Concur Travel & Expense Guide

Accounts Payable & Procurement Services Concur Travel & Expense Software
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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 will be able to 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 upload/scan to 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
- Book Travel (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 their own expense reports, update their profile, book travel (if applicable), etc.
- Approver: An individual authorized to approve/deny travel requests and expense reports. 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 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. Delegates cannot submit reports, they can only prepare.

- **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.

**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 and expense reporting traveler using University funds. Travel Requests must be approved prior to making any travel arrangements and completing a Concur Travel Expense Report (CTER). Individuals traveling for University business that 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, both 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 will be delayed or denied as a result of an incomplete, inaccurate or unapproved CTER. Reimbursements will only be processed for completed travel occurrences. Drexel University will not reimburse any business travel expenses for trips that have not yet taken place.

- Travelers who are enrolled in payroll direct deposit will receive reimbursement through direct deposit. For Faculty and Professional Staff Members who are not enrolled in payroll direct deposit, a paper check will be mailed to the Traveler’s home address. Your home address must be updated at all times with the Human Resources department for the proper processing of your expense reports.

- Only Allowable Purchases may be charged to the P-Card. Prohibited Purchases to the P-Card are forbidden. It is the responsibility of the Cardholder and Approvers 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:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Info" /></td>
<td>Exception</td>
<td>Indicates an exception must be resolved before submission.</td>
</tr>
<tr>
<td><img src="icon" alt="Question" /></td>
<td>Question</td>
<td>Indicates a question that does not prevent submission.</td>
</tr>
<tr>
<td><img src="icon" alt="Info" /></td>
<td>Information</td>
<td>Indicates an exception that does not prevent submission.</td>
</tr>
<tr>
<td><img src="icon" alt="Alert" /></td>
<td>Alert</td>
<td>Indicates an exception that does not prevent submission.</td>
</tr>
<tr>
<td><img src="icon" alt="Calendar" /></td>
<td>Calendar</td>
<td>Indicates that the user can click the icon to access the calendar popup.</td>
</tr>
<tr>
<td><img src="icon" alt="View Image" /></td>
<td>View Image</td>
<td>Indicates that the user can click the icon to view an image.</td>
</tr>
</tbody>
</table>
Concur Travel:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🛫</td>
<td>Fly America Act Compliant</td>
<td>Indicates the flight is compliant with the Fly America Act.</td>
</tr>
<tr>
<td>📡</td>
<td>Gogo Wi-Fi</td>
<td>Indicates Gogo Wi-Fi is available.</td>
</tr>
<tr>
<td>🗺️</td>
<td>Mixed Flight/Train Search</td>
<td>Indicates that the user can click the icon to access the mixed flight/train search window.</td>
</tr>
<tr>
<td>🏨</td>
<td>Hotel Search</td>
<td>Indicates that the user can click the icon to access the hotel search window.</td>
</tr>
<tr>
<td>🚗</td>
<td>Car Search</td>
<td>Indicates that the user can click the icon to access the car search window.</td>
</tr>
<tr>
<td>🚄</td>
<td>Train Search</td>
<td>Indicates that the user can click the icon to access the train search window.</td>
</tr>
<tr>
<td>🕐</td>
<td>Flight Status</td>
<td>Indicates that the user can click the icon to view the status of your flights.</td>
</tr>
<tr>
<td>✔️</td>
<td>Finalize Trip</td>
<td>Indicates finalization of trip.</td>
</tr>
<tr>
<td>🗞️</td>
<td>Flight Itinerary</td>
<td>Indicates flight itinerary information.</td>
</tr>
<tr>
<td>🛅️</td>
<td>Hotel Itinerary</td>
<td>Indicates hotel itinerary information.</td>
</tr>
<tr>
<td>🛡️</td>
<td>Car Itinerary</td>
<td>Indicates car itinerary information.</td>
</tr>
<tr>
<td>🔍</td>
<td>Add Itinerary</td>
<td>Indicates a user can add itinerary to their trip.</td>
</tr>
<tr>
<td>🕗</td>
<td>Warning Exception</td>
<td>Indicates that travel policy will be applied after the user selects the flight.</td>
</tr>
<tr>
<td>🛡️</td>
<td>Quiet Car</td>
<td>Indicates that the rail car has noise restrictions.</td>
</tr>
</tbody>
</table>
### Concur Request:

