NEW Solutions
SAP Concur Travel Management System

Enrollee User Guide

Contents

Concur Sign-in Instructions (for first-time/initial sign-in):

The following document outlines the instructions for the first time you sign in to the Concur Travel Management System. These instructions will cover signing into Concur, creating a password, and using the required Two-Factor Authenticator App.

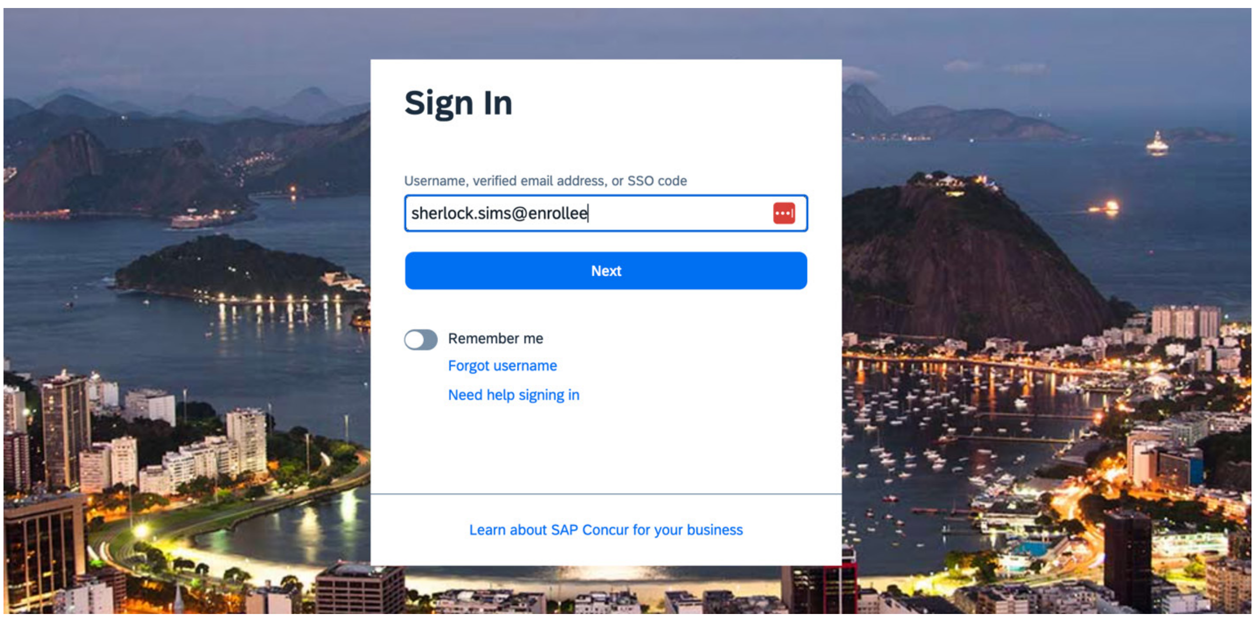
Please note that signing into Concur requires a Two-Factor Authenticator App to be downloaded to your mobile device (the free Microsoft Authenticator App is recommended). *Instructions on using an Authenticator App are detailed below.*

If you encounter any issues or need assistance signing in, feel free to contact New Solutions Concur User Support via email at concursupport@NEWsolutions.org.

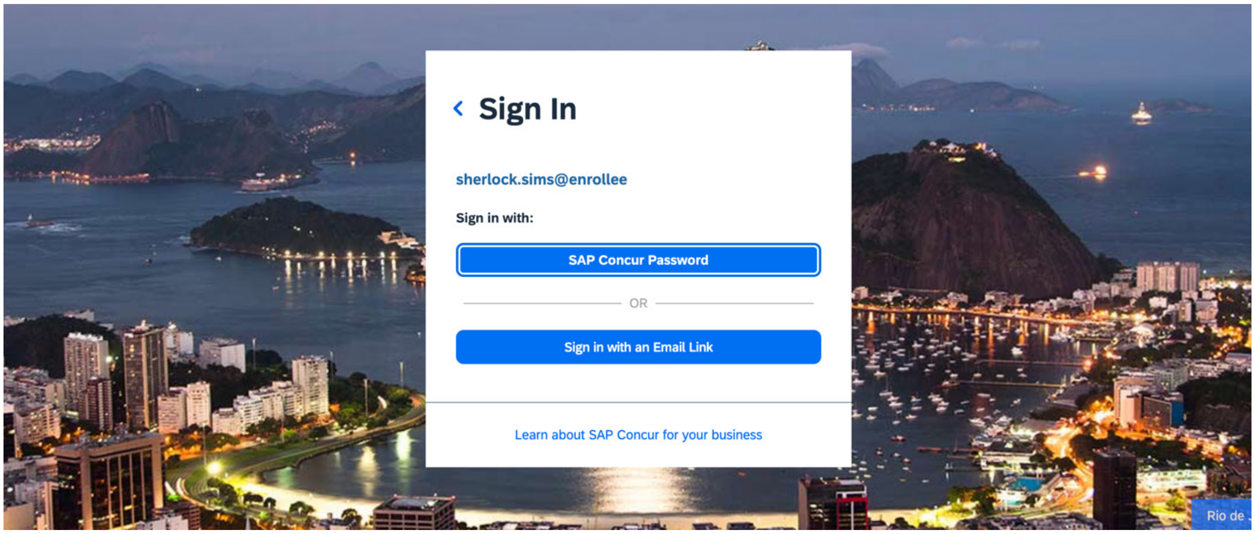
Signing into SAP-Concur (Initial Sign-In):

1. Visit concursolutions.com
2. On the Sign In screen (shown below), Enter your Username and click **Next.**

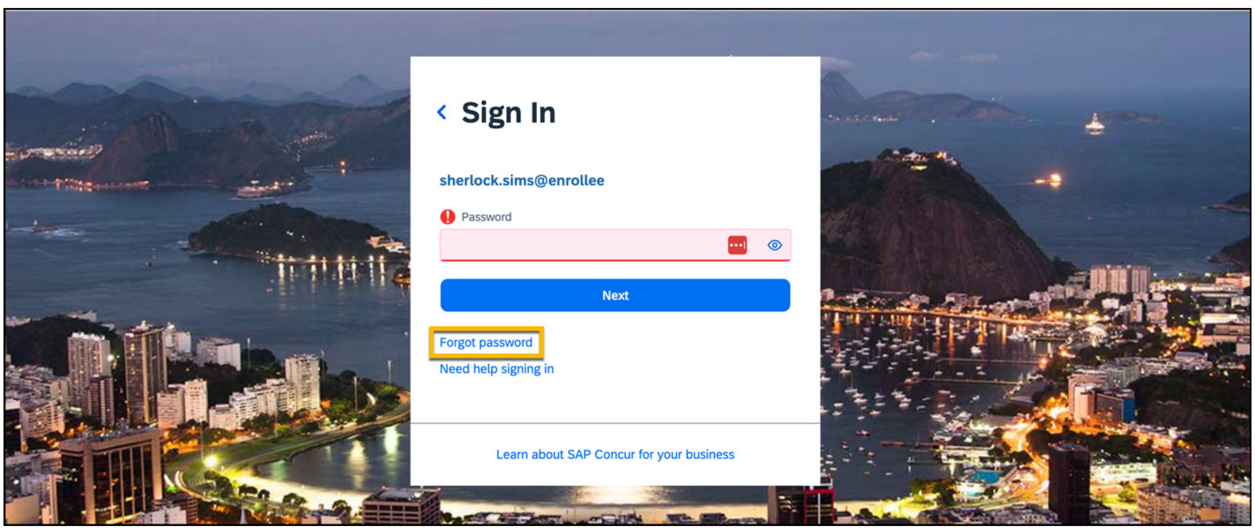
   *Please refer to the email New Solutions sent you on 10/23/2024 for your Username. The format of the Username is firstname.lastname@enrollee. For example, Sherlock Sims's username is sherlock.sims@enrollee.



