSA Precheck (TSA Precheck is a prohibited P-Card expense) information to be used when booking travel.
 - If you do not have a passport, select the checkbox labeled “I do not have a passport.”
 - To add a visa, click **Add a Visa**.

TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. Gender requirement for TSA is optional, but it can still be required by your company on this section. The recommendation is for the user to select the gender that matches the Passport. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No.  TSA Pre✓ Known Traveler Number 

International Travel: Passports and Visas [Go to top](#)

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports [+ Add a Passport](#)

I do not have a passport

International Visas [+ Add a Visa](#)


[Save](#)

- **Step 10:** If you wish to assign an assistant and travel arranger to perform travel functions on your behalf, you can do so under the section labeled **Assistant and Travel Arrangers** by clicking **Add an Assistant**.

Assistants and Travel Arrangers

[Go to top](#)

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants 

Your Assistants and Travel Arrangers [+ Add an Assistant](#)

You currently have no assistants defined.

[Save](#)

- Enter the user's name. Use the checkboxes to allow them to book travel on your behalf and to assign them as your primary assistant for travel, if applicable. Click **Save** when finished. (The assistant must have their work phone number in their Concur profile for this function to work correctly.)

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.


Assistant

Test, Traveler2

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.


 [Save](#) [Cancel](#)

- **Step 11:** Under the **Credit Cards** section, click **Add a Credit Card**. A new window will allow you to add your P-Card/Travel Card information. Click **Save** when finished.

Credit Cards

Go to top

You currently have the following credit cards saved with your profile.

 [+ Add a Credit Card](#)

You currently have no credit cards saved.

[Save](#)

Add a Credit Card * Required

Enter the appropriate information for the credit card you'd like to use below. Use the "Display Name" field to label the card so you can easily identify and select it when using features that require a credit card transaction.

Display Name (e.g., My Corporate Card) * Your name as it appears on this card *

Card Type * Credit Card Number * Expiration Date *

4 ▾ 2024 ▾

Use this card as the default card for:

Plane Tickets Rail Tickets Car Rentals Hotel Reservations

Billing Address

Enter the billing address for this credit card below. If this is a personal credit card, the billing address will typically be your home address. If it's a company card, the billing address might be your company address. The billing address must be the address where the bills for this card are currently delivered, not where you would prefer they be delivered. This information is used to verify your identity during credit card transactions. Your credit card may be declined if your billing address is inaccurate. Billing Addresses longer than 30 characters may cause certain Airlines (Direct Connects and Web Bookings) to decline your credit card. Please abbreviate long addresses if possible.

Street * Tip: If you complete your personal profile, we'll fill in this address information for you each time you add a new card.

City * State * Zip/Postal Code *

Country/Region *

Cancel Reset Save

Request and Expense Information:

- **Note: Request and Expense Information sections share the same cost center information. If the Request is updated, the Expense information will also be updated.**
- Under **Request** and **Expense Information**, you can view your default cost center. If this is incorrect, please email tande@drexel.edu.

Request Information

Save Cancel

User Group	Reimbursement Currency	Chart	Fund
<input type="text" value="TEST USER"/>	<input type="text" value="US, Dollar"/>	<input type="text" value="(D) Drexel University"/>	<input type="text" value="(110001) Education & General"/>
Org	Program		
<input type="text" value="(3820) Drexel Univ Information Techni"/>	<input type="text" value="(160) Institutional Support"/>		

Request and Expense Preferences (Email Preferences):

- Under **Request and Expense Preferences**, you can adjust your email preferences using the checkboxes. Click **Save** when finished.

Request Preferences

Save
Cancel

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.

Send email when...

- The status of a request changes
- A request is submitted for approval

Prompt...

- For an approver when a request is submitted

- If using Expenselt, you must confirm that the expense created from the uploaded receipt is accurate before submission.
 - The more legible the receipt is, the easier it is for Concur software to create an accurate expense.

Expense Preferences

Save
Cancel

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.

Send email when...

- The status of a cash advance changes
- A cash advance is submitted for approval
- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval

Prompt...

- For an approver when an expense report is submitted

Sign me up for...

- Use Expenselt to create expenses from uploaded receipts and receipts emailed to receipts@concur.com

Verifying Default Expense Approver:

- **Note: Request and Expense Approver sections share the same approver. The Expense Approver will also be updated if the Request Approver is updated.**
- **Step 1:** Under profile settings, select **Expense Approvers**.
- **Step 2:** Verify that your expense approver information is correct. If not, please get in touch with your current manager and department administrators to correct this information. For more information, go to the [Employee Information Changes](#) page.

Expense Approvers

Save
Cancel

Default approver for your expense reports.

jwm67@drexel.edu - Default Approver Test

Default approver for your cash advance requests.

Assigning Delegates:

Note: When an approver assigns a delegate to approve on their behalf, the delegate should have innate authority for that level of approval.

- **Step 1:** Under profile settings, select **Expense Delegates**. The Expense Delegates page will appear.
- **Step 2:** Click **Add** and search for the user's name in the search box. Click the **Add** button next to the search box to add the user.

Expense Delegates

Delegates
Delegate For

Add
Save
Delete

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

Search by employee name, email address, employee id or login id

traveler2@drexel.edu - Traveler2 Test

Add
Cancel

Employee	Permissions
<div style="border: 1px solid red; padding: 2px;"> traveler2@drexel.edu - Traveler2 Test jwm67@drexel.edu User ID: traveler2 Logon ID: traveler2@drexel.edu </div>	to a delegate, you are assigning permissions for Expense and Request. Reporting Receives Emails Can Approve Can Approve Temporary Can Preview For Approver Receives Approval Emails

No records found.

- **Step 3:** Use the checkboxes to activate/deactivate delegate permissions. A Concur admin must make the user an approver before the **Can Approve** permission is available.
 - Click **Save** when finished.
 - You can view who you are a delegate for and your delegate permissions by clicking the **Delegate For** tab.

Expense Delegates

Delegates
Delegate For

Add
Save
Delete

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

	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Test, Traveler2 jwm67@drexel.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Considerations prior to Booking Travel:

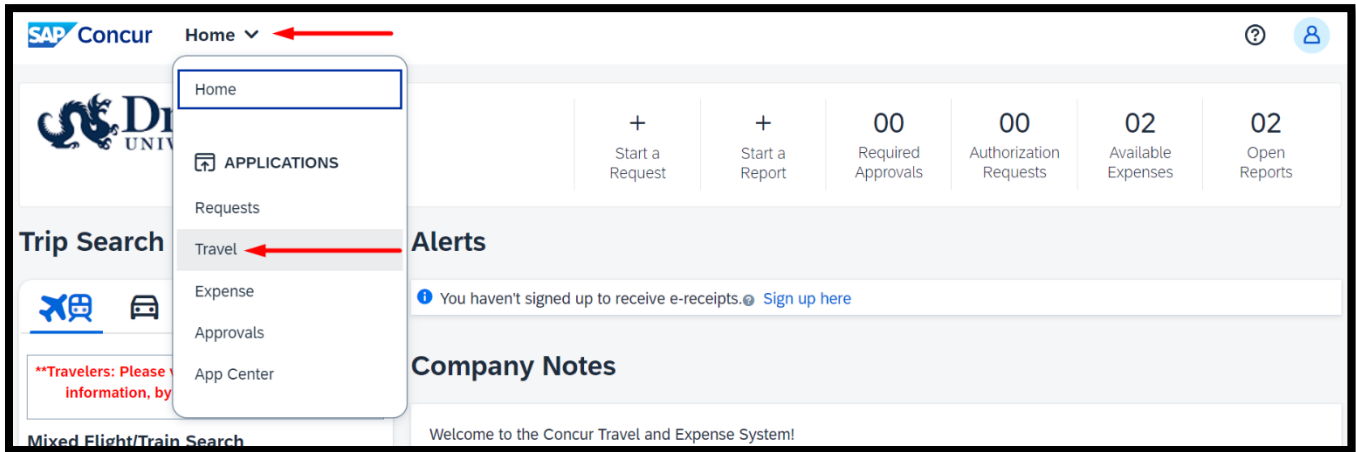
Note: The guest Booking feature can only be added by emailing tande@drexel.edu requesting this feature be added to your profile. Guest booking allows you to book travel for external guests, students, or persons who do not have access to the travel portal. All University travel must first follow an approval process. This process requires completing and submitting a Travel Request in Concur. The Travel Request identifies what travel costs can be paid or reimbursed to the traveler using University funds. Travel Requests must be approved before making travel arrangements and completing an Expense Report in Concur. **Individuals traveling for Drexel University business who have not submitted the proper travel request may not be covered by University insurance policies and may be traveling at their own risk.**

- A complete CTER includes all required receipts, documentation, and pre-approvals.
- Out-of-pocket (OOP) reimbursement expense reports must be submitted via Concur no more than 60 days after the date of return from travel.
- **INTERNATIONAL TRAVEL - Please note a new process is now in effect:**
 - All international travel requires registration through the Office of Global Engagement before requesting and booking travel. For further guidance, please refer to the Drexel Global Registration page: [Drexel Global - Travel Safety](#).
 - Once your travel is fully registered, you will receive an email from Global stating that your trip has been registered in bold. Please upload this email to your travel request.
- Use of limo or car service is allowable with written approval.
- Seat upgrades to business or first class for flights longer than 5+ hours are allowed with written approval.
- Airbnb should not exceed the cost of comparable-priced mid-market hotel accommodations.

- Travel account code definitions for each travel expense are under forms & training on the procurement website. [Travel Account Codes](#).






Booking Travel:

- **Step 1:** Click **Home** at the top left of the page and click **Travel**.



- **Step 2:** On the trip search menu, click **Booking for Myself** or **Book for Guest** (Guest booking must be granted).
- **Step 3:** Use the Flight/Train Search tab to book a flight by itself, with a car rental and hotel reservation. Use the Hotel Search and Car Search tabs to book car and hotel reservations without a flight.
- **Step 4:** Select one of the following types of flight options:
 - Round Trip
 - One Way
 - Multi City (If available)
- **Step 5:** In the **From** and **To** fields, enter the cities for your travel. When you type in a city, airport name, or airport code, Concur will automatically search for a match.
- **Step 6:** Click on the Depart and Return date fields and select the appropriate dates from the calendar. Use the remaining fields in this section to define the desired time range.
 - A box on the left of the Depart and Return Dates shows plus/minus 4. This indicator widens your search to 4 hours before and after the time you select as a desired flight time. You may adjust this number by clicking on the arrow and selecting a number between 2 and 12.

Trip Search

Travelers: Please verify/update your credit card information, by going into your profile.

Mixed Flight/Train Search

Round Trip
One Way
Multi City

From 📍

Find an airport | Select multiple airports

To 📍

Find an airport | Select multiple airports

Depart 📅

depart
09:00 am
± 4
⌵

Return 📅

depart
03:00 pm
± 4
⌵

Pick-up/Drop-off car at airport

 Find a Hotel

Class 📅 Search by

Economy class ⌵
Schedule ⌵

Specify a carrier 📅

 Include additional refundable air fares

Search
←

- **Step 7:** Click the arrow to the right of the time of the flight.
- The graphical display is based on flight schedule data. It does not show rail options or consider refundability or class of service preferences.
- Each green bar represents 30 minutes. Hover the mouse pointer over a green bar to see all the flights available for that time slot.
- If you change locations or dates, click **refresh graph** for more data.
- If you need a car, click the **Pick-up/Drop-off car at the airport** check box.
- If you need an off-airport vehicle or have other special requests, skip this step and add a car later from your itinerary. **(When booking Enterprise or National within the U.S., decline additional insurance. Insurance is included in the Drexel rate. If renting with any other car company or outside the U.S., accept additional insurance.)**
- If you need a hotel, click **the Find a Hotel** check box. Additional fields will appear.
- Choose to search near an airport, an address, a company location, or a reference point/zip code (a city or neighborhood).
- If you stay at more than one hotel during your trip or do not need one for the entire stay, you can skip this step and add a hotel later to your itinerary.
- Verify the hotel's cancellation policy before booking, canceling, or changing your hotel reservation. Hotel cancellation policies have recently become much stricter. Fees will apply.

Mixed Flight/Train Search

Round Trip
One Way
Multi City

From 📍
 PHL - Philadelphia Intl Airport - Philadelphia, PA
Find an airport | Select multiple airports

To 📍
 SJU - San Juan Luis Munoz Marin Intl Airport - San Juan
Find an airport | Select multiple airports

Depart 📅
04/24/2024 depart 📅 09:00 am ± 4 ⬆️

24 hour range refresh graph
12:00 am Noon 11:59 pm

Return 📅
04/30/2024 depart 📅 03:00 pm ± 4 ⬆️

24 hour range refresh graph
12:00 am Noon 11:59 pm

Pick-up/Drop-off car at airport
 Find a Hotel

Class 📅 Search by
 Economy class 📅 Schedule 📅

Specify a carrier 📅
 Include additional refundable air fares

Search
←

- **Step 8:** Click **Search**, use the drop-down menu to select **Business**, if applicable. Click **Next**.
- The matrix at the top of the page displays the airlines to choose from and which offer nonstop, one-stop, or two-stop flights. You may click on a specific airline to display only those flights in the lower section of the screen, or you may scroll down the page and select one of the flights listed.
- Selected fares will be displayed below the matrix.

Trip Summary
Round Trip
PHL - SJU
Depart: Wed, 04/24/2024
Return: Tue, 04/30/2024

Finalize Trip

Change Search

Depart - Wed, Apr 24
Depart 05:00 A - 12:30 P
Arrive 11:39 A - 02:42 P

Display Settings
Hide Propeller Planes

Airport Filters
Departure
PHL - Philadelphia, PA

Philadelphia, PA To San Juan, Puerto Rico Wed, Apr 24 - Tue, Apr 30

Show as USD

Hide matrix Print / Email

All 129 results	American Airlines	Delta	spirit Spirit Airlines	Multiple	United	JetBlue	Hawaiian	Frontier	Southwest	Qatar Airways
Nonstop 1 results	1 results	—	—	—	—	—	—	—	—	—
1 stop 63 results	21 results	5 results	1 results	17 results	7 results	5 results	1 results	4 results	2 results	—
2 stops 65 results	28 results	—	—	20 results	8 results	7 results	1 results	—	—	1 results

Shop by Fares Shop by Schedule

Depart Return

Philadelphia, PA - Wed, Apr 24

Flight Number Search Q Sorted By: Depart - Earliest

Displaying: 129 out of 129 results.
Previous | Page: 1 of 13 | Next | All

American Airlines
05:00a PHL → 07:48a DFW Nonstop Economy
08:34a DFW → 02:14p SJU Nonstop Economy

Select

Shop by Fares Shop by Schedule

DEPART **Wed, Apr 24** - Philadelphia, PA to San Juan, Puerto Rico / 46m layover in Dallas, TX

American Airlines
05:00a PHL → 07:48a DFW Nonstop Economy
08:34a DFW → 02:14p SJU Nonstop Economy

Remove

Preferred Airline for Drexel University
9 hours 14 minutes / American Airlines 2758, American Airlines 1821 - View seats
Airbus Industrie A321 / 1885 lbs CO₂e (Apollo)

The screenshot shows a flight booking interface with the following details:

- Shop by Fares** tab is selected.
- Flight: Delta, 05:30a PHL → 11:39a SJU, 1 stop ATL, 6h 09m. Total price: \$828.50.
- Return flight: 12:50p SJU → 10:17p PHL, 1 stop ATL, 9h 27m.
- Preferred Airline for Drexel University.
- DEPART: Wed, Apr 24 - Philadelphia, PA to San Juan, Puerto Rico / 40m layover in Atlanta, GA.
- RETURN: Tue, Apr 30 - San Juan, Puerto Rico to Philadelphia, PA / 3h 32m layover in Atlanta, GA.
- Fare Options Table:**

Fare Options	Free Checked Bags	Refundable		Price
Main Cabin (Q, Q, H, H) Rules Benefits/Services	0	No	✓	\$828.50
Refundable Main Cabin (Q, Q, H, H) Rules Benefits/Services	1 Up to 23kg (total)	Yes Fees may apply	✓	\$1,011.20
Delta Comfort Plus (S, Q, H, S) Rules Benefits/Services	0	No	ⓘ	\$1,016.50
Refundable Delta Comfort Plus (S, Q, H, S) View more fares	0	Yes Fees may apply	ⓘ	\$1,185.70

- **Step 9:** Click the **Shop by Fares** tab and **View Fares** button to review the fare prices, rules, benefits, and services for the return flight.
- **Step 10:** Select the fare of your choice.
- After you have made your selections, you will be directed to a **Review and Reserve** page, which displays the booking details and often will allow for the selection of seats and payment method.

Drexel University

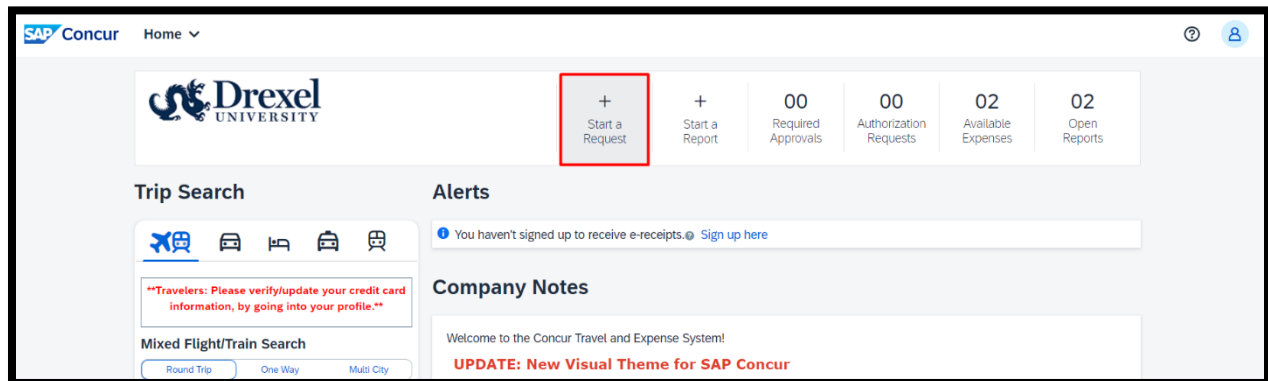
Concur Travel Request Guide

Submitting a Travel Request

Note: All University paid travel for full-time employees with benefits must be pre-approved, whether paid via P-Card or reimbursed for out-of-pocket expenses. All University travel must first follow an approval process. This process requires completing and submitting a Travel Request in Concur. The Travel Request identifies what travel costs can be paid or reimbursed to the traveler using University funds. Travel Requests must be approved before making travel arrangements and completing an Expense Report in Concur. Individuals traveling for Drexel University business who have not submitted the proper travel request may not be covered by University insurance policies and may be traveling at their own risk.

