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Accessing Concur

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

Logging into FSU - Concur Travel & Expense Management

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

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



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

Exploring the Home Page

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

- **Quick Task Bars** – Provide direct access to create or approve an expense report, authorize a travel request, apply available electronic expenses to an expense report, or access incomplete expense reports
- **Company Notes** – Displays University specific information
- **Trip Search/My Trips** – Provides access to travel booking, and upcoming trips.
- **My Tasks** – Displays a dashboard for your approvals, available expenses, and open reports.
- **Profile** – Provides access to verify personal information for travel purposes, designate delegates, set preferences for email notifications, and set-up a mobile device.



The screenshot displays the Concur user interface. At the top, navigation tabs include Requests, Travel, Expense, Approvals, Reporting, App Center, and Quick Task Bars. A user profile dropdown is visible in the top right. The dashboard features a 'Hello, Carla' greeting and a row of task bars: '+ New', '13 Required Approvals', '36 Authorization Requests', '10 Available Expenses', '20 Open Reports', and '04 Cash Advances'. Below this is a 'TRIP SEARCH' section with options for 'Booking for myself' or 'Book for a guest', and a 'Mixed Flight/Train Search' form. A blue banner promotes updating the user's profile. The 'COMPANY NOTES' section contains a 'Concur Training Toolkit' link. The 'MY TRIPS (0)' section shows no upcoming trips. The 'MY TASKS' section is divided into three columns: '13 Required Approvals', '10 Available Expenses', and '20 Open Reports', each with a list of items and amounts.



To return to the Home page from any screen, click the Concur logo in the upper left corner of your screen.



Required Fields & Audit Rules

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

Audit rules typically fall into one of two categories:

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

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

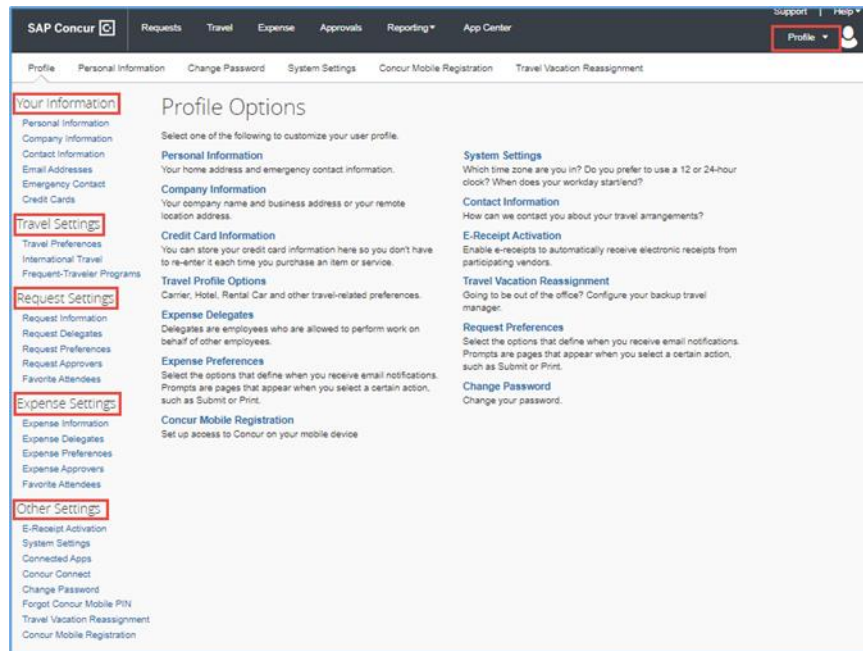


Updating Your Profile

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

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

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



Personal Information

Your complete name should match your government issued photo ID, such as a driver’s license or passport, which you will present to airport security. If first/last name are different than what is on user’s photo ID, please contact travel@fsu.edu.

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

Verify or add Middle Name and, if applicable, Suffix to match your government issued ID. If user needs to modify and is unable, contact travel@fsu.edu.

Ensure information is correct. User cannot modify again after saving.



Contact Information

Enter a work and home phone number; these can be cellular or land lines. Optionally, you may enter a mobile phone.

Email Addresses

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

Email Address	Verify	Contact?	Actions
Email 1	Not Verified	Yes	Verify

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

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

1. To verify the email address, click the Verify link
2. Check your email for a verification message from Concur
3. Copy the code from the email message into the Enter Code box next to the email address
4. Click OK



Emergency Contact

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

The screenshot shows a web form titled "Emergency Contact" with a "Go to top" link in the upper right corner. The form contains the following fields and options:

- Name:** A text input field.
- Relationship:** A dropdown menu.
- Street:** A text input field with a dashed border.
- Address same as employee:** A checked checkbox.
- City:** A text input field.
- State/Province/Region:** A text input field.
- Postal Code:** A text input field.
- Country:** A dropdown menu with "United States of America" selected.
- Phone:** A text input field.
- Alternate Phone:** A text input field.
- Save:** A blue button at the bottom center.

Travel Preferences:

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

The screenshot shows a web form titled "TSA Secure Flight" with a disclaimer: "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. 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." The form contains the following fields and options:

- Gender [Required]:** Radio buttons for Male and Female.
- Date of Birth (mm/dd/yyyy) [Required]:** A text input field.
- DHS Redress No.:** A text input field.
- TSA Pre-Known Traveler Number:** A text input field, highlighted with a red box.
- Save:** A blue button at the bottom center.

If you have a TSA Pre-check number, it can be entered on your Concur profile for your convenience and to expedite the screening process at the airport.



International Travel: Passports and Visas

Recommended for International travelers

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

I do not have a passport

Add a Passport

Passport Date of Birth (mm/dd/yyyy) Passport Nationality Passport Number Passport Date Issued (mm/dd/yyyy)

01/02/70 United States of America 123456 07/01/2016

Passport Expiration (mm/dd/yyyy) Passport Place Issued (City, State) Passport Place Issued (Country)

06/30/2026 Pittsburgh, PA United States of America

International Visas

Add a Visa

Visa Nationality	Visa Type	Visa Number	Visa Expiration
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save

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

Note: You can enable e-receipts by following the instructions [here](#).

Credit Cards: Recommended

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

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

Credit Cards Go to top

You currently have the following credit cards saved with your profile. **Important:** Unless your company requires a single card to be used for all air purchases, you **MUST** check the default box for **Plane Tickets** or your airline ticket may not be issued. User assumes all liability for missed ticketing related to non-compliance.

You currently have no credit cards saved.

+ Add a Credit Card



Fill in the required fields:

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

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 *

University Travel Card Suzzane Seminole VISA

Card Type * Credit Card Number * Expiration Date *

VISA 10 2021

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 * Use this address

5607A Univ. Center Home Address

City * State * Zip/Postal Code *

Tallahassee Florida 32306-2394

Country/Region *

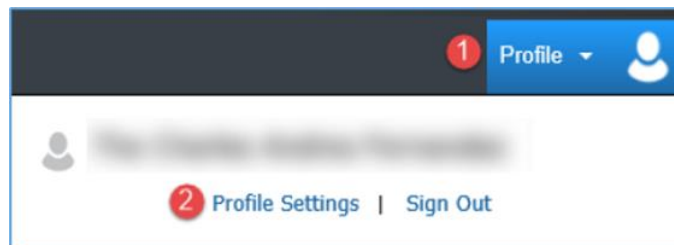
United States of America

Cancel Reset Save



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

1. Navigate to Profile
2. Profile Settings
3. Click on Request Delegates
4. Click **Add**
5. Search for the person you wish to add as a Delegate and click **Add**
6. Check the boxes that correspond with the permissions you are granting to the delegate
 - a. To delete a delegate, click the checkbox to select the person, click **Delete** and confirm deletion
7. Before navigating away from the page, click **Save**



Recommended permissions for Delegates acting as Travel Delegates (*) or Approver Delegates (~)

- (*) **Can Prepare** – delegate has authority to prepare expense reports
- (*) **Can Book Travel** – delegate has authority to book travel (select with Can Submit Requests)
- (*) **Can Submit Requests** – delegate has authority to submit travel requests
- (*) (~) **Can View Receipts** – delegate can view electronic receipts that the traveler has sent to Concur. This will automatically get checked when you select “Can Prepare” or “Can Approve”
- (*) **Can Submit Reports** – delegate can click the submit button to check for audit rules, but traveler still must submit the report.
- (*) **Receives Emails** – delegate receives email notifications
- (~) **Can Approve** – this is typically used by an approver to delegate approval authority to someone else. Approval authority can be permanent or temporary.
 - Can Preview for Approver – this is typically used to add an additional level of review, for example, reviewing for proper account number assignment, before the final review. A Previewer cannot approve or reject a report.
- (~) **Receives Approval Emails** – Copied on email notifications when the approver is required to approve a travel request or expense report in Concur.
- Click **Save**.



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

Request Preferences

No changes necessary

Favorite Attendees

Optional

Expense Settings

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

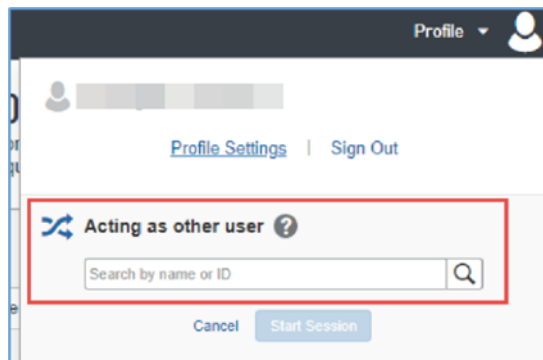


Create a Travel Request

Purpose: All travel requires a travel request (Travel Authorization, T-Auth) for pre-trip approval and to encumber funds prior to traveling. Travel Requests are also used to contact a travel agent for booking assistance. Agents with World Travel Services may ask for a Request number before assisting you.

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

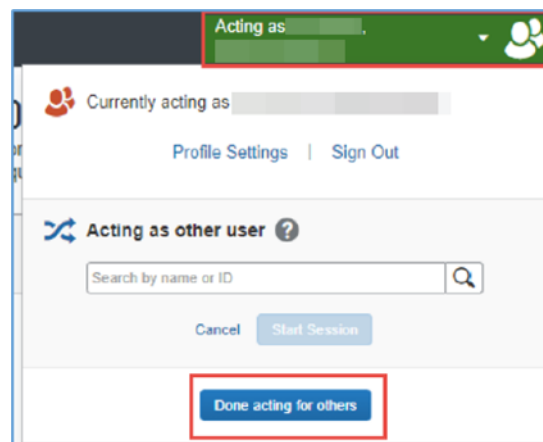
If Creating a Request on Behalf of Another Employee



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

1. Click on Profile
2. Search for employee under Acting as other user
3. Click Start Session

When acting as a delegate, the appearance of the top right corner changes, indicating that the user is acting as a delegate. When you are done acting as a delegate, click the drop-down menu and click “Done acting for others”.





Create a Travel Request

To begin a new Travel Request, click on Requests then select Create New Request. The user may alternatively click New, then select Start a Request. All fields with a red asterisk are required.

1. In the Request Header section, enter the appropriate values for each field.
 - a. **No Cost to University** – Check this box if the trip is being funded by a non-FSU or non-DSO source. Do not check this box if you anticipate reimbursement from or expenses paid by the University.
 - b. **Request Name** – Enter something meaningful to you and your department, using location and date can help distinguish travel easily.
 - c. **Trip Type** – In-state, Out of state, Foreign. Non-Travel is not a valid travel request option.
 - d. **Travel Start/End Dates** – These fields should represent the dates of the business trip, and not include any extra days of personal travel.
 - e. **Destination City** – Begin typing the city name and choose from list.
 - f. **Destination Country** – Will auto-populate based on city selection but you may type in the field.
 - g. **Traveler Type** – Select from drop down menu.
 - h. **Request/Trip Purpose** – Select from the drop-down menu.
 - i. **Benefit to University** – Select from drop down menu.
 - j. **Additional Information** – Required if Request/Trip Purpose or Benefit to University is "Other". Otherwise, use the comment field.
 - k. **Does this trip contain personal travel?** – Select yes or no.
 - l. **Dates of personal travel** – Fill in if answer to previous field is yes.
 - m. **Guest ID** – If booking guest (non-employee) travel, enter the traveler's name here.



- n. **Guest Address** – Required if previous field is completed to verify the guests address.
 - o. **Department & Fund** – Required for all requests.
 - p. **PCBU** – Project Costing Business Unit. Required for travel on projects only.
 - q. **Project** – Required if travel is on a project.
 - r. **Chartfields 1, 2, & 3** – Optional.
 - s. **Comment** – Required in certain circumstances, also helpful in explaining unusual circumstances.
2. Click **Create**. A unique request ID is generated. If No Cost to University box is checked, you can click **Submit**. Otherwise, if you anticipate expenses and/or reimbursements, proceed to adding estimated expenses.

Adding Expenses

Expenses must be added to the request to complete and submit the request. Expenses include but are not limited to airfare, car rental, and hotel. At least one expense must be completed. A user should enter an expense with a zero-dollar amount if they do not anticipate any reimbursement.

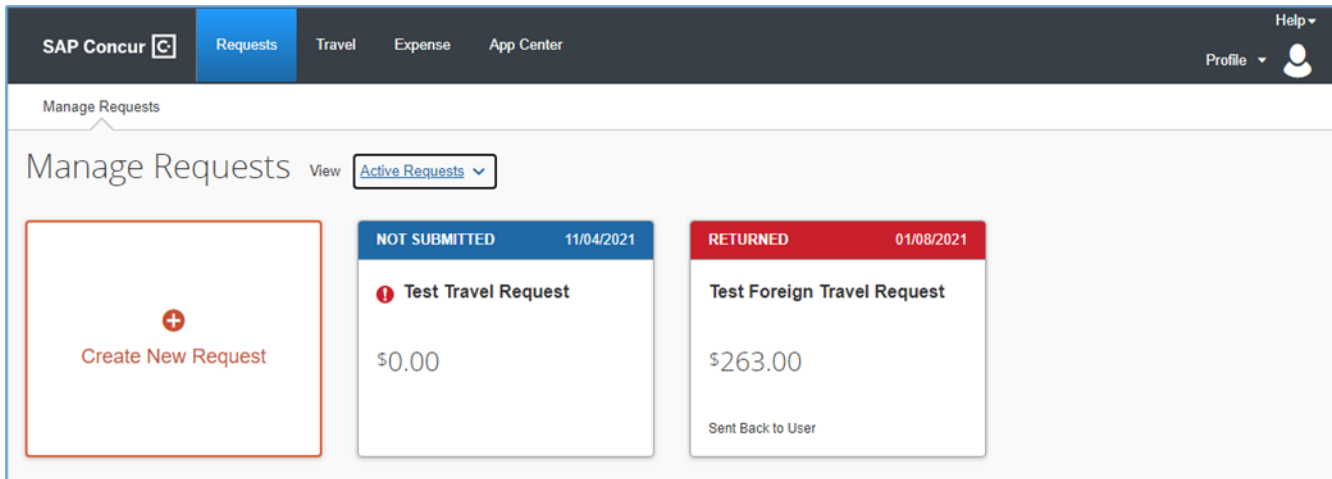
1. Click the **Add** button. In this example we will look at airfare. Click **“Air Ticket”**.
2. Select Round Trip, One Way, or Multi-Segment. Round Trip is the default.

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



Note: Available balance checking (Budget Check) occurs immediately upon request submittal. If the request fails the available balance check, it will automatically be returned. When this happens, verify that all department/fund codes are correct or contact the budget manager.

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



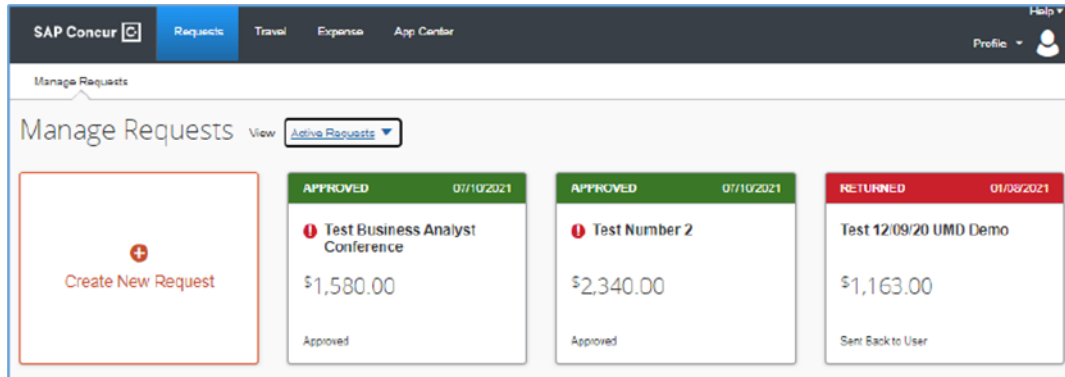
Recalling a Request

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

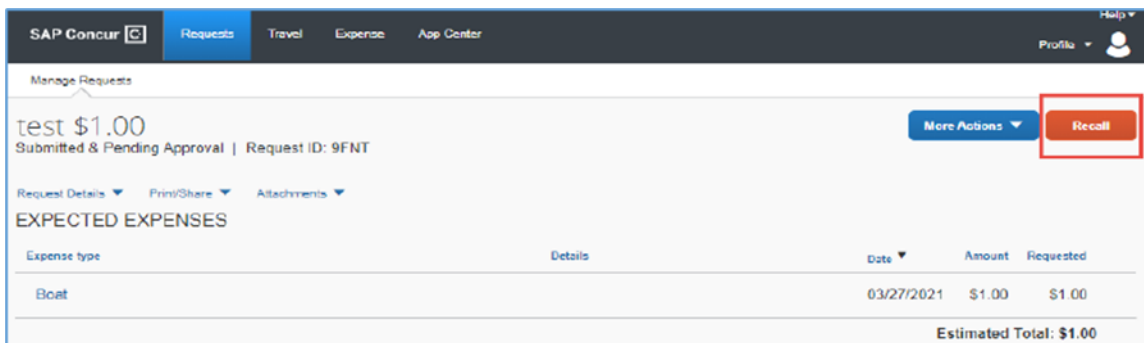


- Cancelling an approved request will release the encumbrance and indicate that travel will not occur but will not allow any changes or additions to the request. A cancelled request can be used to process expense and refunds from a cancelled trip.
- Closing/inactivating a request will release the encumbrance,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

Click the Request from the Manage Requests page.



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



Make any necessary changes, then select Save, Attachments, Print/Email, Cancel the Request or Submit Request to complete the process.

Foreign Travel Requests

Purpose: International or “foreign” travel refers to travel to any country (including Mexico and Canada) outside the continental United States, Alaska, and Hawaii. Travel to the noncontiguous U.S. locations of American Samoa, Guam, Midway Islands, Northern Mariana Islands, Puerto Rico, Virgin Islands, and Wake Island is considered foreign travel.



International travelers will be prompted in Concur to complete and attach an attestation form regarding laws, regulations, and policies associated with international travel as part of the Request process.

Creating a Foreign Travel Request

Follow the instructions [here](#) (until step 6) to create a new travel request, ensure all appropriate fields are filled on the request header and estimated expenses are provided. Ensure trip type used is "Foreign". Then prior to submitting the request (in step 7) follow the steps below to download, review, sign and attach the international travel attestation form to your request. **Note: This form along with all the requirements can only be reviewed and signed by the traveler.**

Downloading and Signing the International Travel Attestation form:

1. After creating your request, navigate to the request **Expected Expenses** page.
2. Locate the **Print/Share** option and select the "FSU-International Travel Attestation Form" to generate a basic form, or download and save the form here: <https://fla.st/24PMCN64>.
 - a. For ease of access, it is recommended to save the form and use Adobe Acrobat DC or FSU Docusign to sign the document digitally.
 - i. [Adobe Acrobat DC Instructions](#)
 - ii. [Docusign Instructions](#)

Alerts: 2

REQUEST

Action Required: The trip type that has been selected is "Foreign". Please download the form here: <https://fla.st/24PMCN64> or navigate to the Print/Share area of the request, download the "FSU-International Travel Attestation Form", sign and attach to this request before submitting. Note: Only the traveler may sign this form as required by State of Florida law. [View](#)

Information: The trip type that has been selected is "Foreign". Please ensure you have attached the International Travel Attestation form to this request. If needed, please download the form here: <https://fla.st/24PMCN64> or navigate to the Print/Share area of the request, download the "FSU-International Travel Attestation Form", sign and attach to this request before submitting. Note: Only the traveler may sign this form as required by State of Florida law. [View](#)

Bolivia Foreign Travel \$5.00 Copy Request Submit Request

Not Submitted | Request ID: 9XEY

Request Details ▼ **Print/Share ▼** Attachments ▼

EXPECTED EXPENSES

Add ▼ Edit Allocate Delete

<input type="checkbox"/>	Expense type ↑↓	Details ↑↓	Date ≡	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>	Hotel Reservation	Reyes, BOLIVIA	01/07/2022	\$5.00	\$5.00

Estimated Total: \$5.00

3. Once the document is signed, return to your request and click the **Attachments** option and then select **Attach Documents**.



