Concur Travel Training
California State University, Stanislaus
Financial Services

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Accounts Payable, Travel
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Getting Started

Log-in:

For Training Purposes Only:
Please enter the User Name and Password located on the bottom right of your Concur Travel Training Handbook.

https://www.concursolutions.com/default.asp

For Live please go to CSU Stanislaus Travel Webpage at:
https://www.csustan.edu/financial-support-services-gateway/staff-faculty/concur-travel-and-expense

Step 1:
Enter your Warrior User Name and Warrior password.

Step 2:
Click Sign In.
Use Concur

Explore the **Company Notes** section for new information regarding Travel. When the Chancellor’s office notifies the University of new policies, procedures, and/or rates that information will be listed here for your convenience.

![Concur Software](image-url)
Set up your Profile

Enter your information:

Why is this important?
Setting up your profile information is important so that all the information in Concur is up to date and accurate for booking Travel.

Step 1:
At the top right of the My Concur page, click Profile, Profile Settings.

Step 2:
Click on Personal Information.
Enter, verify, or update your personal information.

Please remember to verify your email address in the Email Addresses section.
Add a Request & Expense Delegate:

What is this?
A delegate is an individual authorized to process expense reports on behalf of another Concur user.

Why is this important?
Adding a Request & Expense Delegate will authorize that delegate to prepare expense reports or travel requests on your behalf.

Step 1:
At the top of the My Concur page select the white tab labeled Profile.

Step 2:
Select Request Delegates.

Step 3:
On the Request Delegates page, click Add.
Step 4: 
In the **Search by employee name, email address or login ID field**, type the last name of the delegate you wish to add.

**For Training Purposes Only:**
Please enter “Train” and select from one of the options.

Step 5: 
From the list of matches, select the appropriate person.
Step 6:
Select the responsibilities you wish this delegate to perform on your behalf.

Step 7:
Click **Save**.

Step 8:
Verify that Request Delegate has permissions for Request and Expense. To do this go to the column on the left of your screen, view **Expense Settings**, and click **Expense Delegates**.
Request Email Notification Setting:

What is this?
This setting is part of a customization so that you have control over what email notifications you will receive.

Why is this important?
Ease of use for the Traveler.

Step 1:
At the top of the My Concur page select the white tab labeled Profile.

Step 2:
Click on Request Preferences. Located at the center of the screen.

*You can also find this by looking at the column on the left of your screen under...
Request Settings
   > Request Preferences

Step 3:
On the Request Preferences page select the options that define when you receive email notifications.

Default email settings for all users are noted as “Send email when...”

![Request Preferences](image-url)
Expense Email Notification Setting:

Step 1:
At the top of the My Concur page select the white tab labeled Profile.

Step 2:
Click on Expense Preferences.

*You can also find this by looking at the column on the left of your screen under...
Expense Settings
> Expense Preferences

Step 3:
On the Expense Preferences page, select the options that define when you receive email notifications.

Default email settings for all users are as follows:

*Please Note: Once you begin using Concur, verify that the notifications are going to your inbox and not to your junk mail.

If you find that the Concur notifications went to your junk mail you can right click on the email. Select Junk and then select Never Block Sender.
Add a Favorite Attendee:

What is this?
This setting is part of a customization that allows you to add a Favorite Attendee if you will regularly have an attendee in your Travel Request and Expense.

Example: Faculty in your department who will attend a business breakfast, lunch, or dinner when new candidates are being interviewed.

Why is this important?
Ease of use for the Traveler.

Step 1:
View the column on the left of your screen, see Expense Settings.

Step 2:
Select Favorite Attendees.

Step 3:
On the Favorite Attendee page, click New Attendee.
Step 4:
Select the appropriate **Attendee Type** from the dropdown menu.

Step 5:
Complete Required fields marked with a red vertical line.

Step 6:
Click **Save**.

Step 7:
To create an Attendee Group.
Select the **Attendee Groups** tab to create groups from your Favorite Attendees list.
Step 8: Select the Attendees you want to add to your Attendee Group.

Step 9: Enter **Group Name** and click **Save Group**.
Activate Mobile Registration:

What is this?
This setting is part of a customization that allows you to add the Concur app to your mobile device.

Why is this important?
The mobile application allows travelers to take a picture of their receipt at the time of the expense using an iOS, Android, Blackberry or Windows mobile device.