Starting a Travel Request:

- **Step 1:** From the Concur homepage, click on **Start a Request** from the quick access taskbar.
 - The **Request Header Page** will appear, allowing you to enter the details of your travel request.



The Report Header Page:

Note: A red asterisk (*) indicates a required field. Before proceeding, you must provide input.

- The **Report Header Page** contains a summary of your anticipated trip. You will provide information such as destination, business purpose, and travel dates.

- **Step 1:** Complete the **required fields** by entering the details of your request and click **Create Request** when finished.
- A. Request/Trip Name:** With no spaces, enter your **last name, first initial**, and the **start date** of the request using the **naming convention** in the example given. (e.g., John Doe's travel request for June 18, 2022, becomes **DOEJ01182022**)
- B. Request/Trip Purpose:** Select your trip purpose from the drop-down menu.
- C. Detailed Business Purpose:** Explain travel purposes and include the names of those traveling (Name of conference/event).
- D. Request/Trip Start Date and Request/Trip End Date:** Enter your trip's start and end date.

The screenshot shows the 'Create New Request' form with the following fields filled:

- Request Policy:** *Test - Travel Request
- Request/Trip Name (A):** DoeJ043024
- Request/Trip Purpose (B):** Business
- Detailed Business Purpose (C):** Who, what, when, where, and why/business purpose.
- Request/Trip Start Date (D):** 04/30/2024
- Request/Trip End Date:** 05/05/2024

- E. Trip Type:** Select International or Domestic travel using the drop-down menu.
- F. Does this trip include personal Travel?** If your trip includes personal travel, select **Yes** from the drop-down menu and enter the personal travel dates in the corresponding box to the right.
- G. Destination City:** Enter the destination city.
- H. Cost Center Information:** Concur will auto-populate your default cost center information on the **Report Header Page**. You can allocate expenses at both the request and expense levels. Enter comments to approvers/processors in the **Comments** section if needed.

The screenshot shows the 'Create New Request' form with the following fields filled:

- Trip Type (E):** Domestic
- Does this trip include personal Travel? (F):** No
- Destination City (G):** Oklahoma City, Oklahoma
- Destination Country:** UNITED STATES (US)
- Chart (H):** (D) Drexel University
- Fund:** (110001) Education & General
- Org:** (3820) Drexel Univ Information Technology
- Program:** (160) Institutional Support
- Activity:** (Empty)
- Comments To/From Approvers/Processors:** (Empty)

A red arrow points to the **Create Request** button at the bottom right of the form.

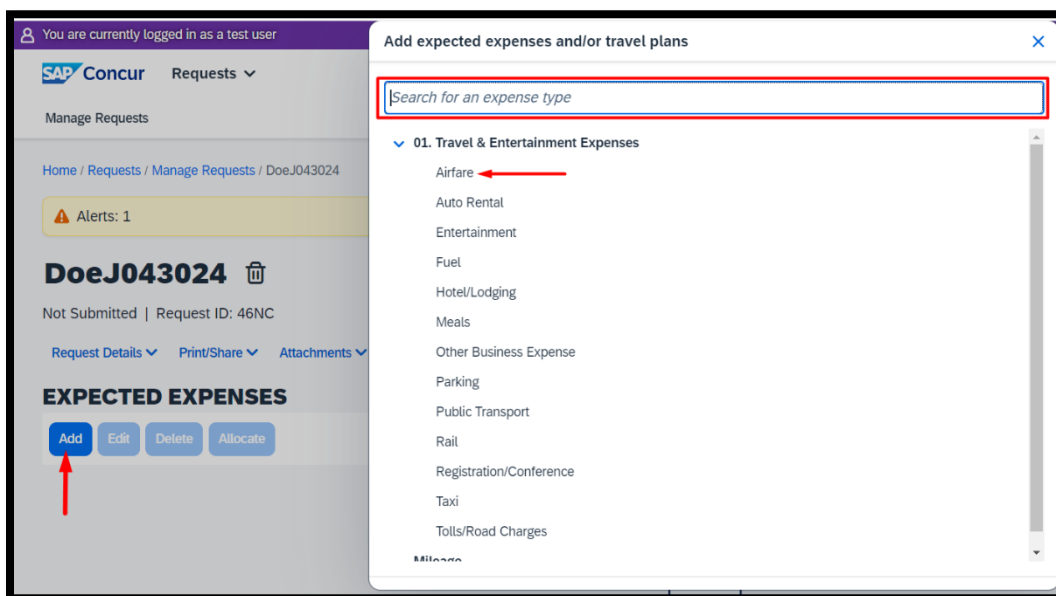
- Click on the **Request Header** name (DoeJ043024) to edit the request header details. Below the request header name, you can find the Request ID and status.
- Click the trash bin icon to delete the request.



Adding Expected Out of Pocket Expenses:

Note: Expected expenses are estimated, reasonable, and necessary travel expenses incurred while carrying out University business, traveling from one's office to a business destination and back, or traveling internationally.

- **Step 1:** Under **Expected Expenses**, click **Add** and select a travel expense from the drop-down menu. You can also use the search bar to find a specific expense type.



- **Step 2:** Complete the **required fields** labeled with a red asterisk.
- Select **Out of Pocket** or **Pending P-Card Transaction** from the **Anticipated Payment Type** drop-down.
- There are two ways to allocate expenses. You can select **Allocate** within the new expense page to allocate the expense to a cost center outside of your default. The allocation page will appear. The second way is to allocate all the expenses simultaneously, as shown later in this guide.

Step 3: Click **Save** when finished.

New Expense: Airfare \$550.00

Allocate ← Cancel **Save** ↗

* Required field

Request/Trip Start Date * 04/30/2024

Request/Trip End Date * 05/05/2024

City
Oklahoma City, Oklahoma

Transaction Amount * 550.00

Currency * US, Dollar (USD)

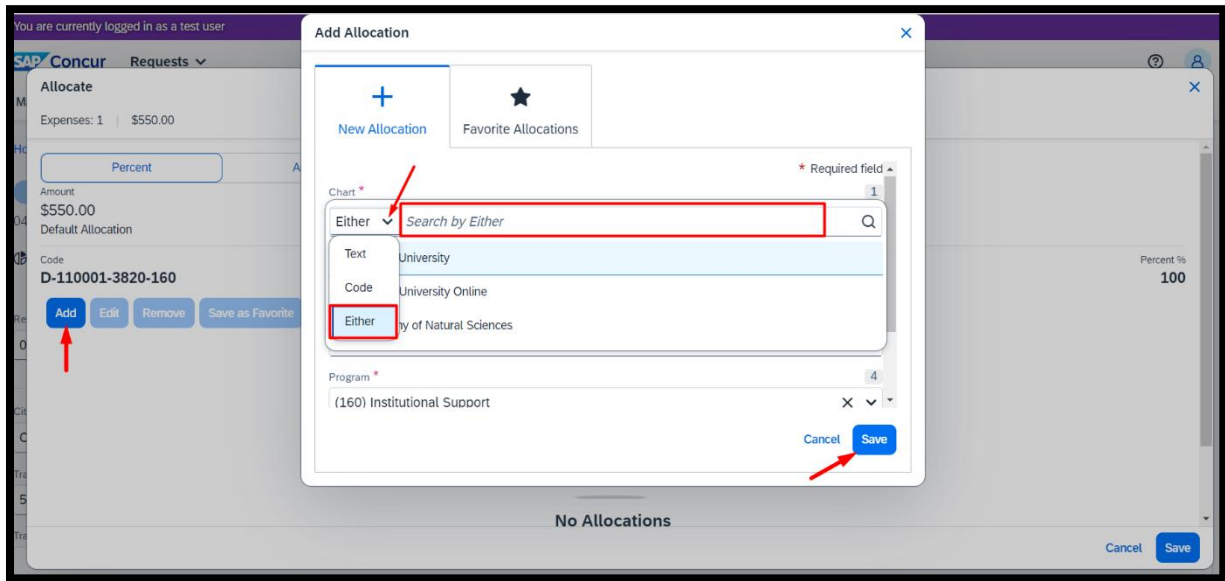
Anticipated Payment Type * Pending Card Transaction

Transaction Notes

Allocating Expected Expenses:

Note: The Allocation menu displays the expense amount, the percent allocated to the default cost center (100%), and the remaining (0%). To view this information in dollar amounts instead of percentages, click the tab labeled Amount next to Percent.

- **Step 1:** After opening an expense line item, click **Allocate** and **Add**. The **Add Allocation** page will appear.
- **Step 2:** To search by **code** or **text**, use the **filter** drop-down and select **either**.
- **Step 3:** Select a **Chart, Fund, Org, Program, and Activity** code, if applicable.
- **Step 4:** Click **Save**.

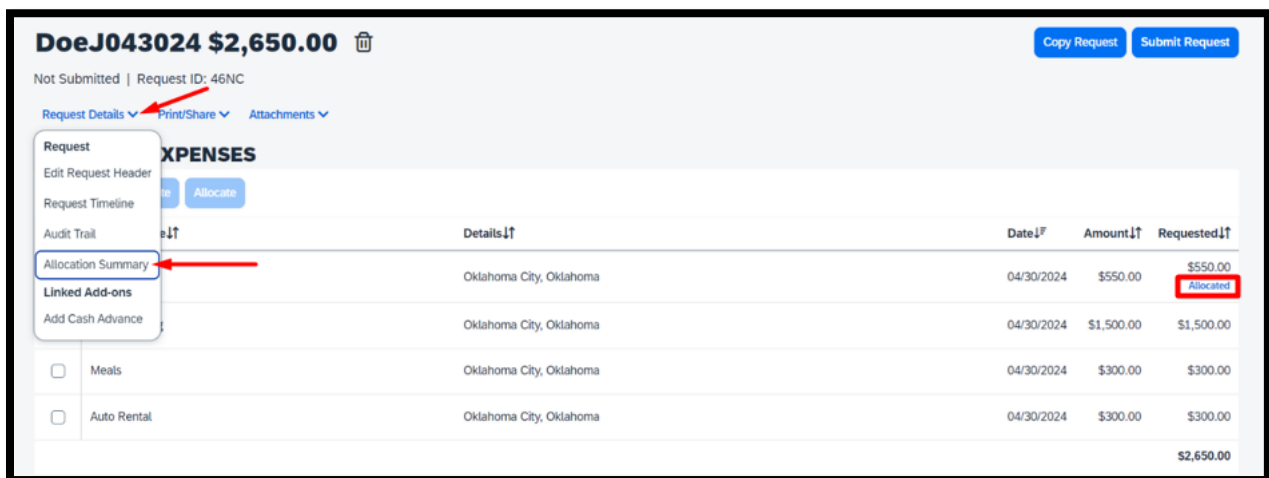


- You can also allocate multiple expenses by selecting them using the checkboxes on the left and then clicking **Allocate**. Repeat steps 1 – 4. These steps are shown again under the Expense reconciliation section of this guide.

Allocation Summary:

Note: The Allocation Summary page is only available from the Request Details drop-down menu if expenses are allocated outside the user’s default cost center.

- **Step 1:** Click **Request Details**.
- **Step 2:** Select **Allocation Summary**.



- You can quickly preview an expense’s allocation by clicking on the hyperlink labeled **Allocated** as shown above.

Allocation Summary

DoeJ043024 | \$2,650.00

The sum of allocation amounts may not exactly match the expense amount due to rounding.

Code	Amount
D-110001-3820-160 Drexel University - Education & General - Drexel Univ Information Technology - Institutional Support	\$2,100.00
D-110001-6401-121 Drexel University - Education & General - Psychiatry Control - Research	\$550.00

Close

Split Allocations:

- **Step 1:** Adjust the percent/amount charged to each cost center by changing the value in the **Percent %/Amount** box.
 - To view dollar amounts, click the tab labeled **Amount**.
- **Step 2:** Click **Save** when finished.

Allocate

Expenses: 1 | \$550.00

Percent | Amount

Amount: \$550.00 | Allocated \$550.00 | Remaining 50.00

Default Allocation: 100% | 0%

Code: D-110001-3820-160 | Percent %: 0

Add Edit Remove Save as Favorite

Chart	Fund	Org	Program	Activity	Code	Percent %
<input type="checkbox"/>	Drexel University	Education & General	Psychiatry Control	Research	D-110001-6401-121	50
<input type="checkbox"/>	Drexel University	Education & General	Psychology Research Fund Positions	Research	D-110001-6676-121	50

Cancel Save

Saving Favorite Allocations:

Note: Allocations can be saved as favorites, making them easily accessible for future use.

- **Step 1:** To save an allocation as a favorite, select the allocation(s) using the checkbox(es) and click the button labeled **Save as Favorite**.
- **Step 2:** Enter the allocation name for future reference and click **Save**.
- When adding an allocation on the Allocate menu, favorite allocations can be found under the Favorite Allocations tab.

Allocate ✕

Expenses: 1 | \$550.00

Amount
\$550.00
Default Allocation

Allocated \$550.00
100%

Remaining \$0.00
0%

Code Percent %
D-110001-3820-160 25

Add
Edit
Remove
Save as Favorite

<input type="checkbox"/>	Chart↑↓	Fund↑↓	Org↑↓	Program↑↓	Activity↑↓	Code↑↓	Percent %
<input checked="" type="checkbox"/>	Drexel University	Education & General	Psychiatry Control	Research		D-110001-6401-121	<input type="text" value="50"/>
<input type="checkbox"/>	Drexel University	Education & General	Psychology Research Fund Positions	Research		D-110001-6676-121	<input type="text" value="25"/>

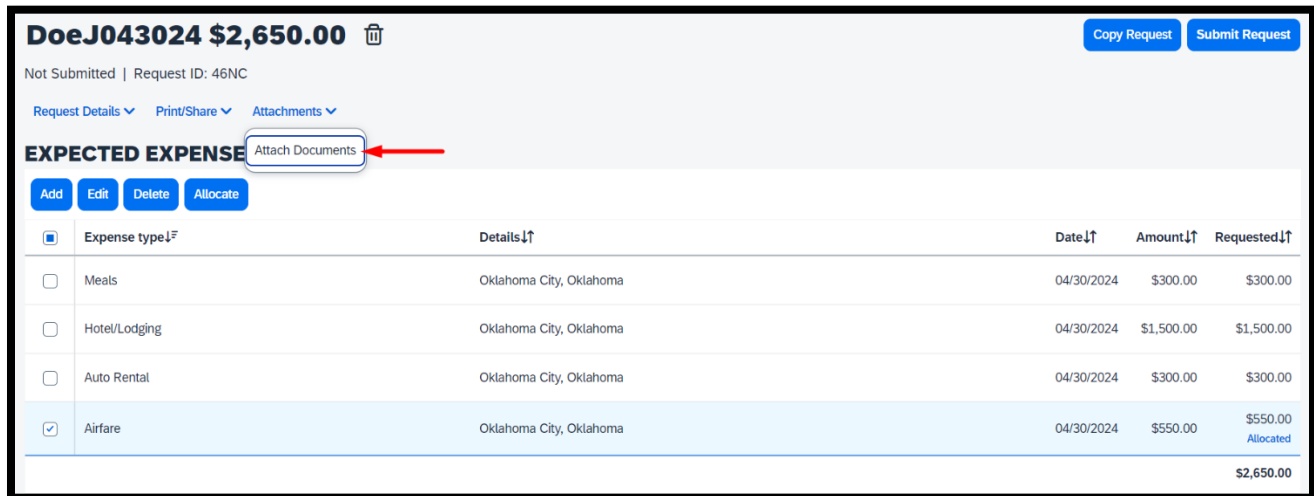
Cancel Save

Managing Attachments:

Adding Attachments:

Note: Max file size is 5MB.

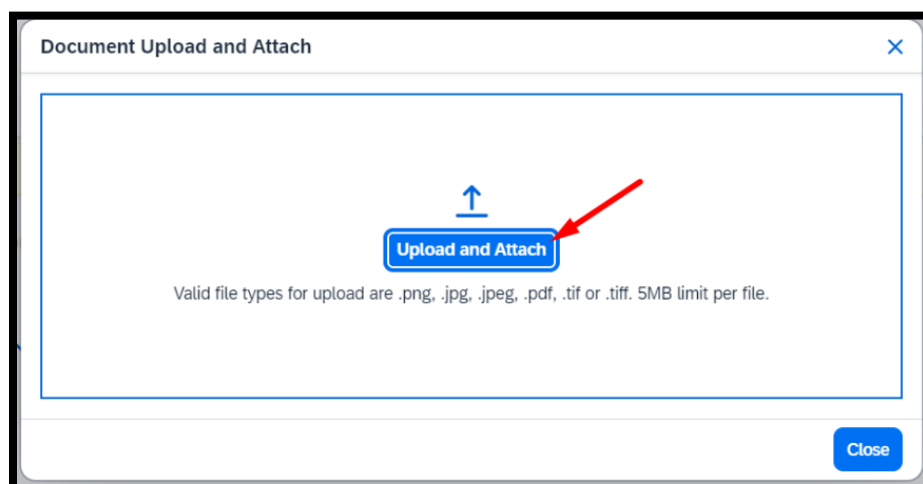
- **Step 1:** Click the **Attachments** drop-down and select **Attach Documents** (You can upload supporting documents such as Pre-Approvals, Prohibited Expense Exception form, and [Essential Travel Request Approvals](#))



The screenshot shows a travel request interface for 'DoeJ043024 \$2,650.00'. At the top right, there are 'Copy Request' and 'Submit Request' buttons. Below the header, there are tabs for 'Request Details', 'Print/Share', and 'Attachments'. The 'Attachments' tab is active, and a dropdown menu is open, showing 'Attach Documents' selected with a red arrow pointing to it. Below the dropdown, there are buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. A table lists expense types with columns for 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. The table includes rows for Meals, Hotel/Lodging, Auto Rental, and Airfare. The 'Airfare' row is selected and highlighted in blue, with a total amount of \$550.00 allocated. A red arrow also points to the 'Attach Documents' button in the dropdown menu.