Bolivia Foreign Travel \$5.00

Not Submitted | Request ID: 9XEY

Request Details Print/Share Attachments

EXPECTED EXPENSES Attach Documents

<input type="checkbox"/> Expense type <input type="text"/>	<input type="text"/> Details <input type="text"/>	<input type="text"/> Date <input type="text"/>	<input type="text"/> Amount <input type="text"/>	<input type="text"/> Requested <input type="text"/>
<input type="checkbox"/> Hotel Reservation	Reyes, BOLIVIA	01/07/2022	\$5.00	\$5.00

Estimated Total: \$5.00

- 4. Click on the **Upload and Attach** icon. Using the pop-up window locate and upload your signed form on your local computer or device.

Document Upload and Attach ✕

+

Upload and Attach
5MB limit per file

- 5. If successful, a notification will appear near the bottom of the screen to confirm that the document is now attached. Review the travel request and attachments as needed, then when ready, **Submit Request**.



Requesting a Cash Advance

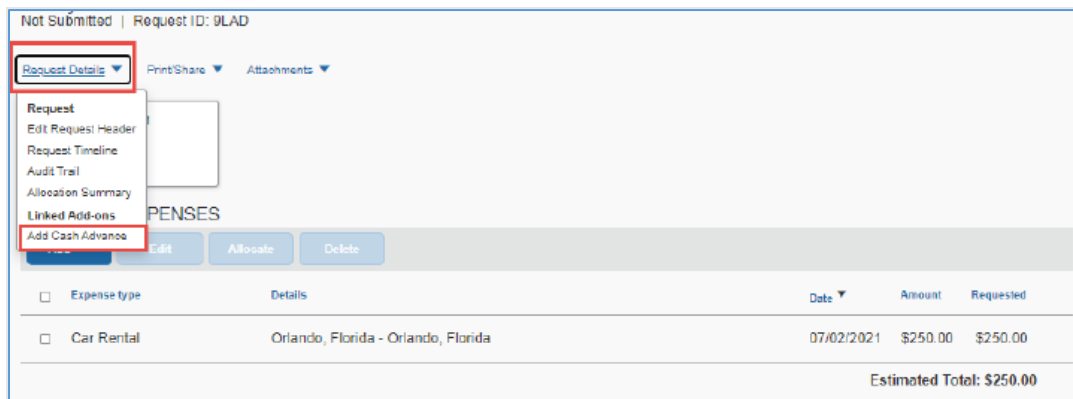
Purpose: Concur users cannot request a cash advance by default. Users will need to contact the Travel Office (travel@fsu.edu) to have the ability to create a cash advance. The steps outlined below describe the process to request a cash advance when other methods of handling travel expenses are impossible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

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

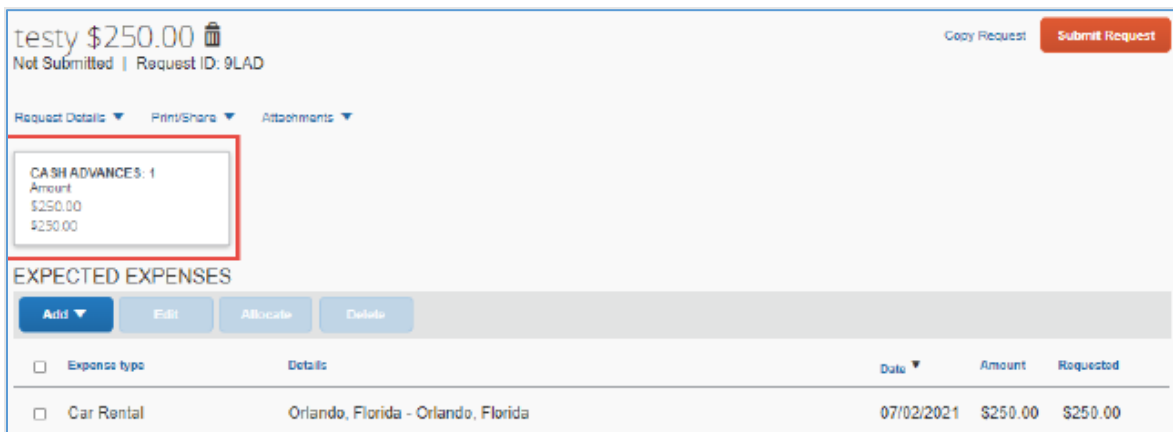
Cash advances are completed as part of the request process and must be done prior to submitting the request. When an employee is eligible for a cash advance, the fields pictured below will be accessible from the Linked Add-ons of the Request Details section.

To Request a Cash Advance or Travel Cash Advance:

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



3. Click **Add Cash Advance**. It will populate above your expected expenses.



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



Reimbursing Guests in Concur

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

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

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

- A student who will be reimbursed for out-of-pocket expenses while attending a conference
- A job candidate who will be reimbursed for expenses incurred while traveling to the University for interviews

You must complete a [Guest Traveler Profile](#) form and have a Guest ID number issued if the payee is not a University employee. You will be able to book travel with the new guest ID 24 hours after submission. Please reach out to the travel office if you encounter any issues. **Note: Travel reps do not act as a delegate to enter guest travel. Guest travel is entered under the travel rep’s own profile. Guests are not employees and do not have a profile.**

Enter a Travel Request for a Guest Traveler:

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

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

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

- Request Policy: TEST-FSU-GENERAL-NIT
- Request Name: (empty)
- Trip Type: None Selected
- Travel Start Date: MM/DD/YYYY
- Travel End Date: MM/DD/YYYY
- Destination City: (empty)
- Destination Country: Search by Country/Region
- Traveler Type: Guest
- Request/Trip Purpose: None Selected
- Benefit to University: None Selected
- Additional Information: (empty)
- Does this trip contain personal travel?: None Selected
- Dates of Personal Travel: (empty)
- Guest ID: (empty)
- Guest Address: (empty)



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

Create estimated expenses, see [Adding Expenses](#) for instructions. Review and then Submit the guest travel request for approval.

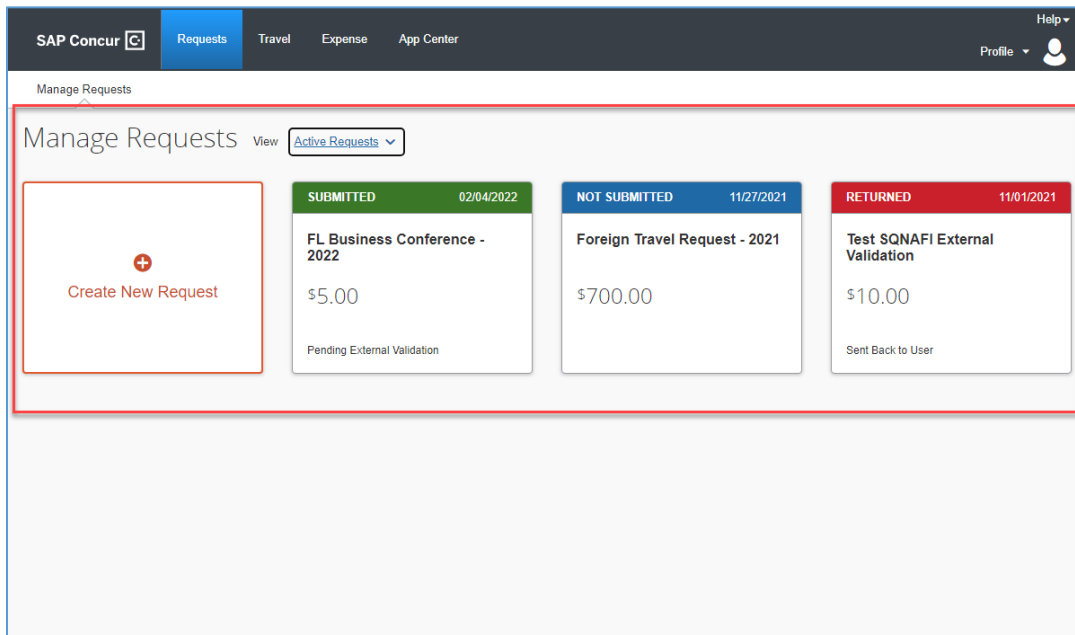


Determining Travel Request Status

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

Access the Travel Request

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



Expense Report Statuses

Pending External Validation	Budget checking between Concur and OMNI FI
Submitted & Pending Approval	In immediate Supervisor’s queue
Pending Cost Object Approval	At Budget Manager or Sponsored Research
Pending Request Administrator	At Office of Compliance and Ethics for international travel review
Approved	Request fully approved and user can begin making travel arrangements

Accessing Comments

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

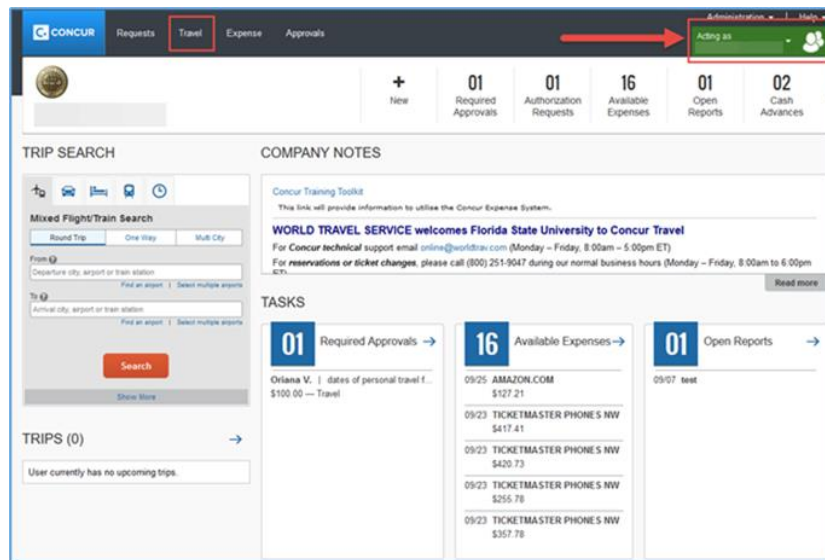


Making a Travel Reservation

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

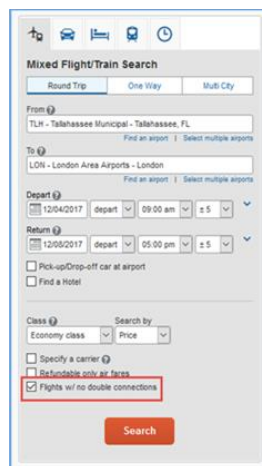
Accessing the Travel Module

Click **Travel** in the top left corner if you are booking travel for yourself or acting as a Delegate to book travel for someone else. If you are booking for another user, verify you have delegated in as them and their name appears in the upper right corner. Example below.



Airfare

1. Select Round Trip, One Way, or Multi City, enter the **From** and **To** destination, and departure and return dates/times and click **Search**. **Note:** If flying to/from Tallahassee or other smaller airports, we recommend unchecking the “Flights w/no double connections” box to display more options.





2. Review the flight availability and select a flight. Flights can be viewed by Fares, or by Schedules, and can be filtered using the Sort-By options. **Note:** "Sort by Duration" will give the flights with shortest layovers.
3. Slide bars on the left of the screen enable you to filter search results by departure/arrival times, and price. **To select your flight, click on the price button.**
4. Review the flight details and traveler information. If this is the flight you wish to book, you may select your seat assignment at this time by clicking **Select Seats**. **Please note that FSU will not reimburse any fees associated with seat selection. Fees, if any, vary by airline.**

i Remember Your Passport Your international travel will require passport or other government-issued identification. Remember to bring your identification with you on your day of travel.

Primary Traveler Edit | Review all

Name: Phone:

Frequent Flyer Programs [Add a Program](#)

For Delta
No Program selected

SEAT ASSIGNMENT

Seats will be automatically selected based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete. [View seatmap](#)

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$661.00	\$533.36	\$1,194.36
		Total Estimated Cost: \$1,194.36	
		Total Due Now: \$1,194.36	

SELECT A METHOD OF PAYMENT

How would you like to pay?

There are no credit cards defined. [Add credit card](#)

* Indicates credit card is a company card

⚠ This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

5. If seat selection is available, click the Select Seat button and make your selection. Click **Close**.
6. Review the method of payment and make any necessary changes. Method of payment should be your University travel card. For instructions on setting up your university card see [here](#).
7. On the Review and Reserve Flight page, verify all information and select **Reserve Flight and Continue**.



Hotel

Important- If the conference hotel has a special conference rate, do not book your hotel through Concur. Book directly through the hotel or conference website to obtain the conference block room rate. **Note:** FSU is allowed to use the state government rates available in Concur. Rates may be comparable or better than the conference hotel rates.

1. Click the Hotel icon

Booking for myself | [Book for a guest](#)

Hotel Search

Check-in Date Check-out Date

Find hotels within miles from

Airport Address

Company Location Reference Point / Zip Code

Reference Point / Zip Code
(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

With names containing:

Add Another Hotel

2. Enter Check-in/Check-out Dates and other search criteria and click the **Search** button.
3. When you are ready to reserve your hotel room, click the **View Rooms** button, and then locate the rate and option that matches your expectations and **click on the price button**.
 - a. **Note:** FSU recommends avoiding room rates that require advanced payments (“Deposit required”) when possible. International hotel reservations have the foreign maximum lodging limits for that location listed as a guide to use when reserving a room.

17. Holiday Inn Express Suites Oak Ridge
114 Tulsa Rd, Oak Ridge, TN 37830 [Map it](#)

5.8 miles ★★★★★

\$96

Per diem limits: Dec 12-Dec 15: \$150

[Hotel details](#)



17. Holiday Inn Express Suites Oak Ridge \$96

114 Tulsa Rd, Oak Ridge, TN 37830 [Map it](#)

5.8 miles ★★☆☆☆ [Hide Rooms](#)

Per diem limits: Dec 12-Dec 15: \$150

[Hotel details](#)

Room Options

Book Early N Save No Refunds Two Queen Beds Nonsmoke Two Queen Beds 37 Inch Flat Panel Tv Microwave Refrigerator Work Desk (Worldspan)	✓	\$96	Deposit required
Book Early N Save No Refunds 2bd Executive Nonsmoke Two Queen Beds 37 Inch Flat Panel Tv Microwave Refrigerator Work Desk (Worldspan)	✓	\$96	Deposit required
Book Early N Save No Refunds King Leisure Nonsmoke 37 Inch Flat Panel Tv Microwave Refrigerator Work Desk With Ergonomic (Worldspan)	✓	\$100	Deposit required
Book Early N Save No Refunds Standard Room Bed Type Preference Cannot Be Guaranteed As It Will Be Allocated Upon Arrival (Worldspan)	✓	\$100	Deposit required
BCD Travel Two Queen Beds Nonsmoke Two Queen Beds 37 Inch Flat Panel Tv Microwave Refrigerator Work Desk Please cancel 1 day before arrival (Worldspan)	✓	\$120	

1. Holiday Inn Paris - Auteuil \$138

21, rue Gudin, Paris 75016 [Map it](#)

2.15 miles ★★★☆☆ [Hide Rooms](#)

Per diem limits: Jan 15-Jan 18: \$425

[Hotel details](#)

Room Options

Advance Saver No Refunds 1 Double Bed Nonsmoking Wifi And High Speed Internet Access Pay Tv Satellite Tv Windows (Worldspan)	i	\$138	Deposit required
--	---	-------	------------------

- On the Review and Reserve Hotel page, read and verify all information and if agreed, check the box "I agree to the hotel's rate rules, restrictions, and cancellation policy."

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

You have selected a hotel that requires a deposit. This deposit may be non-refundable.

The hotel provided the following information:

RATE CHANGES OVER DURATION OF STAY

Hotel Rate: \$100 USD PER NIGHT STARTING 12DEC FOR 3 NIGHTS

I agree to the hotel's rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

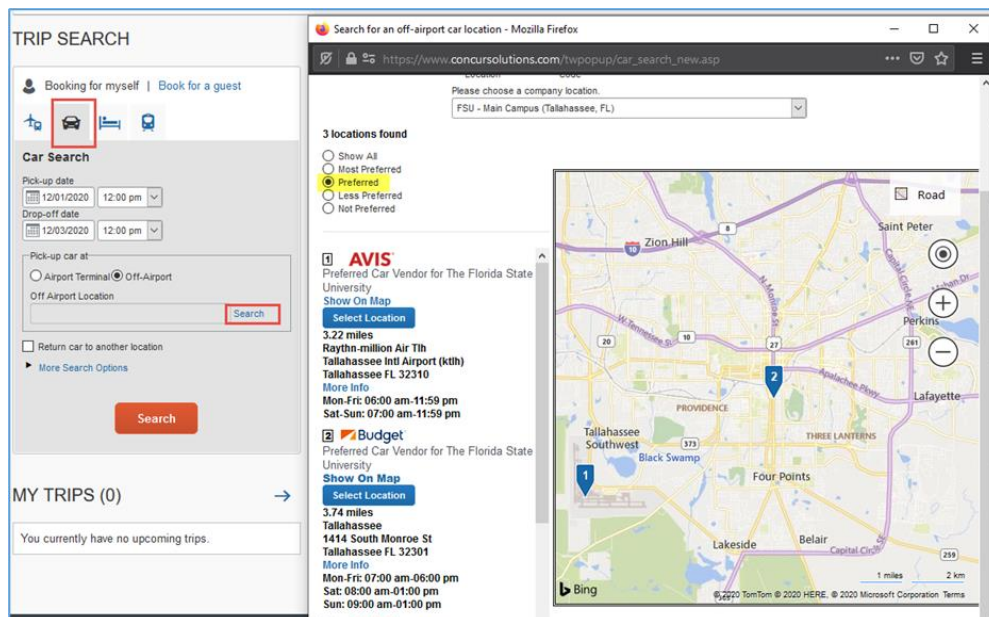
- When ready click the **Reserve Hotel and Continue** button.



Rental Car

To reserve a rental car, click the Car icon. **Note:** Do not use Concur to book a rental car if using an Avis/Budget billing number. Use the link at [FSU Ground Transportation](#).

1. Pick-up date, Drop-off date, and Pick-up car at field should be populated from other trip elements (Flights, Hotel, etc.). If there are no other segments, you will need to enter your dates, times, and pick-up manually.
 - a. **Note:** If traveler is not flying, it is recommended to choose an “Off-Airport” option to avoid any additional convenience fees associated with the vendors airport facility.
2. Include “More Search Options” if needed. To find a list of vendors:
 - a. If picking up car at Airport Terminal, provide the Airport location.
 - b. If picking up car at Off-Airport a pickup location must be chosen using the following steps. Click the blue **Search** link, provide a reference point or zip code then press the blue **Search** button. Review the rental car vendors, then click **Select Location**.



3. To review the available vehicle options and rates, click the orange **Search** button.
4. A list of rates and vehicles will be provided. **Note:** AVIS/Budget is the preferred car vendor of FSU.
5. Review and locate the rate and vendor that matches your expectations and **click on the price button**.
6. On the Review and Reserve Car page, verify all information and when ready select **Reserve Car and Continue**.

Note the following icons:

- Car rates are outside the University policy. These cars can be selected but require valid justification.
- Car rates are within the University travel policy.



Completing the Travel Reservation

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

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



Starting an Expense Report

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

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

Start an Expense Report

Fully Approved Travel Request

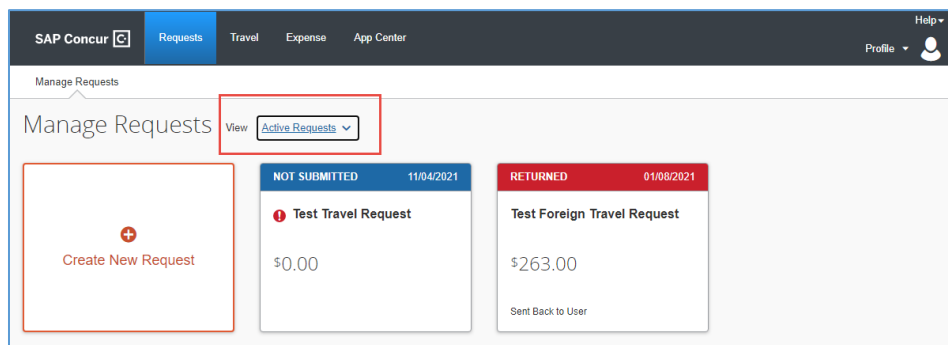
A fully approved travel request must pass budget validation, receive approval from the Default Approver*, and all required Cost Object Approver(s). Once you have a fully approved travel request, you can create your expense report.**

*Default Approver – This would be your Supervisor.