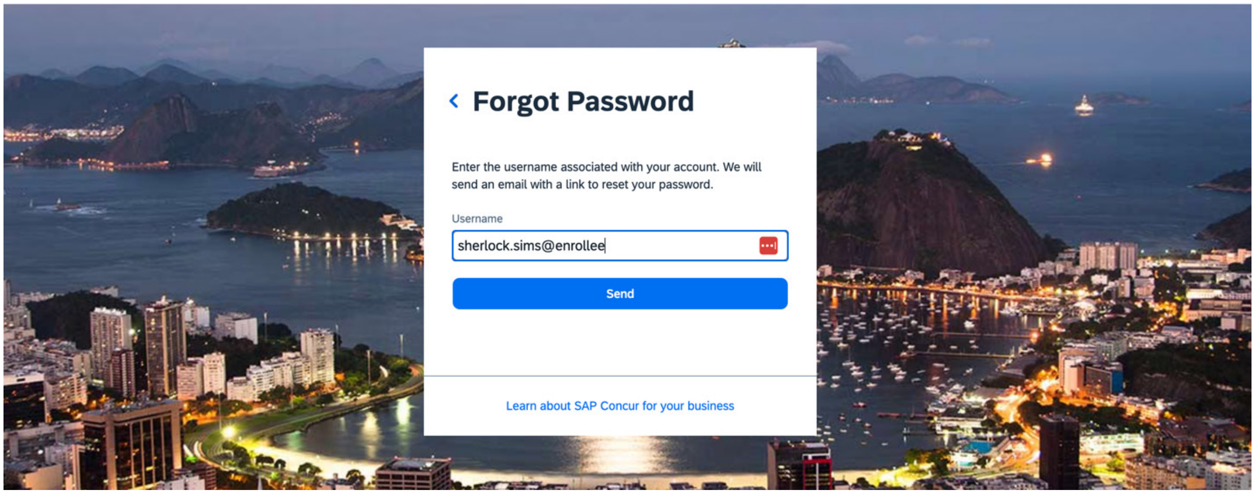
3. The screen below will appear. Click on **SAP Concur Password**. *Note: Do not choose "Sign in with an Email Link".



4. On the Sign In screen, click **Forgot password** (which is in a small blue font). **The Forgot Password process will allow you to create your own password*.

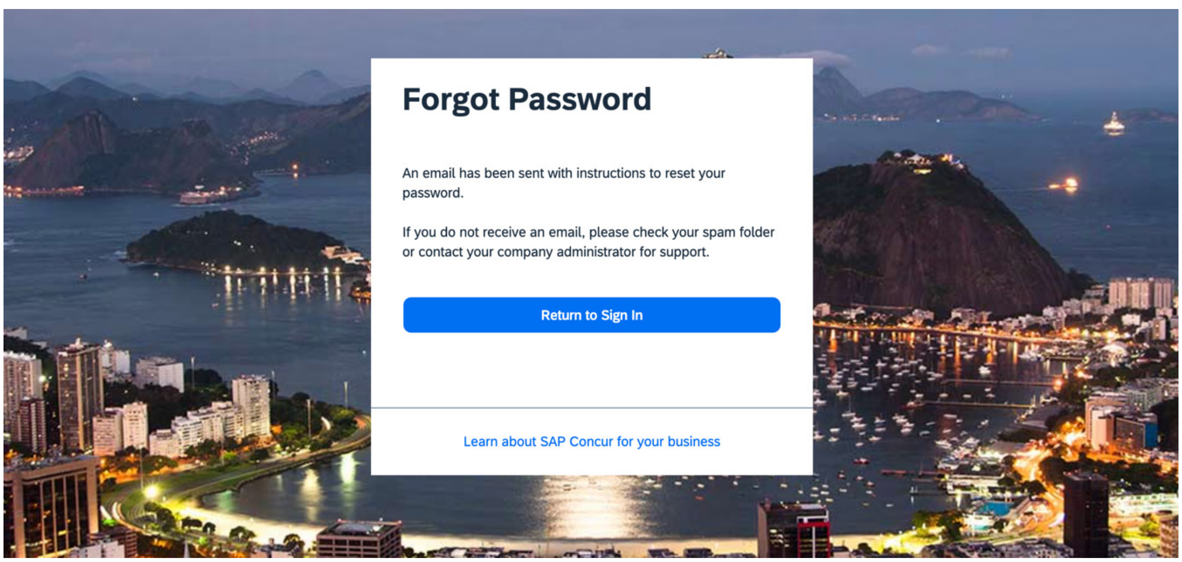


5. On the Forgot Password screen, your Username will automatically display. Click **Send.**

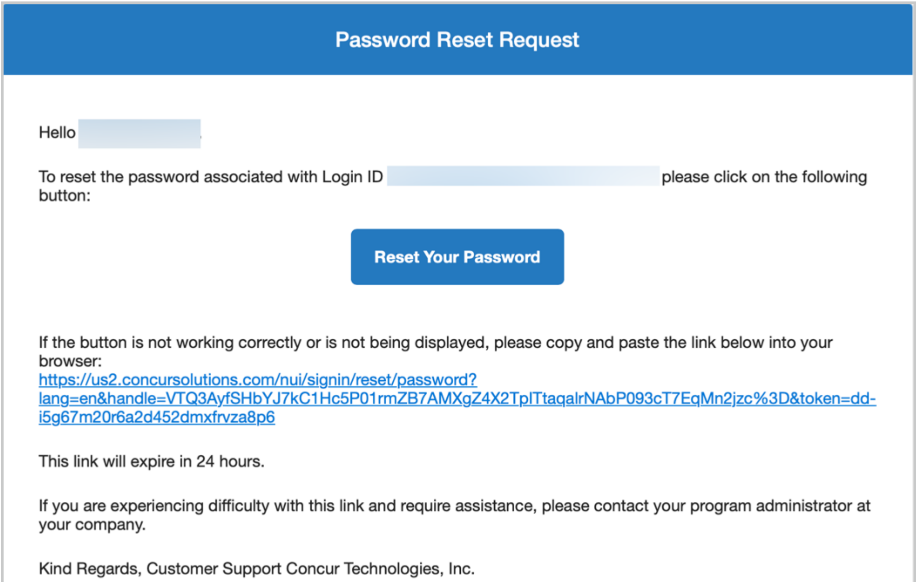


6. The screen below will appear, saying that an **email will be sent to you** from noreply@concur.com with instructions on how to reset your password.

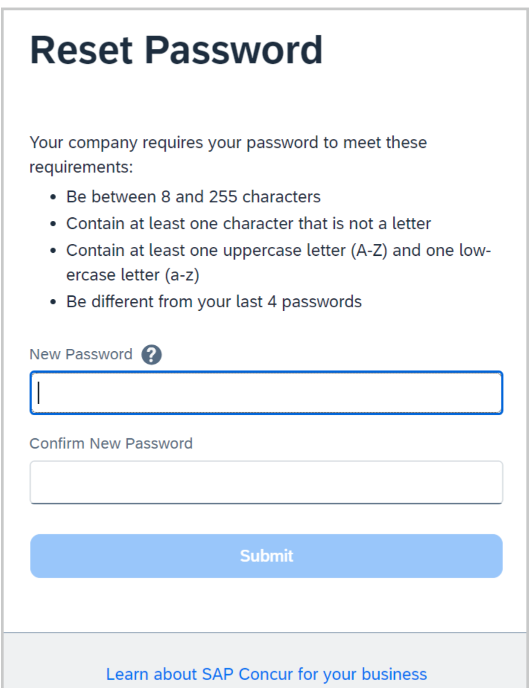
   **Please note* that this email will be sent to the Email Address associated with your Concur account. If you are unsure which email address is associated with your Concur account, this can be found in the email New Solutions sent on 10/23/2024. You can also contact concursupport@NEWsolutions.org to learn your Username.



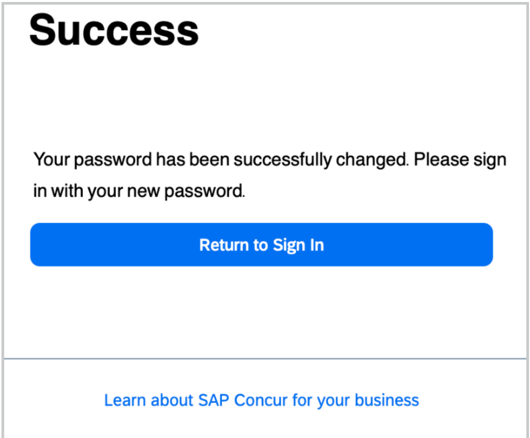
7. Open the email sent from "noreply@concur.com" with the subject of "Password Reset Request". Within this email, click the **Reset Your Password** link (blue button).