Step 1:
At the top of the My Concur page select the white tab labeled Mobile Registration.

Step 2:
See Review your login details. Enter Create PIN and Retype PIN.

Step 3:
Click Set PIN.
Step 4:
See 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. **

Step 5:
Click Send Link.

Step 6:
Follow the instructions on your mobile device to download the app.
Creating a Travel Request

Step 1:
In the Request section of Concur, click the tab New Request.

Step 2:
Under the Request Header tab complete required fields marked with a red vertical line.

*All other fields in the segment are optional, not required by Financial Services.*

**For Training Purposes Only:**
Please enter the following Information-
Request Name: Long Beach Training- Your Name
Start Date: Today’s date
End Date: Today’s date
Purpose: Travel Training
Travel Destination: In State
Business Unit/Fund/Department ID: PLEASE LEAVE AS IS- STABS – A7500 – 75001

Step 3:
Once you have completed all of the required fields go to the Approval Flow tab. Verify that the Authorized Approvers listed are correct.

*If they are correct please continue to Step 4.*

*If they are incorrect please do not proceed with your Request and contact the Travel Desk immediately.*
Step 4:
Click on the **Segment** tab.

*This is the equivalent of entering the dollar amounts under the Requested Budget column for Transportation, Lodging, Meals, Incidentals, Miscellaneous and Fees in our current process.*

**For Training Purposes Only:**
Please enter the following information once we go over each segment-
- Airfare: $150.00
- Taxi Fare: $50.00
- Parking: $20.00
- Registration: $900.00
- Mileage: $70.00

Step 5:
Click on the segment icons to enter the estimated dollar amounts for your Requested Budget.

Step 6:
Select the segment icon for the expense you anticipate you will incur and enter the required **Amount** field.

*All other fields in the segment are optional, not required by Financial Services.*
Step 7:
Before moving on to the next segment icon click **Save**.

For Training Purposes Only:
Taxi Fare: $50.00

Parking: $20.00

Registration: $900.00
Step 8:
If you need to edit to the **Amount** you entered select **Modify** on the bottom right of your screen. Once you have made the adjustment click **Save** once again.

Step 8:
**Complete all the Segments that apply to your Travel.**

Step 9:
**Verify the total amount you are requesting by assuring each segment that applies to your trip has been included in the **Amount** in the top right corner.**
Step 10:
Click Submit Request.

Step 11:
The system will display a Final Review window. Click Accept and Submit.

*Please Note:
Incidentals are now entered under Miscellaneous Expenses.
How to Cancel or Recall a Travel Request that has been submitted:

Step 1:
Select the tab Manage Requests.

Step 2:
Click on the Travel Request you want to cancel or recall.

Step 3:
Select the action you want to complete, Cancel Request or Recall.
• To Recall- on the Please Confirm you will be prompted to select Yes or No.

• To Cancel Request- on the Cancel Request you will be prompted to add a comment to explain why you are cancelling the request. Then select Ok or Cancel.
Check the Status of a Travel Request

What is this?
This setting allows you to check the status of your Travel Requests and where it is in the approval flow.

Why is this important?
This can help travelers know when their Request has been approved so they can plan accordingly and begin making the travel arrangements.

Step 1:
In the Request section of Concur, click the tab Manage Requests.

Step 2:
To see the Status of a Submitted Travel Request view Status. The status will let you know where it is in the approval flow.
Using the Online Booking Tool

What is this?
You may book travel including flights, hotel, and car rentals using the Online Booking Tool in Concur. Before using the Online Booking Tool, ensure all travel preferences have been updated.

Why is this important?
Through this online booking tool, you will have one go-to place for everything related to your University travel. The online booking tool has integrated all of the CSU special pricing contracts such as South West and Enterprise.

*Notice the Option Booking for myself and Book for a guest, the option Book for a guest allows you to book travel for any guest that may accompany you in your travel.*
Make a flight reservation:

Step 1:
On the Flight tab of the MyConcur page, select one of the following options:
- Round Trip/ One Way / Multi-Segment

Step 2:
In the Departure City and Arrival City fields, enter the cities for your travel. As you begin typing, a list of possible matches will appear. Select your choice from the list.

Step 3:
Click Show More. In the Departure and Return fields, select the appropriate dates and times.