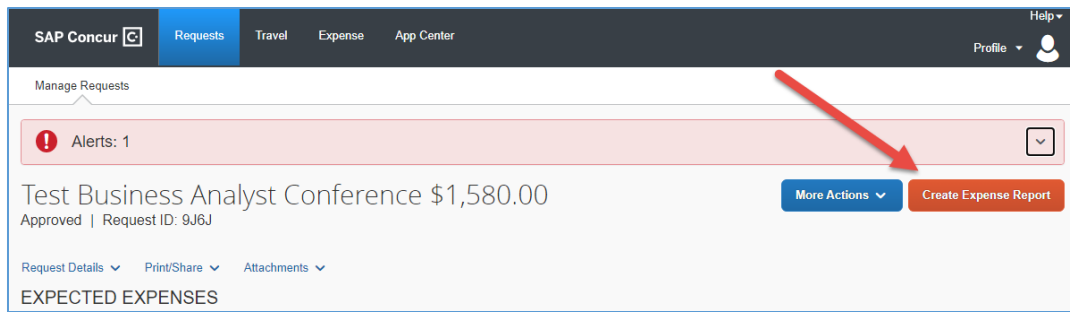
** Cost Object Approver(s) – This would be a Budget Manager, Project Approver, SRA Approver, or Research Foundation Approver.

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

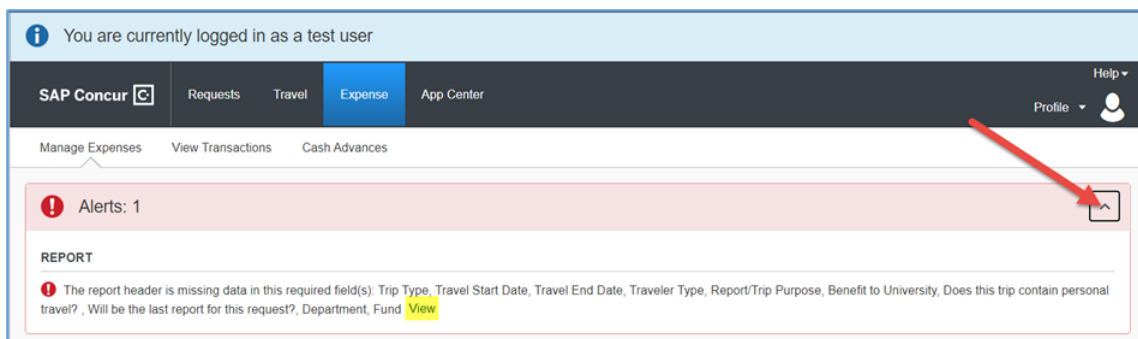
1. Navigate to and open your fully approved travel request. Concur shows items created in the last 90 days, if you don't see the request you are looking for, change your view to show "Approved" requests.



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



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



- Save** report header. Begin adding necessary expenses and transactions. Frequent next steps:
 - [Meal Allowances & Itineraries](#)
 - [Processing University Travel Card Charges](#)
 - [Adding Out-of-Pocket Expenses](#)
 - [Itemizing Nightly Lodging Expenses](#)
 - [Attaching Receipts](#)

Create a New Expense Report

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

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

- From the Concur home page click on the Expense in the navigation menu. See below.



- Click on **Create New Report**
- Fill out all required fields marked by a red asterisk *****.



4. Provide a response to the following question:

Claim Travel Allowance

Are you the traveler claiming meals for this expense report? If this is for a Guest click "No".

Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

- a. FSU Travel Policy indicates that travel which is overnight or more than 50 miles away from the traveler’s headquarters is eligible for a Travel (Meal) Allowance. See [Travel Meals](#) page.
 - i. If response is “Yes, ...”; Creates report and you can begin to add itinerary details for your travel allowances. See [Meal Allowances & Itineraries](#). Begin adding necessary expenses and transactions.
 - ii. If response is “No, ...”; Proceed to Step 5.

5. Click **Create Report**. Begin adding necessary expenses and transactions. Frequent next steps:

- [Processing University Travel Card Charges](#)
- [Adding Out-of-Pocket Expenses](#)
- [Itemizing Nightly Lodging Expenses](#)
- [Attaching Receipts](#)
- [Adding Attendees](#)
- [Allocating Transactions](#)



Non-Travel Expense Report

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

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

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

1. From the Concur home page click on the Expense in the navigation menu. See below.



2. Click on **Create New Report**
3. Fill out all required fields marked by a red asterisk *.

4. Provide a “No, ...” to the following question (see screenshot below):

Claim Travel Allowance

Are you the traveler claiming meals for this expense report? If this is for a Guest click "No".

Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance



5. Click **Create Report**. Begin adding necessary expenses and transactions. Frequent next steps:

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



Meal Allowances & Itineraries

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

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

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

Claim Travel Allowance
 Are you the traveler claiming meals for this expense report? If this is for a Guest click "No".

Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance

Import an Itinerary

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

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

Claim Travel Allowance
 Are you the traveler claiming meals for this expense report?
 If this is for a Guest click "No".

Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance

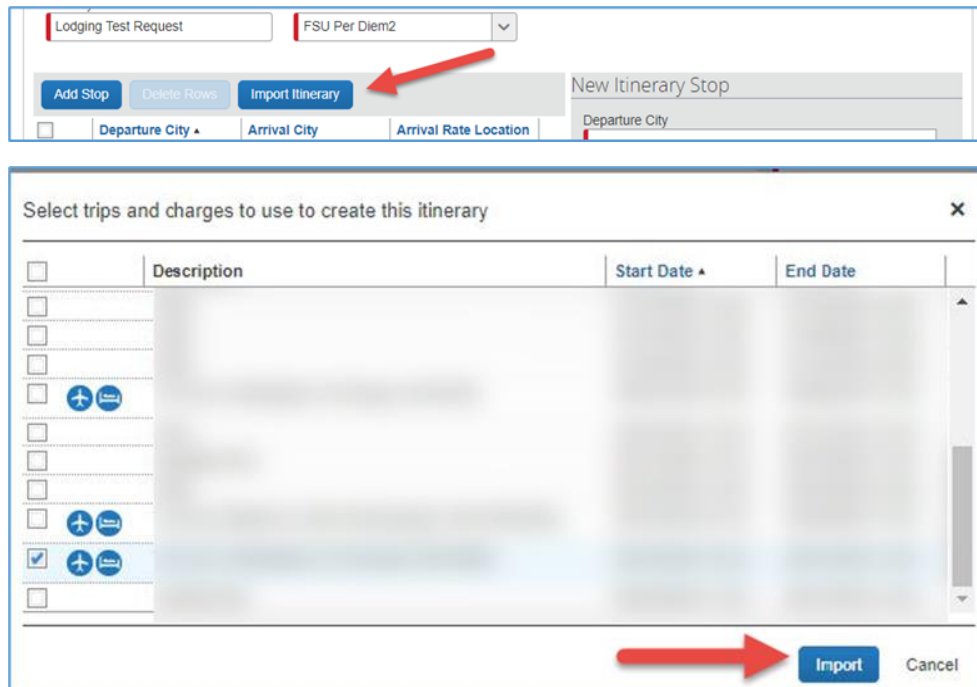
Next: Create report and add itinerary details for your travel allowances

Cancel **Next**

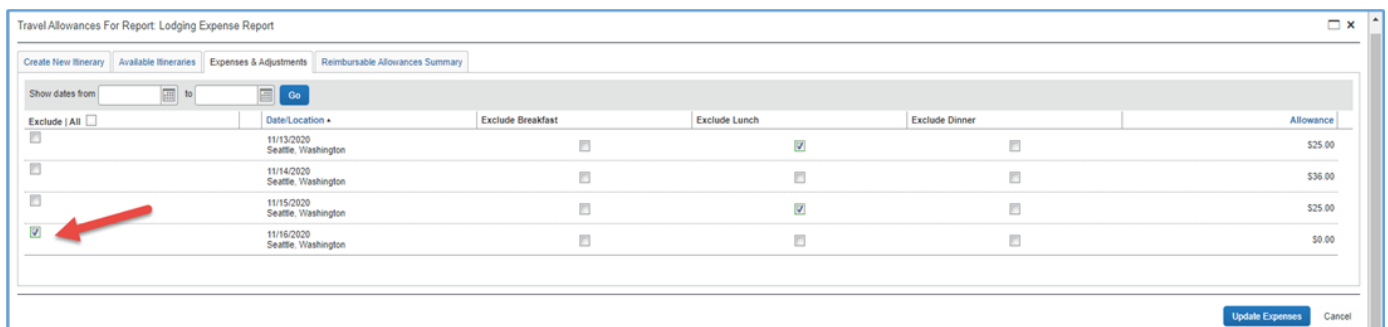
- a. You can also navigate to the **Manage Travel Allowance** page and then clicking on **Create New Itinerary** in the top left corner.



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



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



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



Create an Itinerary

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

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

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

Claim Travel Allowance
Are you the traveler claiming meals for this expense report?
If this is for a Guest click "No".

Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance

Next: Create report and add itinerary details for your travel allowances

Cancel **Next**

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

SAP Concur | Requests | Travel | Expense | App Center

Manage Expenses | View Transactions | Cash Advances

Alerts: 2

Lodging Expense Report \$1,204.74
Not Submitted

Report Details | Print/Share | Manage Receipts | Travel Allowance

REQUEST Approved \$176.00

Manage Travel Allowance

Add Expense | Edit | Delete | Copy | Allocate | Co

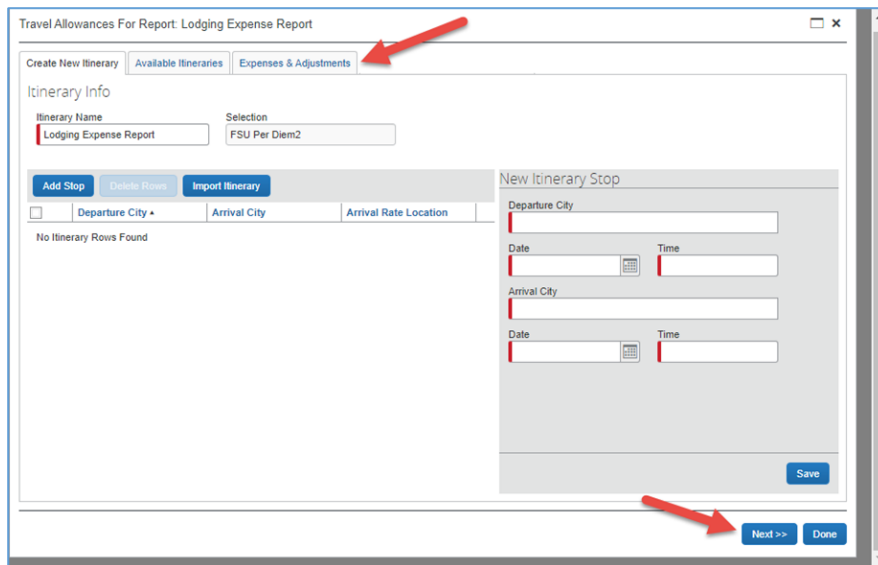
Travel Allowances For Report | Lodging Expense Report

Create New Itinerary | Available Itineraries | Expenses & Adjustments

Itinerary Info

Itinerary Name: Lodging Expense Report
Selection: FSU Per Diem2

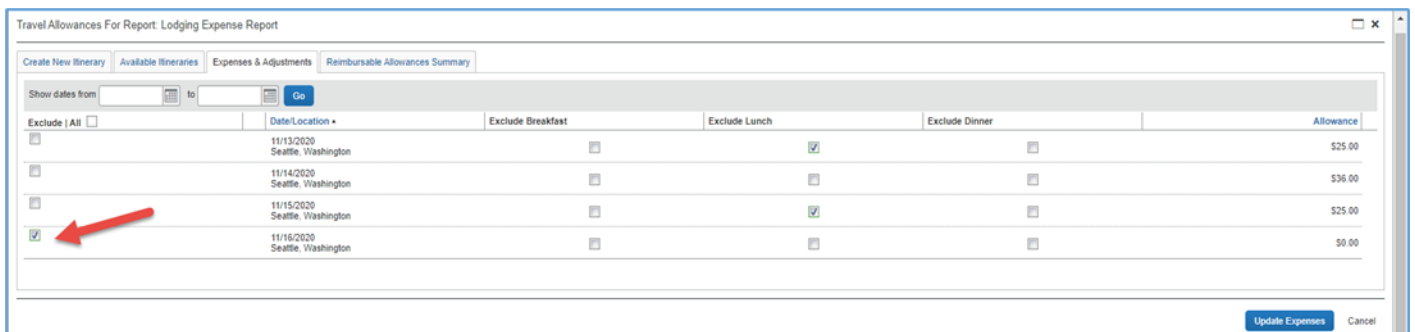
2. Enter the date and time for where your trip started and then for your arrival city. Click **Save**.
 - a. You do not need to enter a stop for indirect travel (layovers), only add a stop if you will be staying for a prolonged period i.e. where you lay your head at night.
3. Now complete an itinerary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



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

Example:

- **Departure City** - London, UK -> **Arrival City** - Atlanta, GA (changes meal allowance to domestic)
 - **Departure City** - Atlanta, GA -> **Arrival City** - Tallahassee, FL (domestic entry point to return destination)
4. Review the dates of travel and use the checkboxes to indicate which meals are ineligible, i.e. provided by the conference or which the traveler is claiming Per Diem for that day instead of a Meal Allowance.
 - a. **Example:** Conference or sponsor provides breakfast, lunch, or dinner on certain days.
 - b. **Example:** Travelers can claim Per Diem on the last day of travel instead of meals.
 - i. Using the exclude checkbox on the left for a specific date will exclude the entire day.



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



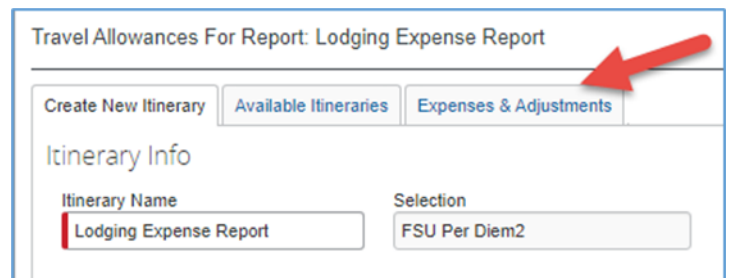
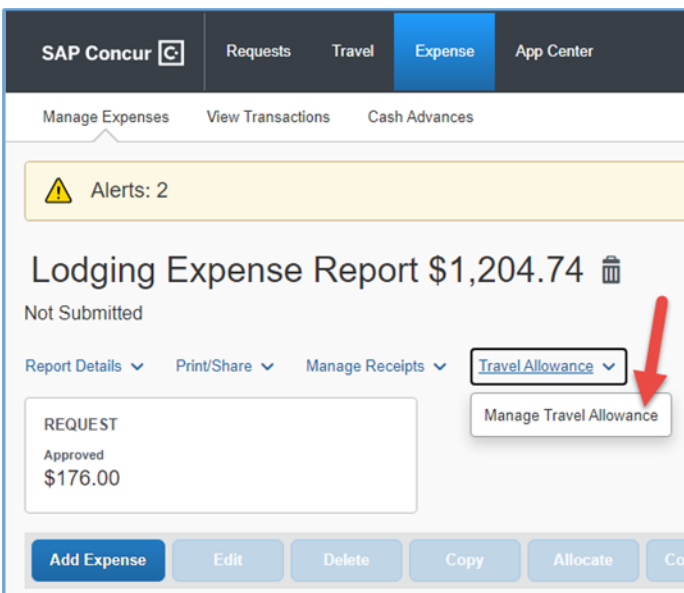
Managing Itineraries, Expenses & Adjustments

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

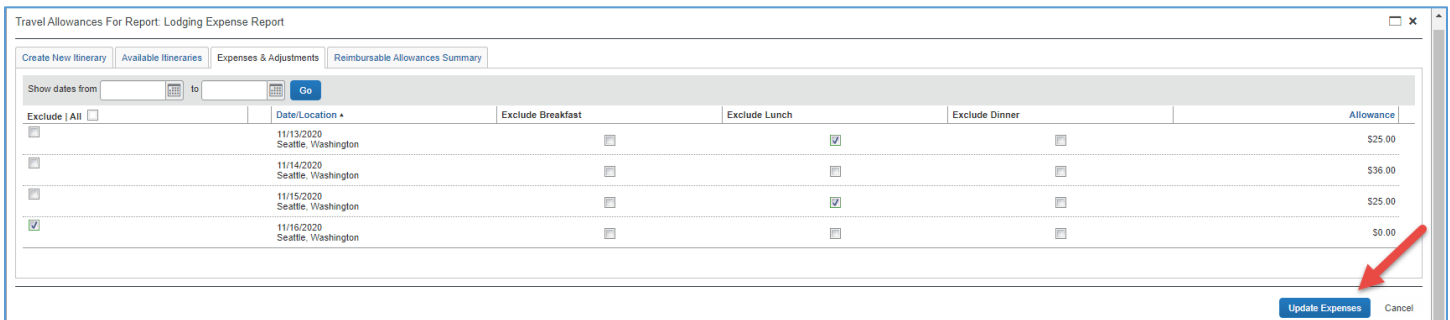
- If you delete your expense report with an itinerary assigned, your manually created itinerary will also be deleted. Itineraries should be unassigned before deleting the expense report to prevent unnecessary work.

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

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



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





Placing University Card Charges on an Expense Report

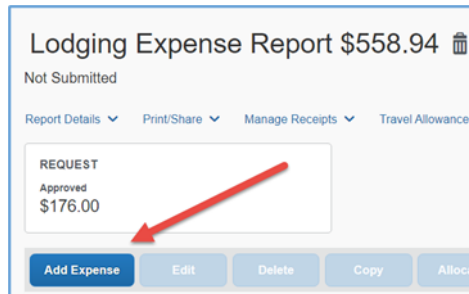
Purpose: In Concur, a university card transaction enters Concur as an available expense on the profile of the T-Card or Lodge Card holder or person responsible for the transaction. Users may have both out of pocket and university card expenses and these may both be placed on the same expense report.

- University card transactions cannot be deleted. Please contact the Travel Office – Travel@fsu.edu if you have questions regarding specific transactions.
- University card transactions should be placed on the related expense report as soon as possible. Email reminders in Concur will notify the card holder to assign the transactions to an expense report for processing at intervals of 8, 15, and 31 days.
- University card transactions cannot be submitted as an undefined expense type.

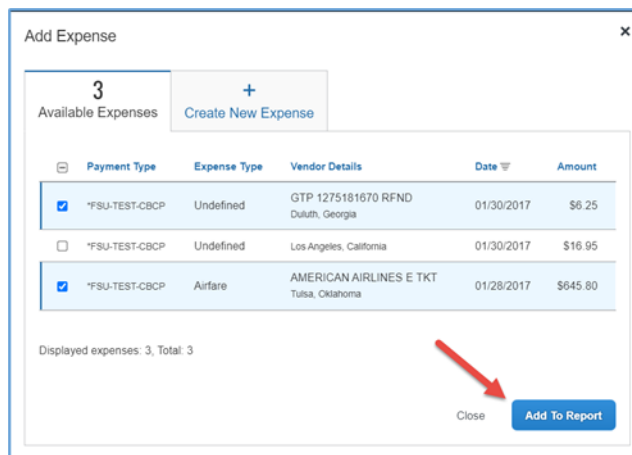
Add Expense

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

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



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





Available Expenses

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

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>		*FSU-TEST-CBCP	Undefined	GTP 1275181670 RFND Duluth, Georgia	01/30/2017	\$6.25
<input type="checkbox"/>		*FSU-TEST-CBCP	Undefined	Los Angeles, California	01/30/2017	\$16.95
<input type="checkbox"/>		*FSU-TEST-CBCP	Airfare	AMERICAN AIRLINES E TKT Tulsa, Oklahoma	01/28/2017	\$645.80

Displayed expenses: 3, Total: 3

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

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
<input checked="" type="checkbox"/>		*FSU-TEST-CBCP	Undefined	GTP 1275181670 RFND Duluth, Georgia	01/30/2017	\$6.25
<input type="checkbox"/>		*FSU-TEST-CBCP	Undefined	Los Angeles, California	01/30/2017	\$16.95
<input checked="" type="checkbox"/>		*FSU-TEST-CBCP	Airfare	AMERICAN AIRLINES E TKT Tulsa, Oklahoma	01/28/2017	\$645.80

Displayed expenses: 3, Total: 3

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



View Transactions

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

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

The screenshot shows the SAP Concur Expense module interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', and 'App Center'. The 'Expense' tab is active. Below the navigation, there are sub-tabs for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main content area is titled 'Company Card Charges'. It features a dropdown menu for 'Card Activity' set to '*FSU-TEST-CBCP - 0001' and a dropdown for 'Time Period' set to 'All Unused Charges'. To the right, there is a dropdown for 'Add Charges To' set to 'New Expense Report', and two buttons: 'Add Selected' (highlighted with a red arrow) and 'Delete Selected'. Below this is a table of charges:

	Date	Description	Expense Type	Amount
<input type="checkbox"/>	01/09/2017	EFAX.COM LOS ANGELES, CA	Undefined	\$16.95
<input checked="" type="checkbox"/>	01/30/2017	GTP 1275181670 RFND DULUTH, GA	Undefined	\$6.25
<input type="checkbox"/>	01/28/2017	AMERICAN AIRLINES E TKT TULSA, OK	Airfare	\$645.80

TOTAL AMOUNT: \$669.00

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



Processing Expenses

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

- If an expense type is undefined or enters the Concur system categorized as an incorrect expense type it can be updated from the available list as needed.
1. Locate and select the checkbox next to the expense, then click **Edit**. This will transition the page to editing the selected expense.