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

### Concur Expense:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📅</td>
<td>Attendees</td>
<td>Indicates that an expense entry has associated attendees.</td>
</tr>
<tr>
<td>📅</td>
<td>Comments</td>
<td>Indicates that the expense or report contains a comment.</td>
</tr>
<tr>
<td>🌍</td>
<td>Trip Data</td>
<td>Indicates trip information from an itinerary.</td>
</tr>
<tr>
<td>🌍</td>
<td>Ground Transportation</td>
<td>Indicates that the expense entry originated from a ground transportation itinerary.</td>
</tr>
<tr>
<td>📅</td>
<td>Personal Expense</td>
<td>Indicates that an expense entry was marked as personal.</td>
</tr>
<tr>
<td>💳</td>
<td>Credit Card Transaction</td>
<td>Indicates that an expense entry originated from a credit card transaction.</td>
</tr>
<tr>
<td>💳</td>
<td>Credit Card Transaction</td>
<td>Indicates that a credit card transaction includes additional data.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warning Exception</td>
<td>Indicates that an expense entry has an exception that does not prevent submission.</td>
</tr>
<tr>
<td>🚨</td>
<td>Exception</td>
<td>Indicates that an expense entry exception must be resolved before submission.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td></td>
</tr>
<tr>
<td>📉</td>
<td>Full Allocation</td>
<td>Indicates that the expense entry has been fully allocated.</td>
</tr>
<tr>
<td>📊</td>
<td>Partial Allocation</td>
<td>Indicates that the expense entry has only been partially allocated.</td>
</tr>
<tr>
<td>📜</td>
<td>OCR Receipt</td>
<td>Indicates that an expense entry has an Optical Character Recognition (OCR) receipt (for example, Expenses).</td>
</tr>
<tr>
<td>📬</td>
<td>Receipt Image Required</td>
<td>Indicates that an imaged receipt is required for this expense.</td>
</tr>
<tr>
<td>📂</td>
<td>Paper Receipt Required</td>
<td>Indicates that an expense requires a paper receipt.</td>
</tr>
<tr>
<td>📌</td>
<td>Missing Receipt Affidavit</td>
<td>Indicates that a missing receipt affidavit has been attached to the expense.</td>
</tr>
<tr>
<td>🏷</td>
<td>E-Receipt Available</td>
<td>Indicates that an e-receipt is available in Available Expenses.</td>
</tr>
<tr>
<td>📚</td>
<td>XML Receipt Attached</td>
<td>Indicates that an XML receipt is attached to the expense.</td>
</tr>
<tr>
<td>☑️</td>
<td>Report Ready for Review</td>
<td>Indicates that the expense report has been reviewed by a delegate and is ready for delegate review and submission.</td>
</tr>
<tr>
<td>📁</td>
<td>Budget Item</td>
<td>Indicates that the item is allocated to a budget you manage and requires your budget approval.</td>
</tr>
<tr>
<td>🟢</td>
<td>Success</td>
<td>Indicates that all required approvals have been processed.</td>
</tr>
<tr>
<td>🟢</td>
<td>Cost Object Approval</td>
<td>Indicates that a cost object has been approved by the approver.</td>
</tr>
<tr>
<td>🧑‍💻</td>
<td>Acting as others</td>
<td>Indicates that the user is acting as a delegate for another user.</td>
</tr>
<tr>
<td>🧑‍💻</td>
<td>Acting as other user</td>
<td>Indicates that the user is acting as a delegate for another user.</td>
</tr>
<tr>
<td>📱</td>
<td>Mobile Phone</td>
<td>Indicates that the user can add a mobile device to their Expense Profile.</td>
</tr>
<tr>
<td>📸</td>
<td>Profile Picture</td>
<td>Indicates that a user can add a profile picture to their Expense Profile.</td>
</tr>
<tr>
<td>📡</td>
<td>Personal Car Mileage Calculator</td>
<td>Indicates that the user can click the icon to access the personal car mileage calculator.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td></td>
</tr>
<tr>
<td>![Drive Icon](image drive)</td>
<td>This icon indicates that this is a Drive expense.</td>
<td></td>
</tr>
<tr>
<td>![Mileage (Calculated) Icon](image mileage calculated)</td>
<td>This icon indicates when there is no location and only distance is provided.</td>
<td></td>
</tr>
<tr>
<td>![Mileage (Manual) Icon](image mileage manual)</td>
<td>This icon indicates when there is no location and only distance is provided.</td>
<td></td>
</tr>
<tr>
<td>![Report Sent Back Icon](image report sent back)</td>
<td>Indicates that the approver sent a report back to the submitter with comments.</td>
<td></td>
</tr>
<tr>
<td>![View Image Icon](image view image)</td>
<td>Indicates that the user can click the icon to view an image.</td>
<td></td>
</tr>
<tr>
<td>![Mobile Expense Icon](image mobile expense)</td>
<td>Indicates that the expense entry was created in Mobile.</td>
<td></td>
</tr>
<tr>
<td>![Commuter Pass Icon](image commuter pass)</td>
<td>A commuter pass was used for this (portion of) travel.</td>
<td></td>
</tr>
<tr>
<td>![Created Manually Icon](image created manually)</td>
<td>The route was added using the manual route search function, and all aspects, including the route itself, may be edited by the user.</td>
<td></td>
</tr>
<tr>
<td>![Created Using Route Search Icon](image created using route search)</td>
<td>This route was created using the Route Search feature, and the route information cannot be edited, only selected items such as the Business Purpose. <strong>TIP:</strong> Hover over this icon to note attributes of the selected route.</td>
<td></td>
</tr>
<tr>
<td>![IC Card Fare Icon](image ic card fare)</td>
<td>In Available Expenses, or within the route search results window, the route was returned with an IC card fare.</td>
<td></td>
</tr>
<tr>
<td>![Round Trip Icon](image round trip)</td>
<td>This route included round-trip travel.</td>
<td></td>
</tr>
<tr>
<td>![Receipt Attached Icon](image receipt attached)</td>
<td>Like other expense report entries, this entry has a receipt image attached to it.</td>
<td></td>
</tr>
</tbody>
</table>
| ![Document Compliance Icon](image document compliance) | Indicates that the receipt has been certified according to one of our supported document compliance solutions which includes:  
- 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 link labeled Business Travel/Concur Travel & Expense 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. This allows for less work and saves time when booking travel.

