Concur Frequently Asked Questions

General

What will I use Concur For?

Concur is used for tracking and reconciling employee Travel, Travel P-Card, and reimbursable out-of-pocket expenses. It can be used to make Travel Arrangements.

Can I log in to Concur from any computer?

Yes. You can log in to Concur from any computer and also through mobile applications.

How do I get help for using Concur Travel & Expense website?

Click 'Help' on 'My Concur' page. In the 'Help' section, you can find specific instructions for the task you are trying to complete. You can also view demonstrations of the most important tasks.

How do I sign on to Concur?

Traveler and/or Approver-

Access to Concur will be available through login using your Warrior Username and your chosen password. To sign in to Concur as a Traveler go to:

https://www.csustan.edu/travel

How do I sign up for Mobile Registration?

At the top of the My Concur page select the white tab labeled Mobile Registration.

See Review your login details. Enter Create PIN and Retype PIN.

Click Set PIN.

See Download the app.

Click Send Link.

Follow the instructions on your mobile device to download the app.

**Please Note:

If you will be adding the app to your mobile phone enter your mobile phone number. If you will be adding it to a mobile device not associated to a phone number such as a tablet, enter your email address. If you will be adding it to both a mobile phone and a tablet, enter your email. **

What functions can I perform on the Mobile Application versus my desktop computer?

The functions that the Mobile Application can perform versus a desktop computer are that the traveler can begin to save receipts on to Concur while they are away during the Travel. Through the ExpenseIt app, travelers can take a picture of a receipt and the app will save this expense information and it will show up in Concur when the traveler begins their expense report.

The functions that the Mobile Application <u>cannot </u>perform are submitting and approving Travel Requests and Expense Reports

How do I update my personal information on my user profile in Concur?

At the top right of the My Concur page, click Profile, Profile Settings.

Click on Personal Information.

Enter, verify, or update your personal information.

When I update my personal information such as address on Concur will that update in PeopleSoft payment system?

No. Personal information stored in Concur will not feed into PeopleSoft. Please notify the Travel Desk of any updates to your address.

Who do I contact with questions regarding Concur?

Questions regarding Travel Policy and Procedures please contact the Travel Desk at (209) 667-3654.

Questions regarding software issues please contact the OIT Help Desk at (209) 667-3687.

<u>Expense</u>

What is the typical reimbursement time frame?

AP turnaround time is 10 business days.

What if my meals exceed $55.00 per day?

Please adjust your meals to the daily maximum of $55.00 per day.

If you used a Travel PCard, you can make a negative expense entry to meals for the amount you owe the University. Select Payment Type: Cash/Personal Card if you have other expense entries that were personally paid and you will be receigin a reimbursement for this trip.

If all transactions were on your Travel PCard and you will not be receiving a reimbursement, select Payment Type: Company Paid – Travel PCard and return cash to University Cashiers. Attach the receipt from Cashiers to the negative meal expense entry. Make sure to return the funds using the same chartstring as your Expense Report. This information can be viewed in your Report Header under Details.

What do I do if my hotel rate exceeds the daily maximum rate per CSU policy?

Include a scanned copy of the Justification Memo signed and approved by your department's Vice President. You should include the scanned Memo in the same attachment with the Hotel receipt.

What do I do if I do not have an itemized receipt?

Include a scanned copy of a completed and approved Missing Receipt Verification form.

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