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Meals	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
<input type="checkbox"/> Hotel/Lodging	Oklahoma City, Oklahoma	04/30/2024	\$1,500.00	\$1,500.00
<input type="checkbox"/> Auto Rental	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
<input checked="" type="checkbox"/> Airfare	Oklahoma City, Oklahoma	04/30/2024	\$550.00	\$550.00 Allocated
				\$2,650.00

- **Step 2:** Click within the **Upload and Attach** box, select the file you wish to upload, and click open.
 - Repeat steps 1 – 2 to attach multiple documents.



The screenshot shows a dialog box titled 'Document Upload and Attach'. Inside the dialog, there is a large empty rectangular area for file selection. Below this area, there is a blue button labeled 'Upload and Attach' with a red arrow pointing to it. Below the button, there is text that reads: 'Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.' At the bottom right of the dialog, there is a 'Close' button.

Viewing and Deleting Attachments

- After uploading documents, you can view or delete them by clicking **Attachments** and selecting **View Documents** or **Delete Documents** from the drop-down menu.

The screenshot shows a travel request for 'DoeJ043024' with a total amount of '\$2,650.00'. The status is 'Not Submitted' and the request ID is '46NC'. The 'Attachments' dropdown menu is open, showing options: 'View Documents', 'Attach Documents', and 'Delete Documents'. The 'View Documents' option is highlighted with a red box.

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Airfare	Oklahoma City, Oklahoma	04/30/2024	\$550.00	\$550.00 <small>Allocated</small>

Submitting the Travel Request:

Travel Request Pre-Submission Checklist:

- The Report Header** is accurate and complete. (The naming convention is correct, has a detailed business purpose, accurate dates, etc.)
 - Expected Out-of-pocket expenses** added.
 - Pending P-Card Transactions** added.
 - Expenses allocated, if applicable (This can be adjusted later when reconciling the expenses if anything changes).**
 - Supporting Documentation** is attached to the travel request. If flying internationally, the correct email from the Office of Global Engagement stating that your travel is **“Registered”** is attached.
- **Step 1:** Click **Submit Request**. The **Travel Request Agreement** will appear.
 - **Step 2:** After reviewing the **Travel Request Agreement**, click **Accept & Continue**. The report will enter the request approval workflow for review.

The screenshot shows the same travel request interface as above, but with a red arrow pointing to the 'Submit Request' button in the top right corner. The 'Attachments' dropdown menu is closed. The table below shows a total of \$2,650.00 for all expenses.

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Airfare	Oklahoma City, Oklahoma	04/30/2024	\$550.00	\$550.00 <small>Allocated</small>
<input type="checkbox"/> Hotel/Lodging	Oklahoma City, Oklahoma	04/30/2024	\$1,500.00	\$1,500.00
<input type="checkbox"/> Meals	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
<input type="checkbox"/> Auto Rental	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
				\$2,650.00

Cancelling/Copying/Recalling a Pending Request:

Note: A request cannot be recalled once it reaches final approval.

- **To Cancel:** Select **Cancel Request** from the More Actions menu on the request page.
- **To Copy:** Select **Copy Request** from the **More Actions** drop-down menu.
- **To Recall:** Click the button labeled **Recall**.

DoeJ043024 \$2,650.00
Pending Manager Approval | Request ID: 46NC

Request Details ▾ Print/Share ▾ Attachments ⓘ ▾

EXPECTED EXPENSES

Expense type↑	Details↑	Date↓	Amount↑	Requested↑
Airfare	Oklahoma City, Oklahoma	04/30/2024	\$550.00	\$550.00 <small>Allocated</small>
Hotel/Lodging	Oklahoma City, Oklahoma	04/30/2024	\$1,500.00	\$1,500.00
Meals	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
Auto Rental	Oklahoma City, Oklahoma	04/30/2024	\$300.00	\$300.00
				\$2,650.00

More Actions ▾ **Recall**

Copy Request

Cancel Request

Navigating to The Request Timeline:

- The **Request Timeline** page displays the approval workflow for the request, a summary of the approval activity for the request, and any comments added to the request.
- **Step 1:** Click **Request Details** and select **Request Timeline**.

DoeJ043024 \$2,650.00
Pending Manager Approval | Request ID: 46NC

Request Details ▾ Print/Share ▾ Attachments ⓘ ▾

Request

- Request Header
- Request Timeline** ←
- Audit Trail
- Allocation Summary

EXPECTED EXPENSES

Expense type↑	Details↑
Airfare	Oklahoma City, Oklahoma
Hotel/Lodging	Oklahoma City, Oklahoma
Meals	Oklahoma City, Oklahoma
Auto Rental	Oklahoma City, Oklahoma

- The request is pending manager approval, as indicated by the filled circle.

The screenshot displays a 'Request Timeline' window for request ID DoeJ043024 with a value of \$2,650.00. It is divided into two main sections: 'Approval Flow' and 'Request Summary'. In the 'Approval Flow' section, there are two steps: 'Manager Approval' (Test, Default Approver) which is currently active and indicated by a filled circle, and 'Cost Center Approval' which is not yet started. In the 'Request Summary' section, the status is 'SUBMITTED' (Test, Traveler 3 04/21/2024) and there is a highlighted entry for 'PENDING MANAGER APPROVAL' (Test, Traveler 3 04/21/2024). A 'Close' button is located in the bottom right corner.

Navigating to the Audit Trail:

The **Audit Trail** logs every addition, change, deletion, and comment for the request.

- **Step 1:** Click **Request Details** and select **Audit Trail**.

The screenshot shows the 'Request Details' page for 'DoeJ043024 \$2,650.00', which is in a 'Pending Manager Approval' state with Request ID: 46NC. At the top, there are navigation options: 'Request Details' (selected), 'Print/Share', and 'Attachments'. Below this is a dropdown menu for 'Request' with the following options: 'Request Header', 'Request Timeline', 'Audit Trail' (highlighted with a red box and a red arrow pointing to it), and 'Allocation Summary'. The main content area shows a table of 'EXPENSES' with columns for 'Details' and 'Location'. The table lists items like 'Meals' and 'Auto Rental', all located in 'Oklahoma City, Oklahoma'.

Audit Trail ✕

DoeJ043024 | \$2,650.00

Request Level

Date/Time↓↑	Updated By↓↑	Action↓↑	Description↓↑
04/21/2024 6:19 PM	Test, Traveler 3	Approval Status Change	Status changed from Submitted to Pending Manager Approval
04/21/2024 6:19 PM	Test, Traveler 3	Approval Status Change	Status changed from Not Submitted to Submitted
04/21/2024 6:19 PM	Test, Traveler 3	Exceptio n	[WARNING] Reports submitted without the proper Request/Trip Name may be return unprocessed. Please ensure "Request/Trip Name" on the Request Header follows the Report naming format: LAST NAME, FIRST INITIAL and START DATE OF TRAVEL [MMDDYYYY] (e.g., J
04/21/2024 6:19 PM	Test, Traveler 3	Confirma tion Agreeme nt Acceptan ce	Travel Request Submit Agreement

[Close](#)

End of Travel Request Guide

Drexel University

Concur Travel Expense Guide

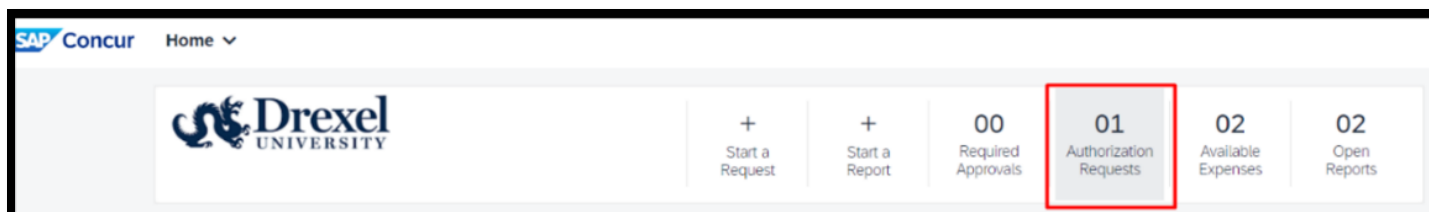
Submitting a Travel Expense Report

Note: All travel-related expense reports must be made from an already approved travel request. Before creating a new expense report from an approved request, *please first verify that Concur has not already automatically created a new expense report from your approved request under the Expense page by clicking Open Reports.* Cardholders with travel expenses spanning multiple cycles are not required to submit multiple expense reports for a single trip. As P-Card transactions post for a particular trip, in compliance with the reconciliation deadline for each P-Card cycle:

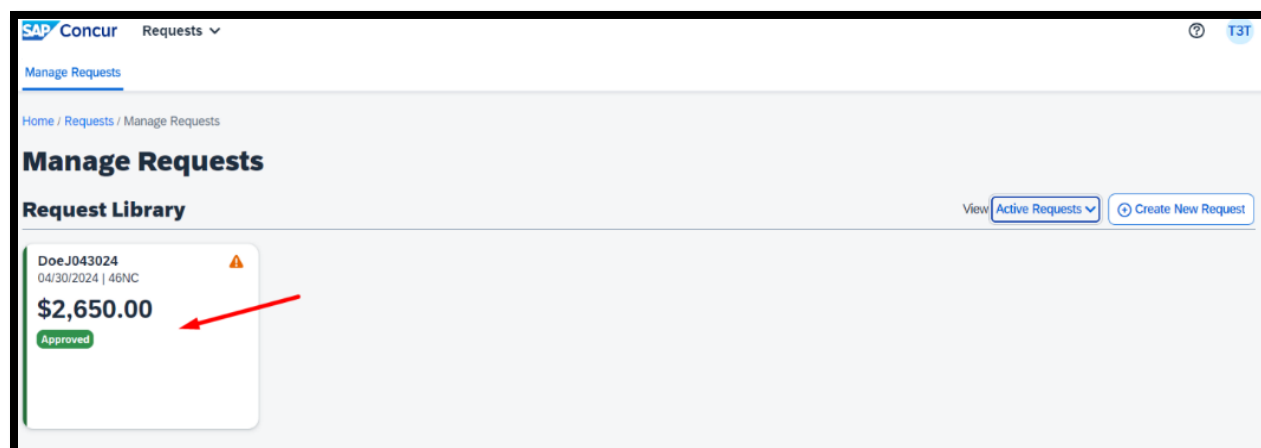
- Add the travel-related transactions to the appropriate expense report.
- Fully reconcile the charges, including allocating to the correct cost center, adding appropriate transaction notes, and uploading receipt(s).
- DO NOT submit the expense report for review until all relevant P-Card transactions for that trip have been added and reconciled and the trip has concluded.

Creating an Expense Report from an Approved Request:

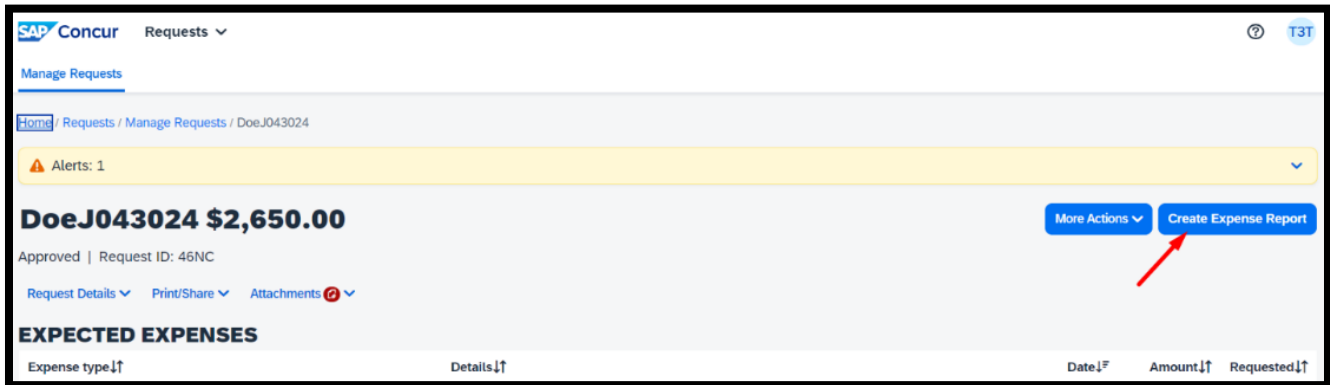
- **Step 1:** From the Concur homepage, click **Authorization Requests**.



- **Step 2:** Open the approved travel request by clicking on its tile.



- **Step 3:** Click the button labeled **Create Expense Report**. The new expense report will open.



Reconciling Travel Expenses:

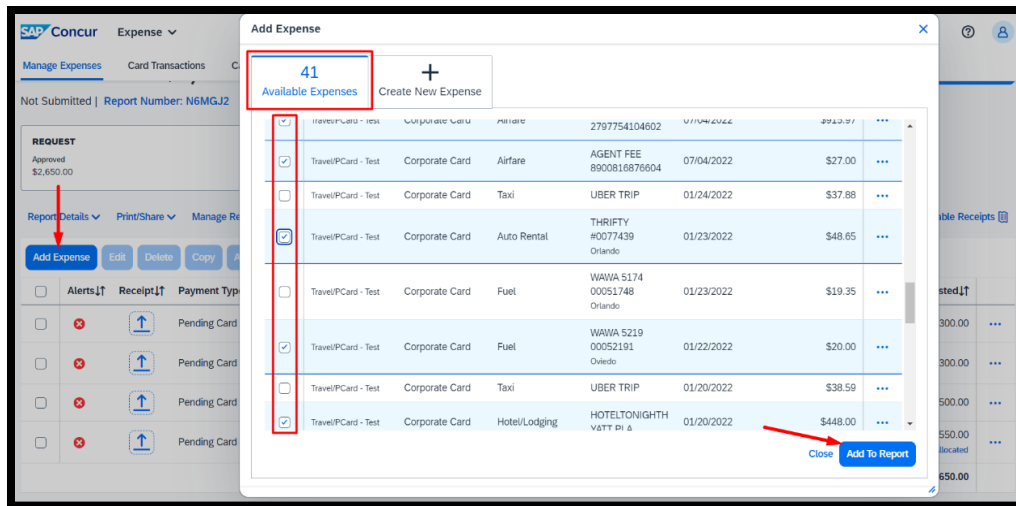
Note: The Alerts menu will contain alerts until each expense is fully reconciled. Pending Card Transactions are placeholders that come from the approved travel request. They allow you to reconcile ahead of time, so when the actual transactions post, you can merge them, effectively combining the reconciliation information with the imported credit card information. Meals are typically estimated on the travel request, in bulk, as one expense line item following the per diem allowance. Therefore, you do not have to merge each meal transaction with the meals Pending Card Transaction. You may delete the meals Pending Card Transaction from the expense report. If reconciling P-Card transactions, the first step would be to add the transactions to the report. Then, merge each expense with the corresponding Pending P-Card transactions from your original request. Each expense will require transaction notes.

Travel expenses may be reconciled on an expense report without a fully approved travel request. Once the travel request is fully approved, you may move the reconciled transactions to the expense report automatically created when the travel request was fully approved.

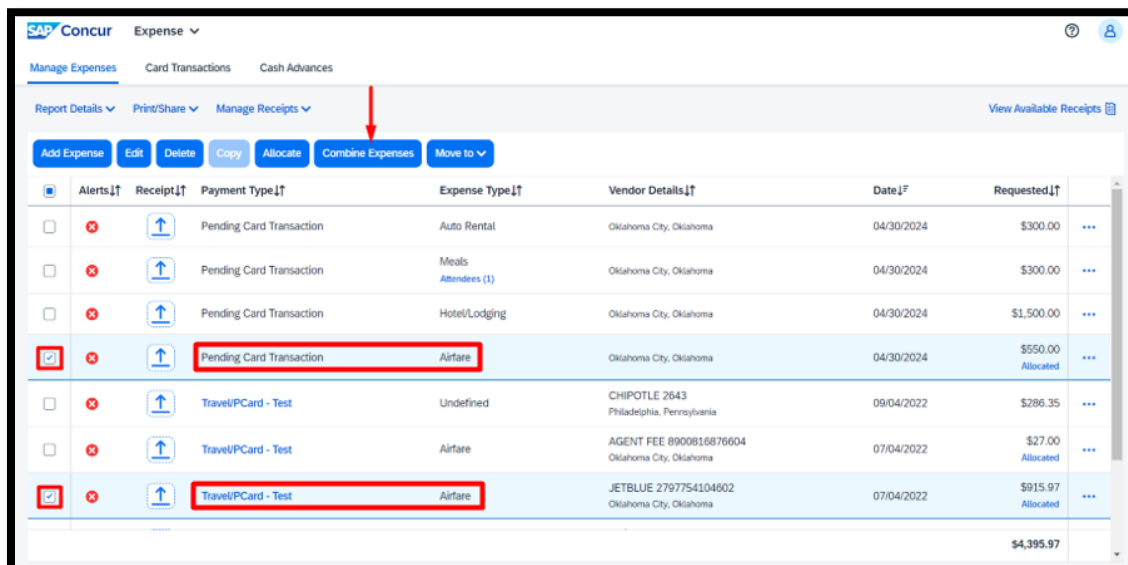
Merging P-Card Transactions with Pending Card Transactions

Note: You cannot submit the expense report until all pending card transactions are merged with the corresponding P-Card expense.