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

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

- **Step 3:** Verify that your name is correct. It should match the name on your ID/Passport. If you have no middle name, check the **No Middle Name** checkbox.
Step 4: Under **Company Information**, verify that the employee ID, manager, and employee position/title fields are correct. If not, please reach out to your current manager and department administrators to correct this information. For more information, go to the [Employee Information Changes](#) page.

Step 5: Verify that your **Work and Home Addresses** are correct. This is to ensure that direct deposit works properly and that your auto-populated information has the correct addresses. If your home address is not correct, update this information in your Concur profile and in DrexelOne. For more information, go to the [Employee Information Changes](#) page.
Step 6: Verify that your Contact Information is correct.

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 be notified when your account has been verified.
Step 8: Verify that your Emergency Contact information is correct.

Step 9: Under Travel Preferences you can note whether you receive travel discounts through memberships, select travel preferences such as seat selection, and accessibility needs. You can also add passport/TSA information to be used when booking travel. If you do not have a passport, select the checkbox labeled, “I do not have a passport.”

You will be able to find any unused tickets under the Unused Tickets section. Only tickets returned after the Concur go live date will be populated here.

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 Arranger by clicking Add an Assistant.
Enter the user’s name and use the checkboxes below 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 properly.)

**Step 11:** Under the **Credit Cards** section, click **Add a Credit Card**. A new window will appear allowing you to add your P-Card/Travel Card information. Click **Save** when finished.
Step 12: Enter your P-Card information and click Save.

Request and Expense Information:

- **Note:** Request and Expense Information sections share the same cost center information. If Request is updated, the Expense information will be updated as well.

- Under Request and Expense Information, you can view your default cost center. If this is incorrect, please reach out to pcard@drexel.edu.
Request and Expense Preferences (Email Preferences):

- Under Request and Expense Preferences, you can adjust your email preferences by using the checkboxes. Click Save when finished.
Verifying Default Expense Approver:

Step 1: Under profile settings, select Expense Approvers.

- Note: Request and Expense Approver sections share the same approver. If the Request Approver is updated, the Expense Approver will be updated as well.