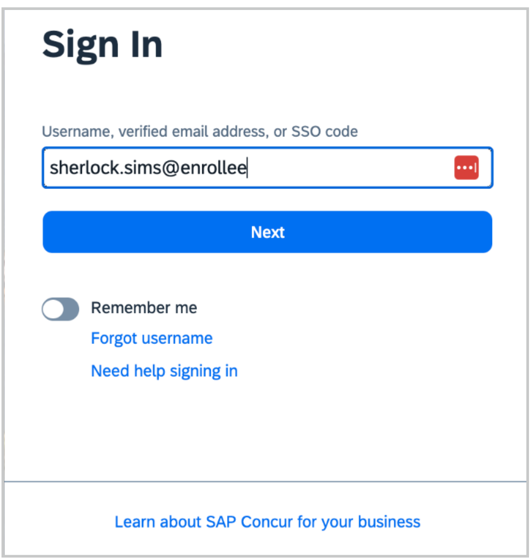
8. The Reset Password screen will appear. Enter a new password in the New Password field and Confirm New Password. Click **Submit**.



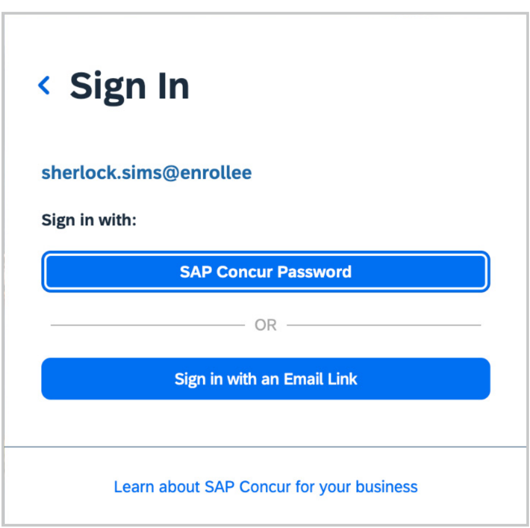
9. You will then see the Success screen. Click **Return to Sign In**.



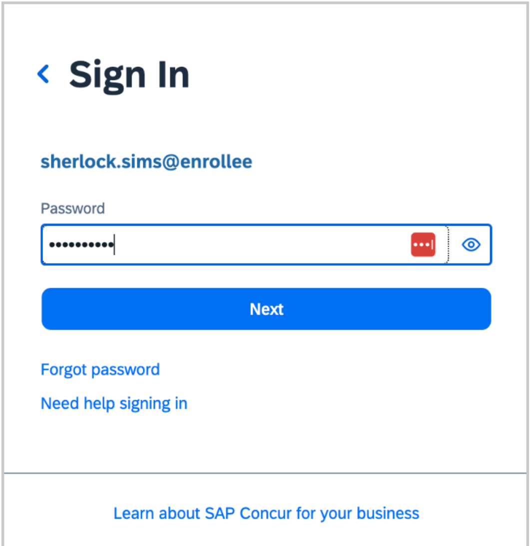
10. On the Sign In screen on the computer, enter your Username and click **Next**.



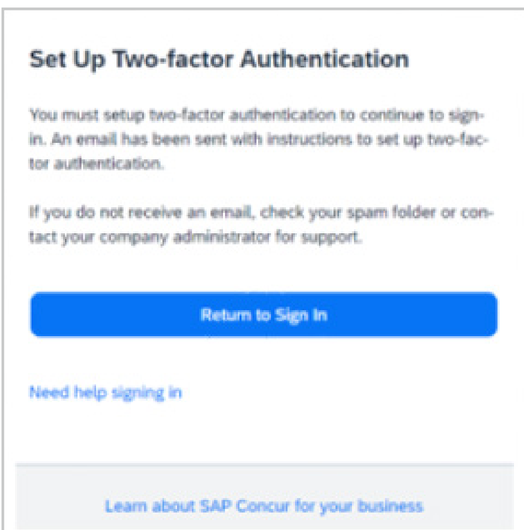
11. The screen below will appear. Click on **SAP Concur Password** and click **Next**.



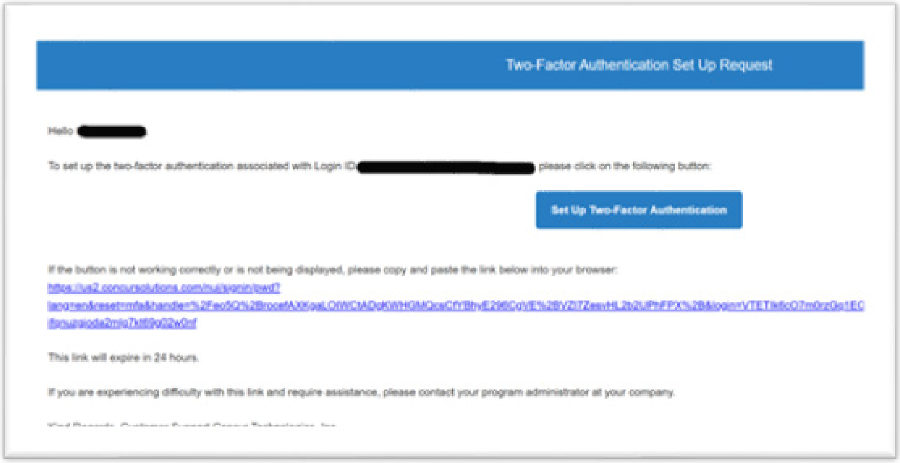
12. Then, enter the Password you just created and click **Next**.



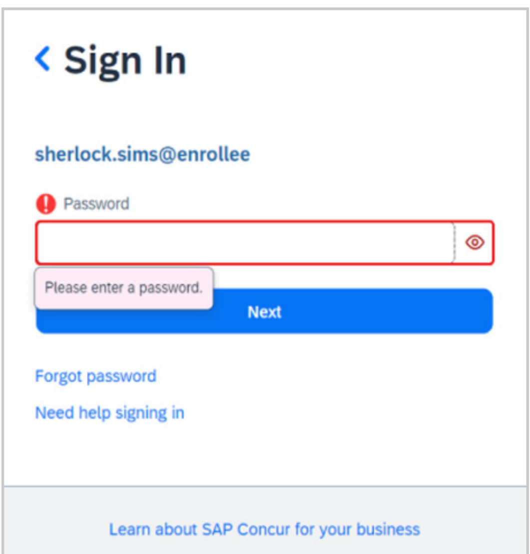
13. The Set Up Two-factor Authentication screen will appear. You will receive an email asking you to set up two-factor authentication. Click **Return to Sign In.**



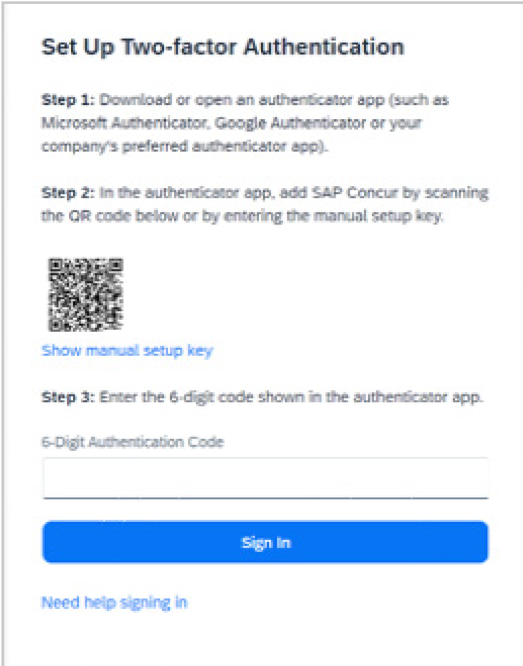
14. Open the email sent from noreply@concur.com with the subject of "Two-Factor Authentication Set Up Request". Within this email, click the **Set Up Two-Factor Authentication** link (blue button).



15. The Sign In screen will appear. Enter your password. Click **Next**.

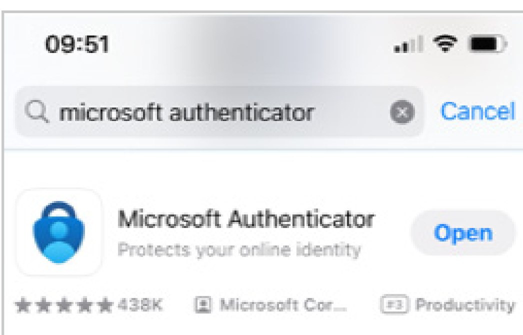


16. The Set Up Two-factor Authentication screen will appear on your computer, displaying a QR code. ***Helpful Hint**: Enlarge the computer screen so the QR code is bigger, which will help the QR scanner on your mobile device scan the code.