<input type="button" value="Add Expense"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Allocate"/> <input type="button" value="Combine Expenses"/> <input type="button" value="Move to"/>							
<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/15/2020	\$25.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/14/2020	\$36.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00
<input checked="" type="checkbox"/>			*FSU-TEST-CBCP	Undefined	GTP 1275181670 RFND Duluth, Georgia	01/30/2017	\$6.25
							\$92.25

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

← → Undefined \$6.25

01/30/2017 | GTP 1275181670 RFND | Corporate Card

Details
Itemizations

Allocate * Required field

Expense Type *

Undefined ▼

- Lodging
- Lodging - Advance Deposit
- Lodging - Group
- Lodging - Other Accommodation Types
- Rental Vehicle
- Train
- 02. Other Travel Expenses
- Agent/Booking Fees
- Airline Fees

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



← → Airline Fees \$6.25
01/30/2017 | GTP 1275181670 RFND | Corporate Card

Cancel Save Expense

Hide Receipt

Allocate

Expense Type *
Airline Fees

Transaction Date
01/30/2017

Airline Fees *
Baggage Fee

Trip Type *
In State

Report/Trip Purpose *
Evaluate/Monitor Programs

Additional Information

CC Vendor Name
GTP 1275181670 RFND

City of Purchase
Duluth, Georgia

Payment Type
*FSU-TEST-CBCP

Amount
6.25

Currency
US, Dollar

Comment

Save Expense Cancel

Attach Receipt Image

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



Lodging Expense Types

Purpose: A hotel bill typically contains a variety of charges including room fees, taxes, parking, meals, etc. Concur requires you to itemize daily charges, when using the Lodging expense type. If lodging was charged to a university card, itemization may be auto populated if the vendor provides the information to Visa.

There are a few different expense types in Concur.

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

Each with their own set of rules and requirements. The instructions below will review how to itemize the nightly lodging expense for our Lodging expense type. Looking at the base rate, then additional taxes, and applicable fees.

Auto-Itemization

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

The screenshot shows the 'Expense Source' pop-up window for a Choice Hotels expense. The main window displays a list of 'AVAILABLE EXPENSES' with a 'Payment type' dropdown menu highlighted in red, showing 'Pending Card Transaction' as the selected option. The pop-up window contains the following information:

Expense Source: Choice | April 11, 2018 | \$779.00

Source	Vendor	Date	Amount
E-Receipt	Choice	04/11/2018	\$779.00

CHOICE HOTELS
 Choice
 433 Hotel Street
 San Francisco CA US 94080
 123-456-1999

\$779.00
 Visa - 1111
 04/11/2018 3:05 PM
 Tax Invoice
 Tax ID: 123-21213
 1234 Main St
 Dallas TX US 75001
 Receipt: 6343430

Check-in	Daily Rate	Number of Guests
April 7, 2018	\$170.00	1

Check-out	Room Number	Total Nights
April 11, 2018	1601	3

Date	Description	Type	Amount
04/07/2018	Room Rate	ROOMRATE	\$170.00
	Hotel Room Tax	Tax	\$18.00



Itemizing Nightly Lodging Expenses

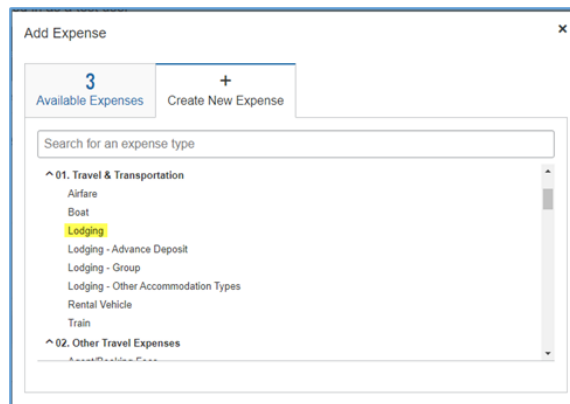
Once an expense report has been started you can begin to add new expenses. Adding a lodging expense requires the following information at a minimum:

- Receipt
- Room rate
- Taxes
- Additional expenses included on the itemized bill

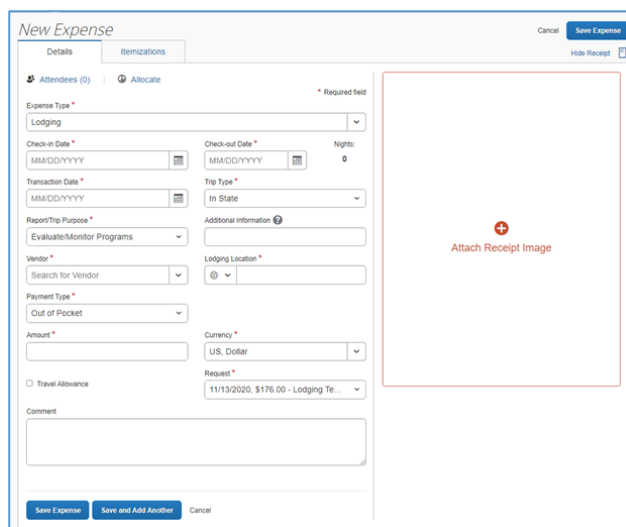
Note: Be sure to settle any disputes or discrepancies before checking out completely. It is easier to settle these issues in person than over the phone or email.

For this scenario we will create a recurring itemization using the Lodging expense type.

1. Click **Add Expense** then move to the **Create New Expense** tab, then select **Lodging**.



2. Fill out the required fields marked with *. **Note:** Check-in and Check-out dates must match the bill and Transaction date should correspond to the date that the charge was billed or charge is posted.





3. Once all necessary fields are filled, select the **Itemizations** tab near the top of the page. Then click on the **Create Itemization** button.
4. From the expense type drop down list select **Lodging**. Begin to fill in the appropriate fields with the necessary information choosing from the following options:
 - a. **The Same Every Night** – The itemized bill shows the room rate and taxes are identical each night.
 - b. **Not the Same** – For at least one day of the stay, the itemized bill room rate and taxes are not identical rate.
5. Provide the room rate, and any room tax as it is displayed on the hotel bill. Click **Save Itemization** button.

6. Verify amount and itemized balance out to \$0.00, any itemization under or over the billed amount will need to be corrected before proceeding.

7. Attach the receipt and when finished click on **Save Expense**



Adding Out of Pocket Expenses to an Expense Report

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

Add Expense

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

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

The screenshot shows the 'Lodging Expense Report \$558.94' page. At the top, there are navigation tabs: 'Manage Expenses', 'View Transactions', and 'Cash Advances'. Below this is an 'Alerts: 1' notification bar. The main title is 'Lodging Expense Report \$558.94' with a trash icon and buttons for 'Copy Report' and 'Submit Report'. Below the title, it says 'Not Submitted'. There are several dropdown menus: 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' box shows 'Approved \$176.00'. A row of action buttons includes 'Add Expense' (highlighted with a red arrow), 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. Below this is a table with columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, Amount, and Requested. The table contains several rows of expense entries, including 'Out of Pocket' for 'Lodging', 'Daily Meal Allowance', and 'Parking'.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Out of Pocket	Lodging	Omni Hotels Orlando, Florida	11/16/2020	\$470.12 Allocated Itemized
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/15/2020	\$25.00 \$25.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/14/2020	\$36.00 \$36.00
<input type="checkbox"/>			Out of Pocket	Parking	Vancouver, British Columbia	11/14/2020	CAD 30.00 \$22.82
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00 \$25.00
						\$578.94	\$558.94

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

The 'Add Expense' dialog box is shown. It has a title bar with a close button. Below the title bar, there are two tabs: '3 Available Expenses' and '+ Create New Expense'. A search bar is labeled 'Search for an expense type'. Below the search bar is a list of expense types, categorized into 'Recently Used' and '01. Travel & Transportation'. The 'Recently Used' list includes Lodging, Boat, Guest Daily Meal Allowance, Documented Miles, and Airfare. The '01. Travel & Transportation' list includes Airfare, Boat, and Lodging.

3. Fill out the required fields marked with asterisk *. Ensure the Payment Method field is marked out of pocket. **Do not modify the Payment Type field unless directed to do so by the Travel Office. Manually created expenses should always be listed as out of pocket.**



4. Use the **Attach a Receipt Image** button to attach a receipt for the out-of-pocket expense.
5. Click **Save Expense** or **Save and Add Another**, if necessary. Repeat steps 2 – 4 as needed.

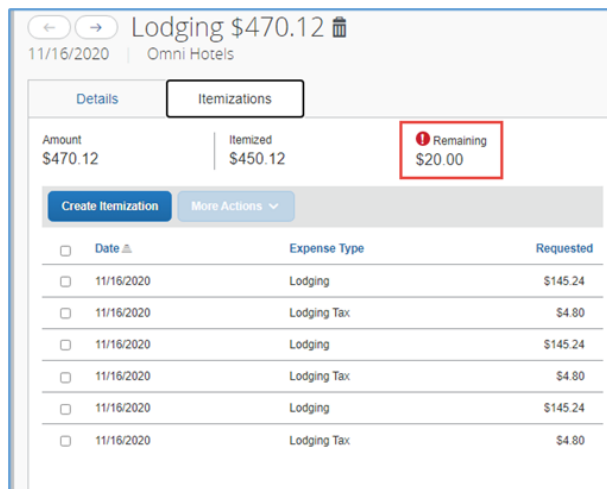


Processing Personal Expenses on a University Card

Purpose: If during business travel a personal purchase is placed on a University card, for instance; a movie rental during a hotel stay, the personal purchase must be included in the Lodging Itemization. Non-reimbursable, unallowable, out of policy, or personal expenses should only be included or itemized if they were placed on the travel card or lodge card. An audit rule prevents this expense type from being used for an out-of-pocket expense.

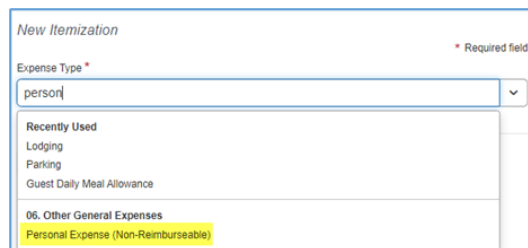
Itemizing Personal Expenses on a University Card

In this expense report example, the system is providing alerts that the Itemization amount does not add up to the Expense Amount



- Total Lodging Expense is \$470.12
- Itemization (daily room rate, taxes) is \$450.12
- The \$20.00 difference is the charge for the movie rental (personal charge)

1. Click **Create Itemization**.
2. Select the Expense Type **Personal Expense (Non-Reimbursable)**.



3. Enter the Type of Personal Expense, Amount, and a Comment. **A comment explaining the reason for the charge is required for this expense type.**



4. Click Save Itemization.

Note: that the Total Amount and Total Requested are now different, reflecting the amount of the personal expense.

Date	Expense Type	Requested
11/16/2020	Lodging	\$145.24
11/16/2020	Lodging Tax	\$4.80
11/16/2020	Lodging	\$145.24
11/16/2020	Lodging Tax	\$4.80
11/16/2020	Lodging	\$145.24
11/16/2020	Lodging Tax	\$4.80
11/16/2020	Personal Expense (Non-Reimbursable)	\$0.00

Processing a Personal Expense on a University Card

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



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

Personal Expense (Non-Reimbursable) \$16.95

01/30/2017 Corporate Card

Details Itemizations Hide Receipt

Expense Type * Required field
Personal Expense (Non-Reimbursable)

Transaction Date 01/30/2017 Type Of Personal Expense *
Out of Policy Hotel Expense

Payment Type
*FSU-TEST-CBCP

Amount 16.95 Currency
US, Dollar

Comment
Room service not billed to personal card. Front desk would not apply it separately.

Attach Receipt Image

Save Expense Cancel

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

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

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

Reimbursing the University for a Personal Travel Expense

Locate and complete the Departmental Deposit Form – [Controller's Website > Forms > Travel Forms > Departmental Deposit Form](#)

Required Information:

- A. Travel Reimbursement
- B. Amount owed
- C. Employee's Home Department ID
- D. 499



E. If applicable

F. 151005

Original Trans Ref – Include the 6 digit “Report Key” found in the Concur Report Header

Departmental Deposit Form, continued

Section III. Expense Refund Detail
 Complete this section when you are depositing a payment resulting from an expense, payroll, or travel reimbursement for a product or service previously incurred by your department. The Controller's Office Auxiliary Accounting area will record these deposits with an AR Direct (ARD) journal to the department, fund, account, project, and optional chartfields you define below. In order to process an expense refund, documentation must contain evidence that the refund is appropriate. Therefore, reference must be made to the original transactions supported by the original journal, voucher, or expense report number. Attach the following backup documentation in order for this form to be processed and cash received by your department.
Required Attachments:

Expense Refund Type	Required Documentation	Suggested Query
Expense Reimbursement	AP Journal ID & Voucher ID	FSU_DPT_GL_JRNL_WITH_VCHR or FSU_DPT_GL_JRNL_WITH_VCHR
Travel Reimbursement	Provided EX Journal ID and Expense Report ID	FSU_DPT_GL_JRNL_WITH_EXP_SHEET
Payroll Reimbursement	Use the Student Business Services Expense Refund Form and submit to the Student Business Services Cashier's Office with Payment.	

A. Expense Refund Type	B. Amount	C. Department	D. Fund	E. Project	F. Account	G. CF 1	H. CF 2	I. CF 3	Original Trans Ref. (eg. Journal ID, ER, Voucher)
Travel Reimbursement			499		151005				
▼									
▼									
▼									

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



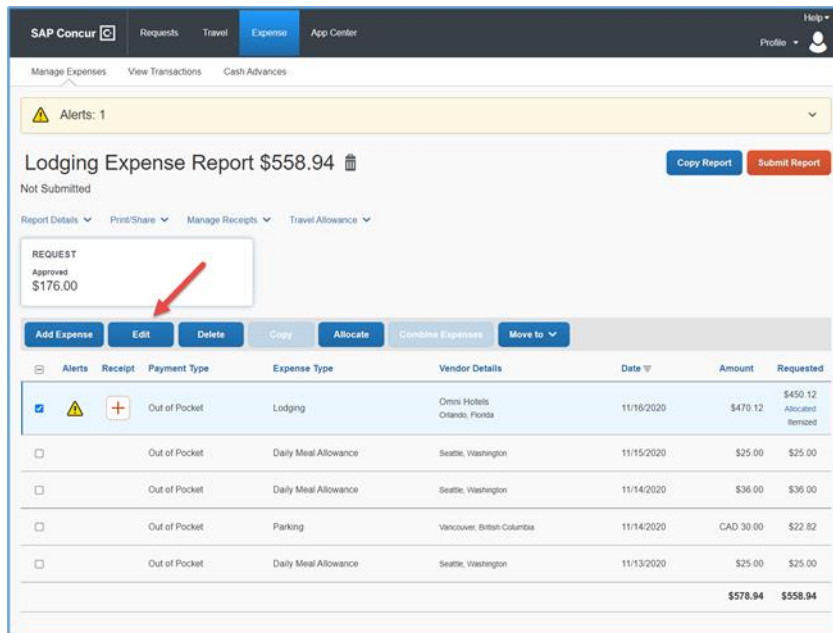
Adding Attendees to an Expense Report

Purpose: You should use the attendee field any time someone purchases something on behalf of someone else. Adding an attendee(s) to expense types allows for transparency when booking on behalf of others. Such as when a travel card holder purchases a plane ticket for another employee. If there are more than five attendees (i.e., group travel), the user may attach a roster of travelers instead of using the attendee fields.

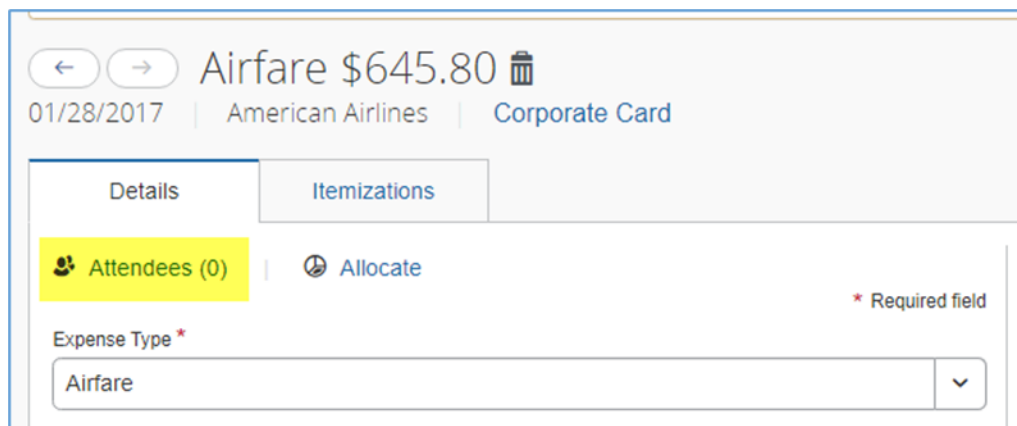
Add an Attendee

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

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



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



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



Attendees
 Airfare | \$645.80

Attendees: 0

Add Remove Create Group Copy from Request

- Choose an "Attendee Type" and search by "Attendee Name"; last name, first name. Once selected you should see confirmation that an attendee was added. If multiple attendees exist continue adding as necessary.

Add Attendees

Recent Attendees Attendees Attendee Groups

Attendee Type: Faculty/Staff

Attendee Name: fernandez

- Fernandez, Sarah
- Fernandez, Silvia
- Fernandez, Tatiana
- Fernandez Denlinger, Michele
- Fernandez Sommariva, Carolina
- Fernandez Valero, Ana
- Fernandez-Garcia, Alicia
- Fernandez-Miro, Marian
- Fernandez-Nieves, Aracelis

- Click **Save** when done adding attendees. **Note:** Concur will automatically adjust the expense amount based on the number of attendees.

Attendees

Airfare | \$645.80


Attendees: 3

Add Remove Create Group Copy from Request

<input type="checkbox"/>	Attendee Name	Employee ID	Email Address	Request ID	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>					Faculty/Staff	1	\$215.27
<input type="checkbox"/>					Faculty/Staff	1	\$215.27
<input type="checkbox"/>					Faculty/Staff	1	\$215.26



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



Airfare \$645.80  Cancel Save Expense

01/28/2017 | American Airlines | Corporate Card

Details | Itemizations Hide Receipt

 Attendees (3) |  Allocate * Required field

Expense Type *
Airfare

Transaction Date: 01/28/2017
Trip Type *
In State

Report/Trip Purpose *
Evaluate/Monitor Programs
Additional Information

Vendor: American Airlines
CC Vendor Name: AMERICAN AIRLINES E TKT
Ticket Number *
0012134229114

Destination City: Tulsa, Oklahoma
Payment Type: *FSU-TEST-CBCP

Amount: 645.80
Currency: US, Dollar

Comment:
Paid for 3 travelers to conduct field research.

Save Expense Cancel



Allocating Transactions

Purpose: Allocations (also known as split-funding) allows users to allocate expenses to multiple department-fund-project combinations. Allocation can be done on either Travel Requests or Expense Reports. The process is the same for both.

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

Allocate an Expense

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

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

The screenshot shows the SAP Concur interface for an Expense Report. The report title is "Lodging Expense Report \$1,204.74" and it is marked as "Not Submitted". A red arrow points to the "Allocate" button in the action bar above the expense table.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>		Out of Pocket	Lodging	Omni Hotels Orlando, Florida	11/16/2020	\$470.12	\$450.12 Itemized
<input type="checkbox"/>		Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/15/2020	\$25.00	\$25.00
<input type="checkbox"/>		Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/14/2020	\$36.00	\$36.00
<input type="checkbox"/>		Out of Pocket	Parking	Vancouver, British Columbia	11/14/2020	CAD 30.00	\$22.82
<input type="checkbox"/>		Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00	\$25.00
<input checked="" type="checkbox"/>		*FSU-TEST-CBCP	Airfare	American Airlines Tulsa, Oklahoma	01/28/2017	\$645.80	\$645.80
						\$1,224.74	\$1,204.74



- Choose between Percent or Amount. Situation can vary depending on allocation requirements and funding sources. Click **Add**.