Last Updated: 3/24/2015
To rent a car:

Step 1:
On the Car Rental tab of the MyConcur page, Select Pick-up Date and Drop-off car date.

Step 2:
Select Airport Terminal or Off-Airport, and enter the destination in the search box.
To book a hotel:

Step 1:
On the Hotel tab of the MyConcur page select Check-in Date and Check-out Date.

Step 2:
Make the appropriate choices.
To book Ground Transportation:

Step 1:
On the **Ground Transportation** tab of the **MyConcur** page enter the appropriate choices.

![Ground Search](image)

To Check Flight Status:

Step 1:
On the **Ground Transportation** tab of the **MyConcur** page enter the appropriate choices.

![Check Flight Status](image)
Uploading Receipts to Concur

What is this?
Concur a paperless Travel Software, virtual receipts must be submitted with your Travel Expense.

Why is this important?
There are many benefits to a paperless Travel Software. Transitioning from paper intensive Travel processes to paperless is cost saving and eco-friendly.

There are two ways to submit your receipts, through your mobile device (mobile phone or tablet) or your computer.

Computer:

Step 1:
Go to the Expense section of Concur. Then select the tab Manage Expenses.

Step 2:
Scroll to the bottom of the page to Available Receipts and click Upload New Receipt.
Step 3:
Click **Browse** and select a saved file of receipt on your computer, then click **Open**
Receipt file needs to be saved in PNG, JPG, PDF, HTML, or TIF format.

**For Training Purposes Only:**
Please go to (W) Shared Drive:
W:\_Shared\OIT-Training\Concur Travel Training\Concur Receipts

Step 4:
Click **Upload**.

Step 5:
When the status of your receipt shows as **Uploaded**, click **Close**.
**Mobile/ ExpenseIt from Concur:**

Once you have downloaded the app from Google Play, Windows Store, Blackberry World or the iOS App Store log in using your mobile id (warriorname@csustan.edu) and PIN.

*If you have forgotten, or need to reset your mobile PIN please visit the Forgot Mobile Password (PIN) section of your Concur Profile.*

**Step 1:**
Once you have the mobile app open access the settings menu by clicking the icon on the top left of your screen.

**Step 2:**
Initially, leave the option to “Automatically export expenses to Concur” turned off. *The reason for this is to allow you to adjust the automatically selected expense types as needed. ExpenseIt will “learn” your preferred expense types and change patterns and adjust its logic to select the appropriate expense types on future expenses.*

Once you feel it is selecting appropriately you may turn this option on.
Step 3:
Select which type of notifications you want to receive.

Step 4:
You are now ready to capture receipt images to generate expenses. *Please remember to capture the images of your itemized receipts.*

Step 5:
Tap the camera button.
Step 6:
Capture the image of the receipt.

Step 7:
Save the image, or select discard to recapture the image.

Step 8:
The image will now show as **Submitted for Analysis**.
Step 9:
Once the image has been processed you will receive notification based on your notification settings you set previously. Below is an example of the push notification received on the mobile device.

![Notification Example](image)

Step 10:
The image is now ready to export.

![Image Export Example](image)

Step 11:
If the wrong expense type was selected, you may change it.
To do this you would:
A. Tap on the expense information or image.
B. Click on the edit button.

C. Select the information you need to edit.
D. Correct the information.

E. Save the edited Expense.
Step 12:
You may now export the expense to Concur.

Step 13:
You may choose to export a single expense, or all expenses.
A. To export a single expense, tap the expense to open it.
B. Tap the export icon.

C. To export all expenses that are ready for export access the application menu and select Export All.

Step 14:
Once exported, the expense will show up in Concur in the same area where credit card charges show up for import onto a report.
Create a Travel Expense
Formerly known as a Travel Claim

Match the Travel Expense to a Travel Request.

Step 1:
In the Request section of Concur, click the tab Manage Requests.

Step 2:
Select the Travel Request that you will use to match to your Expense.

Step 3:
Click Expense under the Action column on the right of your screen.
Step 4:
Verify **Report Header** information on **Create Expense Report**.

![Create Expense Report](image1)

Step 5:
Select the Request and on the bottom right corner select **Next>>**.

![Create Expense Report](image2)
Step 6:
Select the **Expense Types** from the **New Expense** section on the right of the screen.

Step 7:
Complete Required fields marked with a red vertical line.