- **Step 1:** Click **Add Expense**.
- **Step 2:** Using the checkboxes, select the P-Card transaction(s) that belong to the trip.
- **Step 3:** Click **Add to Report**.



- **Step 4:** Select the **Pending Card Transaction** and the corresponding **Travel/P-Card expense** using the checkboxes.
- **Step 5:** Click **Combine Expenses**. Repeat steps 4 and 5 for each transaction.
 - Only the imported **P-Card transaction** will remain after combining expenses. Concur will automatically update the report totals if the actual dollar amount differs from the anticipated amount. Once each P-Card transaction is merged, you can then proceed with expensing each line.



Reconciling Expense Line Items:

- **Step 1:** Click the expense line item to open the expense.

REQUEST
Approved
\$2,650.00

Report Details | Print/Share | Manage Receipts | View Available Receipts

Buttons: Add Expense, Edit, Delete, Copy, Allocate, Combine Expenses, Move to

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Out of Pocket	Personal Car Mileage		04/25/2024	\$11.79
<input type="checkbox"/>			Travel/PCard - Test	Undefined	CHIPOTLE 2643 Philadelphia, Pennsylvania	09/04/2022	\$286.35
<input type="checkbox"/>			Travel/PCard - Test	Airfare	AGENT FEE 8900816876604 Oklahoma City, Oklahoma	07/04/2022	\$27.00 <i>Allocated</i>
<input type="checkbox"/>			Travel/PCard - Test	Airfare	JETBLUE 2797754104602 Oklahoma City, Oklahoma	07/04/2022	\$915.97 <i>Allocated</i>
<input type="checkbox"/>			Travel/PCard - Test	Auto Rental	Thrifty Oklahoma City, Oklahoma	01/23/2022	\$48.65
<input type="checkbox"/>			Travel/PCard - Test	Fuel	WAWA 5219 00052191 Oviedo, Florida	01/22/2022	\$20.00
<input type="checkbox"/>			Travel/PCard - Test	Hotel/Lodging	HOTELTONIGHTHYATT PLA Oklahoma City, Oklahoma	01/20/2022	\$448.00
							\$1,757.76

- **Step 2:** Complete the following required fields under the details tab:

Airfare \$915.97 | Cancel | Delete Expense | Save Expense

07/04/2022 | JETBLUE 2797754104602 | Corporate Card

Details | Itemizations | Hide Receipt

Allocate * Required field

Expense Type *
Airfare

Posted Date: 07/06/2022 | Transaction Date: 07/04/2022

Vendor: [Dropdown] | Enter Vendor Name: JETBLUE 2797754104602

City of Purchase *
Oklahoma City, Oklahoma

Ticket Number: 2797754104602

Payment Type: Travel/PCard - Test | Amount: 915.97

Currency: US, Dollar (USD) | PA Compliance Notes: [Text Area]

Request *
04/29/2024, \$550.00 - DoeJ043024

Transaction Notes: Airfare for John Doe for business trip to Oklahoma. | \$1/500

Receipt

Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Buttons: Add Receipt

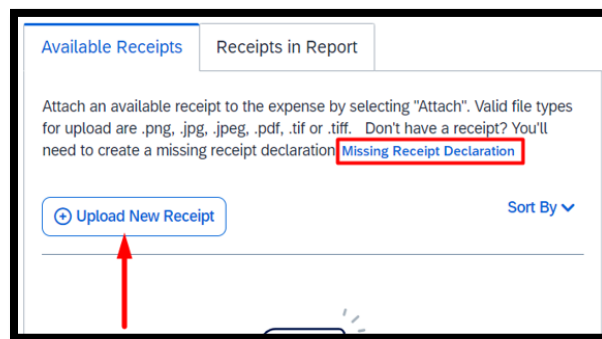
For Out-of-Pocket Transactions:

- **Expense Type** – Expense types correlate to Drexel account codes.
- **Dates**—The posted date cannot be entered as it is specific for P-Card transactions. You will want to enter a transaction date, which should be when the purchase was made.
- **Vendor Name** – Enter the vendor’s name as it appears on the receipt.
- **City of Purchase** – Enter the city where your purchase was made.
- **Payment Type** – Verify that the payment type is set to Out of Pocket.
- **Amount** – Enter the transaction amount as it appears on the receipt.
- **Currency** – Verify that the currency is correct. Concur will automatically calculate the conversion rate if a foreign currency was used.
- ***Request** – This field will populate only for expenses placed on the original request. Verify that the correct request is selected in this field.
- **Transaction Notes** – Although the transaction notes field does not have an asterisk, it is required for all expenses. A proper transaction note will provide a clear business purpose for the expense, including who, what, when, where, and why. If this field is not completed, it will result in an alert at the top of the page.

For P-Card Transactions: P-Card transactions will automatically populate with the posted and transaction date, vendor name, city of purchase, payment type, amount, and currency.

- **Expense Type** – Expense types correlate to Drexel account codes.
- **Transaction Notes** – Although the transaction notes field does not have an asterisk, it is required for all expenses. A proper transaction note will provide a clear business purpose for the expense, including who, what, when, where, and why. If this field is not completed, it will result in an alert at the top of the page.

- **Step 3:** Click **Upload Receipt Image** and select the file to upload.
- Receipts uploaded to Concur through the dashboard or mobile app will be accessible under the Available Receipts tab.
 - If receipts are already uploaded to the report, you can click on the **Receipts in the Report** tab to access them.
 - If you are missing a receipt and cannot obtain a duplicate from the supplier, please use the **Missing Receipt Declaration** by clicking the hyperlink.
 - If using the **Missing Receipt Declaration**, please first remove all attached receipts from the expense.
 - The **Missing Receipt Declaration** replaces the Missing Receipt form. However, delegates may still use this form as they do not have access to complete the missing receipt declaration.

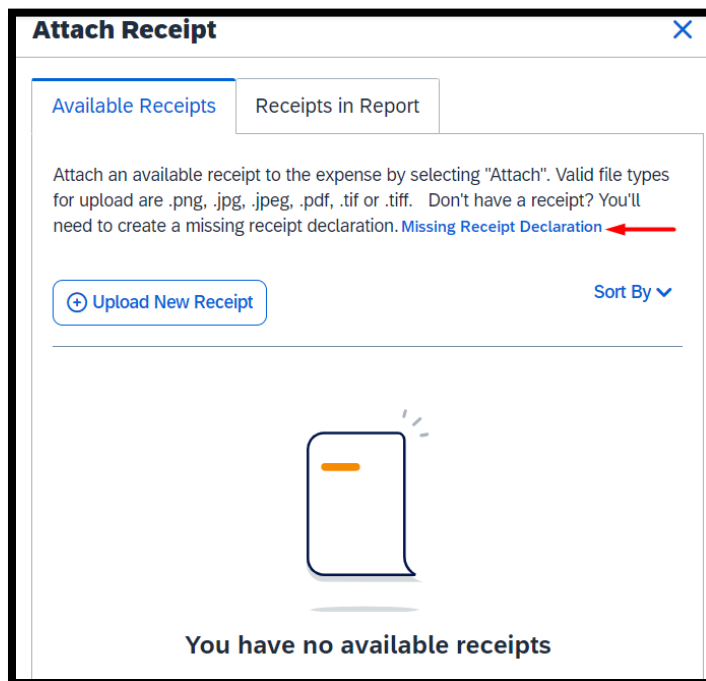


- **Step 4:** Click **Save Expense** when finished.

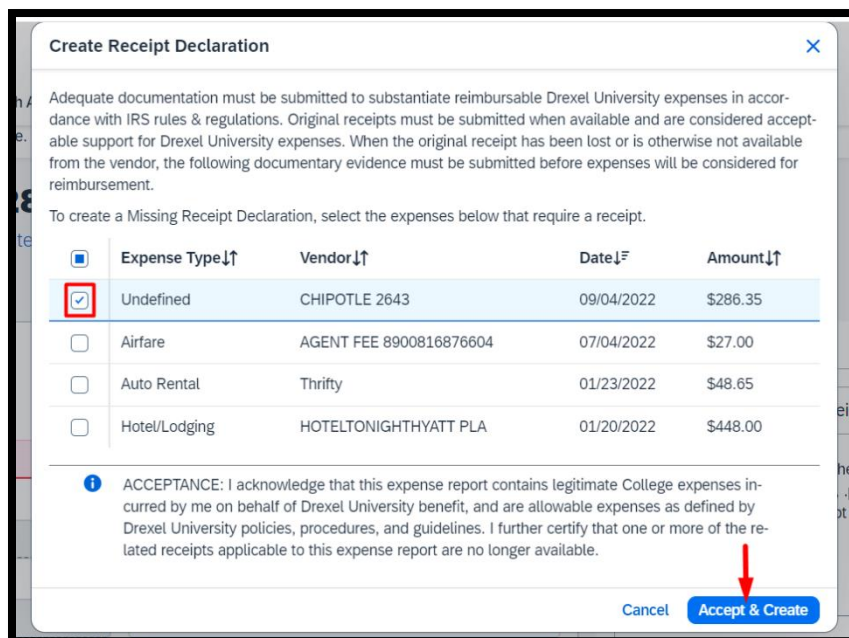
Using the Missing Receipt Declaration:

Note: The Missing Receipt Declaration replaces the missing receipt form. Before using it, you must remove any attachments from the expense item.

- **Step 1:** Click the hyperlink labeled **Missing Receipt Declaration** on the **Attach Receipt** menu.



- **Step 2:** Use the checkbox to select the expense and click **Accept and Create**. The missing receipt affidavit will be created for the selected expense or expenses.



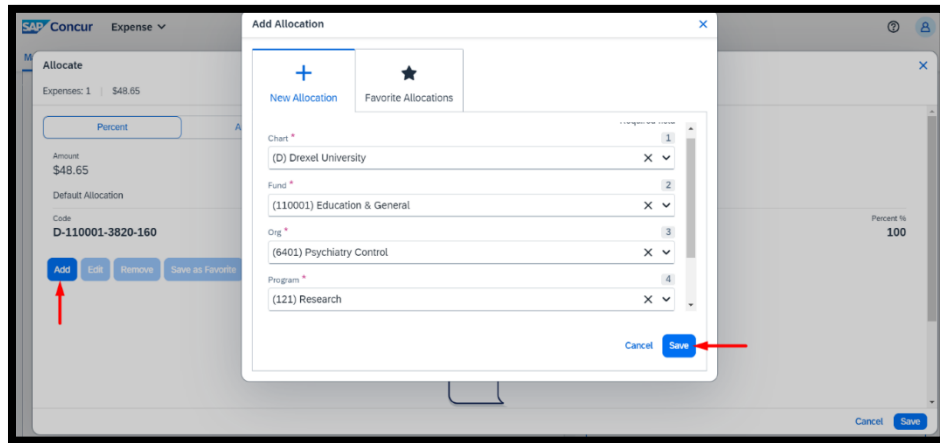
Allocating from the Expense Details Page:

- **Step 1:** After opening an expense line item, click **Allocate**.
 - The Allocation menu displays the expense amount, the percent allocated to the default cost center (100%), and the percent remaining (0%).
 - To view this information in dollar amounts instead of percentages, click the **Amount** tab.



- **Step 2:** Click **Add**, and the **Add Allocation** page will appear.
- **Step 3:** Using the drop-down menus, select a **Chart**, **Fund**, **Org**, **Program**, and **Activity** code, if applicable.
 - To search by **text**, **code**, or **either**, use the **filter** drop-down menu.
 - The drop-down will provide the five most recently used allocations first; you can search by scrolling through the list provided or by typing a portion of the number or description needed.

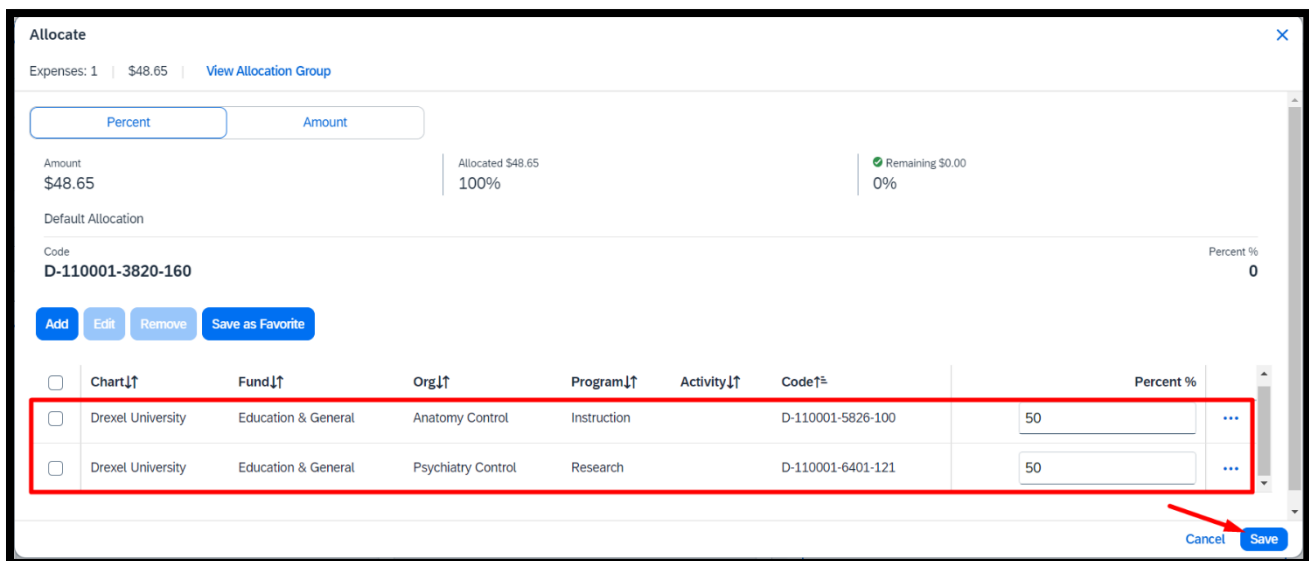
- **Step 4:** Click **Save** to save the allocation.



Split Allocations:

Note: Concur allows you to split an expense between multiple cost centers, either by percentage or dollar amount.

- **Step 1:** In the allocations page, adjust the percent/dollar amount charged to each cost center by changing the value in the **Percent %/Amount** box.
 - To view dollar amounts, click the tab labeled **Amount** (The example below shows the percentage amount).
- **Step 2:** Click **Save** when finished.



Allocating from the Report Page:

Note: You can allocate one or more expenses from the report page by using the checkboxes on the left and then clicking **Allocate**. Repeat steps 2 – 4 from the *Allocating from the Expense Details Page* section.

The screenshot shows an expense report interface. At the top, a 'REQUEST' box indicates 'Approved \$2,650.00'. Below this are navigation options: 'Report Details', 'Print/Share', and 'Manage Receipts'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. A red arrow points to the 'Allocate' button. Below the toolbar is a table of expenses with columns for Alerts, Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. Two rows are visible: 'Out of Pocket' (Personal Car Mileage, \$11.79) and 'Travel/PCard - Test' (Meals Attendees (1), \$286.35). Both rows have a checked checkbox in the Alerts column.

Adding Out-of-Pocket Expenses to the Report:

If you incurred Out-of-Pocket expenses that were not part of your original request, you can add them to your expense report.

- **Step 1:** Click **Add Expense**.
- **Step 2:** Click **Create a New Expense**.
 - Select an expense type from the menu or search for it by name using the search bar.

The screenshot shows an expense report interface for 'CruzJ05022022-22 \$255.00'. It is marked as 'Not Submitted'. At the top right are 'Copy Report' and 'Submit Report' buttons. Below are navigation options: 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'REQUEST' box shows 'Approved \$255.00'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. A red arrow points to the 'Add Expense' button. Below the toolbar is a table of expenses with columns for Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. One row is visible: 'Out of Pocket' (Registration/Conference, \$255.00). The Alerts checkbox is unchecked.

- **Step 3:** A new expense details page will appear. You can follow the steps outlined in this guide's Reconciling Expense Line-Item section.

The screenshot shows the 'Add Expense' dialog box. At the top left, it displays '0 Available Expenses'. To the right is a '+ Create New Expense' button, with a red arrow pointing to it. Below the button is a search bar labeled 'Search for an expense type'. Underneath the search bar is a scrollable list of expense categories: Entertainment, Fuel, Hotel/Lodging, Meals, Non Reimbursable/Personal Expense, Other Business Expense, Parking, and Personal Car Mileage. A red rectangular box highlights the search bar and the list of categories.

Adding Attendees to a Business Meal:

Note: Meal & entertainment expense types require attendees.

- **Step 1:** Click **Attendees**.

The screenshot shows the 'Meals \$286.35' expense details page. At the top, it displays the date '09/04/2022', merchant 'CHIPOTLE 2643', and payment method 'Corporate Card'. Below this are two tabs: 'Details' (selected) and 'Itemizations'. Under the 'Details' tab, there are two buttons: 'Attendees (1)' and 'Allocate'. A red arrow points to the 'Attendees (1)' button. Below these buttons is a dropdown menu for 'Expense Type' with 'Meals' selected. To the right of the dropdown is a '* Required field' label.

- **Step 2:** Select the attendees and click **Add**.