Allocate

Expenses: 7 | \$1,095.92

Expenses marked as personal, or that your administrator doesn't allow to be allocated, are not included in the amount to be allocated.

Percent | Amount

Amount: \$1,095.92 | Allocated \$1,095.92 (100%) | Remaining \$0.00 (0%)

Default Allocation Code: DEFAULT | Percent %: 100

Buttons: Add, Edit, Remove, Save as Favorite

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

Add Allocation

+ New Allocation | ★ Favorite Allocations

* Required field

Department 1: (029000) Controller

Fund 2: (110) E&G General Revenue

PCBU ? 3: Search by Code

Project/Activity 4:

Buttons: Cancel, Save

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



Allocate ✕

Expenses: 7 | \$1,095.92 | [View Allocation Group](#)

Expenses marked as personal, or that your administrator doesn't allow to be allocated, are not included in the amount to be allocated.

Percent	Amount
Amount \$1,095.92	Allocated \$1,095.92 100%
	Remaining \$0.00 0%

Default Allocation

Code
DEFAULT Percent %
0

[Add](#) [Edit](#) [Remove](#) [Save as Favorite](#)

<input type="checkbox"/>	Department	Fund	PCBU	Project/Activity	Chartfield 1	Chartfield 2	Chartfield 3	Code	Percent %
<input type="checkbox"/>	Controller	E&G General Revenue							33.33333334
<input type="checkbox"/>	Controller Admin Services	E&G General Revenue							33.33333333
<input type="checkbox"/>	Controller's Office FSUF	FSU Foundation Dept Funds	FSU Foundation	Associate VP Empl Contribution_1					33.33333333

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

Add Expense Edit Delete Copy Allocate Combine Expenses Move to								
<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Out of Pocket	Lodging	Omni Hotels Orlando, Florida	11/16/2020	\$470.12	\$450.12 Allocated Itemized
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/15/2020	\$25.00	\$25.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/14/2020	\$36.00	\$36.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00	\$25.00
<input type="checkbox"/>			*FSU-TEST-CBCP	Airfare	American Airlines Tulsa, Oklahoma	01/28/2017	\$645.80	\$645.80 Allocated
							\$1,201.92	\$1,181.92

Frequent next steps:

- [Reviewing Expense Report Totals](#)
- [Attaching Receipts & Receipt Handling](#)



Entering Personal Vehicle Mileage

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

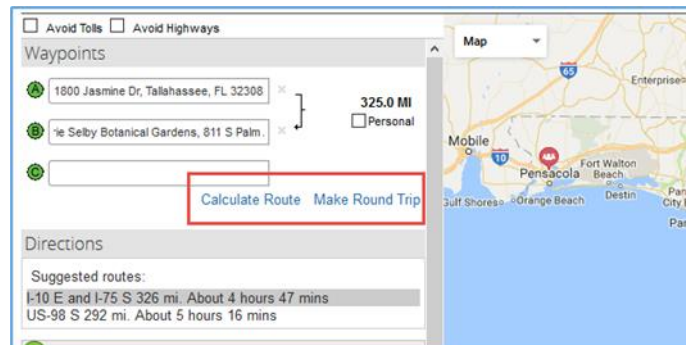
- The Mileage Calculator will calculate mileage based on your point-to-point routes
- Please see [Entering Documented Miles](#) for how to handle Mileage Logs.

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

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

To Create a Personal Vehicle Mileage Expense Line:

1. With the expense report open, on the **New Expense** tab, select **Mileage (Personal Vehicle Only)**.



2. The Google Mileage Calculator window automatically displays. Enter the Starting Point (home, office, or possibly hotel location, if already in-travel), and Destination.
3. Click **Make Round Trip**, only if your endpoint is the same as your starting point.
4. Click **Calculate Route**.
5. If needed, the Google Maps display can be adjusted to reflect the actual route taken. Click **Deduct Commute** (if starting travel from home, on a normal workday).



Deducted Commute Distance

Home
1800 Jasmine Dr

Office
600 W College Ave, Tallahassee, FL 323

16.3 MI

Deduct Round Trip

Directions

Suggested routes:
I-10 E and I-75 S 326 mi. About 4 hours 47 mins
US-98 S 292 mi. About 5 hours 16 mins

1801 Jasmine Dr, Tallahassee, FL 32308, USA

326 mi. About 4 hours 47 mins

1. Head west on Jasmine Dr toward Carissa Dr 39 ft

2. Jasmine Dr turns left and becomes Carissa Dr 0.2 mi

3. Carissa Dr turns left and becomes Quince Dr 184 ft

Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
16.3 MI	308.7 MI

Google

- a. Enter Home and Office location. You only need to do this once, or if your address changes.
- b. Click **Deduct Round Trip**, if applicable.
- 6. Click **Add Mileage to Expense**. Make sure all required fields are completed, including Transaction Date. Users are not required to attach a receipt or any other attachment for this expense type.
- 7. Click **Save Expense**.



Documented Miles Expense Type

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

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

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



Receipt Handling

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

Does Not Require Receipts

The following expense types:

- Daily Meal Allowance
- Per Diem
- Mileage

Also, the following expense types, **if less than \$30.00 and paid out-of-pocket:**

- Agent/Booking Fees
- Baggage
- Parking
- Portage
- Tolls
- Taxi or Car Service

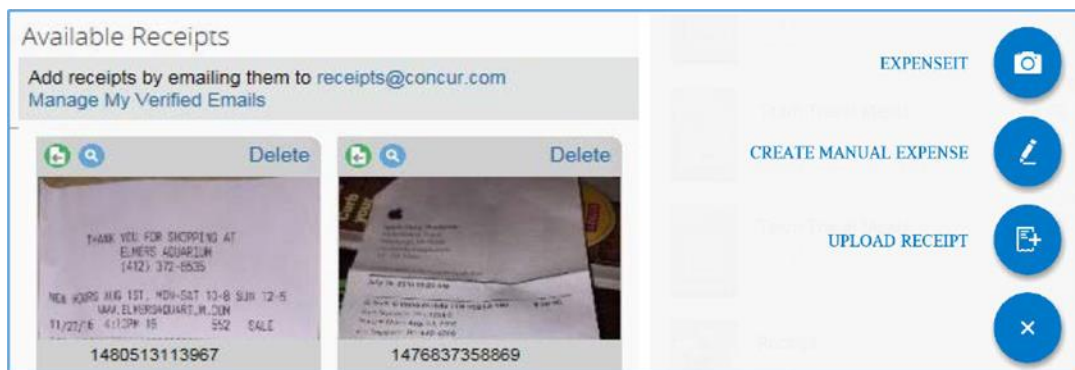
Requires Receipts

- All University Card (Travel Card, Lodge Card, etc.) transactions
- All other expense types, regardless of dollar amount

Receipt Submission Methods

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

If the receipt is applicable for the whole report, it would be appropriate for the report header, however, if it's something specific to one expense then it would be suitable to apply the receipt to the specific expense rather than the whole report.



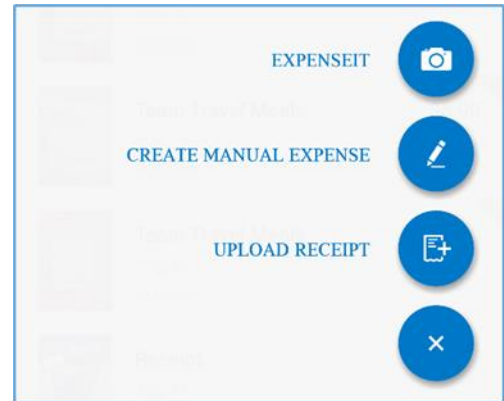


Mobile App

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

There are three options in Concur Mobile when you navigate to “Expenses” and click on the blue plus sign. (See screenshot). Two can be used for uploading receipts directly from your mobile device.

- **Expenselt** – Uses Optical Character Recognition (OCR) to turn images paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the “Expenses” area on the mobile app, or once you add the expense to an ER.
- **Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since requires a lot of manual entry on the phone. **(Does not count as a receipt)**
- **Upload Receipt** – This is the best option for including pictures of things like conference agendas, copies of online transactions, digital or handwritten notes, etc.



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

Scanned Images & E-Mail

Before you attempt to upload:

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

1. Select or open the expense line item that requires a receipt, then click **Attach Receipt Image**

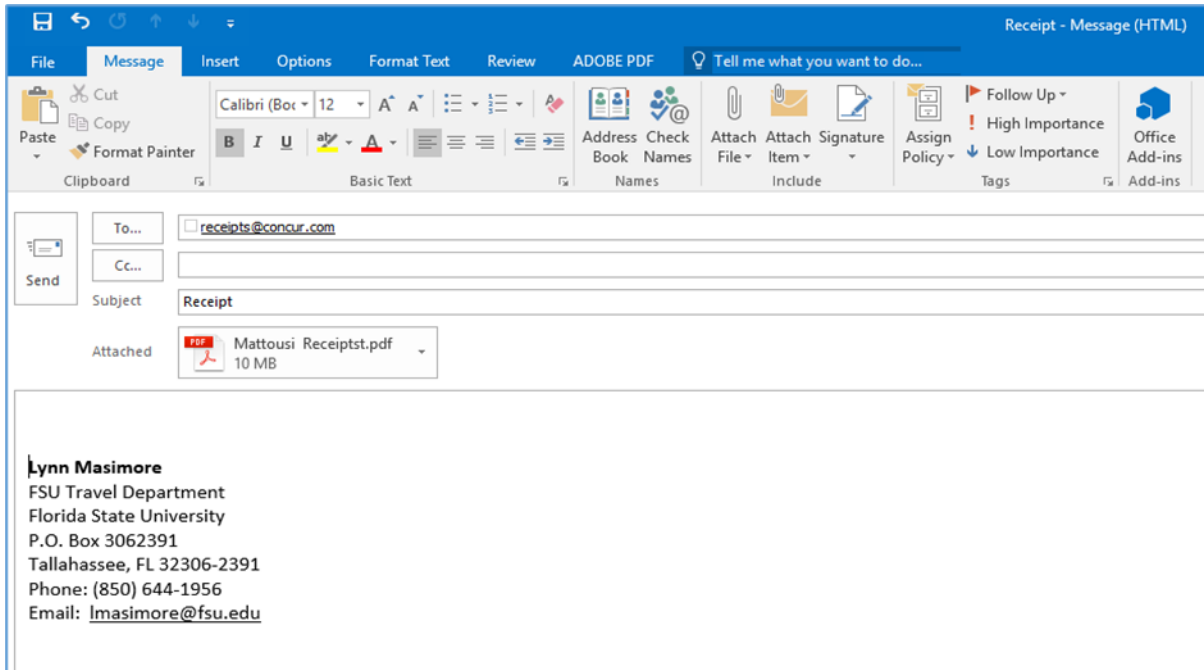
<input type="checkbox"/>	Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00	\$25.00			
<input checked="" type="checkbox"/>			*FSU-TEST-CBCP	Airfare	American Airlines Tulsa, Oklahoma	01/28/2017	\$645.80	\$645.80	Allocated
					\$1,224.74	\$1,204.74			

2. Click **Browse** to locate the file on your computer, then **Attach**.
3. Repeat steps 1 – 2 as necessary

Note: To email receipts from your email address, you must first verify your email address in your Concur profile.



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



2. Navigate to your expense report
3. Select the expense line item that requires a receipt, then click **Attach Receipt Image**
4. Click **Browse** to locate the file on your computer, then **Attach**.
5. Repeat steps 1 – 4 as necessary



Printing Travel Requests and Expense Reports

Purpose: From time to time, a printed or .pdf copy of a report may be necessary. Users can print or save a .pdf copy of Travel Requests and Expense Reports when needed.

Travel Request

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

The screenshot shows a travel request for a "Test Business Analyst Conference" valued at \$1,580.00. The status is "Approved" with Request ID: 9J6J. There are buttons for "More Actions" and "Create Expense Report". A dropdown menu is open under "Print/Share", with a red arrow pointing to the option "*FSU-Request Printed Report". Other options in the menu include "Print", "Save as PDF", and "Email".

Expense Report

To preview and print the expense report:

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

The screenshot shows a lodging expense report for \$1,204.74. The status is "Not Submitted". There are buttons for "Copy Report" and "Submit Report". A dropdown menu is open under "Print/Share", with a red arrow pointing to the options. The menu includes "Print", "Save as PDF", "Email", and two report options: "*FSU-Detailed Report with Audit Trail & App flow" and "*FSU-Guest Detailed Report with Audit & App flow".

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



Reimbursing Guests in Concur

Purpose: This document describes the steps needed to complete an expense report on behalf of a traveler who is not an FSU employee. All expense coverage must follow FSU guidelines.

Before entering guest travel, the user should be familiar with navigating Concur, entering [travel requests](#) and entering [expense reports](#).

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

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

In these examples since the payees are not University employees. You must complete a [Guest Traveler Profile](#) form and have a Guest ID number issued.

Important to note: Travel reps do not act as a delegate to enter guest travel. Guest travel is entered under the travel rep’s own profile.

Enter an Expense Report for a Guest Traveler

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

The screenshot shows a portion of the Concur expense report form. It includes the following fields and options:

- Report Id: A3ED2204F82649D5AED7
- Report Total: 77.00
- Amount Approved: 77.00
- Amount Due User: 77.00
- Guest Expense Reimbursement (highlighted with a red arrow)
- Will be the last report for this request? * ? (Dropdown menu set to Yes)
- Department * (Dropdown menu set to (029000) Controller)
- Project/Activity (Dropdown menu)
- Chartfield 3 (Dropdown menu)

3. In the area, near the bottom of the expense report header page there will be a section asking “Are you the traveler claiming meals for this expense report?” Select **No, I do not want to claim Travel Allowance**.



Claim Travel Allowance

Are you the traveler claiming meals for this expense report? If this is for a Guest click "No".

Yes, I want to claim Travel Allowance

No, I do not want to claim Travel Allowance

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

Entering Travel Card Charges Made on Behalf of a Guest Traveler

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

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

5. Search for your guest by last name and first name. If the guests name does not appear, click **Create New Attendee**
6. Select the attendee type "**Guest**" and enter your traveler’s last name and first name. Click **Create Attendee. Save.**
 - a. The guest traveler’s name will be associated with that expense line, however, the line is paying the travel card



Create New Attendee ✕

[← Go back](#)

Attendee Type * * Required field

Guest

Last Name *

Seminole

First Name *

Suzzane

Cancel Create Attendee

7. Click **Save**, then **Save Expense** to finish the expense line entry

Obtaining Guest Signature/Review

1. Once all expense lines are entered, Click on **Print/Share** and select ***FSU-Guest Detailed Report with Audit & App flow**

Guest Expense Report \$77.00 🗑️

Copy Report Submit Report

Not Submitted

Report Details ▾ **Print/Share ▾** Manage Receipts ▾ Travel Allowance ▾

REQUEST

Approved

\$5.00

*FSU-Detailed Report with Audit Trail & App flow

*FSU-Guest Detailed Report with Audit & App flow

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

Guest Expense Report \$77.00 🗑️

Copy Report Submit Report

Not Submitted

Report Details ▾ Print/Share ▾ **Manage Receipts ▾** Travel Allowance ▾

REQUEST

Approved

\$5.00

Manage Attachments

Missing Receipt Declaration

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

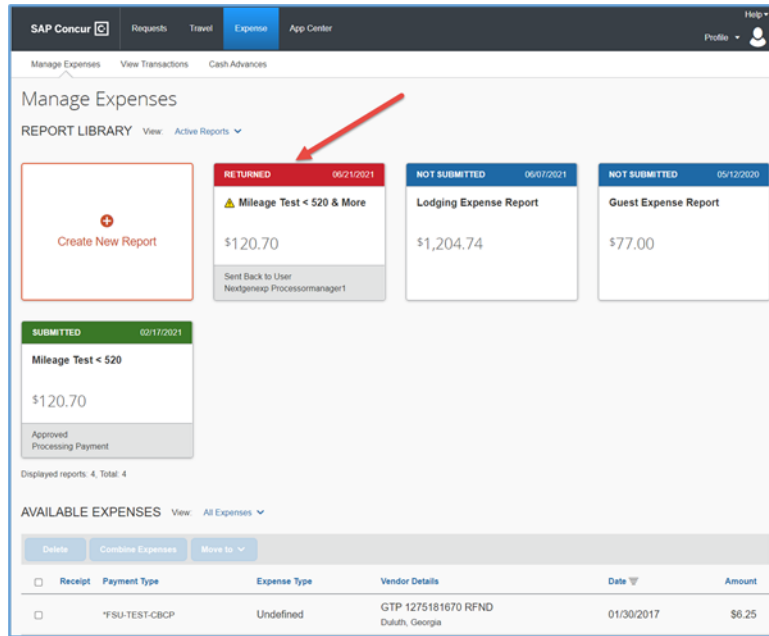


Correcting and Resubmitting an Expense Report

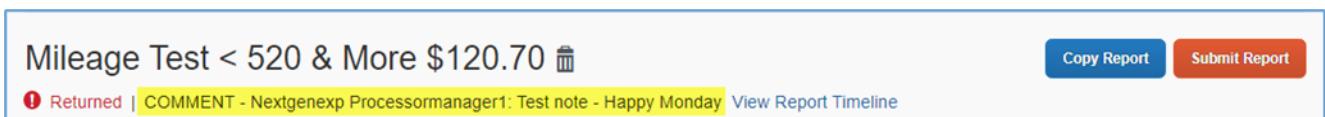
Purpose: Expense approvers and pre-pay auditors can send an expense report back if an error is found. The approver will include a comment explaining why the report was returned.

To Identify and Correct a Report Requiring Resubmission:

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



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



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

Delegates and Returned Reports

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

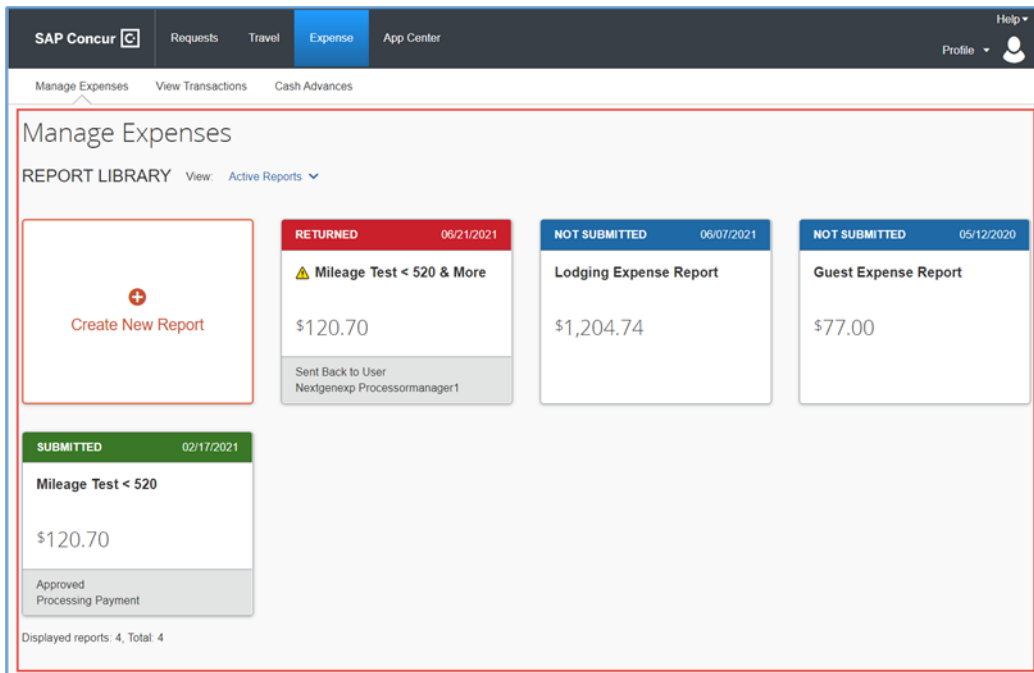


Determining Expense Report Status

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

Access the Expense Report

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



Expense Report Statuses

Pending External Validation	Budget checking between Concur and OMNI FI
Submitted & Pending Approval	In immediate Supervisor’s queue
Pending Cost Object Approval	At Budget Manager, Sponsored Research, or Research Foundation
Approved & in Accounting Review	At FSU Foundation for approval or Compliance (Athletics)
Approved and Pending Processor Manager	At central Travel Office for prepay audit
Sent for Payment	Approved for Payment

Accessing Comments

Occasionally a report is placed on hold. Typically, a user will receive an email from an auditor or travel rep informing them of this, along with a request for additional documentation or information. A user can also find comments on the expense report by opening the report and clicking **Report Details > Report Timeline**.