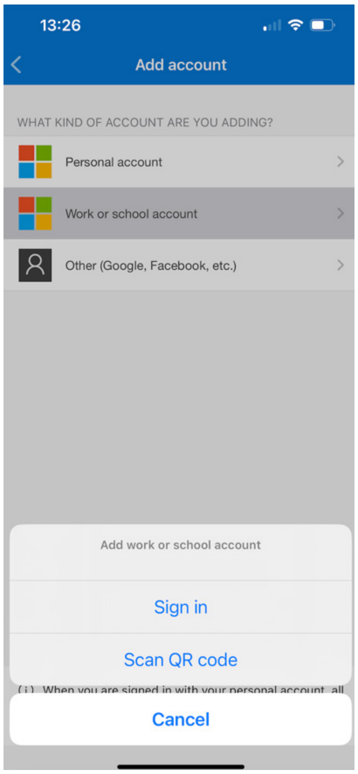


17. To finish the sign-in process, you must have a **Two-factor Authentication App** on your mobile device.

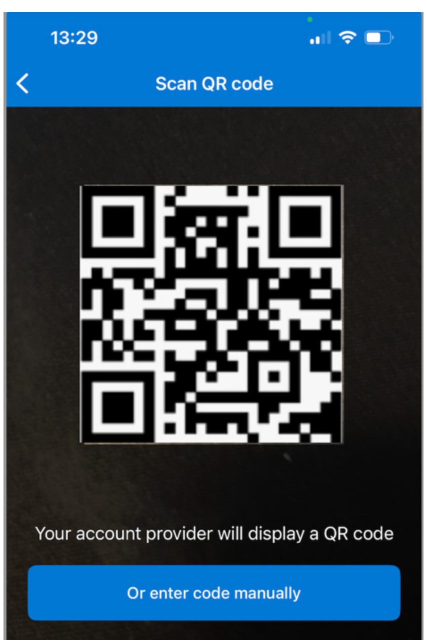
18. If you don't already have an authenticator app, please download the free **Microsoft Authenticator App** by going to the App Store on your mobile device (Apple Store, Google Play, etc.), searching for Microsoft Authenticator, and downloading the app. See below.



19. Scan the QR code on the computer screen by following these steps:
    - Open the Microsoft Authenticator app on your mobile device.
    - Click on the plus sign **(+)** on the top right corner of the screen which brings you to the "Add account" screen.
    - Click on **Work or school account**.
    - Click on **Scan QR code**.

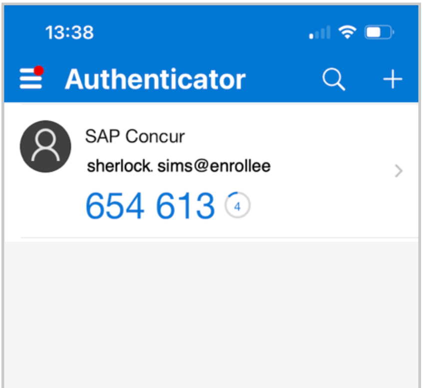


20. The QR scanner will display on your mobile device.

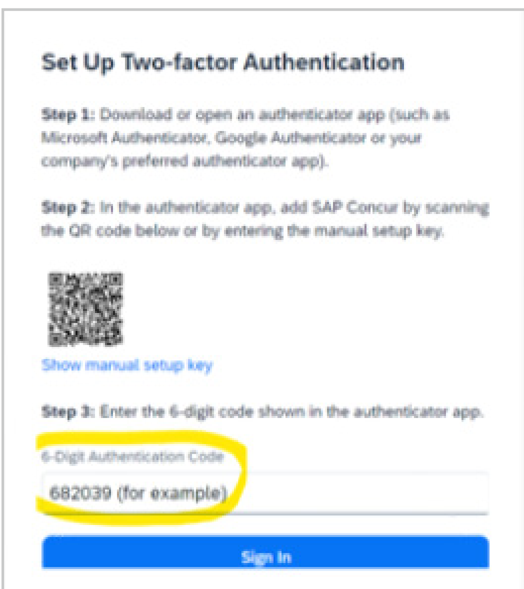


21. Hold the mobile device to the “Set Up Two-factor Authentication” screen on the computer screen and scan the QR code that is displayed.

22. Look at your Authenticator app on your mobile device. You will see your SAP Concur account added to your Authenticator list. You will also see a six-digit code below your account name, refreshed every 30 seconds.



23. On the “Set Up Two-factor Authentication” screen on your computer, enter the **six-digit code** (without spaces) generated from your mobile device’s authenticator app into the “6-Digit Authentication Code” field on your computer screen. Click **Sign In**.

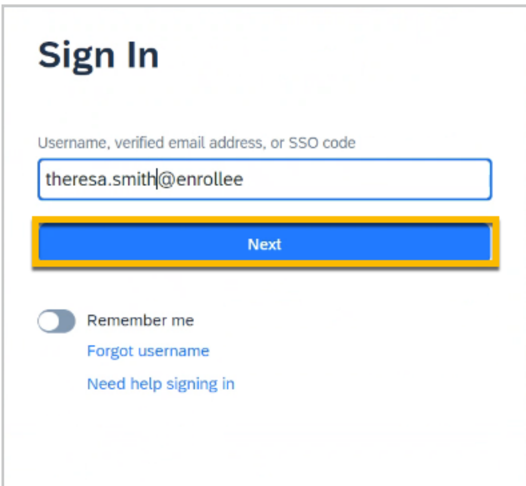


24. You are now signed into the Concur system. If you encounter any issues or need assistance, please contact **New Solutions Concur User Support** via email at concursupport@NEWsolutions.org

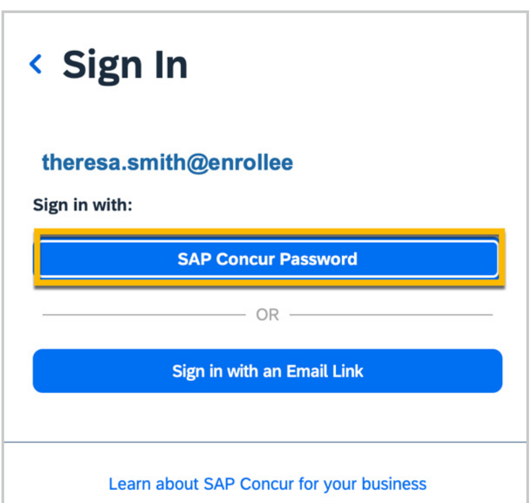
Concur Sign-in Instructions (after initial sign-in)

After the initial login to Concur and setting up Two-factor authentication, logging into Concur is as easy as entering your username, password, and copying the 6-digit code from the authenticator app.

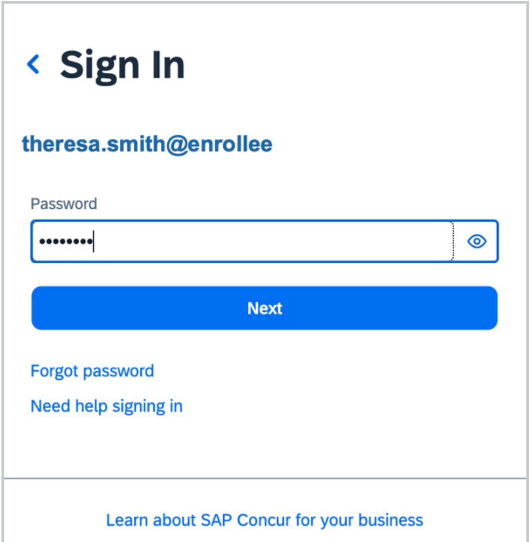
1. Visit concursolutions.com
2. On the Sign-in screen, enter your username and click **Next**.
    - Username is firstname.lastname@enrollee.
    - You can select the Remember Me check box to store your password, so you don't need to enter it the next time you sign into SAP Concur from this device.