Added Attendees
Added attendees will be listed here

Search Results (3) [Add](#) [Remove](#)

<input type="checkbox"/>	Attendee Name↑≡	Email Address↓↑	Country/Region↓↑	Attendee Title↓↑	Institution/Company↓↑	Attendee Type↓↑	
<input type="checkbox"/>	Test, Traveler 3	jjc437@drexel.edu	UNITED STATES			Faculty/Staff	Remove
<input checked="" type="checkbox"/>	Test, Traveler1	traveler1@drexel.edu	UNITED STATES			Faculty/Staff	Add
<input checked="" type="checkbox"/>	Test, Traveler2	jwm67@drexel.edu	UNITED STATES			Faculty/Staff	Add

- **Step 3:** Click the **Attendees** tab and use the search bar to search for the attendee by name. Use the **Attendee Type** drop-down menu to search for faculty/staff or guests. Use the search bar to search for an attendee by name.
- **Step 4:** Click **Search**.
- **Step 5:** Scroll down, select the attendees using the checkboxes, and click **Add**.
- **Step 6:** Click **Save**.

Add Attendees

Attendees Recent Attendees Attendee Groups

Search Criteria: * Required field

Attendee Type * Last Name First Name

Attendee Title Institution/Company Email Address

Country/Region

Include inactive employees

[Reset](#) [Search](#)

Added Attendees
Added attendees will be listed here

Posted Date: 09/05/202

[Close](#)

Searching/Creating Guests:

Note: Guests can be searched for or created under the **Add Attendees** page.

To Search for a Guest:

- **Step 1:** Click the **Attendees** tab and use the Attendee Type drop-down to select **Guest**.
- **Step 2:** Repeat steps 3-6 above.

The screenshot shows the 'Add Attendees' interface. At the top, there are three tabs: 'Attendees' (selected), 'Recent Attendees', and 'Attendee Groups'. Below the tabs is a 'Search Criteria' section with a red border around the input fields. The 'Attendee Type' dropdown is set to 'Guest'. The 'Last Name' field contains 'Doe' and the 'First Name' field contains 'John'. The 'Affiliation' field is empty. A red arrow points to the 'Search' button in the bottom right corner. The text '* Required field' is visible in the top right of the search criteria section. Below the search criteria, there is a link 'Can't find an attendee? Create New Attendee' and a 'Reset' button next to the 'Search' button. At the bottom, there is a section for 'Added Attendees' with the text 'Added attendees will be listed here'.

To Create a Guest:

- **Step 1:** Under the **Attendees** tab, select Guest and click **Create New Attendee** in the lower right-hand corner of the menu.
- **Step 2:** Enter the attendee type, last name, first name, and affiliation. Click **Create Attendee** when finished.
- **Step 3:** Click **Save** to add them to the expense.
 - **This same procedure can be used to create Group Events.**

This screenshot is similar to the previous one but highlights the 'Attendee Type' dropdown menu with a red box. The dropdown is currently set to 'Guest'. The other search criteria fields (Last Name, First Name, Affiliation) are empty. A red arrow points to the 'Create New Attendee' link in the bottom right corner. The 'Search' button is also visible. The text '* Required field' is present in the top right of the search criteria section. The 'Reset' button is located next to the 'Search' button. The 'Added Attendees' section at the bottom is also visible.

Itemizing Hotel/Lodging Expense Types:

Note: Hotel expenses always require itemization to ensure various expense types, such as parking, meals, and lodging, are allocated appropriately. You cannot allocate hotel expenses until the itemization is complete.

- **Step 1:** On the expense's Details page, click the **Itemizations** tab after completing the required fields.
- **Step 2:** Enter the room rate per night (Remaining / Nights) and click **Save Itemization**.

←
→

Hotel/Lodging \$448.00

01/20/2022
HOTELTONIGHTHYATT PLA
Corporate Card

Details

Itemizations

Amount \$448.00	Itemized \$0.00	<div style="display: flex; align-items: center; justify-content: center;"> ✖ Remaining \$448.00 </div>
--------------------	--------------------	---

New Itemization

* Required field

Expense Type *

Hotel/Lodging
✕
▼

Entry Type:

Recurring Itemization
▼
04/25/2024 - 04/30/2024 (Nights: 5)

Your hotel room rate was:

The Same Every Night

Not the Same

Room Rate (per night)*	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
89.60			

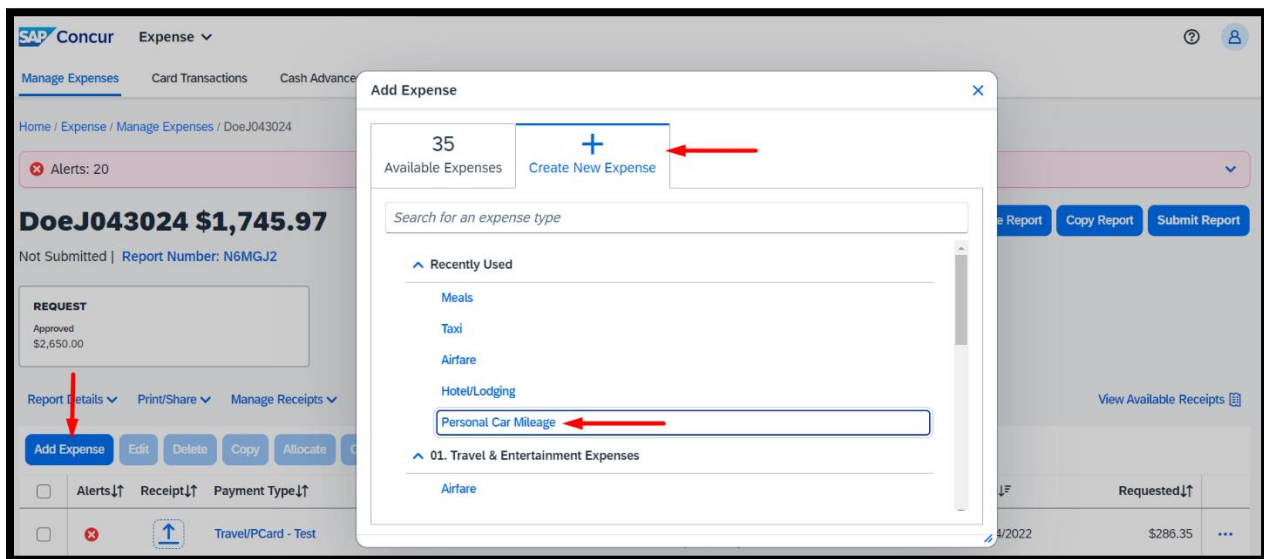
(Amounts in USD) Add Tax Fields



Adding Personal Car Mileage Expense Type:

Note: If origination from home is on a weekend, normal commuting mileage does not need to be deducted. Business mileage does not include the normal commute to and from work. A rental car, taxi, or other form of travel (e.g., rail, bus, airline, etc.) should be used for international travel. Reimbursement of international mileage when using a personal vehicle owned by the Traveler or another person will not be reimbursed.

- **Step 1:** Click **Add Expense**.
- **Step 2:** Select **Personal Car Mileage** under the **Create New Expense** tab. The Mileage Calculator will appear.



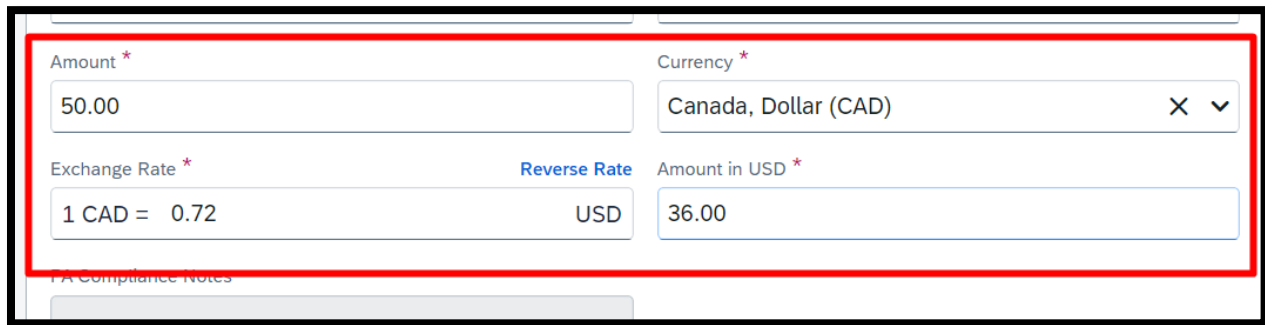
- **Step 3:** Enter the start and end points.
 - Click the hyperlink labeled **Make Round Trip** if desired.
 - Select the **Deduct Commute** checkbox when business travel originates from home on a weekday.
- **Step 4:** Click **Add Mileage to Expense**.

- **Step 5:** Complete the **required fields** labeled with a red asterisk.
- **Step 6:** Click **Save Expense**.

Converting Foreign Currency:

Note: When expensing a transaction utilizing foreign currency, the Concur system will automatically convert to USD.

- **Step 1:** Enter the amount of the expense and select the currency from the drop-down menu.
 - The conversion rate is displayed in the **Conversion Rate Field**, and the converted amount is displayed in the **Amount in USD** field.
- **Step 2:** Click **Save Expense**.



The screenshot shows a form with the following fields and values:

Amount *	50.00	Currency *	Canada, Dollar (CAD) X v
Exchange Rate *	1 CAD = 0.72	Reverse Rate	USD
		Amount in USD *	36.00

Below the form, there is a section for "FA Compliance Notes" with a text input field.

Submitting the Expense Report:

- **Step 1:** Once all expenses are entered and all hard-stop alerts are cleared, click **Submit Report**.

SAP Concur Expense

Manage Expenses Card Transactions Cash Advances

DoeJ043024 \$1,757.76

Not Submitted | Report Number: N6MGJ2

REQUEST
Approved
\$2,650.00

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
			Out of Pocket	Personal Car Mileage		04/22/2024	\$11.79	...
			Travel/PCard - Test	Meals Attendees (1)	CHIPOTLE 2643 Philadelphia, Pennsylvania	09/04/2022	\$286.35 Allocated	...

Delete Report Copy Report **Submit Report**

- **Step 2:** Review the User Electronic Agreement and click **Accept & Continue**.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for Drexel University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying Drexel University in full for those expenses.

Cancel **Accept & Continue**

- **Step 4:** Click **Submit Report** when finished reviewing the **Report Totals** page.
- The **Totals** page summarizes the amounts owed to the traveler and the amount owed to the University.

Report Totals ✕

⚠ Alerts: 6 ☑

Company Payments

\$11.79 Employee	\$1,745.97 Travel/PCard - Test
---------------------	-----------------------------------

Employee Payments

\$0.00
Company

Amount Total: \$1,757.76	Due Employee: \$11.79	Owed Company: \$0.00
	Amount Due (Travel/PCard - Test): \$1,745.97	

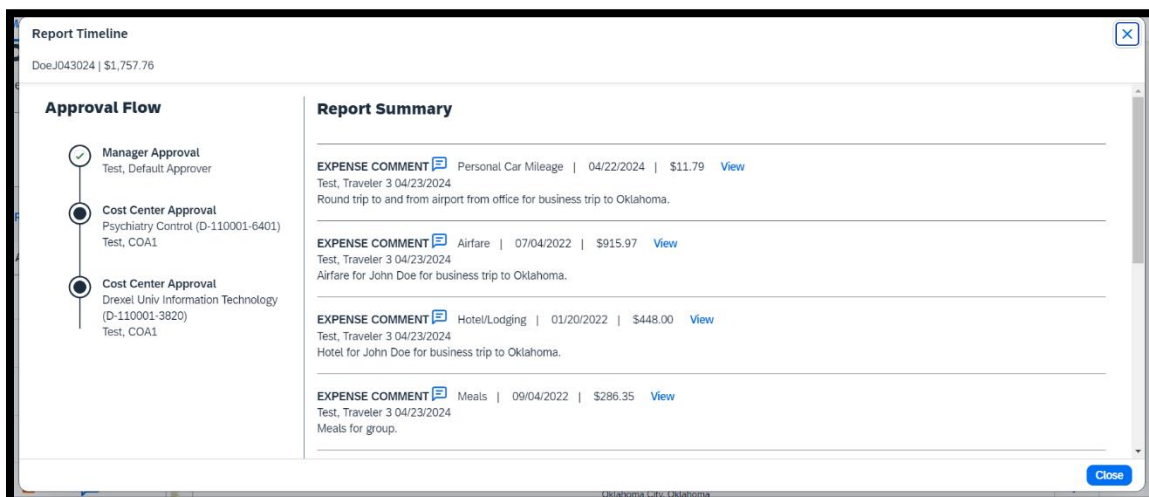
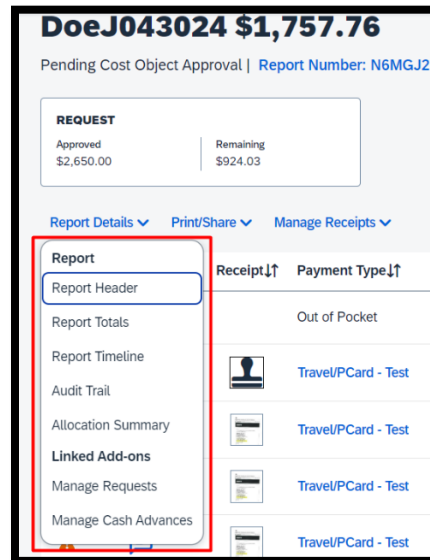
Requested Amount: \$1,757.76	Total Paid By Company: \$1,757.76	Total Owed By Employee: \$0.00
---------------------------------	--------------------------------------	-----------------------------------

[Cancel](#) [Submit Report](#)

Navigating to the Report Timeline and Audit Trail:

Note: The **Request Timeline** page displays the approval workflow for the expense report, a summary of the approval activity for the report, and any comments added to the report.

- **Step 1:** On the request page, click the Report Details menu and select **Report Timeline** or **Audit Trail** from the drop-down menu.
- The Audit Trail logs every addition, change, deletion, comment, etc., for the report.




Audit Trail ✕

DoeJ043024 | \$1,757.76

Report Level

Date/Time↓↑	Updated By↓↑	Action↓↑	Description↓↑
04/23/2024 11:50 AM	Test, Default Approver	Approval Status Change	Status changed from Manager Approval to Approved
04/23/2024 11:50 AM	Test, Default Approver	Confirmation Agreement Acceptance	*DU-Approver Electronic Agreement
04/23/2024 11:31 AM	Test, Traveler 3	Approval Status Change	Status changed from Submitted to Manager Approval
04/23/2024 11:31 AM	Test, Traveler 3	Approval Status Change	Status changed from Not Submitted to Submitted
04/23/2024 11:31 AM	Test, Traveler 3	Confirmation Agreement Acceptance	*DU User Electronic Agreement

Entry Level



Close

End of Travel Expense Guide

Drexel University

Concur Non-Travel Expense Guide

Submitting a Non-Travel Expense Report

Starting a Non-Travel Expense Report:

Note: All Non-Travel P-Card expenses must be reconciled on an expense report using the Non-Travel Policy. Any travel-related transactions (air, lodging, meals, etc.) must be reconciled separately through an approved Travel Request and the resulting Travel Expense Report.

- **Step 1:** Click **Expense** on the header toolbar and select **Card Transactions**.
 - To sort expenses by card account, use the **Card Activity** menu.
 - To sort transactions by statement cycle, use the **Current Statement** menu.

The screenshot shows the SAP Concur Expense interface. The top navigation bar includes 'SAP Concur', 'Expense' (with a dropdown arrow), 'Manage Expenses', 'Card Transactions' (highlighted with a red box), and 'Process Reports'. Below this is the 'Company Card Charges' section. On the right, the 'Add Charges To' dropdown is set to 'New Expense Report' (highlighted with a red box). On the left, the 'Current Statement' dropdown is set to 'Jan 21, 2022 - Feb 21, 2022' (highlighted with a red box). A table of card charges is visible, with columns for 'Date', 'Expense Type', and 'Amount'. The 'Expense Type' column shows 'Hotel/Lodging' and 'Airfare'.

- **Step 2:** Select the checkbox(es) for the non-travel expenses you will reconcile.
- **Step 3:** On the **Add Charges To** menu, select **New Expense Report**.
- **Step 4:** Click the **Add Selected** button to move your expenses to initiate a new expense report.

The screenshot shows the SAP Concur Expense interface. The top navigation bar includes 'SAP Concur', 'Expense' (with a dropdown arrow), 'Manage Expenses', 'Card Transactions' (highlighted with a red box), and 'Process Reports'. Below this is the 'Company Card Charges' section. On the right, the 'Add Charges To' dropdown is set to 'New Expense Report' (highlighted with a red box). Below the dropdown is the 'Add Selected' button (highlighted with a red box) and the 'Delete Selected' button. A table of card charges is visible, with columns for 'Date', 'Description', 'Expense Type', and 'Amount'. The 'Expense Type' column shows 'Undefined'. The 'Amount' column shows '\$39.58' and '\$63.55'. The total amount is '\$103.13'.

Completing the Non-Travel Report Header Page:

- **Step 1:** Select the **Non-Travel Policy** from the policy drop-down menu.
- **Step 2:** Under **Report Name**, enter a corresponding name using the following format: Cardholder **LAST NAME**, Cardholder **FIRST INITIAL**, **MONTH**, and **YEAR**. (e.g., John Doe's Report for March 2022: **DOEJMAR2022**).

Create New Report

Create From an Approved Request

Policy *
 *Test - Non-Travel
 *Test - Travel
 *Test - Non-Travel

Report Total

Statement Period *
 None Selected

- **Step 3:** Verify the correct P-Card Cycle is selected using the **Statement Period** drop-down menu.
- **Step 4:** Click **Create Report**. A new page will open with the selected transactions.