Reviewing Expense Report Totals

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

Lodging Expense Report \$1,204.74

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST
Approved
\$176.00

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Out of Pocket	Lodging	Omni Hotels Orlando, Florida	11/16/2020	\$470.12	\$450.12 Itemized
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/15/2020	\$25.00	\$25.00
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/14/2020	\$36.00	\$36.00
<input type="checkbox"/>			Out of Pocket	Parking	Vancouver, British Columbia	11/14/2020	CAD 30.00	\$22.82
<input type="checkbox"/>			Out of Pocket	Daily Meal Allowance	Seattle, Washington	11/13/2020	\$25.00	\$25.00
<input checked="" type="checkbox"/>			*FSU-TEST-CBCP	Airfare	American Airlines Tulsa, Oklahoma	01/28/2017	\$645.80	\$645.80
							\$1,224.74	\$1,204.74

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

To review a breakdown of the expense report totals:

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

Report Totals ✕

Company Pays \$558.94 Employee	\$645.80 Card (*FSU-TEST-CBCP)	Employee Pays \$0.00 Company
Amount Total: \$1,224.74 Less Personal Amount: \$20.00 <hr/> Requested Amount: \$1,204.74	Due Employee: \$558.94 Amount Due (*FSU-TEST-CBCP): \$645.80 <hr/> Total Paid By Company: \$1,204.74	Owed Company: \$0.00 <hr/> Total Owed By Employee: \$0.00

Expense Report **Amount Total** is \$1224.74

- **Total Paid By Company** is \$1204.74, 1224.74 subtracted by **Less Personal Amount** of \$20.00 (from a Personal Non-reimbursable expense).



-
- \$645.80 was charged to the FSU Travel Card (FSU-Test-CBCP) This amount is deducted from the **Amount Total**
 - **Amount Total** subtracted by Amount Due is \$645.80, which results in an **Amount Due Employee** of \$558.94



Reviewing and Approving Requests & Expenses

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

Accessing Approval Items

- Approvals link on the Quick Task Bar
- Required Approvals link next to the FSU-Concur welcome message
- Required Approvals link found under My Tasks

The screenshot displays the Concur user interface. At the top, navigation tabs include 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Approvals' tab is highlighted with a red box. Below the navigation is a dashboard with several metrics: 'New' (+), '05 Required Approvals', '81 Authorization Requests', '01 Available Expenses', '11 Open Reports', and '00 Cash Advances'. The '05 Required Approvals' metric is also highlighted with a red box. Below the dashboard are sections for 'TRIP SEARCH', 'ALERTS', 'COMPANY NOTES', and 'MY TASKS'. The 'MY TASKS' section contains three task cards: '05 Required Approvals', '01 Available Expenses', and '11 Open Reports'. The '05 Required Approvals' card is highlighted with a red box and lists several tasks with names and amounts, such as 'Justin K. | Just Inactive | \$100.00 — Travel'.

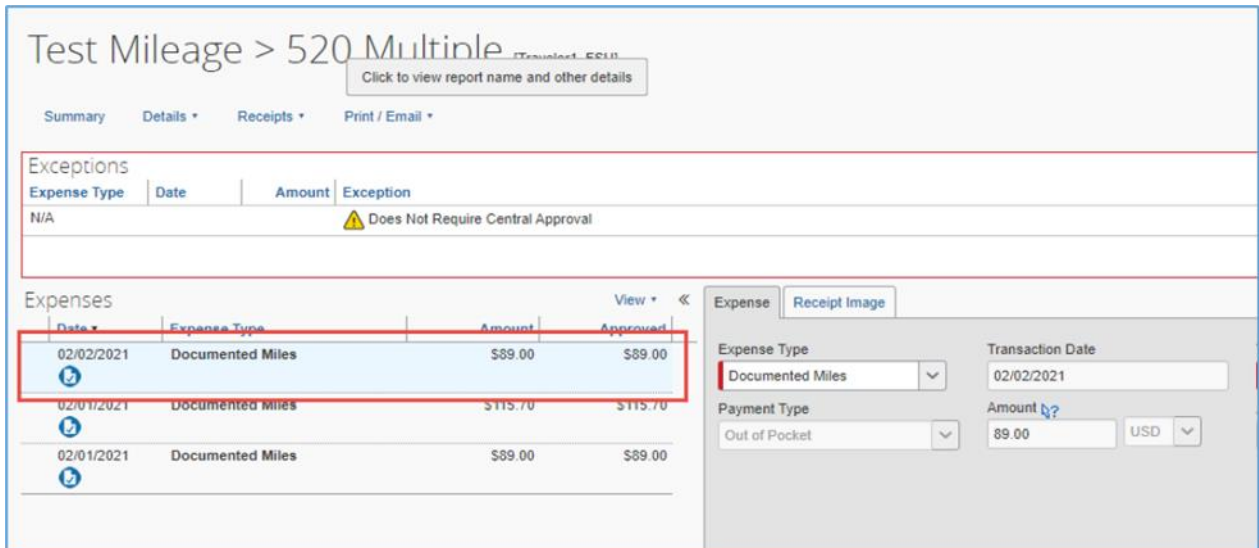


Approve Submitted Requests or Reports

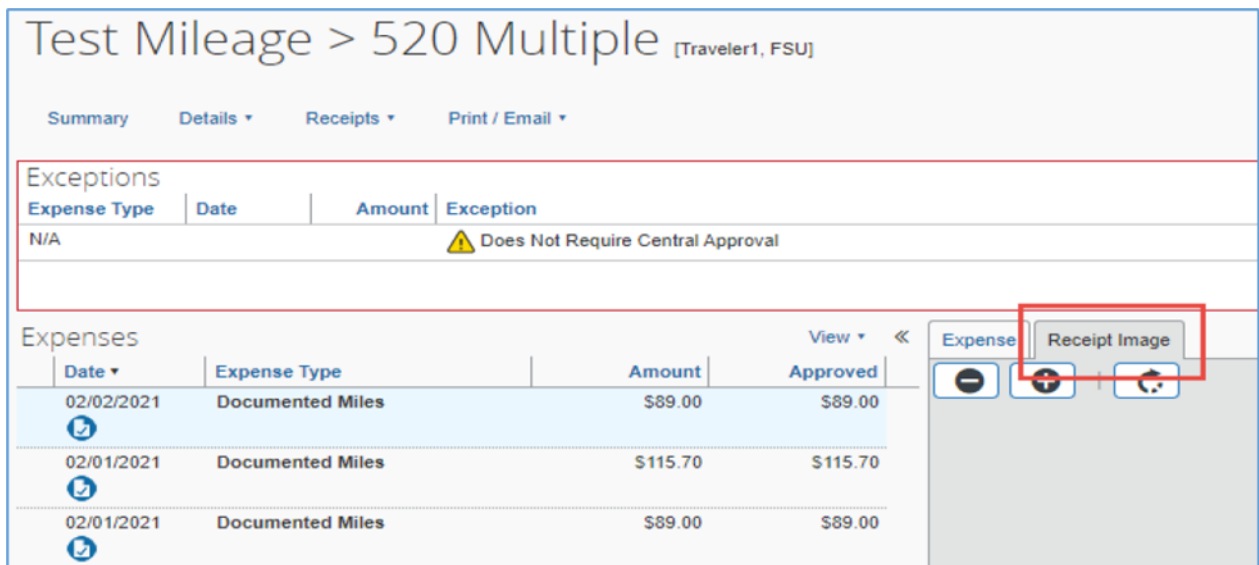
1. Click the name of the request or report you want to open.
2. Review each line item for compliance, and to ensure any required receipts and itemizations have been provided.

Note: Approvers can change allocations, some expense types, and transaction date for out of pocket expenses. They can also add comments and receipts. They cannot add or delete lines or change amounts.

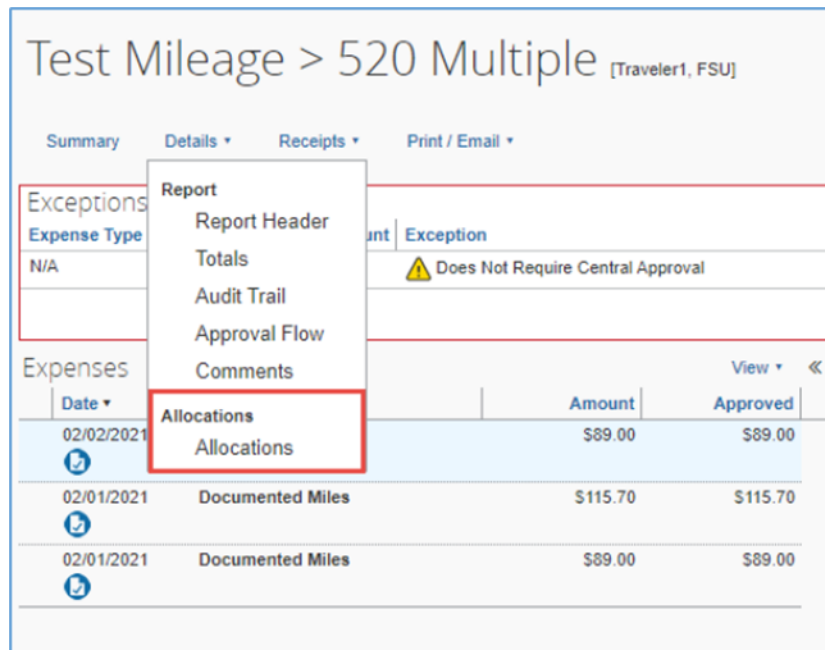
 - a. Click the expense on the left-hand side to display itemization details including account allocations, comments, missing receipt affidavits, and exceptions.



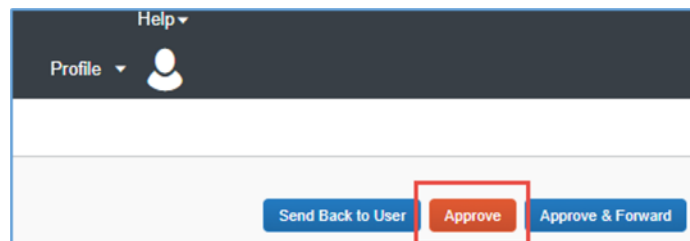
- b. Receipt images can be viewed in the **Receipt Image** tab.



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



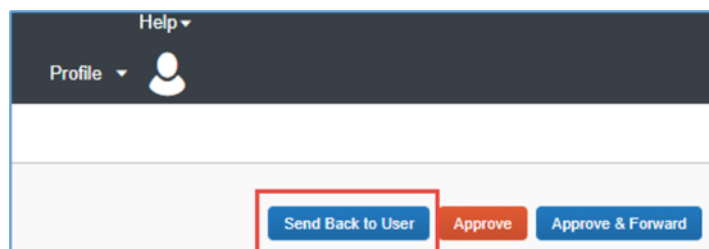
4. If all items are in compliance, click **Approve**.
 - a. **Note:** If allocations are changed, upon clicking **Approve**, workflow will adjust to send the report to any newly added Cost Object Approvers (Budget Manager).



Send a Submitted Request or Report Back to the User

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

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



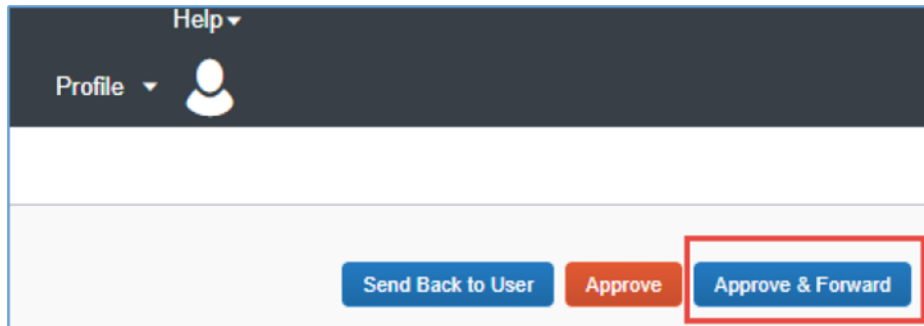


Adding an Additional Review Step

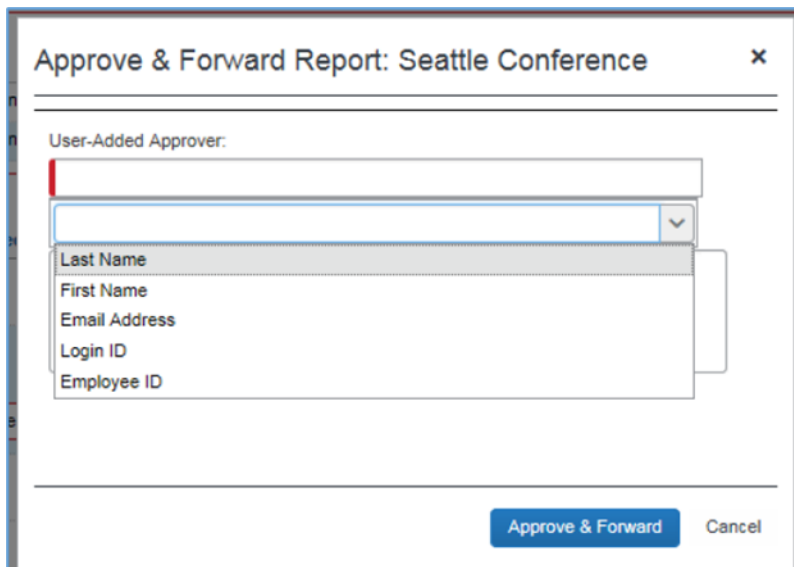
Approvers have the option to forward transactions in their queue to additional approvers as needed. **Note:** This is a one-time process and if necessary, will need to be repeated for each request/report.

To approve and forward a request or report:

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



3. In the User-Added Approver field, click the drop down and select Last Name or Email Address for the search method.
4. Search for, then select the appropriate individual.
5. Click **Approve & Forward**



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

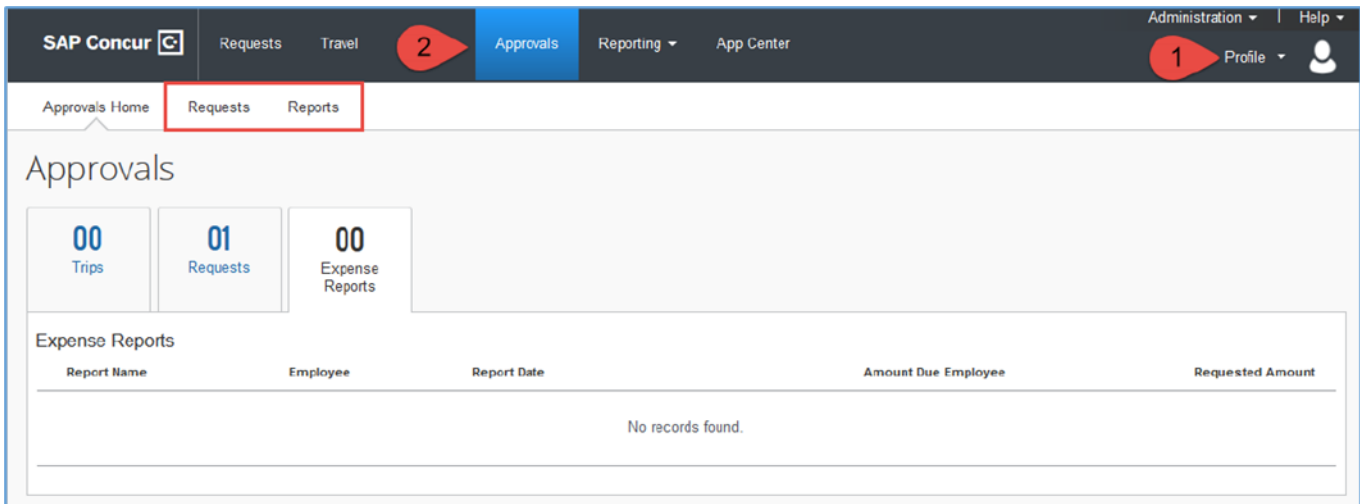
1. Click **Details**, and then **Approval Flow**.
2. Click the "+" icon to add an approver to the workflow and click **Approve**.



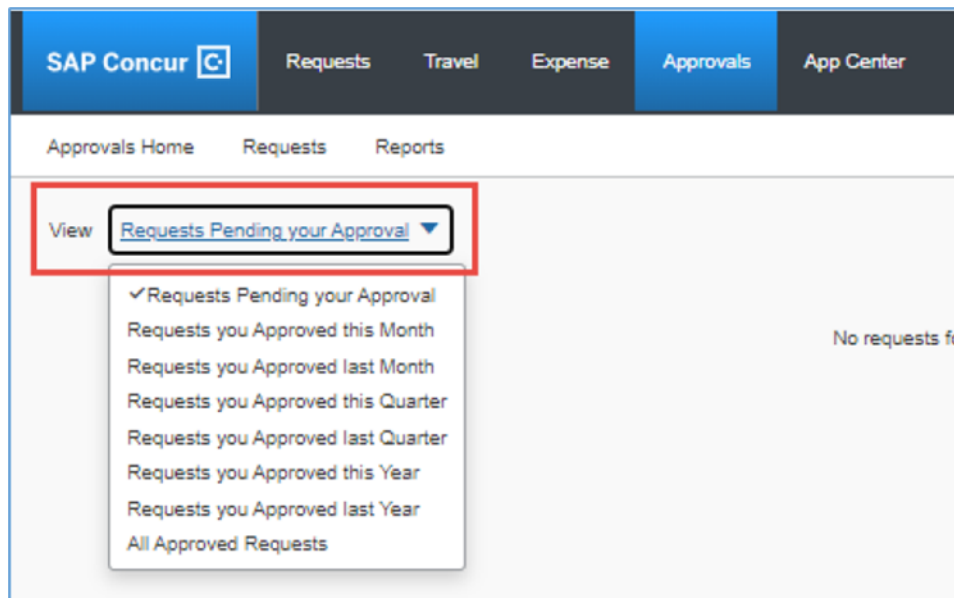
Accessing Past Approvals

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

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



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



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



SAP Concur									
Requests		Travel		Expense		Approvals		App Center	
Help									
Profile									
Approvals Home Requests Reports									
View All Approved Requests									
Request Name	Employee Name	Request Dates	Comment	Status	Date Submitted	Total	Approved amount	Remaining amount	
Test Business Analyst Conference ID: 9J6J	Traveler1, Nextgen	07/10/2021 - 07/15/2021		Approved	05/10/2021	\$1,580.00	\$1,580.00	\$1,580.00	
Test Number 2 ID: 9J6U	Traveler1, Nextgen	07/10/2021 - 07/15/2021		Approved	05/11/2021	\$2,340.00	\$2,340.00	\$2,340.00	
Lodging Test Request ID: 97QF	Traveler1, Nextgen	11/13/2020 - 11/14/2020		Approved	11/10/2020	\$176.00	\$176.00	\$176.00	

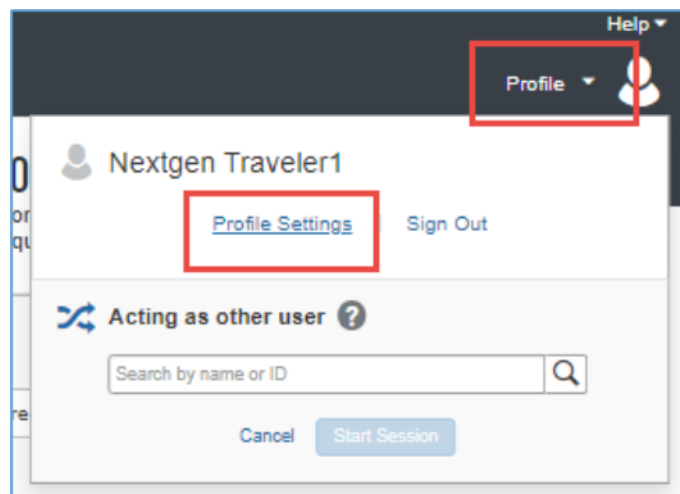


Request /Expense Delegates

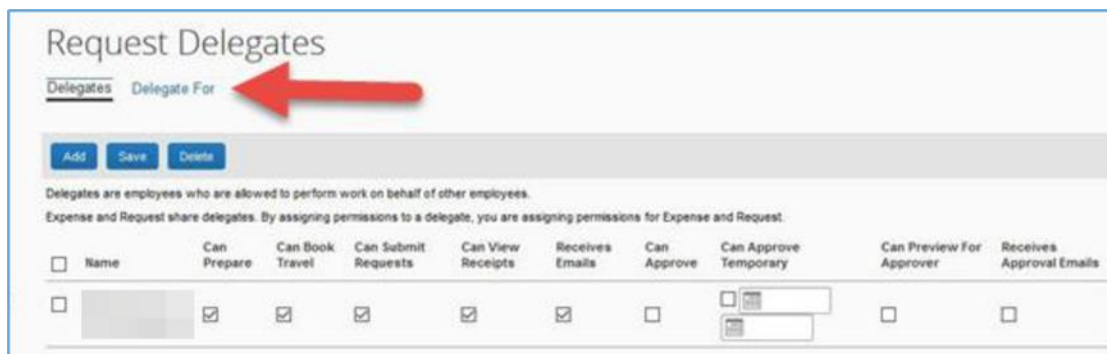
Purpose: Delegates are employees who are allowed to perform work on behalf of other employees. Delegates can prepare and submit travel requests, book travel, and prepare, **but not submit**, an expense report on behalf of the traveler. It is the responsibility of the traveler to add/delete Delegates.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