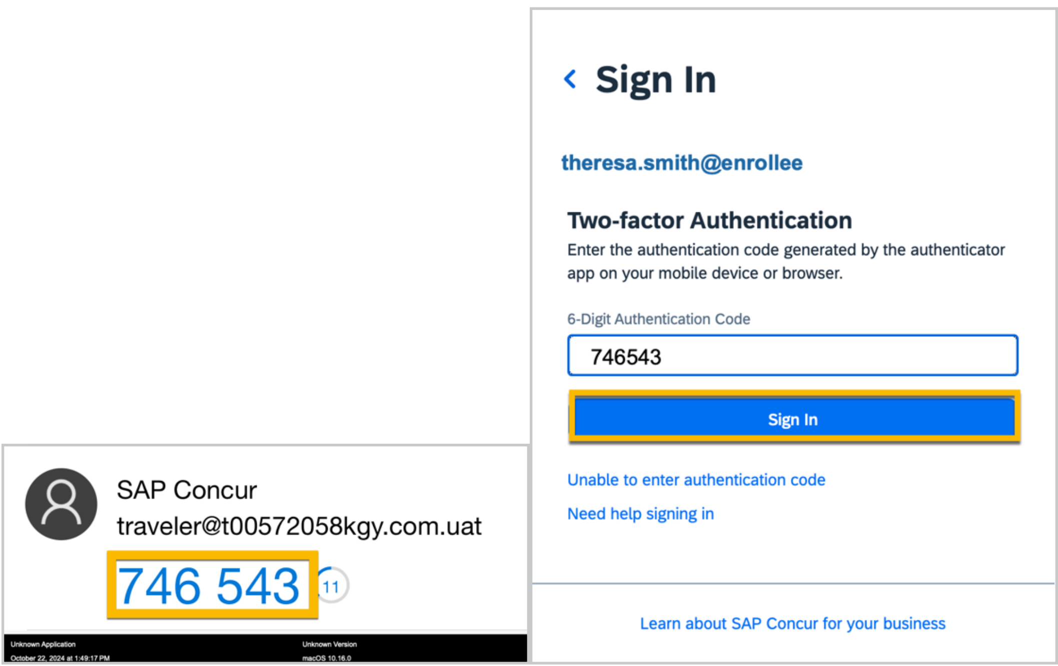
3. Select **SAP Concur Password**.



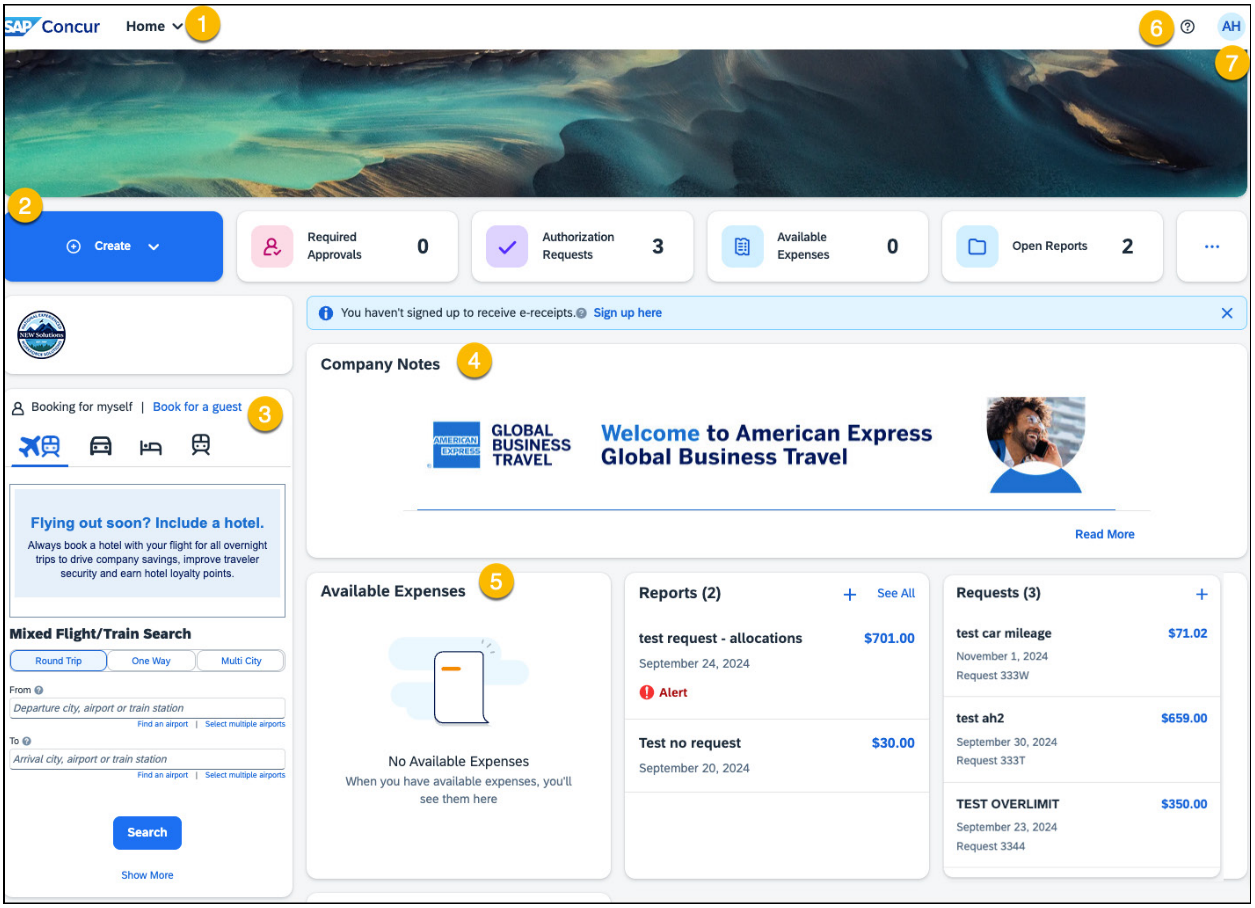
4. Enter your password and click **Next**.



5. **Copy the six-digit code** generated from the app into the Authentication Code field on the mobile device and select **Sign In**.



Exploring the Home Page



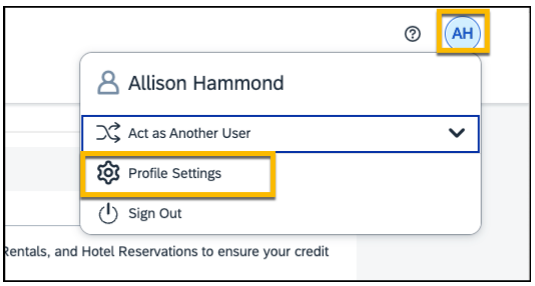
Section	Description
Application Drop Down	This area houses all the applications that you have access to, such as Expense, Travel, Request, approvals, etc.
Create Button/Quick Access Tasks	Create Requests, Cash Advances, Expense Reports, and enter Travel Reservations by clicking Create. View any Authorization Requests, Cash Advance, Trips, Available Expenses, and Open Reports.
Trip Search	Search and book airfare, hotel, and car rental from this section.
Company Notes	Traveler Information including contact and link information to Amex GBT, as well as links to training materials and user support contact information.

Activity Cards	Browse open items such as Available Expenses, Reports, and Requests.
Help Section	Get assistance, product resources, and access the SAP Concur Community.
Profile Icon	Denoted with your initials, here you can go to Profile Settings or Sign Out

Step 1: Updating Your Profile

When you log in to Concur for the first time, an important and often overlooked step is updating your profile. While we will be touching on the most critical profile areas to update, we highly encourage you to add as much information as possible to each profile section. **Your profile does not need to be updated each time you log in. It only needs to be updated if the information provided is outdated.*

1. The profile is available by clicking the **profile icon** and choosing **Profile Settings**.



Personal Information

Navigation Path: Profile > Profile Settings > Your Information > Personal Information

1. Verify your personal information is correct.
2. Your name must be identical to what is shown on your photo ID that you present at the airport.
   - If there is a discrepancy in Personal information, please get in touch with concursupport@NEWsolutions.org. This information is imported to Concur nightly from EMS and can't be manually altered in Concur.

Company Information

Navigation Path: Profile > Profile Settings > Your Information > Company Information

1. The Manager and Employee Position/Title will be blank. This does not mean a monitor hasn't been assigned to your Requests or Reports.

2. To view your **Monitor**, visit the Request or Report Details page. Instructions can be found here.

Contact Information

Navigation Path: Profile > Profile Settings > Your Information > Contact Information

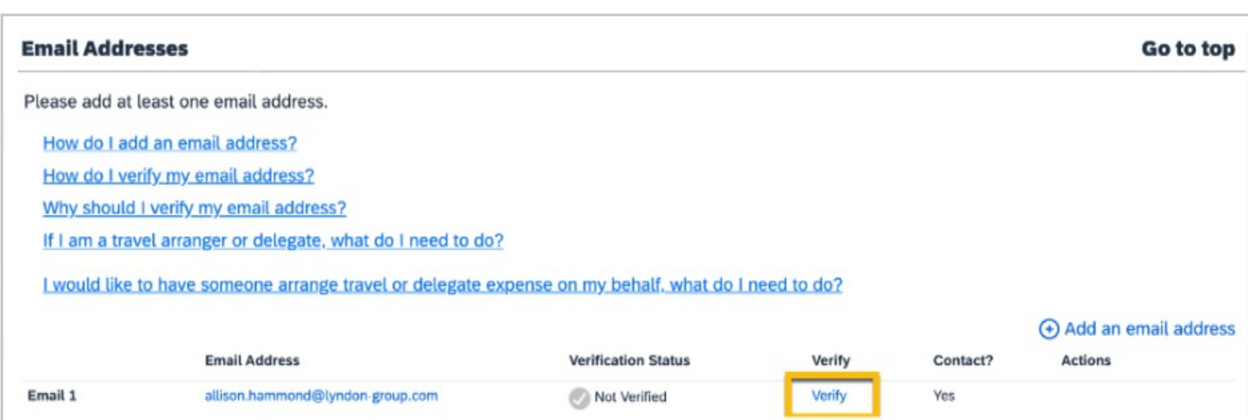
1. A home or work phone number must be entered. Use your mobile number if you don't have a home or work phone number.
2. A mobile phone is required, but you must select the country/region from the drop-down.
   - The same mobile phone can be used for home, work and mobile phone.