Policy *
 *Test - Non-Travel

Report Total

Report Name * ?
 DOEJJAN2022

Statement Period *
 None Selected
 19. JANUARY 2024 - 01/23/2024-02/20/2024
 20. FEBRUARY 2024 - 02/21/2024 - 03/20/2024
 21. MARCH 2024 - 03/21/2024 - 04/22/2024
 DECEMBER 2021 - 12/21/2021-01/20/2022
 JANUARY 2022 - 01/21/2022-02/21/2022

Chart 1
 (O) Drexel University Online

Activity

3 Program 4
 resident and Administra... (160) Institutional Support

Cancel Create Report

Reconciling Non-Travel Expenses:

- **Step 1:** Click on a transaction to open the expense detail page and begin reconciling.

Home / Expense / Manage Expenses / DOEJJAN2022

Alerts: 7

DOEJJAN2022 \$103.13 Delete Report Copy Report Submit Report

Not Submitted | Report Number: HNMQX9

Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

<input type="checkbox"/>	Alerts↑	Receipt↑	Payment Type↑	Expense Type↑	Vendor Details↑	Date↓	Requested↑	
<input type="checkbox"/>	✖	↑	Travel/PCard - Test	Undefined	TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania	01/27/2022	\$39.58	...
<input type="checkbox"/>	✖	↑	Travel/PCard - Test	Undefined	TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania	01/22/2022	\$63.55	...
							\$103.13	

- **Step 2:** Complete the following required fields under the details tab:

- P-Card transactions will automatically populate with the posted and transaction date, vendor name, city of purchase, payment type, amount, and currency.
- **Expense Type** – Expense types correlate to Drexel account codes.
- **City of Purchase** – Enter the city where your purchase was made, if applicable.
- **Transaction Notes** – Although the transaction notes field does not have an asterisk, it is required for all expenses. A proper transaction note will provide a clear business purpose for the expense, including **who, what, when, where, and why**. If this field is not completed, it will result in an alert at the top of the page.
 - **Click Add Receipt.**

← → **3325 - Meals (Local) \$63.55** Cancel Delete Expense Save Expense

01/22/2022 | TST* LANDMARK AMERICANA - | Corporate Card

Details Itemizations Hide Receipt

Attendees (1) Allocate * Required field

Expense Type *
3325 - Meals (Local) × ▾

Posted Date: 01/24/2022 Transaction Date: 01/22/2022

Enter Vendor Name: TST* LANDMARK AMERICANA - City of Purchase: Philadelphia, Pennsylvania × ▾

Payment Type: Travel/PCard - Test Amount: 63.55

Currency: US, Dollar (USD) PA Compliance Notes:

Transaction Notes: 117/500
Networking lunch with Dr. James Dough from ABC University to discuss research opportunities and team collaborations.

Save Expense Save and Add Another Cancel

Receipt

↑
Add Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

- **Step 3:** Once you click **Add Receipt**, click **Upload New Receipt** and select the file to upload.
 - Receipts uploaded to Concur through the dashboard or mobile app will be accessible under the Available Receipts tab.
 - If receipts are already uploaded to the report, you can click on the **Receipts in the Report** tab to access them.

3325 - Meals (Local) \$63.55

01/22/2022 | TST* LANDMARK AMERICANA - | Corporate Card

Details | Itemizations | Hide Receipt

Attendees (1) | Allocate

Expense Type * 3325 - Meals (Local)

Posted Date 01/24/2022 Transaction Date 01/22/2022

Enter Vendor Name TST* LANDMARK AMERICANA - City of Purchase Philadelphia, Pennsylvania

Payment Type TravelPCard - Test Amount 63.55

Currency US, Dollar (USD) PA Compliance Notes

Transaction Notes 117/500
Networking lunch with Dr. James Dough from ABC University to discuss research opportunities and team collaborations.

Attach Receipt

Available Receipts | Receipts in Report

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration.
[Missing Receipt Declaration](#)

Upload New Receipt

Receipt3.jpg Uploaded: 01/19/2024 10:44 AM

Receipt2.jpg Uploaded: 01/11/2024 11:29 AM

Acme Point of Sale
Built for specialty retail.

Total Businessware Inc.
Suite 200 -416
14033 Commerce Ave NE

RECEIPT

Logo

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Food and Beverage	63.55	63.55

Save Expense | Save and Add Another | Cancel

- If you are missing a receipt and cannot obtain a duplicate from the supplier, please use the **Missing Receipt Declaration** by clicking the hyperlink.
- The **Missing Receipt Declaration** replaces the missing receipt form.
- **Step 4:** Click **Save Expense**.

Attach Receipt

Available Receipts | Receipts in Report

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. Don't have a receipt? You'll need to create a missing receipt declaration.
[Missing Receipt Declaration](#)

Upload New Receipt

Sort By

Receipt3.jpg
Uploaded: 01/19/2024 10:44 AM

Receipt2.jpg
Uploaded: 01/11/2024 11:29 AM

Acme Point of Sale
Built for specialty retail.

Total Businessware Inc.
Suite 200 -416
14033 Commerce Ave NE

RECEIPT

Logo

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Food and Beverage	63.55	63.55

Using the Missing Receipt Declaration:

- **Step 1:** Click the hyperlink labeled **Missing Receipt Declaration** on the **Attach Receipt** page.



- **Step 2:** Select the expense(s) using the radio button and click **Accept and Create**. The missing receipt affidavit(s) will be created for the selected expense(s).

Create Receipt Declaration ✕

Adequate documentation must be submitted to substantiate reimbursable Drexel University expenses in accordance with IRS rules & regulations. Original receipts must be submitted when available and are considered acceptable support for Drexel University expenses. When the original receipt has been lost or is otherwise not available from the vendor, the following documentary evidence must be submitted before expenses will be considered for reimbursement.

To create a Missing Receipt Declaration, select the expenses below that require a receipt.

<input type="checkbox"/>	Expense Type↓↑	Vendor↓↑	Date↓↑	Amount↓↑
<input type="checkbox"/>	3325 - Meals (Local)	TST* LANDMARK AMERICANA -	01/27/2022	\$39.58
<input checked="" type="checkbox"/>	3325 - Meals (Local)	TST* LANDMARK AMERICANA -	01/22/2022	\$63.55

i ACCEPTANCE: I acknowledge that this expense report contains legitimate College expenses incurred by me on behalf of Drexel University benefit, and are allowable expenses as defined by Drexel University policies, procedures, and guidelines. I further certify that one or more of the related receipts applicable to this expense report are no longer available.

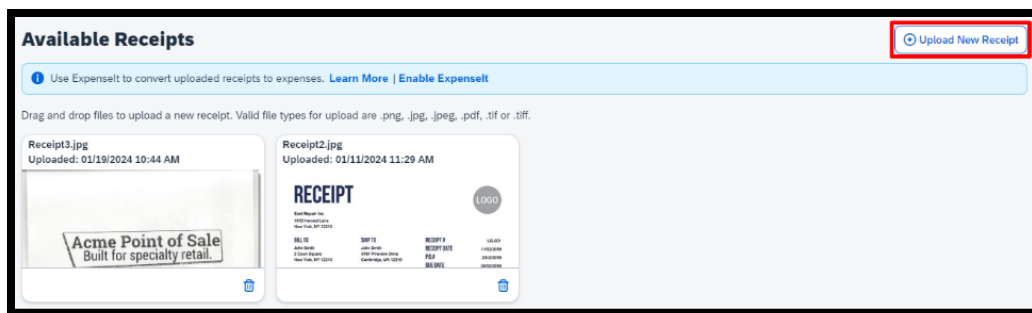
Cancel
Accept & Create

Using Available Receipts:

Note: Users can upload images to the **Available Receipts** library, which stores the receipt until the user can attach it to an expense report.

Upload images from the Expense home page:

- **Step 1:** From the Concur homepage, click **Expense** on the header toolbar.
- **Step 2:** Under Available Receipts, click Upload New Receipt at the bottom of the page. The Receipt Upload window appears.
- **Step 3:** Click Browse (or Choose File, depending on the browser).
- **Step 4:** Locate the desired file. You may upload more than one file at a time. To select more than one file, hold the “ctrl” OR “shift” keys on your keyboard while selecting files.
- **Step 5:** Click **Upload and Close**. The receipt will be available and attached at any time.



Adding Transaction Notes:

Note: Transaction Notes are always required when reconciling/expensing transactions.

- **Step 1:** Click on the transaction notes field and enter your transaction notes. All Transaction Notes must include the following required information:
 - **Who:** Specific names of the individuals or groups who incurred the expense or benefited from the purchase; the supplier's name if not indicated on the receipt (e.g., PayPal receipt).
 - **What/Why:** Explanation of the expense (what was purchased; why was the purchase made on behalf of the University).
 - **When:** The time/date of the transaction (if not indicated on the receipt).
 - **Where:** The location of the supplier/event (if not indicated on the receipt).
- **Step 2:** Continue reconciliation OR click **Save Expense** when finished.

The screenshot displays the 'Corporate Card' interface for an expense entry. The 'Details' tab is active, showing fields for Expense Type (3325 - Meals (Local)), Posted Date (01/24/2022), Transaction Date (01/22/2022), Vendor Name (TST* LANDMARK AMERICANA -), City of Purchase (Philadelphia, Pennsylvania), Payment Type (Travel/PCard - Test), Amount (63.55), and Currency (US, Dollar (USD)). The 'Transaction Notes' field is highlighted with a red border and contains the following instructions:

- Who: Specific names of the individuals or groups who incurred the expense or benefited from the purchase; name of the supplier if not indicated on the receipt (e.g. PayPal receipt).
- What/Why: Explanation of the expense (what was purchased; why was the purchase made on behalf of the University).
- When: The time/date of the transaction (if not clearly indicated on the receipt).
- Where: The location of the supplier/event (if not clearly indicated on the receipt).

At the bottom left, a red arrow points to the 'Save Expense' button. To the right, the 'Receipt' section features an 'Add Receipt' button and instructions for uploading a receipt, including valid file types (.png, .jpg, .jpeg, .pdf, .tif or .tiff) and a 5MB limit per file.

Allocating from the Expense Details Page:

- **Step 1:** After opening an expense line item, click **Allocate**.
 - The Allocation menu displays the expense amount, the percent allocated to the default cost center (100%), and the percent remaining (0%). To view this information in dollar amounts instead of percentages, click the **Amount** tab to the right of the **Percent** tab.

01/22/2022 | TST* LANDMARK AMERICANA - | Corporate Card

Details | Itemizations

Attendees (1) | **Allocate** ←

* Required field

Expense Type *

3325 - Meals (Local) X v

- **Step 2:** Click **Add**, and the **Add Allocation** page will appear.

Allocate

Expenses: 1 | \$63.55

Percent | **Amount**

Amount \$63.55	Allocated 100% \$63.55	Remaining 0% \$0.00
-------------------	---------------------------	------------------------

Default Allocation

Code O-200000-1000-160	Amount USD \$63.55
---------------------------	-----------------------

Add | Edit | Remove | Save as Favorite

- **Step 3:** Using the drop-down menus, select a **Chart, Fund, Org, Program,** and **Activity** code, if applicable.
 - To search by **text, code,** or **either,** use the **filter** drop-down menu.
 - The drop-down will provide the five most recently used allocations first; you can search by scrolling through the list provided or by typing a portion of the number or description needed.
- **Step 4:** Click **Save.**

The screenshot shows the 'Add Allocation' form. At the top, there are two buttons: 'New Allocation' (with a plus icon) and 'Favorite Allocations' (with a star icon). Below these is a 'Chart *' dropdown menu, which is currently open. The dropdown menu has a search bar with the text 'Search by Code' and a magnifying glass icon. Below the search bar, there are three options: 'Text' with the description '2000-121) Research', 'Code' with '3231-160) Institutional Support', and 'Either' with '5455-100) Instruction'. The 'Code' option is highlighted with a blue background. Below the dropdown menu, there are two more options: '(D) Drexel University' and '(O) Drexel University Online'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button.

Split Allocations:

Note: The system allows you to split an expense between multiple cost centers, either by percentage or dollar amount.

- **Step 1:** In the allocations page, adjust the percent/dollar amount charged to each cost center by changing the value in the **Percent %/Amount** box.
 - To view dollar amounts, click the tab labeled **Amount**.
- **Step 2:** Click **Save** when finished.

The screenshot shows the 'Allocate' window with the following details:

- Expenses: 1 | \$63.55 | View Allocation Group
- Amount: \$63.55 | Allocated: \$63.55 (100%) | Remaining: \$0.00 (0%)
- Default Allocation Code: O-200000-1000-160
- Buttons: Add, Edit, Remove, Save as Favorite

Chart	Fund	Org	Program	Activity	Code	Percent %
Drexel University Online	Unrestricted Operations	Strategic Partnerships	Research		O-112001-2000-121	50
Drexel University Online	Unrestricted Operations	Marketing	Institutional Support		O-112001-4265-160	50

Buttons: Cancel, Save

Allocating from the Report Page:

Note: In the report view, multiple expenses may be allocated to the same cost centers by using the checkboxes on the left and then clicking **Allocate**. Repeat steps 2 – 4 above from the Allocating from the Expense Details Page section.

DOEJAN2022 \$103.13

Not Submitted | Report Number: HNMQX9

Delete Report Copy Report Submit Report

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	...
<input checked="" type="checkbox"/>				Travel/PCard - Test	3325 - Meals (Local) Attendees (1)	TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania	01/27/2022	\$39.58	...
<input checked="" type="checkbox"/>				Travel/PCard - Test	3325 - Meals (Local) Attendees (1)	TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania	01/22/2022	\$63.55 <i>Allocated</i>	...
								\$103.13	

Adding Attendees to a Business Meal:

Note: Meal and Entertainment expense types require attendees. If the receipt is missing or not itemized, itemization is needed.

- **Step 1:** Click **Attendees**.

The screenshot shows the 'New Expense' form with the 'Attendees (1)' link highlighted by a red arrow. The form includes fields for Expense Type (3325 - Meals (Local)), Posted Date, Transaction Date (01/25/2022), Enter Vendor Name (Total Business Meals), City of Purchase (Philadelphia, Pennsylvania), Payment Type (Out of Pocket), Amount (58.29), and Currency (US, Dollar (USD)). A receipt image is visible on the right side of the form.

- **Step 2:** Click **Add**.

The screenshot shows the 'Add Attendees' form with the 'Attendees' tab selected. The 'Faculty/Staff' option in the 'Attendee Type' dropdown menu is highlighted with a red box. The form includes search criteria for Last Name, First Name, Institution/Company, and Email Address.

- **Step 3:** Click the **Attendees** tab and use the search bar to search for the attendee by name. Use the **Attendee Type** drop-down menu to search for Faculty/Staff, Group Event, or Guest.

Attendees

3325 - Meals (Local) | \$58.29

Attendees: 0

Add **Remove** **Create Group** **Copy from Request**

A red arrow points to the **Add** button.

- **Step 4:** Use the search bar to search for an attendee by name. Click **Add** to select the attendee. Repeat this step if needed to add all attendees. Click **Close** to return to the Attendees tab.

Add Attendees

Search Criteria:

Attendee Type * Faculty/Staff Last Name test First Name Traveler1

Attendee Title Institution/Company Email Address

Country/Region Search by Country/Region

Include inactive employees

Added Attendees

Added attendees will be listed here

Search Results (1)

<input type="checkbox"/>	Attendee Name↑↕	Email Address↓↑	Country/Region↓↑	Attendee Title↓↑	Institution/Company↓↑	Attendee Type↓↑	
<input type="checkbox"/>	Test, Traveler1	traveler1@drexel.edu	UNITED STATES			Faculty/Staff	Add

Buttons: **Reset** **Search** **Add** **Remove**

Red arrows point to the **Search** button and the **Add** button in the search results table.

- **Step 5:** Click **Save** to add attendees to the expense.

Attendees

3325 - Meals (Local) | \$58.29

Attendees: 2

Add **Remove** **Create Group** **Copy from Request**

<input type="checkbox"/>	Attendee Name↑↕	Attendee Title↓↑	Institution/Company↓↑	Attendee Type↓↑	Attendee Count↓↑	Amount↓↑	
<input type="checkbox"/>	Test, Traveler1			Faculty/Staff	1	\$29.15	...
<input type="checkbox"/>	Test, Traveler2			Faculty/Staff	1	\$29.14	...

Cancel **Save**

Red arrows point to the **Save** button and the **Add** button in the search results table.

Searching/Creating Guests:

Note: Guests can be searched for/created under the **Add Attendees** page.

- **Step 1:** Click the **Attendees** tab and use the **Attendee Type** drop-down to select **Guest**.

The screenshot shows the 'Add Attendees' interface. At the top, there are three tabs: 'Attendees' (selected), 'Recent Attendees', and 'Attendee Groups'. Below the tabs is the 'Search Criteria' section. It includes three input fields: 'Attendee Type *' (with a dropdown menu open showing 'Guest' selected), 'Last Name', and 'First Name'. A red arrow points to the 'Guest' option in the dropdown menu. At the bottom right, there are 'Reset' and 'Search' buttons, and a link that says 'Can't find an attendee? Create New Attendee'.

- **Step 2:** Enter the attendee's last name, first name, and affiliation, and click **Search**.

The screenshot shows the 'Add Attendees' interface with the search criteria filled out. A red box highlights the search criteria section. The 'Attendee Type *' dropdown is set to 'Guest'. The 'Last Name' field contains 'Dough' and the 'First Name' field contains 'James'. The 'Affiliation' field contains 'ABC University'. At the bottom right, there are 'Reset' and 'Search' buttons, and a link that says 'Can't find an attendee? Create New Attendee'.

To Create a Guest:

- **Step 1:** Under the **Attendees** tab, select **Guest** and click **Create New Attendee** in the lower right-hand corner of the menu. The **Create New Attendee** menu will appear.

The screenshot shows the 'Add Attendees' interface with the search criteria filled out. A red arrow points to the 'Create New Attendee' link in the lower right-hand corner of the menu. The search criteria are: 'Attendee Type *' is 'Guest', 'Last Name' is 'Dough', 'First Name' is 'James', and 'Affiliation' is 'ABC University'. At the bottom right, there are 'Reset' and 'Search' buttons, and a link that says 'Can't find an attendee? Create New Attendee'.