- Step 2: Verify that your expense approver information is correct. If not, please reach out to your current manager and department administrators to correct this information. For more information, go to the Employee Information Changes page.
Assigning Delegates:

➢ Note: When an approver is assigning 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.
Step 3: Use the checkboxes to activate/deactivate delegate permissions. The user must be assigned the approver permission in Concur before the Can Approve option becomes available. Click Save when finished.

Considerations prior to Booking Travel (Essential Travel Form):

- Note: The guest Booking feature can only be added by sending an email to travel@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.

- Note: 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 prior to making any travel arrangements and completing an Expense Report in Concur. 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.

- A complete CTER includes all required receipts, documentation, and pre-approvals.

- Out-of-Pocket (OOP) reimbursement expense reports must be submitted no more than 60 days from the date of return from travel via Concur.

- Essential travel link for international travel: https://drexel.edu/procurement/about/covid-19-operations/travel-guidance/

- Use of limo or car service is allowable with written approval.

- Seat upgrades to business or first class for flights longer than 5+ hours is allowed with written approval.
Airbnb should not exceed the cost of comparable reasonable priced mid-market hotel accommodations.

Travel account code definitions for each travel expense can be found under forms & trainings on the procurement website. Travel Account Codes.

**Booking Travel:**

**Step 1:** Click the Travel tab at the top of the screen.

**Step 2:** Click **Booking for Myself** or **Book for Guest** (if applicable).

**Step 3:** Use the Flight/Train Search tab to book a flight by itself, with a car rental, and/or hotel reservation. To book car and hotel reservations without a flight, use the Hotel Search and Car Search tabs.

**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 in 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.

- On the right side of the Depart and Return Dates is a box that 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 ranging from 2 to 12.

- Step 7: Click the arrow to the right of the time of the flight.

- If a user has the guest booking enabled, they can access the feature by clicking the blue hyperlink labeled Book for a guest under the Trip Search menu.
The graphical display is based on flight schedule data. It will not show any rail options, nor can it take refundability or class of service preferences into account.

Each green bar represents 30 minutes of time. 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 airport check box.

If you need an off-airport car or have other special requests, you can 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 of 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, near an address, near a company location, or near a reference point / zip code (a city or neighborhood).

If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel later from your itinerary.

Before booking, canceling, or changing your hotel reservation, verify the hotel’s cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.

Step 8: Click Search.
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 simply scroll down the page and select one of the flights listed.

Selected fares will display below the matrix.

**Step 9:** Click the **View Fares** button to review the fare rules, benefits, and services.
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 details of the booking, and often will allow for selection of seats and method of payment.
Drexel University
Concur Travel Request Guide
Submitting a Travel Request

- Note: All University paid travel, for full-time employees with benefits, whether paid via P-Card or reimbursed for out-of-pocket expenses, must be pre-approved.

- Note: 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 prior to making any travel arrangement and completing an Expense Report in Concur. Individuals traveling for University business that 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, drag your cursor over the tab labeled New in the quick taskbar and select Start a Request from the drop-down menu.

- The Request Header Page will appear, allowing you to enter the details of your travel request.

The Report Header Page:
- The Report Header Page contains a summary of your anticipated trip. Like the current reimbursement form, you will provide information such as, destination, business purpose, and dates of travel.
Step 1: Verify that Travel Request is selected under the Request Policy drop-down menu.

Note: A red asterisk (*) indicates a required field. An input is required before moving forward.

Step 2: Complete the required fields by entering the details of your request and click Create.

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 the purpose of travel and include the names of the individuals or groups who are traveling (Name of conference/event).

d. Request/Trip Start Date and Request/Trip End Date: Enter your trip’s start and end date.

e. Trip Type: Using the drop-down menu, select International or Domestic travel.

f. Does this trip include personal Travel?: If your trip includes personal travel, select Yes from the drop-down menu and enter the personal dates of travel 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.
You can click on the **Request Header** name (DoeJ01182022) to edit the request header details. Below the request header name, you can find the Request ID and the status of the request.

You can 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 and incurred while traveling from one’s office to a business destination and back or while on international travel.

**Step 1:** Under Expected Expenses, click on **Add** and select an expected travel expense from the drop-down menu. You can also use the search bar to search for a specific expense type.
Step 2: Complete the **required fields** labeled with a red asterisk.

- Select **Out of Pocket** from the **Anticipated Payment Type** drop-down or **Pending P-Card Transaction** if the expense will be put on a P-Card.