Email Addresses

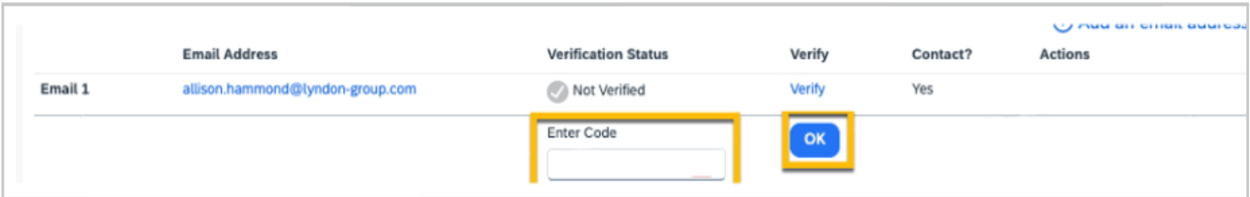
Navigate Path: Profile > Profile Settings > Your Information > Email Addresses

Verify your email address. Once it is verified, you can forward receipt images to receipts@concur.com. They will automatically be matched to your Concur account and uploaded to your Available Expenses for you to add to an expense report.

1. Click Verify.



2. An email with a verification code will be sent. Copy the code from the email and place it in the **Enter Code box** in Concur.



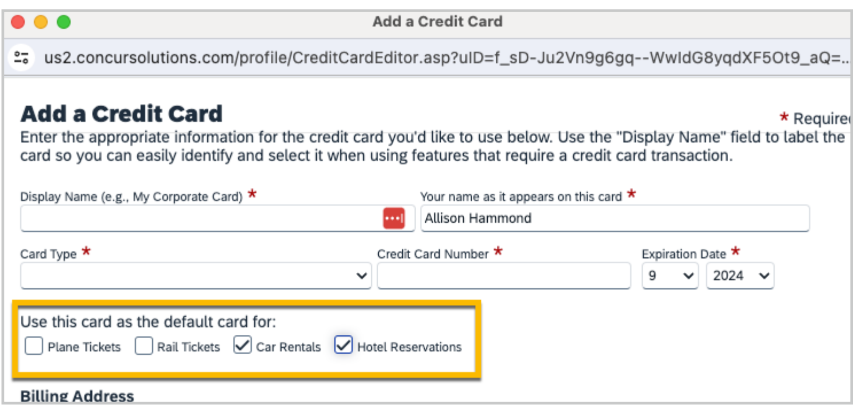
3. Click **OK**.

Credit Cards

Navigation Path: Profile > Profile Settings > Your Information > Credit Cards

Airfare and Rail are automatically charged to NEW Solutions credit card, but you must add a personal credit card to book Hotel and Car Rentals via the Concur Travel management system.

1. Click **Add a Credit Card**
2. Enter the credit card information. **Be sure to check off to use this card for car rental and hotel reservations.**



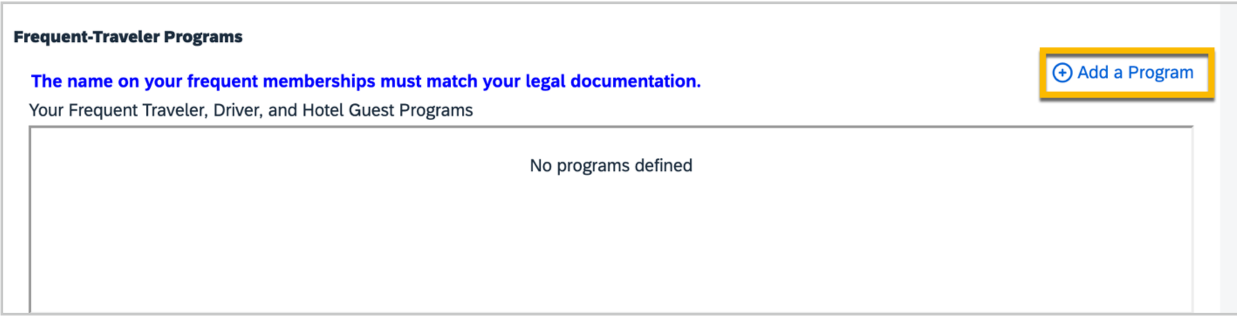
3. Click **Save**. Your credit card information has now been saved and is encrypted for security.

Frequent-Traveler Programs

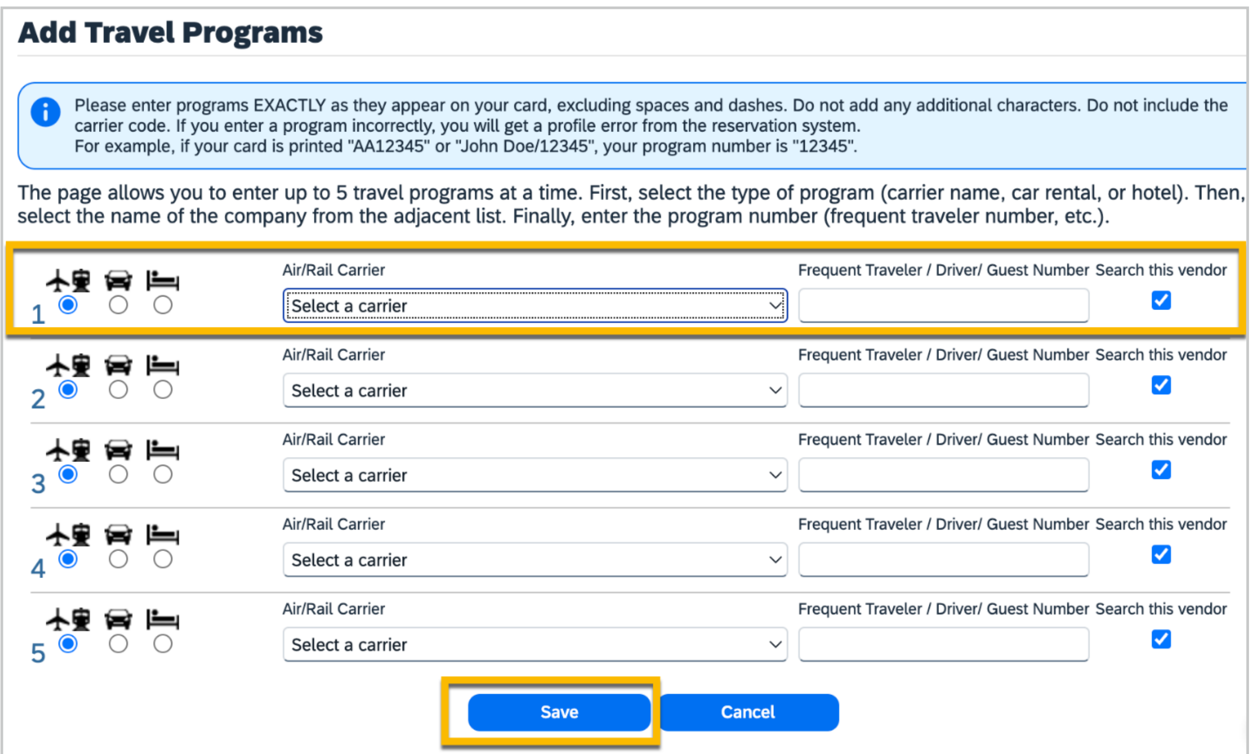
Navigation Path: Profile > Profile Settings > Frequent-Traveler Programs

Add all Frequent-Traveler Programs to your profile before booking your travel in Concur. This ensures that you get credit for your trip for that program and that your travel plans are included in the program's app, such as United, Southwest, etc.

1. Click **Add a Program**.



2. Select if the program is for **Air/Rail, Car, or Hotel**.
3. Select the **Carrier**.
4. Enter the **Frequent Traveler/Driver/Guest Number**. *You can enter up to 5 travel programs at a time.



