Logging In

1. In the **User Name** field, enter your ***CNetID***.
2. In the **Password** field, enter your **CNet *password***.
3. Click **Login**.

If you are not sure how to start Concur Travel & Expense, check with your company's system administrator.

Update Your Profile

Change your time zone, date format, or language

1. At the top of the My Concur page, click **Profile**.
2. On the Other Settings menu on the left side of the page, click **System Settings**.
3. On the System Settings page, update the appropriate information, and then click **Save**.

Update your personal information

1. At the top of the My Concur page, click **Profile**.
2. Click **Personal Information** in the middle of the page.
3. On the Personal Information page, update the appropriate information, and then click **Save**.

Set up a Travel Arranger or Assistant

1. At the top of the My Concur page, click **Profile**.
2. Select Personal Information.
3. Scroll down to the Assistants and Travel Arrangers section.
4. Click **Add an Assistant** located to the right of the section.
5. In the **Search Criteria** field, type the last name of the person you wish to add as an assistant/travel arranger.
6. Click **Search**.
7. From the **Assistant** dropdown menu, select the appropriate assistant.
8. Select Can Book Travel for Me.
9. Select Is my primary assistant for travel, if necessary.
10. Click **Save**.

Verify Expense Information

1. At the top of the My Concur page, click **Profile**.
2. On the **Expense Settings** menu on the left side of the page, click **Expense Information**.
3. On the **Expense Information** page, verify the pre-populated information.

If any of the Expense Information is incorrect, contact your company's system administrator.

Add an Expense Delegate

1. At the top of the My Concur page, click **Profile**.
2. On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
3. On the Expense Delegate page, click Add Delegate.
4. In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
5. From the list of matches, select the appropriate person.
6. Select the responsibilities you wish this delegate to perform on your behalf.
7. Click **Save**.

Change Expense Preferences

1. At the top of the My Concur page, click **Profile**.
2. On the Expense Settings menu on the left side of the page, click **Expense Preferences**.
3. In the Send email when… section, select the appropriate actions.
4. In the Prompt…section, select the appropriate actions.
5. In the Display…section, select the appropriate options.
6. Click **Save**.

Verify Expense Approvers

7. At the top of the My Concur page, click **Profile**.
8. On the Expense Settings menu on the left side of the page, click **Expense Approvers**.
9. On the Expense Approvers page, verify that your default expense approver is correct.

If the approver name listed on the Expense Approvers page is incorrect or if the field is blank, contact your company's system administrator.

Add a Favorite Attendee

1. At the top of the My Concur page, click **Profile**.
2. On the **Expense Settings** menu on the left side of the page, click **Favorite Attendee**.
3. On the **Favorite Attendee** page, click **New Attendee**.
4. From the **Type** dropdown menu, select the appropriate Attendee Type.
5. In the **Last Name** field, enter the last name of the new attendee.
6. In the **First Name** field, enter the first name of the new attendee.
7. In the **Attendee Title** field, enter the job title of the attendee.
8. In the **Company field**, enter the company where the attendee is employed.
9. Click **Save**.

Enable E-Receipts

1. At the top of the My Concur page, click **Profile**.
2. On the **Other Settings** menu on the left side of the page, click **E-Receipt Activation**.
3. On the **E-Receipts** page, click **E-Receipt Activation**.
4. In the E-Receipts confirmation window, click **I Accept**.

Exclude a Credit Card from E-Receipts

1. At the top of the My Concur page, click **Profile**.
2. On the **Profile** page, scroll down to the credit card section.
3. Click the **Edit** icon (pencil icon located to the far right of the credit card section) for the credit card you wish to exclude.
4. Uncheck the **Receive e-receipts for this card** checkbox.
5. Click **Save Changes**.

Make a Travel Reservation

Make a flight reservation

1. On the **Flight** tab, select one of these:
   - Round Trip
   - One Way
   - Multi-Segment
2. In the **Departure City** and **Arrival City** fields, enter the cities for your travel.
3. In the **Departure** and **Return** fields, select the appropriate dates and times.
4. If you need a car, select **Pick-up/Drop-off car at airport**.
5. If you need a hotel, select **Find a Hotel**. (More information appears; make the appropriate choices.)
6. Select **Refundable Only**, if appropriate.
7. In the **Search Flights By** field, select either **Price** or **by Schedule**.
8. Click **Search**.
9. Select the appropriate flight, but do not click Reserve.
10. After you find the appropriate flight, click **View Seatmap** next to the flight.
11. Click any green (unoccupied) seat (move the mouse pointer over a seat to see the number). Click **Select Seat**, and then click **Close**.
12. Click **Reserve**.

Select a car

1. If you specified that you need a car on the **Flight** tab, you will see car results for the car search.
2. Select the appropriate rental car, and then click **Reserve**.

Select a hotel

*If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose rental car.*

1. To filter by hotel chain, click **Hotel Chain**, and then select the chains you want to view.
2. To filter by hotel amenities, click **Hotel Amenities**, and then select the appropriate amenity options.
3. In the upper-right corner of the page, click **Map of Hotels** to view a map of the selected location and the nearby hotels.
4. Click **Info** for a specific hotel to find more detailed information for the hotel.
5. Three rates appear by default. To see more, click **View more hotel rates**.
6. When ready to reserve your room, click **Reserve** for the appropriate rate and hotel.
7. Click **Next**.