- There are two ways to allocate expenses. To allocate the expense to a cost center outside of your default, you can select **Allocate** within the new expense page. The allocation page will appear.

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

Allocating Expected Expenses:

- **Note:** 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 tab labeled Amount next to Percent.

Step 1: After opening an expense line item, click **Allocate** and then click **Add**. The **Add Allocation** page will appear.
Step 2: To search by code or text, use the filter drop-down and select code or text.

Step 3: Select a Chart, Fund, Org, Program, and Activity if applicable.

Step 4: Click Add to List.

Note: You can save allocations as favorites in the next page after clicking Add to List by selecting the checkbox next to the allocation and clicking Save as Favorite. Favorite allocations will be available under the Favorite Allocations tab.

You can also allocate multiple expenses at once by selecting them using the checkboxes on the left and then clicking Allocate. Repeat steps 1 – 4.
Allocation Summary:

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

- **Step 1:** Navigate to the Travel Request page or to the Expense Report page, click Request Details and select Allocation Summary.

  ![Allocation Summary Example](image)

  You can quickly preview an expense’s allocation by clicking on the hyperlink labeled Allocated emphasized above.

  ![Allocation Summary Preview](image)
Split Allocations:

- **Step 1:** Adjust the percent charged to each cost center by changing the value in the **Percent%/Amount** box.

  ![Allocate Screen](image)

  - **Step 2:** Click **Save** when finished.
    - To view in dollar amounts, click the tab labeled **Amount**.
    - If splitting between the default cost center and one other cost center, enter the split amount (50% in this case) and click **Save**.
    - A menu will appear asking if you would like to split the remaining amount to your default cost center. Click **Allocate to Default** and then save the expense.
Saving Favorite Allocations:

- Allocations can be saved as favorites allowing them to be 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**.

  ![Allocate Allocation Screen](image)

- **Step 2:** Enter the allocation name for future reference and click **Save**.

  ![Save as Favorite Dialog](image)

- Favorite allocations can be found under the **Favorite Allocations** tab under the **Add Allocation** menu.

  ![Add Allocation Screen](image)
Managing Attachments:

Adding Attachments:

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

**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.

**Note:** Max file size is 5MB.
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.

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Submitting the Travel Request:

**Travel Request Pre-Submission Checklist:**

- **Report Header** accurate and complete. (Naming convention correct, detailed business purpose, accurate dates, etc.)
- **Expected Out of Pocket expenses** added.
- **Pending P-Card Transactions** added.
- **Supporting Documentation** attached to the travel request.

**Step 1:** Click **Submit Report**. 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.
Cancelling/Copying/Recalling a Pending Request:

- **Note:** Once a request reaches final approval it cannot be recalled.

**Step 1:** On the Requests page (Click Requests Tab from the Concur Homepage), find the pending request you wish to cancel, copy, or recall and click to open the request.

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

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 the Request Details menu on the request page and select Request Timeline from the drop-down menu. The Request Timeline page will appear.

Navigating to the Audit Trail:

- The Audit Trail logs every addition, change, deletion, and comment for the request.
Step 1: Click the **Request Details** menu on the request page and select **Audit Trail** from the drop-down menu. The Audit Trail page will appear.
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Submitting a Travel Expense Report

- Notes: 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 verify that Concur has not automatically created a new expense report from your request under the Expense page by clicking the Expense tab.
- Cardholders with travel expenses spanning multiple cycles are not required to submit more than one expense report 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, drag your cursor over the tab labeled New in the quick taskbar and select Start a Report from the drop-down menu. The Report Header Page will appear.

Step 2: Click the hyperlink labeled Create from an Approved Request located near the top left corner of the Report Header Page.

Step 3: Click the button labeled Create from an Approved Request.
Step 4: Select the approved request using the radio buttons on the left and click Create Report. The expense report will be created and expected expenses from the travel request will auto-populate.

Reconciling Travel Expenses:

- **Note:** There will be hard-stop alerts in the Alerts menu until each expense is fully reconciled. Alerts will clear as each line item is expensed. If reconciling P-Card transactions, the first step would be to import the transactions to the report. Then, you can merge them with the Pending P-Card transactions from your original request. Each entry requires transaction notes.