*All other fields in the expense segment are optional, not required by Financial Services.*
Step 8:
Select **Attach Receipt**.
*Select **Itemize** if applicable.

Step 9:
Select your receipt from the **Available Receipts** or to upload a receipt from your computer select **Browse**.

Step 10:
Click **Attach**.

Step 11:
Once receipt has been attached click **Save**.
For Training Purposes Only:

Please enter the following Expense Type:

- **Airfare:** $150.00 (Paid with Travel PCard)

- **Taxi Fare:** $50.00 (Paid with cash)
Parking: $10.00  (Original amount requested was $20.00. Paid with personal debit card)

Registration: $900.00  (Paid via CPO)
Mileage: $70.00

*When entering Expense for Personal Car Mileage- scroll down to the Mileage Calculator.

*Enter the Waypoints, click Calculate Route and mark Make Roundtrip. Then, click Add Mileage to Expense.
Once you select **Add Mileage to Expense** you should automatically see the expense information on the **Expense** tab complete.

**Step 12:**
Continue the same process to enter other **Expense** types.

**Step 13:**
Keep track of the expenses on the column on the bottom left, verify you are adding all the receipts and review the **Exception** warnings in the center of your screen.
Step 14:
Once all expenses have been included select **Submit Report** on the top right.

Step 15:
On the **Final Review** notification select **Submit Report** to submit.

Step 16:
Once you select Submit Report you will receive a **Report Successfully Submitted** notification that summarizes your **Expense Report** and **Company Disbursements**.

Last Updated: 3/24/2015
**Incidentals Expense:**

Step 1:  
When entering an expense type for Incidentals you would look under the Expense under **Other**.

Step 2:  
Complete Required fields marked with a red vertical line.  
*Notice you are prompted to enter the **Number of 24-hour periods** not the **Amount**. The **Amount** will automatically auto populate once you have entered the required fields.*
Step 3:
Click Save.

Step 4:
Once you have saved the information then the **Amount** is calculated.

Step 5:
Once you have saved the Incidentals Expense you will see this Expense added to your Expense Report.
Check the Status of a Travel Expense

What is this?
This setting allows you to check the status of your Travel Expense and where they are in the work flow.

Why is this important?
Allows the Travelers to know where their Travel Expense stands in the work flow. This can help travelers know when their Expense has been approved and processed by Accounts Payable so they know when to expect their Travel Expense reimbursement.

Recently Submitted Reports:

Step 1:
In the Expense section of Concur, click the tab Manage Expenses.

Step 2:
Review the status of the Active Reports.
Past reports that have been reimbursed:

Step 1:
In the Request section of Concur, click the tab Manage Requests.

Step 2:
Click on Report Library→.

Step 3:
Once you are prompted to the screen labeled Reports for this Quarter, click on the View button.
Step 4:
From the drop down options select **All Reports**.
*Or you can view any other Expense Report you want to see e.g. Paid Reports.*

---

Step 5:
Once you have been prompted to the **All Reports** screen you will be able to view the **Report Name, Status, Payment Status, Report Date, Total, and Requested Amount**.
Acting as a Delegate

What is this?
A delegate is an individual authorized to process expense reports on behalf of another Concur user.

Why is this important?
Adding a Request & Expense Delegate will authorize that delegate to prepare expense reports or travel requests on your behalf.

Reporting on Another User’s Behalf:

Step 1:
To administer for another Concur user, click the Profile link in the upper right corner of your Concur screen. The Administer for another user… dropdown will appear allowing you to select from a list of users who have assigned you as an expense delegate. Select the desired user from the list.
Step 2: You will now see the name of the user you are administering for at the top of the page. Click the **Expense** tab.

![Expense tab example](image)

Step 3: The list of active reports for the person you selected will appear in the **Active Reports** area.

![Active Reports example](image)

Step 4: You may enter a report by clicking on the **Create New Report** link.
Submitting a Travel Request on Another User’s Behalf:

Step 1:
To administer for another Concur user, click the Profile link in the upper right corner of your Concur screen. The Administer for another user... dropdown will appear allowing you to select from a list of users who have assigned you as an expense delegate. Select the desired user from the list.

Step 2:
You will now see the name of the user you are administering for at the top of the page. Click the Request tab.
Step 3:
The list of active requests for the person you selected will appear in the **Active Requests List**.