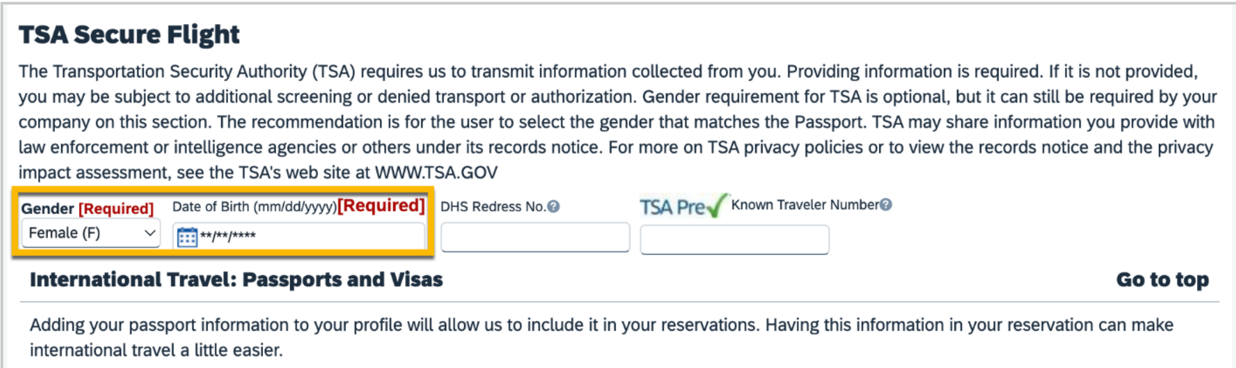
TSA Secure Flight

Navigation: Profile > Profile Settings > Frequent-Traveler Programs

It is required for you to enter your **Gender** and your **Date of Birth**.

1. Select your gender from the **Gender dropdown**.

2. Enter your birth date in the **Date of Birth (mm/dd/yyyy)** free text form.
    - Once your date of birth has been entered, it will appear as **/**/****



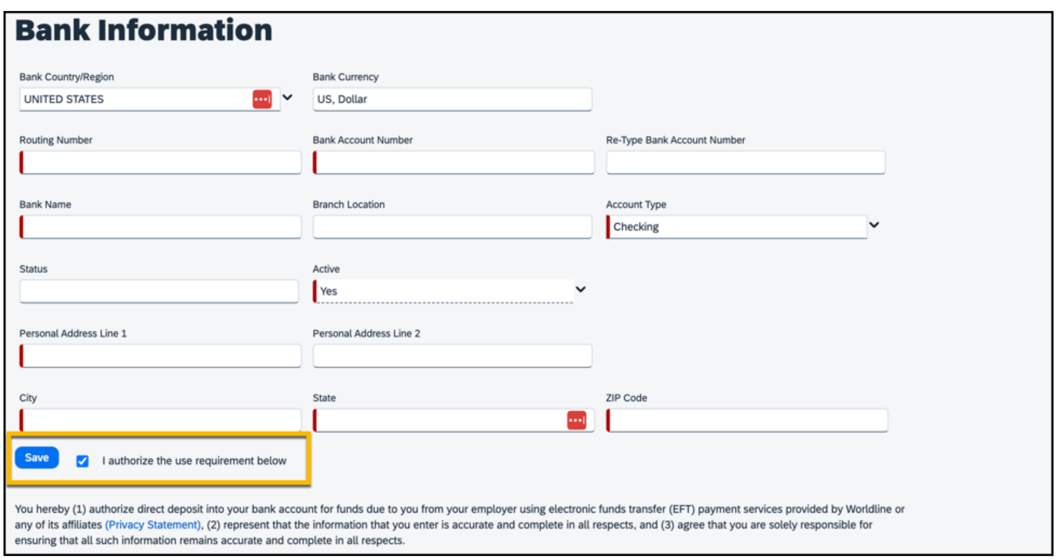
Bank Information

Important: If you have an update to your banking details, please update in both ADP and your Concur Profile.

Navigation: Profile > Profile Settings > Expense Settings > Bank Information

Reimbursement will be paid via direct deposit. To receive reimbursements, you must add your bank account information. To ensure privacy, your data is encrypted, and your full account number cannot be viewed or accessed by anyone, including you.

1. Enter all bank account details.
2. Select the **I authorize the use requirement** below checkbox.
3. Next, click **Save**

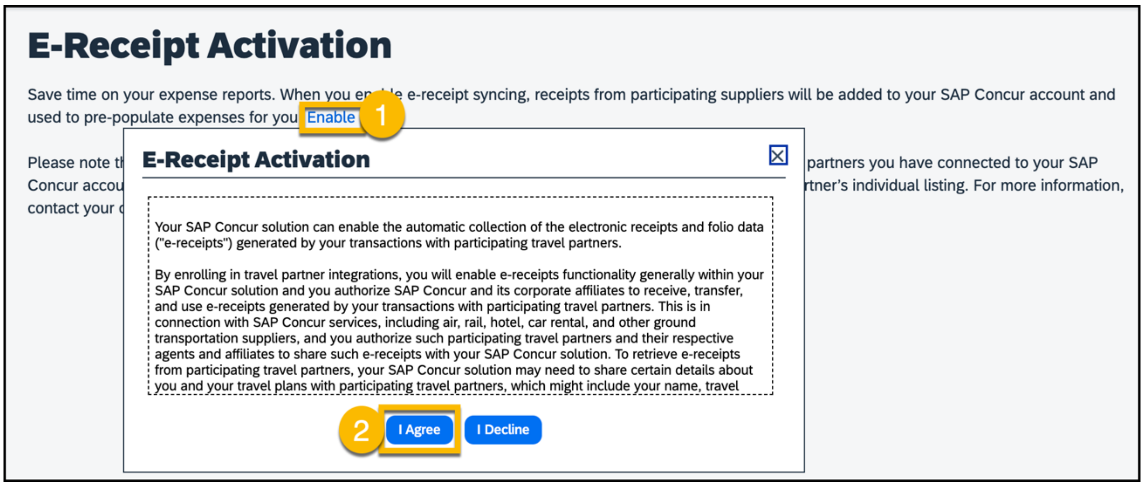


E-Receipt Activation

Navigation: Profile > Profile Settings > Other Settings > E-Receipt Activation

When you enable e-receipt syncing, receipts from participating vendors, such as Uber, most major Airlines, and hotel vendors, will be added to your SAP Concur account and used to pre-populate expenses for you. The e-receipt will be filed under your **Available Expenses** for you to add to a report.

1. Click **Enable** hyperlink.
2. Select **I Agree** on the E-Receipt Activation terms page.



Step 2: Create a Request

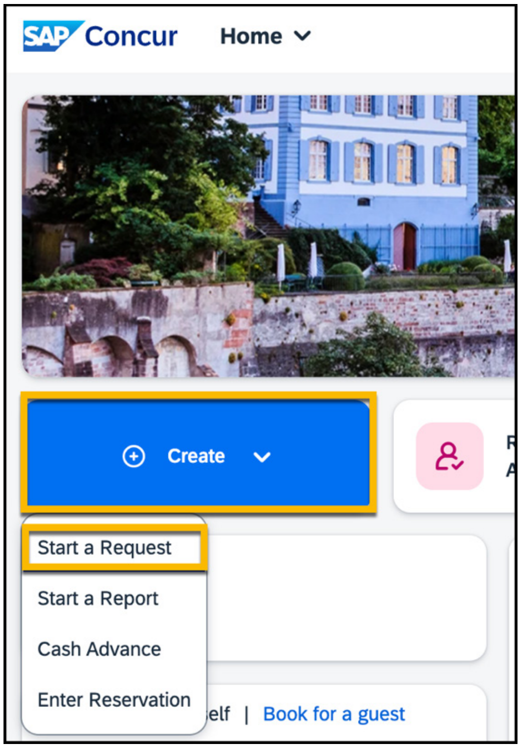
All travel, conferences, and training must be approved by creating a Request before booking or purchasing. *All Local Travel of 12 hours or less only requires a Request to be completed if a rental car is needed. To see the Local Travel guide, click here.