- **Step 2:** Enter the Attendee Type, Last Name, First Name, and Affiliation. Click **Create Attendee** when finished.

Create New Attendee ✕

[← Go back](#)

* Required field

Attendee Type * <input type="text" value="Guest"/>	Last Name * <input type="text" value="Dough"/>
First Name * <input type="text" value="James"/>	Affiliation * <input type="text" value="ABC University"/>

- **Step 3:** Click **Save** to add guest attendees to the expense.

Attendees ✕

3325 - Meals (Local) | \$63.55

Attendees: 2

	Attendee Name↑⇅	Attendee Title↓↑	Institution/Company↓↑	Attendee Type↓↑	Attendee Count↓↑	Amount↓↑	
<input type="checkbox"/>	Dough, James		ABC University	Guest	1	\$31.78	⋮
<input type="checkbox"/>	Test, Traveler1			Faculty/Staff	1	\$31.77	⋮

Submitting a Non-Travel Expense Report:

Note: On the Expense Report page, any notes, attendees, or allocated expenses entered will be indicated. *You may click on the corresponding hyperlinks to review your entries.

- **Step 1:** Click **Submit Report**.

The screenshot shows the SAP Concur interface for managing an expense report. At the top, there are tabs for 'Manage Expenses', 'Card Transactions', and 'Process Reports'. The report title is 'DOEJJAN2022 \$103.13'. Below the title, there are buttons for 'Delete Report', 'Copy Report', and 'Submit Report'. A red arrow points to the 'Submit Report' button. Below these buttons, there are links for 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'View Available Receipts' link is also present. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. Below the toolbar is a table with columns: Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains two rows of expense entries. The first row has a comment icon, a receipt icon, 'Travel/PCard - Test', '3325 - Meals (Local) Attendees (1)', 'TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania', '01/27/2022', and '\$39.58'. The second row has a comment icon, a receipt icon, 'Travel/PCard - Test', '3325 - Meals (Local) Attendees (2)', 'TST* LANDMARK AMERICANA - Philadelphia, Pennsylvania', '01/22/2022', and '\$63.55 Allocated'. The total amount is '\$103.13'.

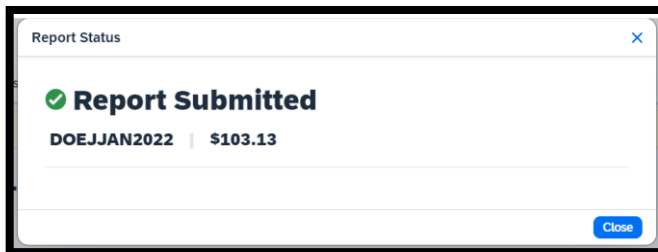
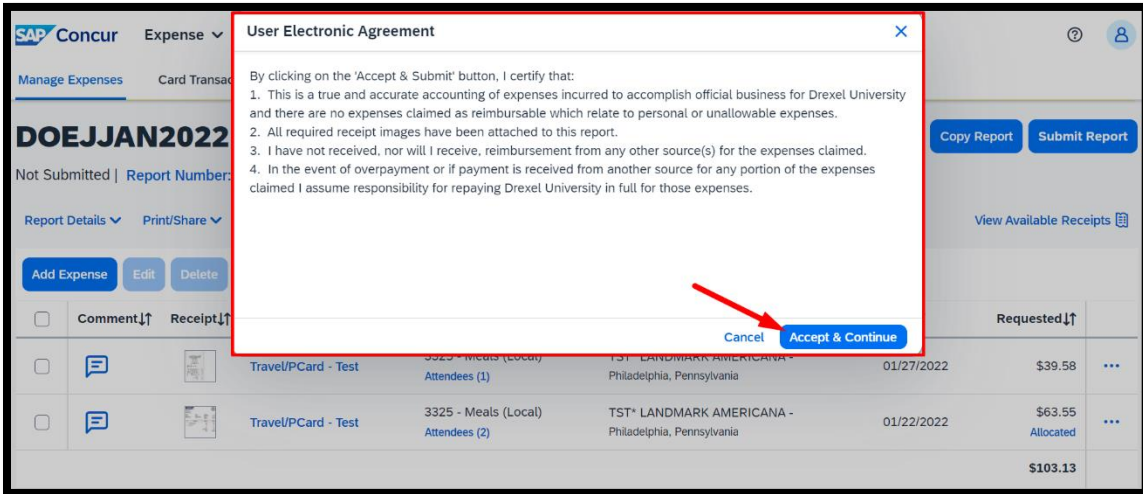
- **Step 2:** A window appears with the **User Electronic Agreement**. By clicking **Accept & Submit**, the user accepts the terms and conditions of the agreement.
- **Step 3:** A report summary will be displayed. If all is correct, click **Submit Report**.

The screenshot shows the SAP Concur interface with a 'Report Totals' modal window open. The modal displays the following information:

- Alerts:** 1
- Company Payments:** \$0.00 Employee, \$103.13 Travel/PCard - Test
- Employee Payments:** \$0.00 Company
- Amount Total:** \$103.13
- Due Employee:** \$0.00
- Owed Company:** \$0.00
- Amount Due (Travel/PCard - Test):** \$103.13
- Requested Amount:** \$103.13
- Total Paid By Company:** \$103.13
- Total Owed By Employee:** \$0.00

At the bottom of the modal, there are 'Cancel' and 'Submit Report' buttons. A red arrow points to the 'Submit Report' button. The background shows the same expense report page as in the previous screenshot, with the 'Submit Report' button highlighted.

- You will receive a notification that the report has been submitted. Your report and its status will now be available on your Concur dashboard.

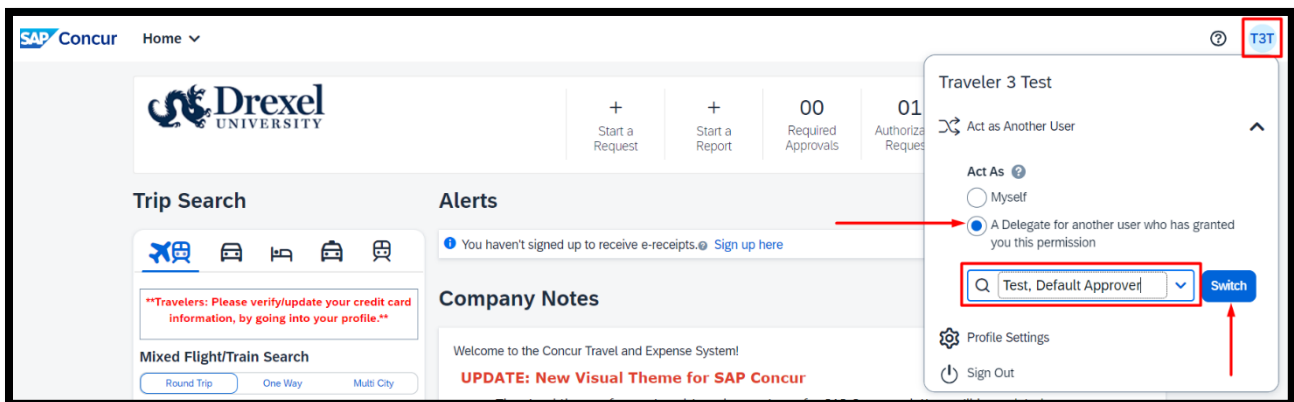


End of Non-Travel Expense Guide

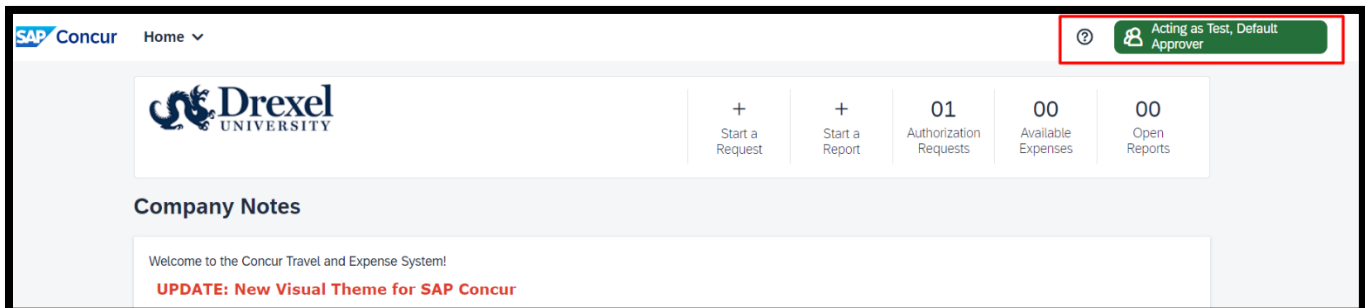
ACTING AS A DELEGATE

Note: To be assigned as a Delegate, you must be a Drexel Employee with an active Concur account. By acting as a Delegate, you can prepare and approve Travel Requests and Expense Reports on behalf of another user and receive email notifications. The user must add you as a delegate and grant appropriate permissions under their user profile before you can act on their behalf.

- **Step 1:** Click the **Profile** icon on the top right-hand corner. Click **A Delegate for....** Search for the user's name or ID in the search box, select the desired user, and click **Switch**.
 - If you do not have this option or if you do not see the user's name, they have not added you to their Concur profile as a delegate.



- **Step 2:** Now, the delegate will act on the user's behalf and see their name.
 - If the delegate is granted preparation permissions, they can create a Travel Request and Expense Report on behalf of the traveler. However, the traveler must submit the Travel Request/Expense Report for certification.



- **Step 3:** Delegate completes Travel Request/Expense Report. For information about completing a Travel Request/Expense Report, follow the instructions in this guide's Travel Request and Expense Report sections. Once finished, click the button labeled **Notify Employee**. Then click **Close**.

SAP Concur Requests

Manage Requests

Alerts: 1

CruzJ060922 \$550.00

Not Submitted | Request ID: 33CX

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add Edit Delete Allocate

Copy Request Notify Employee

- The traveler will receive an email notification, as seen above.

Request Ready for Submission

AutoNotification@concursolutions.com
To Cruz, Jose

EXTERNAL

SAP Concur

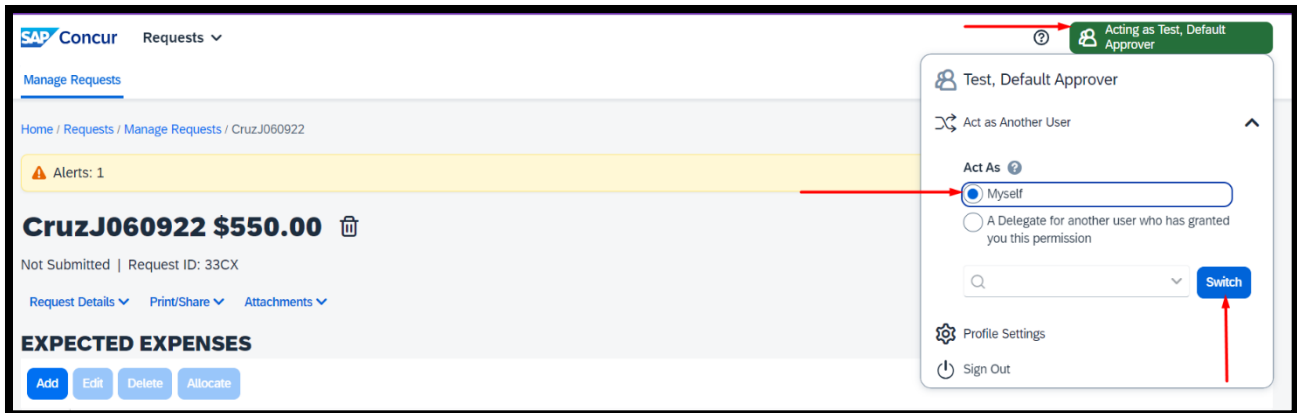
Request Ready for Submission

Request Name	Copy of CRUZI06012022
Request Date	08/24/2022

Link To Request Processing

<http://www.concursolutions.com>

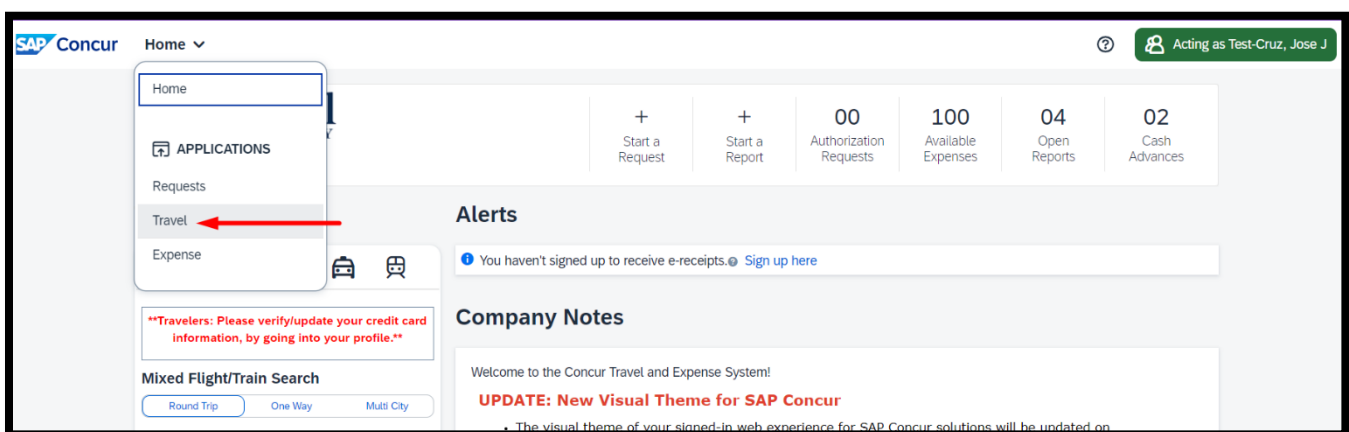
- **Step 4:** To end acting as the Delegate, click on **Profile** and click **Myself**. If you need to act as a delegate on behalf of another user, you can search for another user to act on their behalf and click **Start Session**.
- The Traveler will receive a notice that their Travel Request/ Expense Report is ready for review. Once reviewed, they can click **Submit** to submit their request/report. Once reviewed, the traveler can click **Accept & Submit** to submit their request/report.



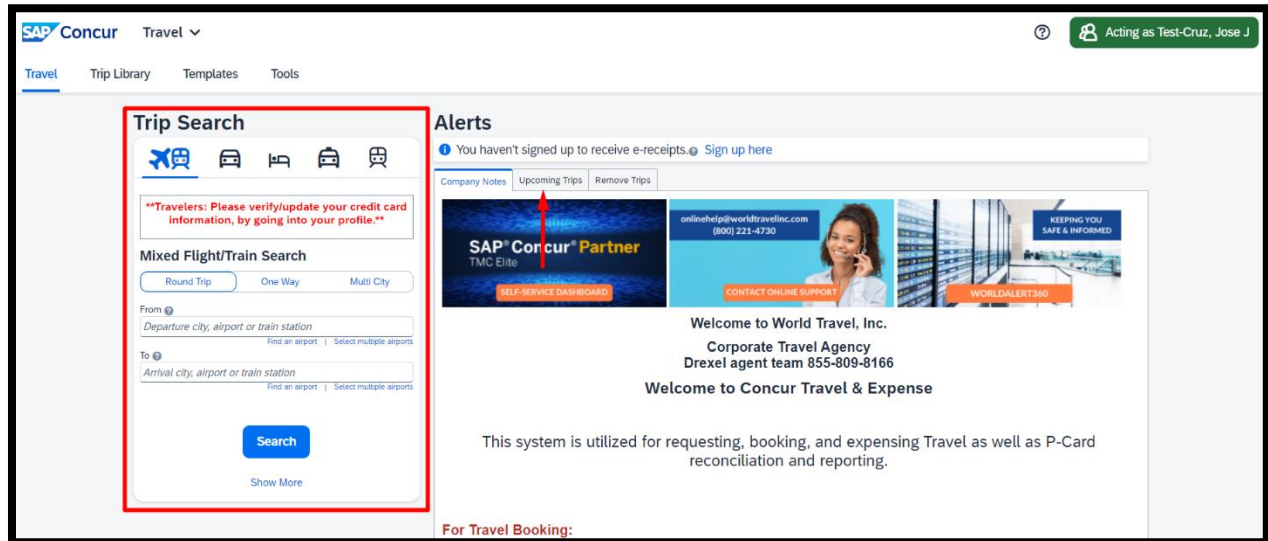
BOOKING TRAVEL ON ANOTHER USER'S BEHALF

Note: By acting as a Travel Arranger, you can book travel in Concur on behalf of another user. To act as a Travel Arranger, you must be a Drexel Employee with an active Concur account. The user must add you as a travel arranger and a delegate. They can then grant appropriate permissions under their user profile before you can act and book travel on their behalf (prepare Requests/Expense Reports). All required fields of the traveler's user profile must be completed, and the profile must be saved to book travel in Concur. A credit card must be saved in the traveler's profile to book hotel reservations. To book airfare for the traveler, please make sure the name in Concur is identical to the name on their photo identification used for travel.

- **Step 1:** Access the traveler's profile as their travel arranger (follow the Same steps as in the delegate section above).



- **Step 2:** Click on the Travel Tab at the top of the page and click on the tab labeled **Upcoming Trips** to view any travel reservations related to the user.
- **Step 4:** To book travel on the user's behalf, proceed to book through Trip Search. **Please refer to the Booking Travel section of this guide.**
- Once finalized, you and the traveler will receive an email with the booked travel reservation.