![Active Requests List](image)

Step 4:
You may enter a request for that employee by clicking on the **New Request** link.

![New Request Link](image)
Booking Travel on Another User’s Behalf:

Step 1:
To administer for another Concur user, click the **Profile** link in the upper right corner of your Concur screen. The **Administer for another user...** dropdown will appear allowing you to select from a list of users who have assigned you as an expense delegate. Select the desired user from the list.

Step 2:
You will now see the name of the user you are administering for at the top of the page. Using the Online Booking Tool, complete the **Travel Reservation.**
Approving in Concur

Approving Travel Requests:

Step 1:
Sign in to Concur Log In - Approver:
https://www.concursolutions.com/

Approuver ID: appr_warriorusername@csustan.edu
Example: appr_JBond@csustan.edu

For Training Purposes Only:
Approver Level 1 Log in: approver1@csustan.edu  Password: welcome1
Approver Level 2 Log in: approver2@csustan.edu  Password: welcome1
Approver Level 3 Log in: approver3@csustan.edu  Password: welcome1

Step 2:
Click on the Approvals section of Concur.

Step 3:
On the Approvals page select Requests.
Step 4: Select the Request name from your available options.

**For Training Purposes Only:**
Select the Request Name- Long Beach Training Your Name

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Request ID</th>
<th>Employee</th>
<th>Request Dates</th>
<th>Date Submitted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Beach Training</td>
<td>33DA</td>
<td>Travelor, Test</td>
<td>03/04/2015</td>
<td>03/04/2015</td>
<td>$1,190.00</td>
</tr>
</tbody>
</table>

Step 5: Review all the tabs; Request Header, Segments, Expense Summary, Approval Flow, Audit Trail.
Step 6: Once you have reviewed all the tabs you can: **Send Back Request, Approve, or Approve and Forward.**

- **Send Back Request**- If you do not wish to approve it or if you require any additional information from the Traveler you can select this option and it will send it back to the Traveler. If you select this option you must enter a comment in the **Comment** field and click **OK**.

- **Approve**- If you approve then it will follow the delegation of authority approval flow.
• **Approve and Forward** - If you approve and forward you must enter the name of the person you wish to send it to, this would be in addition to the approval flow based on the Delegation of Authority.
**Approving Travel Expense Reports:**

**Step 1:**
Log-in to Concur using your Approver ID and password.

Approver ID: appr_warriorusername@csustan.edu

Example: appr_JBond@csustan.edu

**For Training Purposes Only:**
Approver Level 1 Log in: approver1@csustan.edu  Password: welcome1
Approver Level 2 Log in: approver2@csustan.edu  Password: welcome1
Approver Level 3 Log in: approver3@csustan.edu  Password: welcome1

**Step 2:**
Click on the **Approvals** section of Concur.

**Step 3:**
On the **Approvals** page select **Expense Reports**.
Step 4:
Select the Expense Report name from your available options.  
**For Training Purposes Only:**
Select the Report Name- Long Beach Training Your Name

Step 5:
Review the **Expenses** and the **Total Amount**.

Step 6:
To review the receipts click on icon with the check mark. And it will pop-up a digital copy of the **Receipt**. View the little cloud icon to view the **Comment History**.
Step 7:
Once you have reviewed all the expenses you can:

- **Send Back Request** - If you do not wish to approve it or if you require any additional information from the Traveler you can select this option and it will send it back to the Traveler. If you select this option you must enter a comment in the **Comment** field and click **OK**.

- **Approve** - If you approve then it will follow the delegation of authority approval flow.
• **Approve and Forward**- If you approve and forward you must enter the name of the person you wish to send it to, this would be in addition to the approval flow based on the Delegation of Authority.
Approving Cash Advances:

*Only applicable to CSU Stanislaus Athletics Dept. and International Education Dept.*

Step 1:
Log-in to Concur using your Approver ID and password.

Approver ID: appr_warriorusername@csustan.edu
Example: appr_JBond@csustan.edu

Step 2:
Click on the Approvals section of Concur.

Step 3:
On the Approvals page select Cash Advances.

Step 4:
Select the Cash Advance name from your available options.
Step 5: Review the **Cash Advance Details** and the **Cash Advance Amount**.