To See Who You are a Delegate For

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



4. Click **Delegate For**.



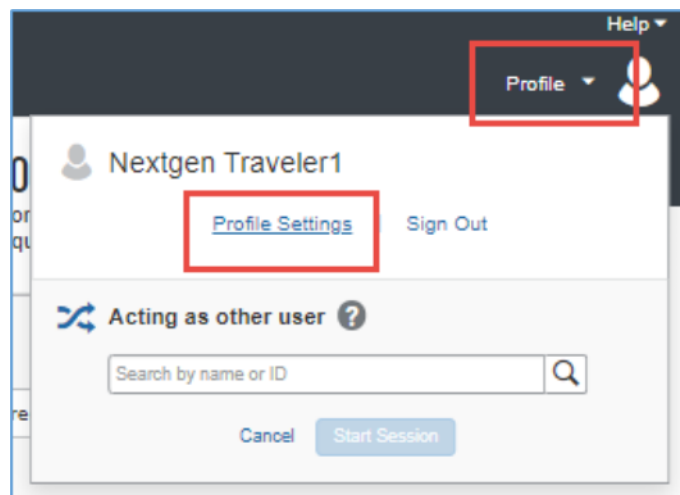


Remove Unneeded Travelers or Delegates in Concur

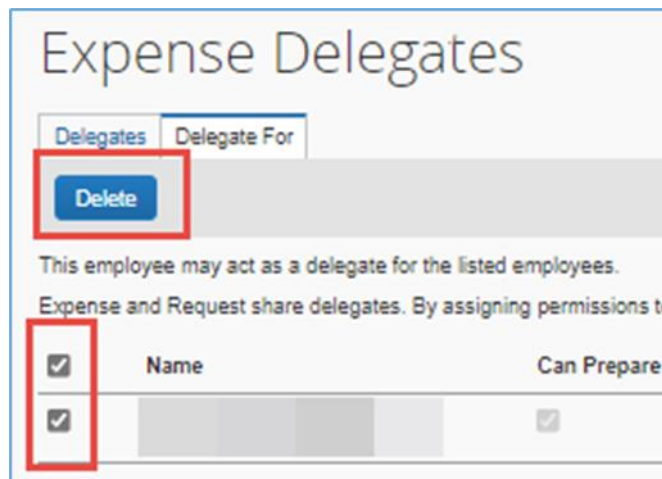
Delegates can work in Concur on behalf of travelers. They can also elect to receive email notifications that are intended for the traveler. This can cause users to receive Concur emails when any of those travelers have activity in Concur. Removing unneeded travelers will reduce unnecessary emails.

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

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



4. Click on either **Expense Delegates** or **Request Delegates** (they go to the same place).
5. Select the check box to the left of the individual(s) and click **Delete**.



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

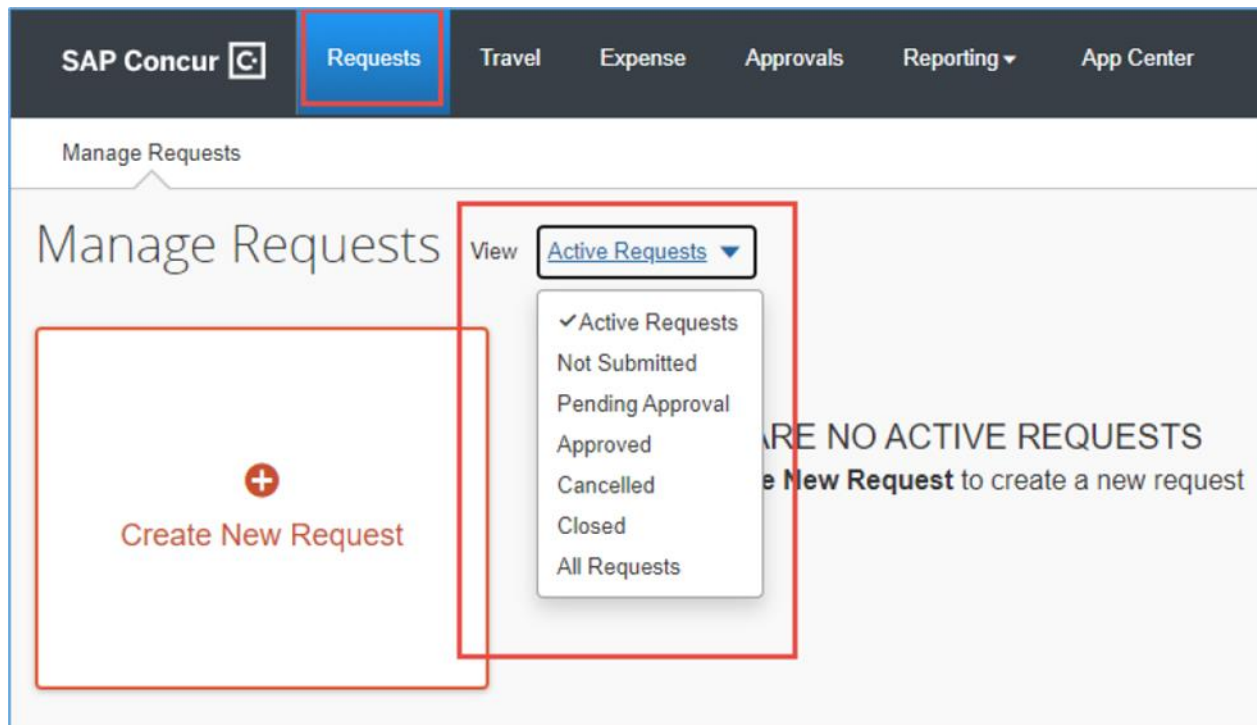


Accessing Past Travel Requests & Expense Reports

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

Manage Requests

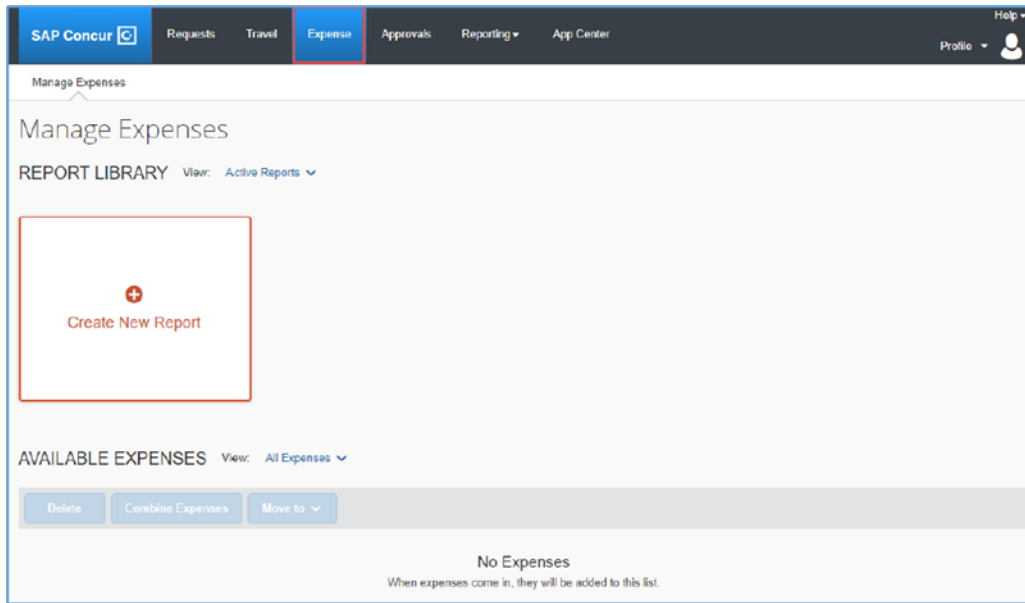
1. Log into Concur and, if needed, act on behalf of the traveler whose request you wish to view. Delegates may view requests of any user they are a delegate (travel rep) for.



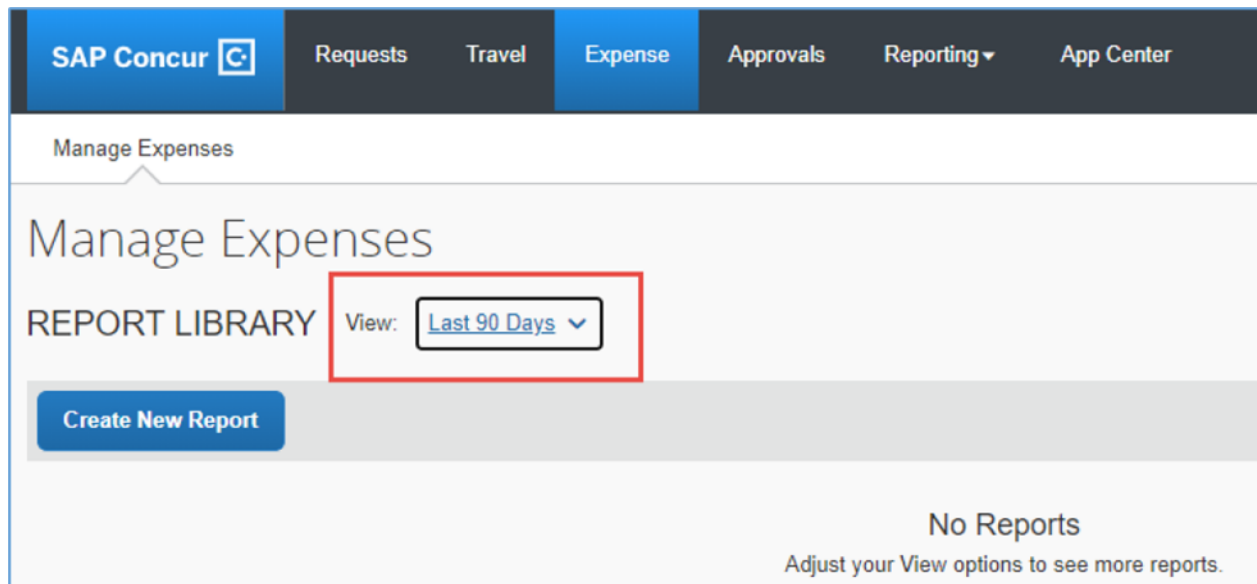
2. Active requests will display by default. Users may view other requests by clicking **View**.
3. Click on a request name to view it.

To Access the Report Library

1. Log into Concur and, if needed, act on behalf of the traveler whose report you wish to view. Delegates may view reports of any user they are a delegate (travel rep) for.
2. Click on the **Expense** module
3. Click on an expense report name to view it.



Note: Concur displays Reports for the last 90 Days. Users may click View to select a different range or a particular report status to view.





Concur Connected Applications

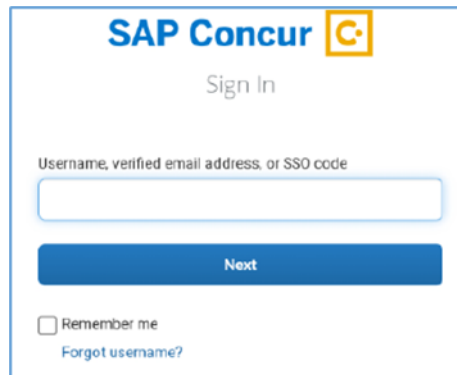
Purpose: To take full advantage of the functionality in the Concur application, we recommend that you download two applications onto your smartphone or mobile device. These are optional and provide convenience to users.

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

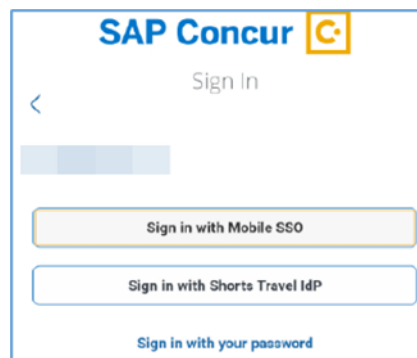
Concur Mobile & Registration

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

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



3. Click **Sign in with Mobile SSO**



4. Click **OK**, to allow Concur to send Notifications concerning approvals, expenses, etc. This can be customized later.



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

Booking Travel with Concur Mobile

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

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

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

Please refer to our Concur Travel page for information on contacting World Travel Service for assistance and any associated fees.

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

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

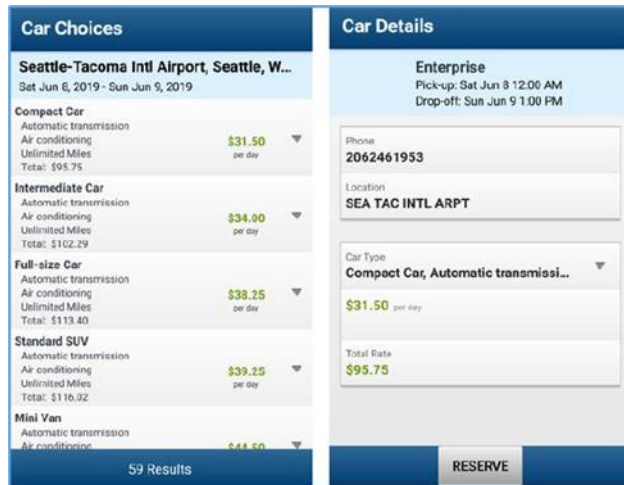
Rental Car

1. Select **Book a Car** or **Car**
2. Provide Location (Mobile is limited to airports), Departure Dates and Times
3. Select Car Type "**Compact**" and **Search**. The University will only reimburse for the rental of compact size vehicles unless justification is provided detailing the necessity for a larger vehicle.

The screenshot shows the 'Book Car' interface in the Concur Mobile app. It features a blue header with a back arrow and the title 'Book Car'. Below the header, there are four input fields: 'Location' (Seattle-Tacoma Intl Airport, SEA), 'Departure' (Sat, Jun 8, 12:00 AM), 'Return' (Sun, Jun 9, 1:00 PM), and 'Car Type' (Compact). A blue 'Search' button is located at the bottom of the screen.



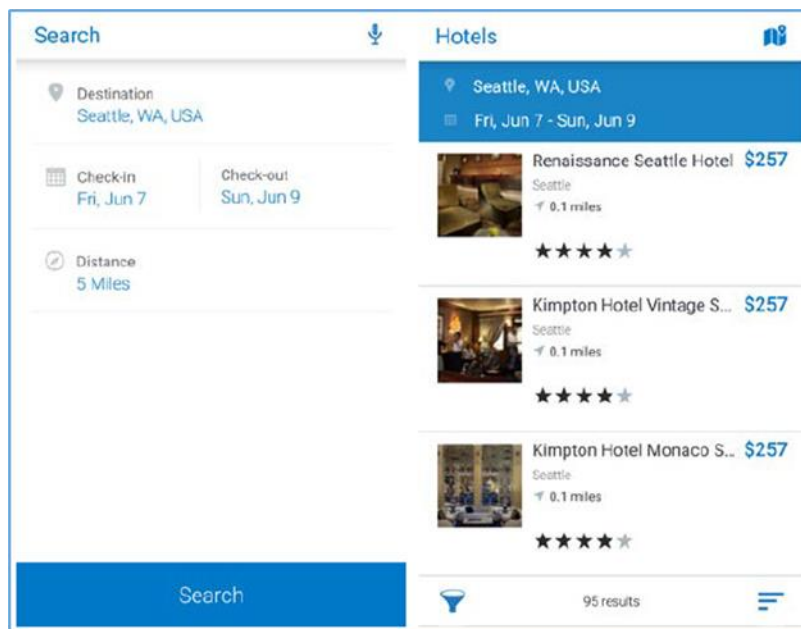
- Review available car choices (Options will be presented beginning with contracted and preferred vendors AVIS/Budget). **Note:** Reimbursement for non-contracted vendors will require a justified explanation.
- Review the car details to ensure the car matches your expectations, confirm times, dates,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



Note: Using Reserve will place a hold on the car and it should be processed by World Travel Service within 24 hrs. Car reservations can be cancelled by accessing your car segment and clicking “Cancel Car” in the bottom left corner.

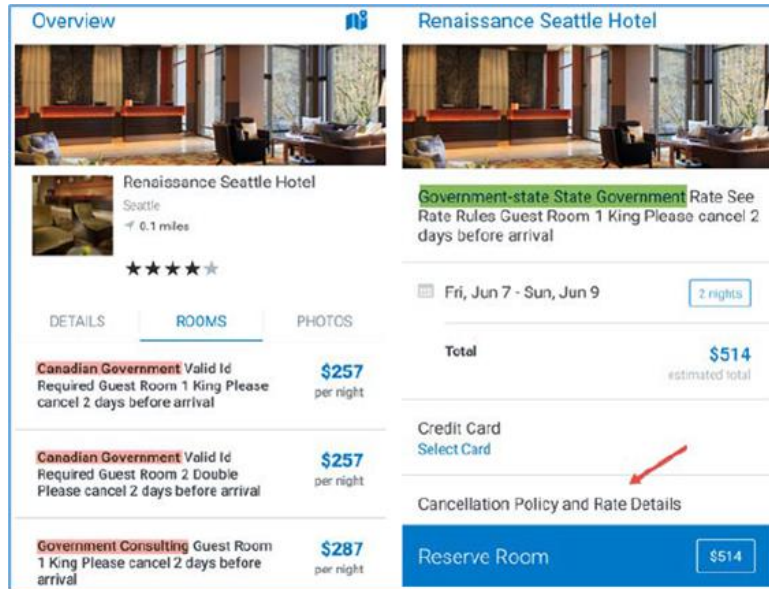
Hotel

- Select **Book a Hotel** or **Hotel**
- Using Destination Check-in, Check-out, and Distance as criteria, press **Search**





3. Evaluate available options for hotels, data can be filtered or sorted based on preferences and available options
4. Review details on hotel booking to ensure room Cancellation Policy and Rate Details match expectations and the requirements are applicable to your situation

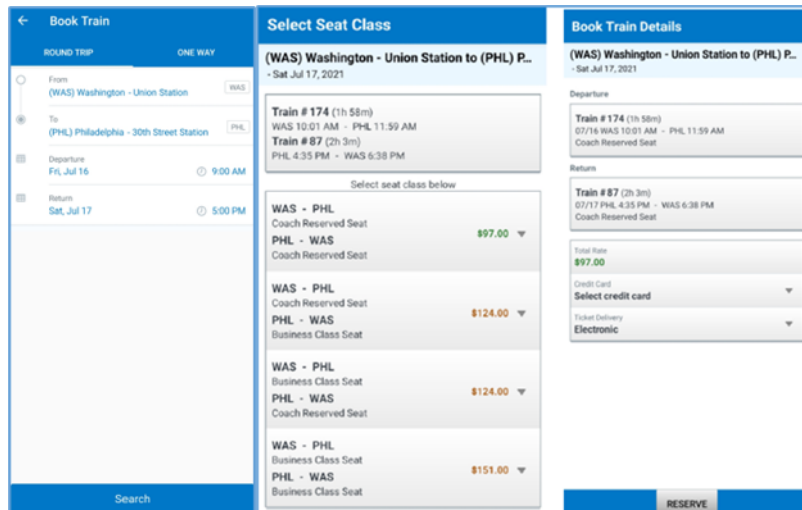


5. Confirm Method of Payment and Reserve Room
 - a. **Note:** Using Reserve Room will place a hold on the selected option and it should be processed by World Travel Service within 24 hrs. Room is not confirmed until you receive confirmation of the reservation. Hotel reservations can be cancelled by accessing your hotel segment and clicking “**Cancel Hotel**” in the bottom left corner.

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

Trains

1. Select **Book a Train** or **Train**
2. Select your trip type. Concur may default to One Way or Round Trip.
3. Provide Departure City and Arrival City
4. Provide Departure Date and Return Date
 - a. Departure Time and Return Time will further define results, if no results are returned try to alter your dates or times.
5. Click **Search**



- Review the train detail and confirm your seat class to ensure the trip matches your expectations, confirm the method of payment, and click **Reserve**.