Complete the Booking

1. Enter your trip information in the **Trip Name** and **Trip Description** fields.
2. Click **Next** to finalize your reservation.
3. To complete the booking, click **Purchase Ticket**.

Cancel or Change an Airline, Car Rental, or Hotel Reservation

Flight changes are available for e-tickets that include a single carrier.

If the trip is already ticketed but has not occurred, you can change the time of the flight if an even exchange is available or the ticket is refundable. Your change options will be with the same airline and routing.

Contact the appropriate Website or vendor directly if you did not book your trip using Concur Cliqbook Travel.

1. At the top of the My Concur page, click **Travel**.
2. In the **Upcoming Trips** section of My Concur, click the name of the trip.
3. Click **Change Trip**.
4. On the itinerary, click the appropriate link to:
   - Email your itinerary
   - Change seat
   - Change the flight day or time for travel (you cannot change the airline)
   - Add, change, or cancel parking
   - Add, change, or cancel a taxi
   - Add, change, or cancel car rental
   - Add, change, or cancel hotel
   - Add, change, or cancel dining
5. To cancel your entire trip, click the **Trip Library** link at the top of the Travel home page.
6. Click **Actions** to the left of the trip you wish to cancel, select **Cancel Trip**, and then click **OK**.

Create an Expense Report from a Completed Trip

*When your trip has completed (past the trip end date), the button appears in the **Exp Report?** Column of the **Trip List** section of My Concur.*

1. Click the **Exp Report?** Button. Concur Travel & Expense creates an expense report for you and attaches the applicable expenses to the report.
2. Make any necessary changes.
3. Print, submit, and provide receipts.

Create a New Report

Create the report

1. In the **Expense Reports** (sometimes also labeled **Active Work)** section of My Concur, click **New Expense Report**.
2. In the **Report Name** field, enter a name for the expense report.
3. In the **Business Purpose** field, enter the business purpose for the expense report.
4. Complete all required and optional fields as directed by your company.
5. Click **Next**.

Add an out-of-pocket expense to the new expense report

1. On the **New Expense** tab, select the appropriate expense type.
2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. In the **Amount** field, enter the amount spent on the expense.
4. Click **Save** (or click **Itemize** to itemize the expense).

*The **Transaction Date** and **Amount** fields are required for all expense types. Some expense types will have different required fields that other expense types do not have. Be sure to fill out all required fields (denoted by red).*

Review or Edit a Report

1. In the **Expense Reports** (sometimes also labeled **Active Work)** section of My Concur, click the name of the report that you want to review.
2. Make the appropriate changes.
3. Click **Save**.

Convert Foreign Currency Transactions

1. Click **New Expense**.
2. On the **New Expense** tab, select the appropriate expense type.
3. Complete all required fields as usual *except* **Amount**.
4. In the **Amount** field, enter the amount spent on the expense.
5. Select the "spend" currency from the dropdown list to the right of the **Amount** field.
6. Click the appropriate mathematical symbol to change the conversion format, if required.
7. Click **Save** (or click **Itemize** to itemize the expense).

Import a Trip or Company Card Transaction to Your Expense Report

Company card transactions (charges) are automatically transferred (imported) to Concur Travel & Expense. (Your company determines how frequently new company card transactions appear.)

1. Create a new expense report as usual.
2. From the **Import** dropdown menu, select **Charges & Expenses**.

   If you have turned on the option in your Expense Settings to be prompted to add company card transactions, you will not need to select Charges & Expenses from the Import dropdown menu.
3. In the **Unmatched Charges** section, select the trip or charges to be imported by clicking the checkbox to the left of the expense or trip.
4. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**.

You can also click and drag all highlighted card charges to the Expense List section of your expense report.

Add a Personal Credit Card Transaction to Your Expense Report

Before you can import the personal credit card transactions, you need to download the transactions from the financial institution, and then save them to your computer. Debit card transactions are not supported.

1. Create a new expense report as usual.
2. On the **Expense Report** page, from the **Import** dropdown menu, select **From File**.
3. In the **Import Personal Card Transactions** window, click **Browse**.
4. Click the bank transaction file to download from your financial institution, and then, click **Open**.
5. Click **Upload**.
6. From the list of personal credit card transactions, select all transactions you wish to import by clicking the checkbox to the left of the transaction.
7. Click **Import**.

*The imported card transaction will appear as an **Undefined** expense type. You will need to update the expense type and add any additional information required by your company.*

Itemize Nightly Lodging Expenses

1. On the **New Expense** tab, select the **Hotel** expense type.

   Your company will define this expense type. It may also be listed as Room Rate, Lodging, Accommodations, etc.
2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. Fill out all other required fields as defined by your company.
4. In the **Amount** field, enter the amount spent on the expense.
5. Click **Itemize**.
6. On the **Nightly Lodging Expenses** tab in the **Number of Nights** field, enter the number of nights for your hotel stay (the **Check-in Date** will be filled in once you enter the number of nights).
7. In the **Room Rate** field, enter the amount you were charged per night for the room.
8. In the **Room Tax** fields, enter the amount of each room tax that you were charged.
9. In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
10. In the **Amount** field, enter the amount of the expense.
11. Repeat steps 9-10 using the second **Expense Type** field if you have more than one recurring additional charge.
12. Click **Save Itemizations**.