Merging P-Card Transactions with Pending Card Transactions

- **Note:** You will not be able to submit the expense report until all pending card transactions are merged with the corresponding P-Card expense. If you have no P-Card transactions for this report, skip ahead to the Reconciling Expense Line Items section below.

Step 1: Click Add Expense.
Step 2: Click the Available Expenses tab.
Step 3: Select the P-Card transaction(s) that matches the Pending P-Card Transaction(s) on the report.
Step 4: Click Add to Report.
Step 5: Select the **Pending Card Transaction** and the matching **Travel/P-Card expense** using the checkboxes.

**Step 6:** Click **Combine Expenses**.

- Only the imported **P-Card transaction** will remain after combining expenses. Concur will automatically update the report totals if the actual dollar amount differed from the anticipated amount. Once any P-Card transactions are merged, you can then proceed with expensing each line.
Reconciliating Expense Line Items:

Step 1: Click the expense line item to open the expense detail page.

Step 2: Complete the following required fields under the details tab:
For Out-of-Pocket Transactions:

- **Expense Type** – Expense types correlate to Drexel account codes.
- **Dates** – The posted date cannot be entered as this is specific for P-Card transactions. You will want to enter a transaction date. This date 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 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 that were 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 a required field 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 with 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 a required field 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 with an alert at the top of the page.

Click **Upload Receipt Image**.

**Step 3:** Click **Upload Receipt Image** and select the file to upload.

- Receipts that you have uploaded to Concur either through the dashboard and/or mobile app will be accessible under the **Available Receipts** tab.
➢ If there are receipts already uploaded to the report, you can click on the **Receipts in 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.

➢ The **Missing Receipt Declaration** replaces the missing receipt form.

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**Step 4:** Click **Save Expense**.

**Using the Missing Receipt Declaration:**

➢ **Note:** The **Missing Receipt Declaration** replaces the missing receipt form.

**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](image1)

**Allocating from the Expense Details Page:**

- **Step 1:** After opening an expense line item, click **Allocate**.

![Allocate](image2)

- 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.
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.

Split Allocations:

- The system will allow 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 in dollar amounts, click the tab labeled Amount (Example below shows the percent amount).

**Step 2:** Click Save when finished.
Allocating from the Report Page:

- 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 above from the Allocating from the Expense Details Page section.

Adding Additional Expenses to the Report:

- If you incurred additional unanticipated expenses that were not part of your original request, you can add them to your expense report.
Step 1: Click Add Expense.

- If the additional expense was placed on a P-Card, locate the transaction by selecting the Available Expenses tab.
- If the additional expense was Out-of-Pocket, click Create New Expense.

Step 2: Select an expense type from the menu or search for it by name using the search bar.

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

Adding Attendees to a Business Meal:

- Note: Meal & entertainment expense types require attendees. They also need to be itemized if the receipt is not itemized or is missing.
Step 1: Click Attendees.

Step 2: Click Add.

Step 3: Click the Attendees tab and use the search bar to search 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, select the attendee, and click **Close**.
➤ **Step 4:** Click **Save** to add them to the expense.

Searching/Creating Guests:

➤ Guests can be searched for/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:** Enter the attendee’s last name, first name, affiliation, and click **Search**.

To Create a Guest:

➢ **Step 1:** Under the **Attendees** tab with **Guest** selected, click on **Create New Attendee** in the lower right-hand corner of the menu. The **Create New Attendee** menu will appear.
> **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.
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 a hotel expense until the itemization is complete.

Step 1: Click the Itemizations tab after completing the required fields.

![Image of Itemizations tab]

Step 2: Click the Create Itemization tab and select Hotel/Lodging from the expense type drop-down menu.

Step 3: Enter the room rate per night and click Save Itemization.

- If the rate per night is different, click the tab labeled Not the Same.

![Image of Hotel/Lodging itemization form]
If you have other expense types such as meals/parking, select the expense type from the Expense Type drop-down until the transaction is fully itemized.

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. For international travel, a rental car, taxi, or other form of travel (e.g., rail, bus, airline, etc.) should be used. Reimbursement of international mileage when using a personal vehicle either owned by the Traveler or owned by 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:

- 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**.
- The converted amount is displayed in the **Amount in USD** field.