Airfare

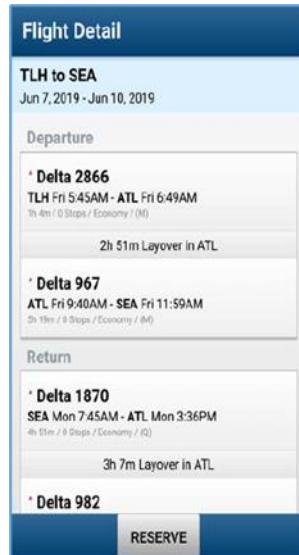
- Select **Book a Flight** or **Flight**
- Select your trip type. Concur may default to One Way or Round Trip
- Provide Departure City and Arrival City
- Provide Departure Date and Return Date.
 - Departure Time and Return Time will further define results, if no results are returned try to alter your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

Note: If you encounter any issues while searching, you can check the web version for accuracy.

Results Summary	
TLH to SEA	
Jun 7, 2019 - Jun 10, 2019	
See All (163 results)	
1 Stop	
American Airlines	Starting \$691.50
1 result	
Delta	Starting \$1,087.74
12 results	
See All 1 Stop (13 results)	
2 Stops	
American Airlines	Starting \$590.70
100 results	
Delta	Starting \$903.77
38 results	



Note: You will be provided a Results Summary page to review options. The results may be grouped based on matching criteria. Clicking on the options will allow you to review the price and itinerary details for the selected choice.



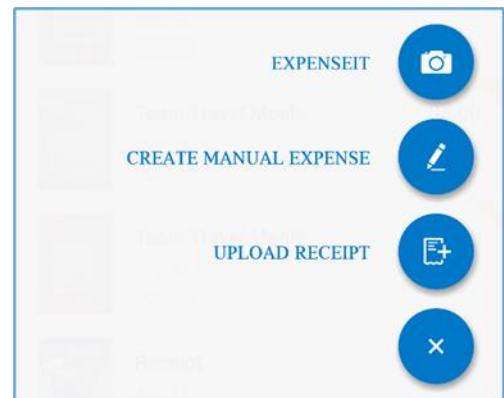
- Review the Flight Detail to ensure the flight matches your expectations, confirm the method of payment, and click **Reserve**.

Mobile Upload Options

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

There are three options in Concur Mobile when you navigate to “Expenses” and click on the blue plus sign. (See screenshot). Two can be used for uploading receipts directly from your mobile device.

- ExpenseIt** – Uses Optical Character Recognition (OCR) to turn images paper receipts into an expense that can be modified on the expense report (ER). Works well for out-of-pocket expenses. Information captured using this can be modified either from the “Expenses” area on the mobile app, or once you add the expense to an ER.
- Create Manual Expense** – Useful for creating an expense manually while traveling but not ideal since requires a lot of manual entry on the phone. **(Does not count as a receipt)**
- Upload Receipt** – This is the best option for including pictures of things like conference agendas, copies of online transactions, digital or handwritten notes, etc.

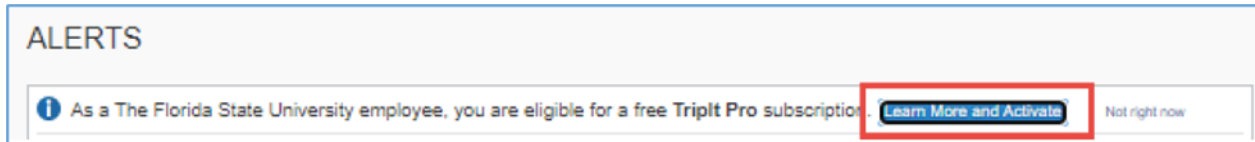


For the best experience while uploading receipts it is recommended to use a strong and stable internet connection for the entirety of the upload process. If the process fails, you can retry the upload until it succeeds.



TripIt Pro

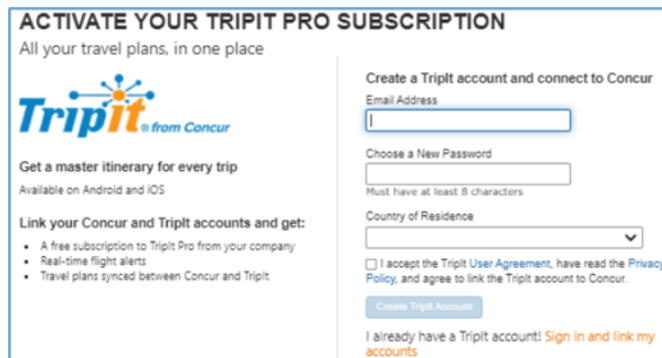
On the Concur home page, under Alerts, you may see a message regarding eligibility for a free TripIt Pro subscription from time to time. Click “**Learn More and Activate**”.



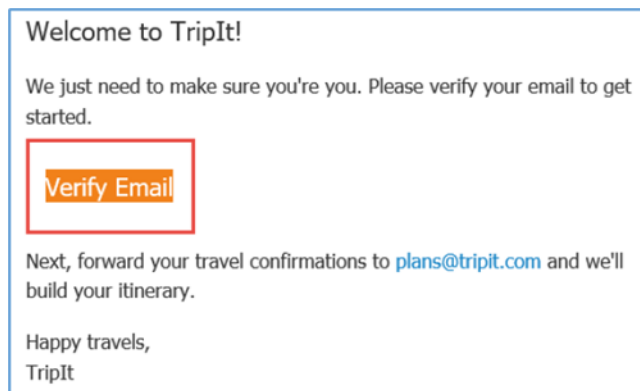
Note: TripIt can also be initialized by proceeding to 1) Profile, 2) Profile Settings 3) Connected Apps.

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

Note: TripIt passwords are not managed by the University; protect your account by using a different password

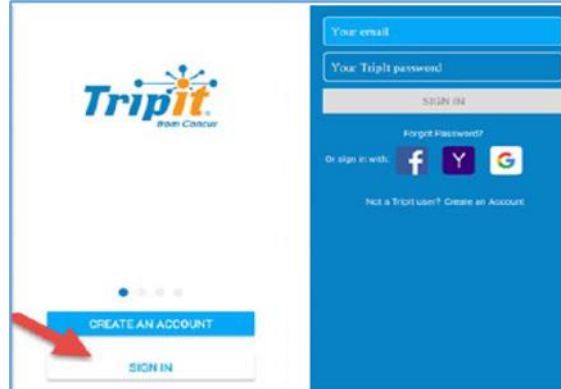


2. TripIt will send a verification email to your “@fsu.edu” email address. Click the link in the email to verify the account.
3. Click **Verify Email**





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



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

Converting Foreign Currency Transactions

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

To Convert an Expense Incurred in Another Currency:

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



5. Complete the remaining fields as appropriate. Then click **Save**.

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

Test Validation Foreign \$856.19 Copy Request Submit Request
 Not Submitted | Request ID: 9KVF

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Add ▾ Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>	Boat		05/30/2021	\$5.00	\$5.00
<input type="checkbox"/>	Car Rental	London, UNITED KINGDOM - London, UNITED KINGDOM	05/29/2021	GBP 600.00	\$851.19
				Estimated Total: \$856.19 Foreign currency converted	

Exchange your Unused Tickets

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

Traditional Exchange

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

ALERTS

Triplt creates a schedule with all your travel details in one place, accessible on Android or iPhone. Simply connect your Concur account to **Triplt**. Connect to Triplt Not right now

You have unused tickets



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

Unused Tickets

You have the following unused tickets in the reservation system.

Carrier	Ticket Number	Credit	Expiration Date	Notes
DELTA	006 7880000000	1,000.00		Etkf

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

Hide matrix: [Print / Email](#)

	Delta	Southwest
All 258 results	Preferred	
Nonstop 4 results	—	195.76 4 results
1 stop 224 results	243.60 48 results	199.18 176 results
2 stops 30 results	—	297.78 30 results
Unused tickets available 1 tickets	1 tickets	—

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

Fare Details	Free Checked Bags	Refundable		
Main Cabin (V) Rules / Fare Details	0	No		\$243.60
Unused tickets available View more fares				

Worldspan

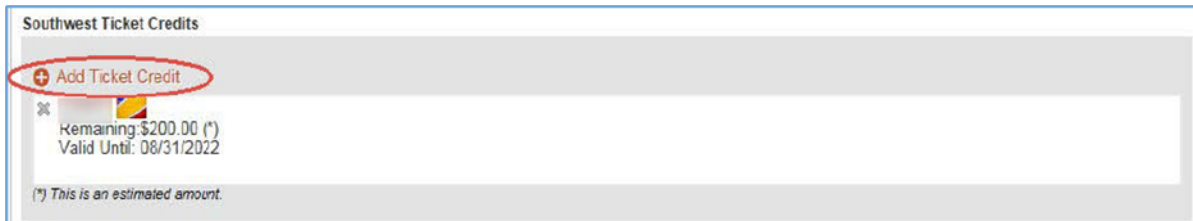
Traditional carrier bookings do not need to specify that an unused ticket can be used on your new reservation. As long as the selected fare meets the requirements of an unused ticket, the credit will be applied by a World Travel Service agent once the transaction is complete and they receive your reservation.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



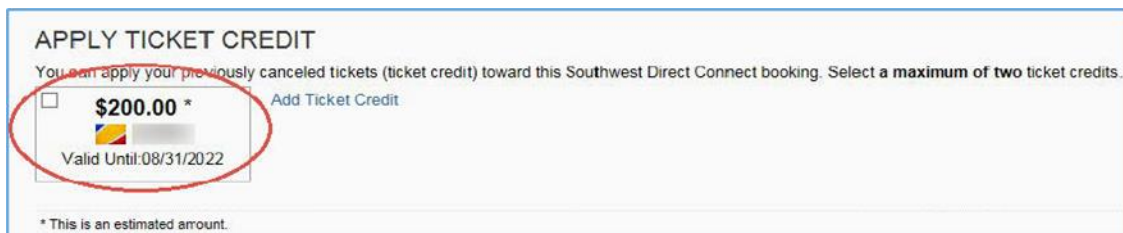
Non-Traditional Exchange (Southwest Airlines, et. al.)

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

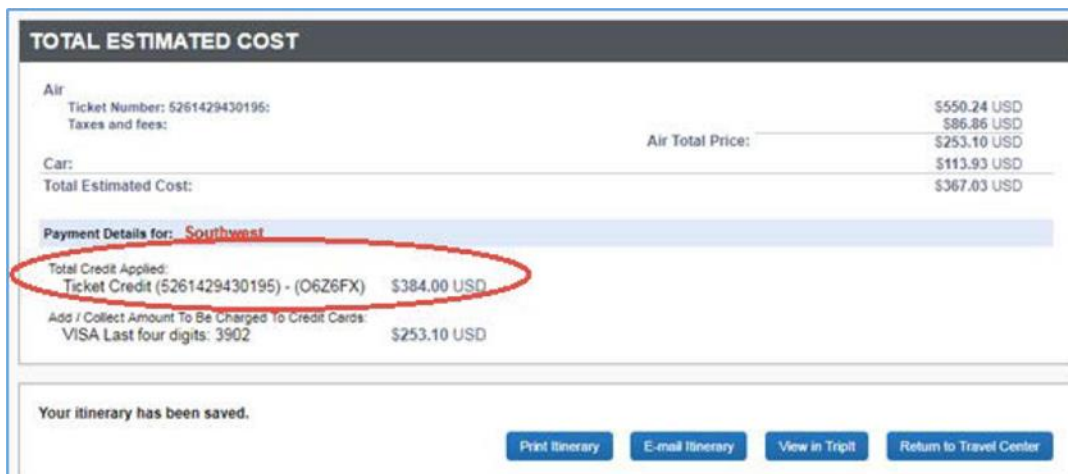
- **Scenario 1:** If a reservation is cancelled in Concur or with a World Travel Service agent the credit will automatically be added to the user’s profile
- **Scenario 2:** If cancelled directly with the airline (Southwest, et. al.) the credit will need to be added to the user’s profile by using the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



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



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





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

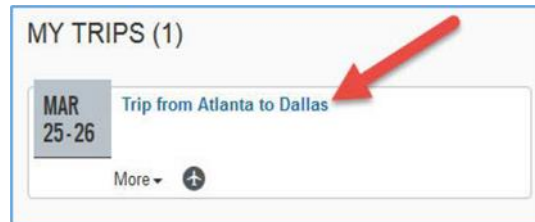
Changing an Existing Reservation

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

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

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

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



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



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



The image displays two side-by-side 'Change Flight' dialog boxes. Each dialog has a title bar with a close button (X) and a header 'Change Flight'. Below the header is the instruction 'Make changes to the following flight segments:'.
The left dialog shows a checked segment: 'Atlanta Hartsfield-Jackson Intl Airport (ATL) to Dallas/Fort Worth Intl Airport (DFW)'. It includes fields for 'From' (ATL - Atlanta Hartsfield-Jackson Intl Airport - A), 'To' (DFW - Dallas/Fort Worth Intl Airport - Dallas, TX), and 'Depart' (03/25/2019, dep, 11:00 am, ± 3). There is an unchecked checkbox for 'Dallas/Fort Worth Intl Airport (DFW) to Atlanta Hartsfield-Jackson Intl Airport (ATL)' and a checked checkbox for 'Flights w/ no double connections'. 'Search' and 'Cancel' buttons are at the bottom.
The right dialog shows two checked segments. The first is 'Atlanta Hartsfield-Jackson Intl Airport (ATL) to Dallas/Fort Worth Intl Airport (DFW)' with 'From' (ATL - Atlanta Hartsfield-Jackson Intl Airport - A), 'To' (DFW - Dallas/Fort Worth Intl Airport - Dallas, TX), and 'Depart' (03/25/2019, dep, 11:00 am, ± 3). The second is 'Dallas/Fort Worth Intl Airport (DFW) to Atlanta Hartsfield-Jackson Intl Airport (ATL)' with 'From' (DFW - Dallas/Fort Worth Intl Airport - Dallas, TX), 'To' (ATL - Atlanta Hartsfield-Jackson Intl Airport - A), and 'Depart' (03/25/2019, dep, 04:00 pm, ± 3). It also has a checked checkbox for 'Flights w/ no double connections'. 'Search' and 'Cancel' buttons are at the bottom.

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

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



Flight Information

Current Flights:

Carrier	Flight Number	From	To	Depart	Arrive	Class
DELTA	635	ATL	DFW	Mar 25 11:00 am	Mar 25 12:26 pm	K
DELTA	1321	DFW	ATL	Mar 26 04:00 pm	Mar 26 07:01 pm	X

New Flights:

Carrier	Flight Number	From	To	Depart	Arrive	Class
DELTA	793	ATL	DFW	Mar 25 10:00 am	Mar 25 11:25 am	H
DELTA	1321	DFW	ATL	Mar 27 04:00 pm	Mar 27 07:01 pm	X

Exchange details

Original Airfare:	USD368.60
New Airfare:	USD454.60
Airfare Difference:	USD86.00
Forfeited Fare Amount:	0.00
Exchange Fee:	USD200.00
Total Cost of Exchange:	USD286.00

The new air segment(s) have been added to your itinerary. Please choose "Purchase New Flights" to complete the exchange or "Cancel Flight Exchange" to cancel your change.

[Cancel Flight Exchange](#) [Purchase New Flights](#)

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

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

Travel Details

Important: If you are making a **NEW** reservation or **CHANGING** an existing one, be sure to complete your booking by following the instructions found at the bottom of the page.

WARNING! When cancelling a **Southwest** reservation, please consider the guidelines below:

You cannot cancel a Southwest flight if (1) the flight was booked by an agent, (2) you have already checked-in for the flight [attn: **A-List Members** or **Early Bird Check-in**], (3) if the first leg of the flight is set to depart within 30 minutes or already departed, (4) if the trip is already in progress. **These reservations must be canceled directly with Southwest or by calling World Travel Service.**

Southwest tickets not cancelled via Concur or a WTS agent will not appear as an unused credit unless you manually enter the information.

TRIP OVERVIEW

<p>I want to...</p> <p>Print Itinerary</p> <p>E-mail Itinerary</p>	<p>Trip Name: Trip from Atlanta to Dallas (edit)</p> <p>Start Date: March 25, 2019</p> <p>End Date: March 27, 2019</p> <p>Created: February 28, 2019, William Never (Modified: February 26, 2019)</p> <p>Description: (No Description Available) (edit)</p> <p>Agency Record Locator: LRMCBS</p> <p>Ticket Number(s): 0067299098015</p> <p>Passengers: William J Never</p> <p>Total Estimated Cost: \$368.60 USD (Details)</p>	<p>Add to your Itinerary</p> <p> Car Hotel</p> <p> Parking Wi-Fi</p>
---	---	---



Complete any required fields and click on **Finish** to update booking with World Travel.

Trip Confirmation

Press the "Finish" button to complete your booking and have it processed.

Trip Name:
Trip from Atlanta to Dallas

Description:

Comments for the Travel Agent (optional)
Special Requests may incur a higher service fee.

Send a copy of the confirmation to:

Send my email confirmation as HTML Plain-text

Include directions to hotels:

[Display Trip](#) [<< Previous](#) [Finish](#)

World Travel Service will contact the traveler to resolve any issues prior to final confirmation. **The reservation is not complete until you receive confirmation that the flight is booked.**

Finished!

You have successfully booked your trip!

Trip Record Locator : [blurred]

This trip complies with your travel policy.
Your itinerary has been saved. (US) World Travel Service will service your itinerary.

Please Note: Fares are not guaranteed until tickets are issued and are subject to change without notice.

Exchange Restrictions

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

- Itineraries with multiple carriers
- Any portion of the ticket has been used/changed/checked-in
- Record has more than 4 segments
- The cost of the exchange is higher than purchasing a new ticket
- You are booked for travel on an instant purchase carrier (i.e. Allegiant, JetBlue, etc.)
- Trip is for a foreign destination
- Your trip is for multiple destinations
- Your trip was not originally booked online via Concur Travel



-
- The credit card address does not match the standards stated in the profile (billing address no longer than 30 characters)
 - The street address is entered on more than one line or special characters were used in address
 - The name on your frequent flyer account and the name listed in your Concur profile do not match exactly

Contact a World Travel full-service agent for assistance with your exchange in any of these situations.

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

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

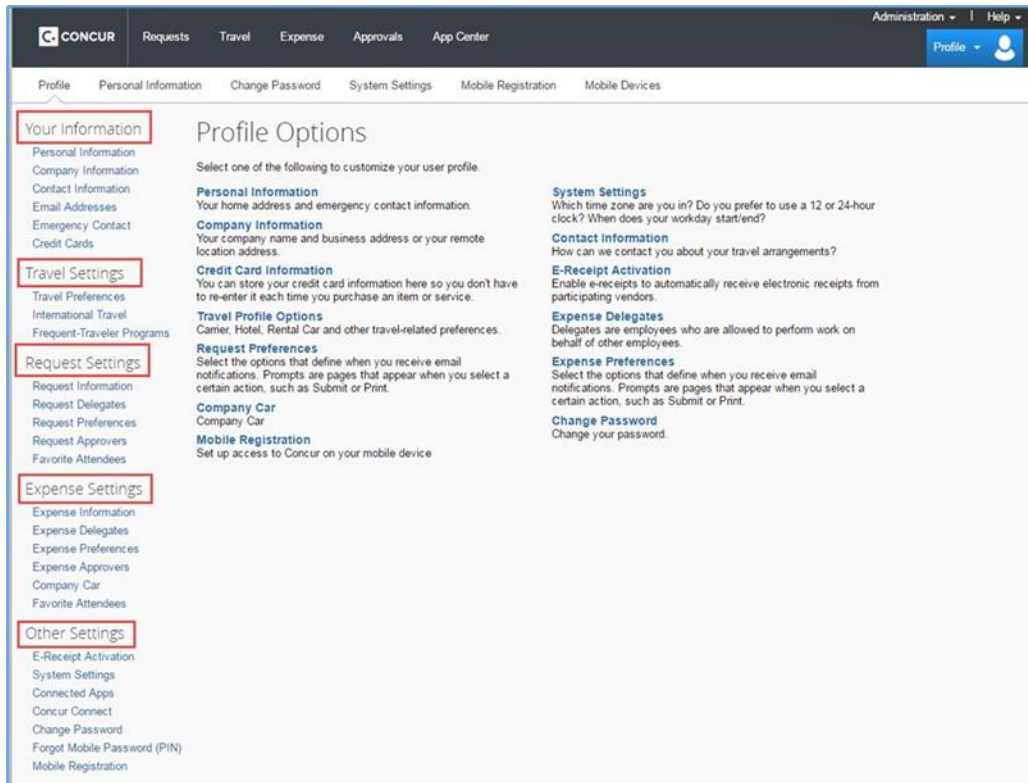


E-receipt Activation in Concur

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

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

Click **Profile** and select **Other Settings**.



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

1. Click the link **E-Receipt Activation**
2. Accept the E-Receipt Activation and Use Agreement
3. You will receive a confirmation that E-Receipts has been activated

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





Concur - Frequently Asked Questions

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

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

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

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

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

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

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

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

A: Yes, all airfare is required to be booked through Concur or over the phone with World Travel Service.

Note: Additional Concur relevant frequently asked questions can be found [here](#).