Add remaining lodging itemizations

1. If the amount remaining is more than zero, on the **New Itemization** tab, click the **Expense Type** dropdown arrow, and then select the appropriate expense from the dropdown list.
2. Complete all required and optional fields as directed by your company.
3. Click **Save**.
4. Repeat steps 1-3 until the **Remaining Amount** equals $0.00.

Allocate Expenses

*You can select multiple expenses to allocate, click **Allocate** in the right-side pane, and then continue with step 4.*

1. Complete all expenses as usual.
2. Select the expense you wish to allocate from the Expense List.
3. In the lower right-hand corner of the window, click **Allocate**.
4. From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.

5. In the **Allocate By** field, enter the **Percentage** or **Amount**.
6. Click in the field under the **Department** column heading, and then select the department.

   Your company may define Department as Cost Center or some other alternative.
7. Click **Add New Allocation**, and then repeat steps 5-6 for each new allocation.
8. Click **Save**, and then click **OK**.
9. In the **Allocate Report** window, click **Done**.

Itemize Expenses

1. On the **Expense Report** page, click the expense you want to itemize.
2. Click **Itemize**.
3. On the **New Itemization** tab, click the **Expense Type** dropdown arrow and select the appropriate expense from the dropdown list.
4. Complete all required and optional fields as directed by your company.
5. Click **Save**.
6. Repeat steps 3-5 until the **Remaining Amount** equals $0.00.

Add Attendees

1. On the **New Expense** tab, select an Entertainment, Business Meals, or Group Meals expense type.

   Your company defines the expense type names that deal with entertaining clients, customers, or group meals that include employees.
2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. Fill out all other required fields for this expense type as defined by your company.
4. In the **Amount** field, enter the amount of the expense.
5. Click **Favorites**.
6. On the **Favorites** tab in the **Search Attendees** window, select the attendees for this expense, and then click **Add to Expense**.
7. To add a new attendee, click **New Attendee**. Complete the required fields, and then click **Save**.
8. To search for an attendee, click **Search**, enter your search criteria in the **Search Attendees** window, and then click **Add to Expense**.
9. Click **Save**.

Calculate Car Mileage

1. On the **New Expense** tab, select the appropriate expense type that pertains to personal car mileage.
2. Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3. In the **From Location** field, enter the starting location of your trip.
4. In the **To Location** field, enter the ending location of your trip.
5. Complete any additional required fields as directed by your company.
6. In the **Distance** field, enter the total distance traveled (round-trip).
7. Click **Save**.

Print & Submit or Resubmit Expense Reports

Preview, print, and submit your report

1. From the **Print** menu, select **Fax Receipt Cover Page**, **Detail Report**, or **Receipt Report**.
2. After reviewing the document, click **Print**, and then click **Close Window**.
3. On the **Expense Report** page, click **Submit Report**.
4. In the **Final Review** window, click **Submit Report**.
5. In the **Report Submit Status** window, click **Close**.

Correct and resubmit a report sent back by your approver

1. In the **Expense Reports** (sometimes also labeled **Active Work)** section of My Concur, read the approver's comment in the **Status** column.
2. Click the report name (link).
3. Make the requested changes.
4. Click **Save**.
5. Click **Submit Report**.

Fax or Attach Receipts

If your company uses Concur Imaging, you can fax or attach scanned images of your receipts.

Fax your receipts

1. From the **Print** dropdown menu, select **Fax Receipt Cover Page**.
2. Click **Print**.
3. Fax the cover page and the receipts to the number on the cover page.
4. To view the faxed receipts, from the **Receipts** dropdown menu, select **View Receipts**.

Attach scanned images of your receipts

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Attach Receipt Images**.
2. Click **Browse**.
3. Locate the file you want to attach.
4. Click the file, and then click **Open**.
5. To attach another image, click **Browse**, and then repeat the process.
6. Click **Attach**.
7. Click **Done**, when finished.
8. To view the attached receipts, from the **Receipts** dropdown menu, select **View Receipts**.

Delete receipt images

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Delete Receipt Images**.
2. In the confirmation window, click **Yes**.

When you select the Delete Receipt Images option, all attached images are deleted. You cannot delete individual receipt images.

Review & Approve Expense Reports

Review and approve a report

1. In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2. On the **Expense Report** page, click the expense you want to view.
3. Click **Approve**.

Send an expense report back to an employee

1. In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2. Click **Send Back to Employee**.
3. In the **Send Back Report** page, add comments in the **Comment** box.
4. Click **OK**.

Adjust authorized amounts on an expense report

1. In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2. On the **Expense Report** page, click the expense you want to adjust.
3. Change the amount in the **Approved Amount** field.
4. Click **Save**.
5. To approve the report with the changes, click **Approve**.