APPROVER ROLE

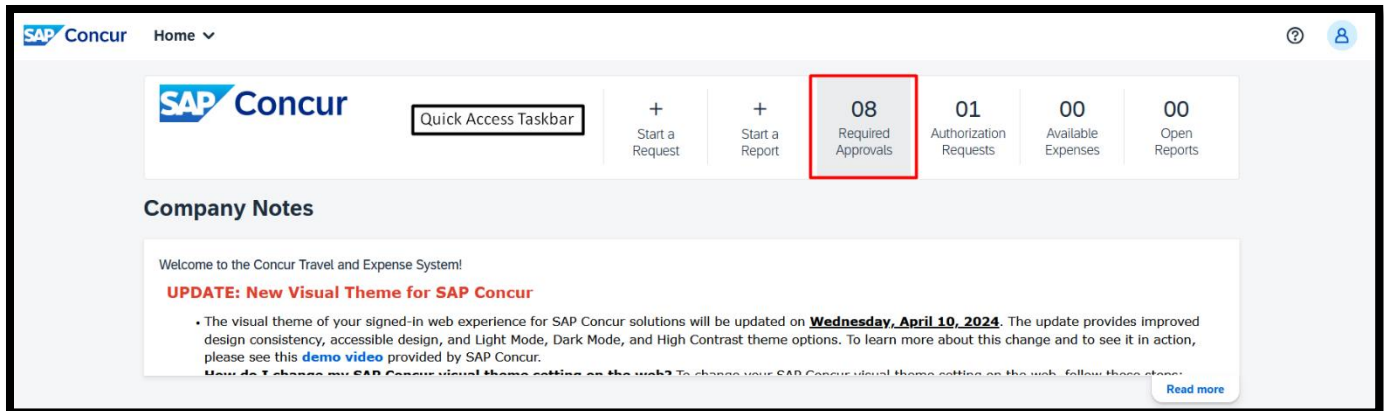
Note: Having the approver role allows you to approve Travel Requests and Expense Reports in Concur. You will have a single login for both your travel and approvals. By having the approval role, you will see an additional Approvals Tab at the top of the Concur homepage. Concur will alert you via email notification when there are requests/reports pending your approval. You can also check your Quick Access Taskbar, shown below, to see if any pending travel requests or expense reports are awaiting your approval.

Approver Timeline: [Concur P-Card Reconciliation Due Dates](#)

Approving Travel Requests:

- **Approval Authority Responsibility:** Approval authority ensures all expenses are reasonable in terms of price, purpose, and necessity and is responsible for:
 - Ensuring appropriate use of funds.
 - Ensuring expenses requested are reasonable, essential, and supported by a business purpose or justification, as appropriate.
 - Validating, to the extent possible, that the employee will incur the expenses listed and that supporting documentation (Pre-Approvals, Prohibited Expense Exception form, [Essential Travel Request Approvals](#)), if applicable, is attached to the request.
 - Reviewing and approving the business purpose and ensuring the request follows any applicable University policy, guidelines, or sponsored project/grant requirements.

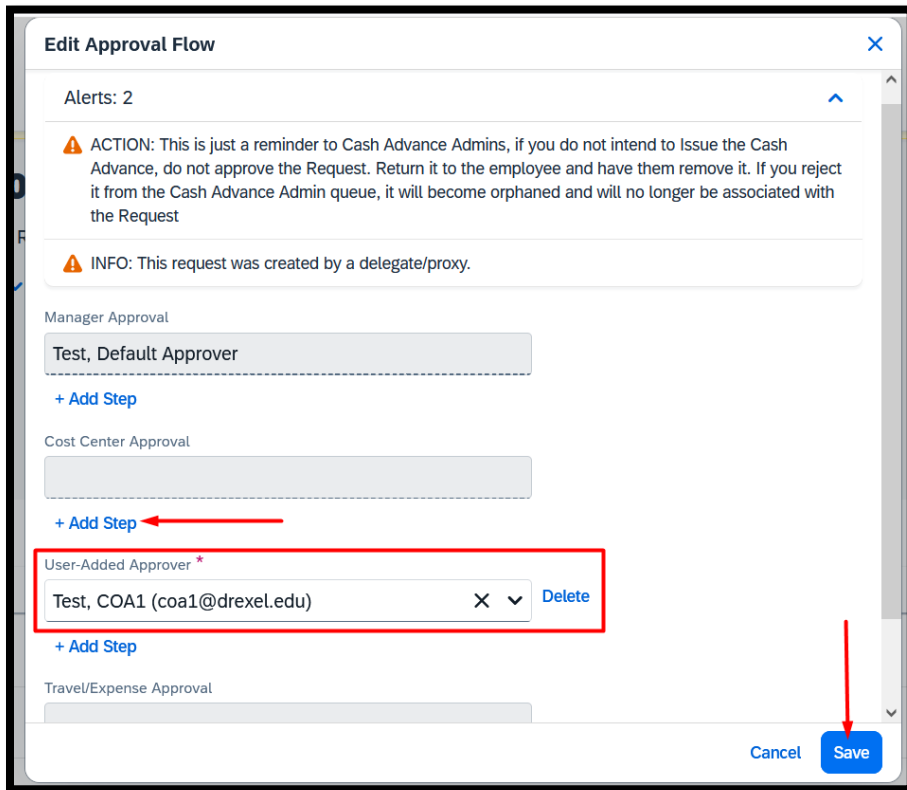
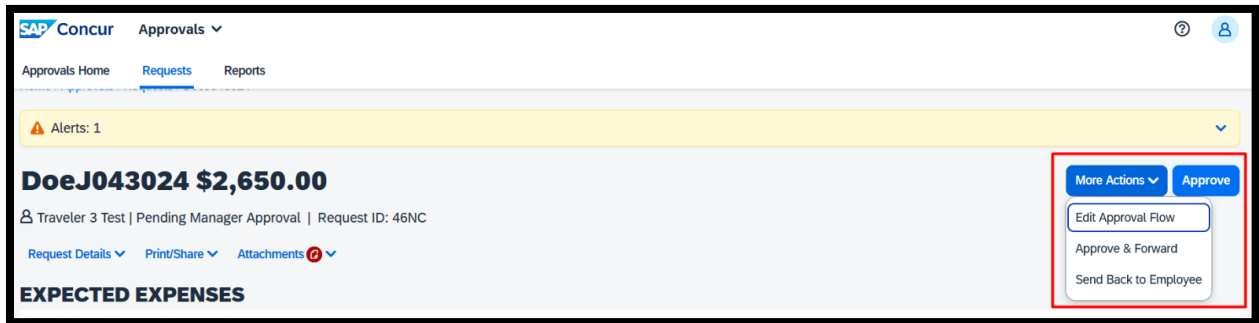
- Approving/denying payment of the travel claim promptly and denying expenses unrelated to official University business.
- **Step 1:** Click **Required Approvals** on the Quick Access Taskbar.



- **Step 2:** There are two tabs related to approvals. One for travel requests and one for expense reports. Click the **Requests** tab under Approvals.
- **Step 3:** Click the request name hyperlink to access the request.
- **Step 4:** You can now review the Travel Request by viewing the following:
 - Request Header (Trip Purpose corresponds with the destination, start and end dates of travel, personal travel (if applicable))
 - Request Timeline
 - Audit Trail
 - Allocation Summary
 - Ensuring all fields have the correct information and attachments, if applicable. Approvers can also attach documentation if needed.
 - If a cash advance was requested, ensure a justification was provided.
 - Review comments, transaction notes, and attachments, if any.

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	DoeJ063024 Who, what, when, where, and why/business purpose.	46NC	Test, Traveler 3	04/30/2024 05/05/2024	04/22/2024	\$2,650.00
Travel	INT_ACCT_TEST INT_ACCT_TEST	37P3	Test-Mar, Jessica	09/01/2022 09/02/2022	09/09/2022	\$906.00
Travel	CruzJ060922 Delegate Test	33CY	Test, Traveler1	06/09/2022 06/10/2022	07/12/2023	\$1,217.00
Travel	WilliamsK03032022 WilliamsK03032022	33AL	Test, Traveler2	03/03/2022 03/04/2022	01/19/2024	\$3,310.42

- **Step 5:** Under **More Actions**, you can:
- Edit the Approval Flow: Add approvers without approving the request or report.
- Approve & Forward: Used to approve and add additional approval steps to the workflow.

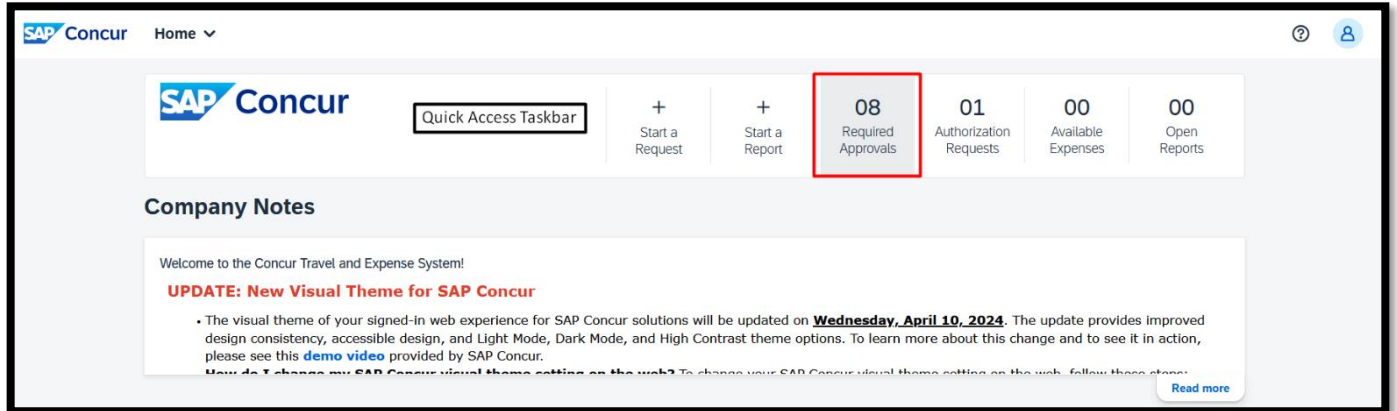


- **Send Back to Employee:** If you do not wish to approve the request, click **Send Back to Employee**, and the traveler will be notified. A comment is required in the **Reason for Sending Back the Request** field.

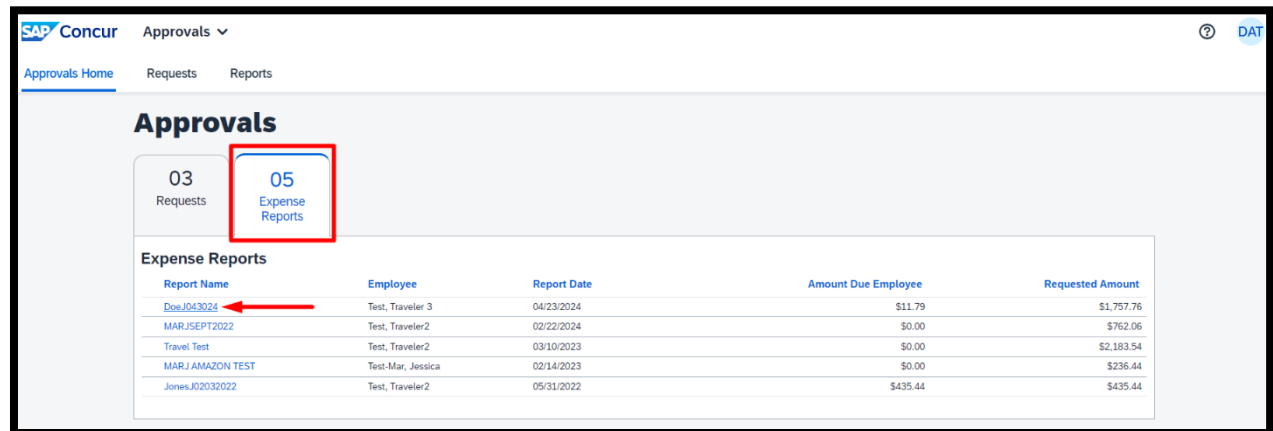
- **Step 6:** If the request meets all requirements, click **Approve**.
- **Step 7:** Click **Accept & Continue** after reading the **Travel Request Approver Agreement**.
 - The request will automatically enter the next step in the approval workflow. You can review the **Request Timeline** to view the next step of approval.

Approving Expense Reports:

- **Step 1: Click Required Approvals.**



- **Step 2: Click on the report's name to open the expense report summary.**

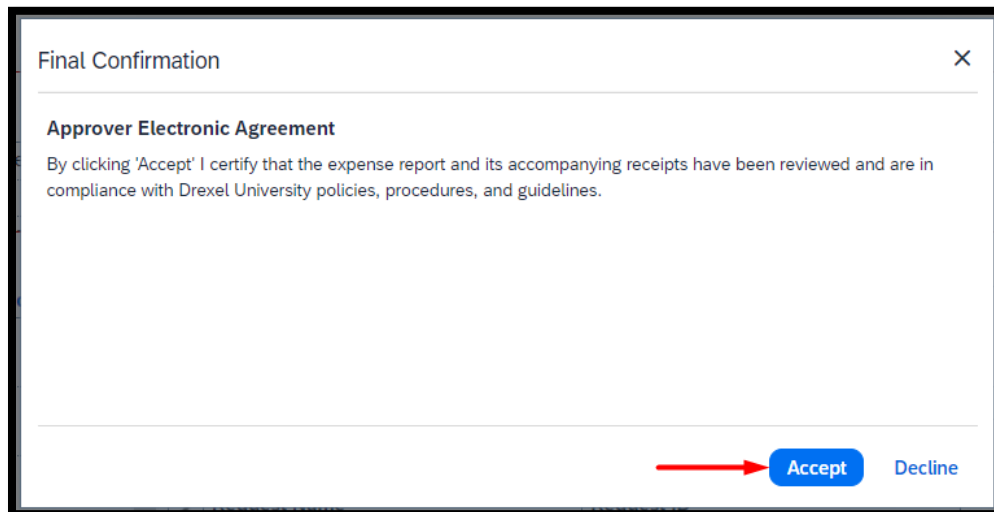


- **Step 3:** Review each expense and all fields.
 - Click on the **Details** drop-down menu and step through each link to gather information about the request.
- The **Report Header** will give you trip details such as the business purpose. You can also add comments to the Report Header for approvers/processors.
- The Summary section houses the Report Summary and shows the original request, which can be accessed by clicking the Request Name hyperlink.
- You can review receipts by clicking the **Receipts** drop-down menu to the right of the **Details** menu displayed in the image above. You can also **Print/Email** a summary of the report.
- The **Show Exceptions** link below the **Approve & Forward** button will open a menu summarizing any exceptions within the report.
- The **Expenses** section displayed each expense that exists in the report. You can use the icons on each line item to quickly view **exceptions, receipts, comments, attendees, itemizations, allocations, etc.**
- **Step 4:** After reviewing, you have three options:
 - Send Back to User
 - Approve
 - Or Approve & Forward.
 - Please refer to the **Approving a Travel Request** section above for definitions of each option.

The screenshot displays the SAP Concur interface for a travel report. The report ID is DoeJ043024. The 'Details' menu is open, showing options like Report Header, Totals, Audit Trail, Approval Flow, and Comments. The 'Expenses' table lists various items with their dates, descriptions, and amounts. A 'Report Summary' section provides a high-level overview of the report's totals. At the bottom, a summary row indicates a total amount of \$1,757.76 and a total requested amount of \$1,757.76. Action buttons for 'Send Back to User', 'Approve', and 'Approve & Forward' are located at the top right of the report details.

Date	Description	Amount	Requested
04/22/2022	Mileage	\$11.79	\$11.79
09/04/2022	Meals CHIPOTLE 2643, Philadelphia, Pen	\$286.35	\$286.35
07/04/2022	Airfare JETBLUE 2797754104602, Oklahc	\$915.97	\$915.97
07/04/2022	Airfare AGENT FEE 8900816876604, Okla	\$27.00	\$27.00
01/23/2022	Auto Rental THRIFTY #0077439, Oklahoma Cit	\$48.65	\$48.65
01/22/2022	Fuel WAWA 5219 00052191, Oviedo, Fl	\$20.00	\$20.00
01/20/2022	Hotel/Lodging	\$448.00	\$448.00
TOTAL AMOUNT		\$1,757.76	\$1,757.76

- **Step 5:** Read the **Final Confirmation** and Click **Accept** to approve the report.



Viewing Approved Requests/Reports:

- **Step 1:** Click the **Approvals** tab.
- **Step 2:** Click **Requests/Reports**.
- **Step 3:** For requests, click the drop-down menu labeled **Limit results** too. For reports, click the drop-down menu labeled **View**.
- **Step 3:** Select the option to review requests/reports from the prior month, quarter, year, or all reports approved.

Requests

Limit results to

- Requests Pending your Approval
- Requests you Approved this Month
- Requests you Approved last Month
- Requests you Approved this Quarter
- Requests you Approved last Quarter

Employee	Start Date	Limit Approval Date	Total
37P3 Test-Mar, Jessica	09/01/2022		\$906.00
33CY Test, Traveler1	06/09/2022		\$1,217.00
WilliamsK03032022 ID: 33AL Test, Traveler2	03/03/2022		\$3,310.42

Reports Pending your Approval (4)

View

- Reports Pending your Approval
- Reports you Approved this Month
- Reports you Approved last Month
- Reports you Approved this Quarter
- Reports you Approved last Quarter
- Reports you Approved this Year
- Reports you Approved last Year
- All Reports you Approved

Report Name	Report Date	Date Submitted	Total	Amount Due Empl...	Requested Amount
MARJSEPT2022	02/22/2024	02/22/2024	\$762.06	\$0.00	\$762.06
Travel Test	03/10/2023	01/19/2024	\$2,183.54	\$0.00	\$2,183.54
Test-Mar, Jessica W. MARJ AMAZON TEST	02/14/2023	02/15/2023	\$236.44	\$0.00	\$236.44
Test, Traveler2 JonesJ02032022	05/31/2022	01/19/2024	\$435.44	\$435.44	\$435.44