![Cash Advance Details](image)

Step 6: Once you have reviewed the **Cash Advance Amount** you can **Approve** or **Send Back to Employee**.

- **Send Back Request** - If you do not wish to approve it or if you require any additional information from the Traveler you can select this option and it will send it back to the Traveler. If you select this option you must enter a comment in the **Comment** field and click **OK**.

- **Approve** - If you approve then it will follow the delegation of authority approval flow.
New Travel Procedures

What is this?
Travel PCard Charges must be made by cardholder **only** for his or her own Travel.

Why is this important?
All Travel PCard charges are loaded to Concur. When a Travel Custodian in a department books Travel Expenses on his or her Travel PCard those charges will load in concur and require an Expense Report to clear those charges. Since the Travel Custodian did not actually do the Travel there will not be an expense report and those charges would sit in his or her Concur account indefinitely. Concur will automatically send you notifications when you have Travel PCard transactions that need to be associated to an expense report via email. Travel PCard charges loaded into Concur cannot be deleted.

If you travel more than twice a year on University business please submit a Travel PCard application.

The Travel PCard program offers a timely and reliable way to pay for Travel. It eliminates the need to pay for travel personally and then seek reimbursement.

Travel PCard application form can be found at:
> CSU Stanislaus Financial Services- Travel Webpage
  > Travel Forms
    > Travel PCard Application and Cardholder Agreement

https://www.csustan.edu/sites/default/files/FinancialServices/Documents/travelpcardcardholderagreement.pdf
Concur Frequently Asked Questions

General

1) **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.

2) **Can I log in to Concur from any computer?**

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

3) **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.

4) **How do I sign on to Concur?**

**Traveler**

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/financial-support-services-gateway/staff-faculty/concur-travel-and-expense

Click on **Concur Log In**

**Approver**

Access to Concur Approver functionality and sign in to Concur go to:

https://www.csustan.edu/financial-support-services-gateway/staff-faculty/concur-travel-and-expense

Click on **Concur Log In- Approver**

Approver ID: appr_warriorusername@csustan.edu

Example: appr_JBond@csustan.edu
5) **How do I sign up for Concur training?**

Contact your Department Travel Coordinator for upcoming Concur Travel Trainings.

6) **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. **

7) **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 **cannot** perform are submitting and approving Travel Requests and Expense Reports

8) **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.

9) **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.
10) 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.

Request

1) How do I determine the funding for my travel request?

Please contact your department’s Travel Custodian or Budget Analyst.

2) How do I route my request for approval?

Concur will automatically route your request electronically for approval based on the funding selected. Please be sure to review your approvers at the time of creating a new Travel Request. If the approvers listed on Concur are incorrect please do not continue and contact the Travel Desk immediately.

3) What do I do if my manager is on vacation or out of the office for an extended period of time? How does my request get approved?

Contact your Department Travel Coordinator to confirm if your manager has delegated someone in your office to approve Travel Requests and Expense.

4) How do I get reimbursed for expenses that I had to pay before the trip occurred (i.e. registration, airfare)?

Step 1: Submit a Travel Request; once all the approvals have been completed continue to Step 2. For more information on creating a Travel Request please see Creating a Travel Request instructions in this handbook.

Step 2: Submit an Expense Report for the expenses you have pre-paid. Be sure to have receipts for these expenses.

5) How do I know when my request has been approved?

Click Request, and then Manage Requests. View the Status for the Travel Request next to the Request Name.
Expense

1) **What happens if my funding has changed since I submitted my request?**

You have an option to change the funding when you begin your Expense Report. Please note that it will be routed for approvals if the funding has changed.

2) **What is the typical reimbursement time frame?**

AP turnaround time is 10 business days.

3) **What happens if my trip costs exceed the approved budget?**

Your Expense Report will be routed for approvals if the actual expenses exceed the requested budget.

4) **What if my meals exceed $55.00 per day?**

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

5) **What do I do if my hotel rate exceeds the daily maximum rate of $195.00 per CSU policy?**

Include a scanned copy of the Justification Memo signed and approved by your department’s Vice President. You would include the scanned Memo as an additional receipt.

6) **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. You would include the scanned Missing Receipt Verification form as an additional receipt.
Contact Information

CSU Stanislaus Travel Webpage:
https://www.csustan.edu/financial-support-services-gateway/staff-faculty/concur-travel-and-expense

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