**Step 2:** Click **Save Expense**.
Submitting the Expense Report:

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

![Submitting Expense Report](image)

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

![User Electronic Agreement](image)

**Step 4:** Click **Submit Report** when finished reviewing the **Report Totals** page.

![Report Totals](image)

- The **Report Totals** page summarizes the amounts owed to the traveler and the amount owed to the University.
Navigating to the Report Timeline and Audit Trail:

- 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: Click the Report Details menu on the request page and select Report Timeline or Audit Trail from the drop-down menu. The Report Timeline or Audit Trail page will appear.

- The Audit Trail logs every addition, change, deletion, comment, etc., for the report.
End of Travel Expense Guide
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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 then select **View Transactions**.

![Expense View Transactions](image1)

**Step 2:** Select the checkbox(es) for the non-travel expenses you will be reconciling.

**Step 3:** On the **Add Charges To** menu, select **New Expense Report**.

**Step 4:** Click on the **Add Selected** button to move your expenses to and initiate a new expense report.

![Add Charges To New Expense Report](image2)
Completing the Non-Travel Report Header Page:

Step 1: Select the Non-Travel Policy from the policy drop down menu.

![Create New Report](image)

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).

Step 3: Verify the correct P-Card Cycle is selected using the Statement Period drop-down menu.

![Create New Report](image)

Step 4: Click Create Report. A new page will open with the selected transactions.
Reconciling Non-Travel Expenses:

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

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 a required field 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 with an alert at the top of the page.
  - Click **Upload Receipt Image**.

Step 3: Click **Upload Receipt Image** and select the file to upload.
Receipts that you have uploaded to Concur either through the dashboard and/or mobile app will be accessible under the Available Receipts tab.

If there are receipts already uploaded to the report, you can click on the Receipts in 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.

The Missing Receipt Declaration replaces the missing receipt form.
Step 4: Click **Save Expense**.

**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).

**Using Available Receipts:**

- Users can upload images to the **Available Receipts** library which stores the receipt until the user is ready to attach it to an expense report.
Upload images from the Expense home page:

1. From the Concur homepage, click Expense on the header toolbar.
2. At the bottom of the page under Available Receipts, click Upload New Receipt. The Receipt Upload window appears.
3. Click Browse (or Choose File, depending on browser).
4. Locate the desired file.
5. Click Upload and Close. The receipt will be available to be attached at any time.

Adding Transaction Notes:

- Transaction Notes are always required when 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; 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).
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.

- **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.
  
  o To search by **text**, **code**, or **either**, use the **filter** drop-down menu.
  
  o 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**.

**Split Allocations:**

 The system will allow 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 in dollar amounts, click the tab labeled **Amount** (Example below shows the percent amount).

➢ **Step 2:** Click **Save** when finished.

Allocating from the Report Page:

➢ 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 above from the Allocating from the Expense Details Page section.
Adding Attendees to a Business Meal:

- **Note:** Meal & entertainment expense types require attendees. They also need to be itemized if the receipt is not itemized or is missing.

- **Step 1:** Click Attendees.
- **Step 2:** Click Add.
➢ **Step 3:** Click the **Attendees** tab and use the search bar to search the attendee by name. Use the **Attendee Type** drop-down menu to search for faculty/staff or guests.

![Add Attendees](image1)

➢ **Step 4:** Use the search bar to search for an attendee by name, select the attendee, and click **Close**.

![Add Attendees](image2)
➢ **Step 5:** Click **Save** to add them to the expense.

Searching/Creating Guests:

➢ Guests can be searched for/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: Enter the attendee’s last name, first name, affiliation, and click Search.

To Create a Guest:

Step 1: Under the Attendees tab with Guest selected, click on Create New Attendee in the lower right-hand corner of the menu. The Create New Attendee menu will appear.
- **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.
Submitting a Non-Travel Expense Report:

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

- **Step 1:** If complete and you are satisfied, click **Submit Report**.

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

![Image of report summary with submit 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.

![Image of report status with submit notification]

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*End of Travel Expense Guide*
**ACTING AS A DELEGATE**

- **Note:** To be assigned as a Delegate, you must be a Drexel Employee and have 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 will need to add you as a delegate and grant appropriate permissions under their user profile before you can act on their behalf.

- **Step 1:** Once added, the Delegate will log into their Concur account and click on **Profile** on the top right-hand corner. There will be a box labeled **Acting as other user**. Search for the user’s name or ID in the search box, select the desired user, and click the button labeled **Start Session**.

- **Note:** If you do not have this option or if you do not see the user’s name, they have not added you in their Concur profile as a delegate.

- **Step 2:** Now the delegate will be acting on the user’s behalf and will see their name.

- **Note:** If the delegate is granted prepare permissions, they can create a Travel Request and Expense Report on behalf of the traveler, however the traveler must be the one to submit the Travel Request/Expense Report due to certification purposes.

- **Step 3:** Delegate completes Travel Request/Expense Report. For information about how to complete a Travel Request/Expense Report, follow instructions listed in the Travel Request and
Expense Report sections of this guide. Once completed, click the button labeled Notify Employee. Then click Close.

- The traveler will receive an email notification as seen below.
- **Step 4:** To end acting as the Delegate, click on **Profile** and click **Done acting for others**. 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 and have an active Concur account. The user will need to add you as a Travel Arranger as well as 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 will need to be completed and profile saved to book travel in Concur. To book hotel reservations, there must be a credit card saved in the traveler’s profile. To book airfare for the traveler, please make sure the name in Concur is identical to the name that is on their photo identification used for travel.
- **Step 1:** The delegate will login to their Concur account and click **Profile** on the top right-hand corner. There will be a box labeled **Acting as other user**. From the drop-down list, select the user’s name of who you want to book travel for.

- **Step 2:** Click **Start Session**. Now the delegate will be acting on the user’s behalf. The delegate will now to be acting as the traveler and will see the traveler’s name.

- **Step 3:** Click on **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 the Trip Search. Please refer to Booking Travel section of this guide.

- Both you and the traveler should receive an email of the booked travel reservation once finalized.

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 own 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 check your Quick Taskbar to see if there are any pending travel requests or expense reports awaiting your approval.

Approver Timeline: An Approver has _ calendar days to approve a Travel Request and _ calendar days to approve an Expense Report.
Approving Travel Requests:

- **Approval Authority Responsibility**: Approval authority ensures all expenses are reasonable in terms of price, purpose, 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, and/or sponsored project/grant requirements.
  - Approving/denying payment of the travel claim in a timely manner and denying expenses not related to official University business.

- **Step 1**: Click on the **Approvals Tab** either at the top of the homepage or **Required Approvals** on the Quick Task Bar. This will take you to Approvals Home.

- **Step 2**: You will see two tabs related to approvals. One for **Requests** and one for **Expense Reports**, which will house all your pending travel approvals. Click the **Requests Tab**.
Step 3: In the example above, there is only one pending request. Click the Request Name hyperlink to access the request.

Step 4: You can now review the Travel Request:
- Request Header (Trip Purpose corresponds with the destination, Start and End Dates of travel, Personal Travel (if applicable))
- Request Timeline
- Audit Trail
- Allocation Summary
- Ensure all fields are completed with the correct information and attachments, if applicable. Approvers can also attach documentation if needed.
- If a cash advance was requested, ensure that a justification was provided.
- Review comments and attachments, if any.
Step 5: Under more options, you can:

- Edit Approval Flow

- Approve & Forward. (Used to add an additional approval step to the workflow. Budget Approvers can add additional approver under Approval Flow tab)

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

![Send Back to Employee](image1)

➢ **Step 6:** If the request meets all requirements, **click** **Approve** **to approve the request.**

![Travel Request Approval](image2)

➢ **Step 7:** **Click** **Accept & Continue** after reading the **Travel Request Approver Agreement.**

![Travel Request Approver Agreement](image3)

➢ 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 the Approvals tab.

Step 2: Click the Expense Reports tab to view the reports pending approval. There are six pending reports in the example above.

Step 3: Click on the name of the report to open the expense report summary.

Step 4: 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 details of the trip such as the business purpose. You can also add comments in the Report Header to approvers/processors.
The Summary section houses the Report Summary and display the original request which can be accessed by clicking on the Request Name hyperlink.

You can review receipts by clicking on 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 that exist within the report.

The Expenses section displayed each expense that exists on the report. You can use the icons on each line item to quickly view exceptions, receipts, comments, attendees, itemizations, allocations, etc.

Step 5: 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.

Step 6: 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 to. For reports, click the drop-down menu labeled View.

Step 3: Select the desired option to review requests/reports from the prior month, quarter, year, or all reports approved.