Creating a Request

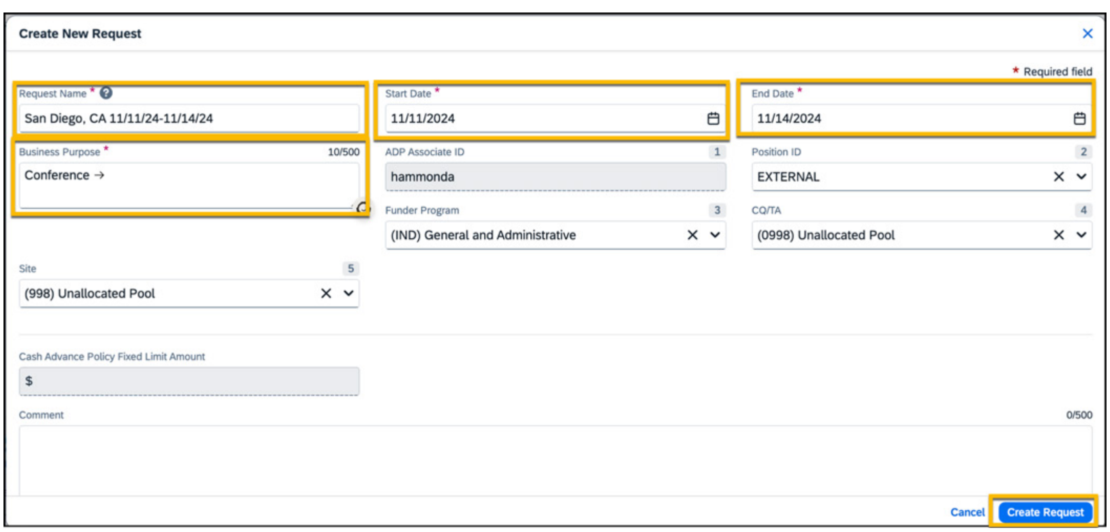
To book travel or attend a conference/training, you must create a Request.

1. From the **Home** Page, select the **Create** drop-down.

2. Click **Start Request**.



3. Enter all the required information denoted with a red asterisk *.
   - The Request Name should use the format of City, State, Start Date, and End Date (i.e., Arlington, VA 12/15/24-12/17/24). **There are only 32 characters in this field so please abbreviate.*
   - If you are using a **government car**, please add a comment so Accounts Payable is aware.
4. When complete, click **Create Request**.

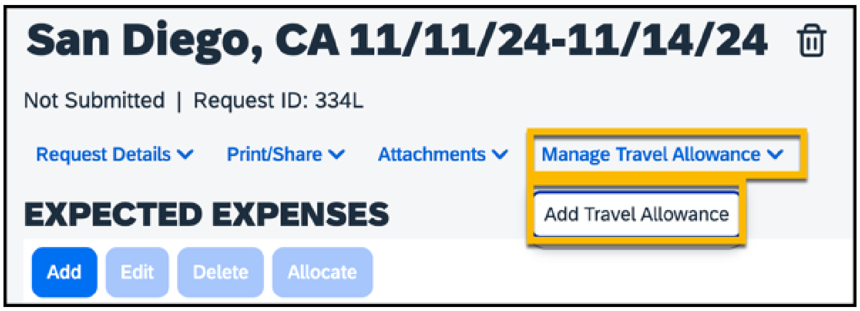


5. Next, create your travel allowance.

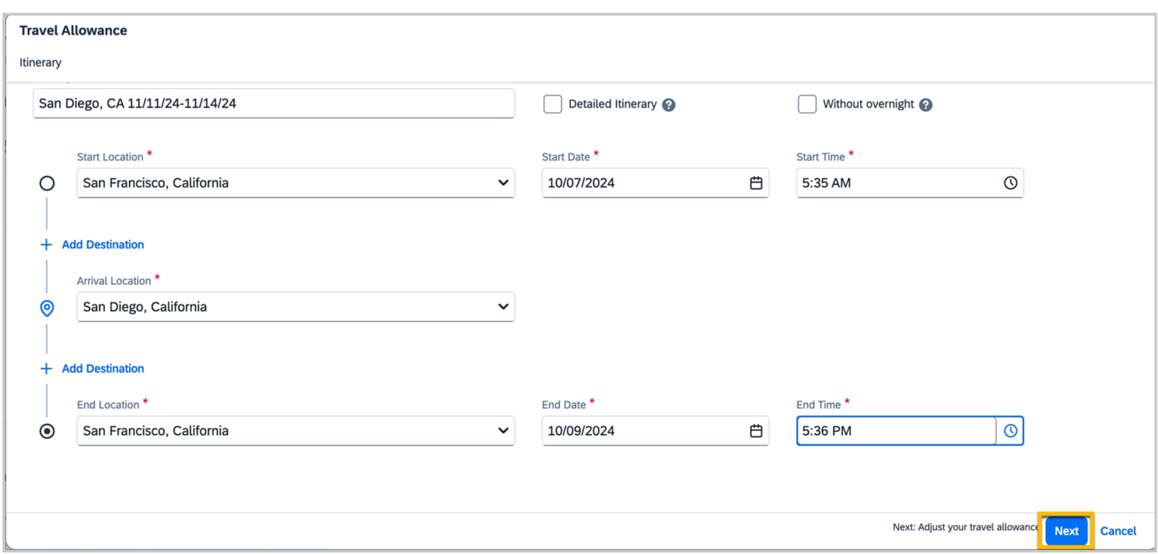
Step 3: Adding Travel Allowance to a Request

All travelers are entitled to a daily allowance, also known as Per Diem, to cover travel expenses, such as lodging, meals, and incidentals.

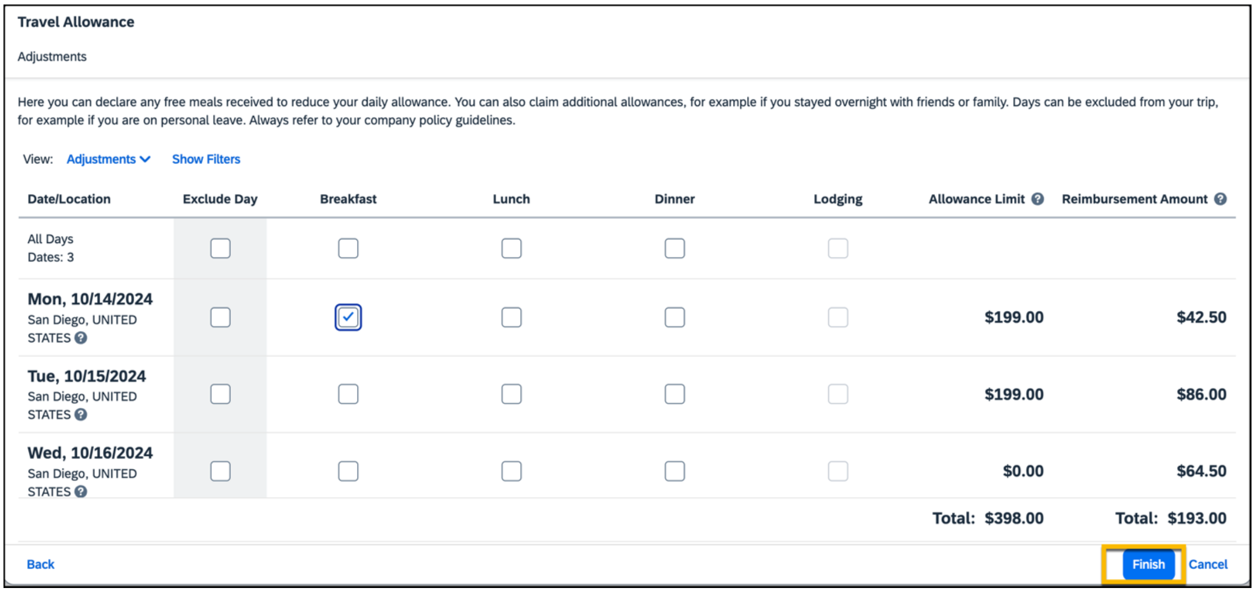
1. From the **Expected Expenses** page, select the **Manage Travel Allowance** drop-down.
2. Select **Add Travel Allowance**.



3. Select the **locations, dates, and times** of your travel.
   - For overnight trips, times are required but are irrelevant. For ease of use, enter 8:00 am start time and 10:00 pm end time.
4. **Detailed Itinerary** check box: Use this check box if the arrival date falls on the day after the departure date (i.e., this occurs with redeye, late, or long flights).
5. **Without Overnight** check box: Select this box if the trip is over 12 hours but does not require you to stay overnight.
6. Select **Next**.



7. This brings up the **Adjustments** Page. On this page, you can:
    - Declare any free meals you received during each day of your trip (i.e., meals included in your hotel stay, provided by friends or family, etc.).
    - If you received free meals for the entire day, select the Exclude Day check box.
    - Any declared meals will lower your reimbursement amount for that day.
8. Select **Finish**.

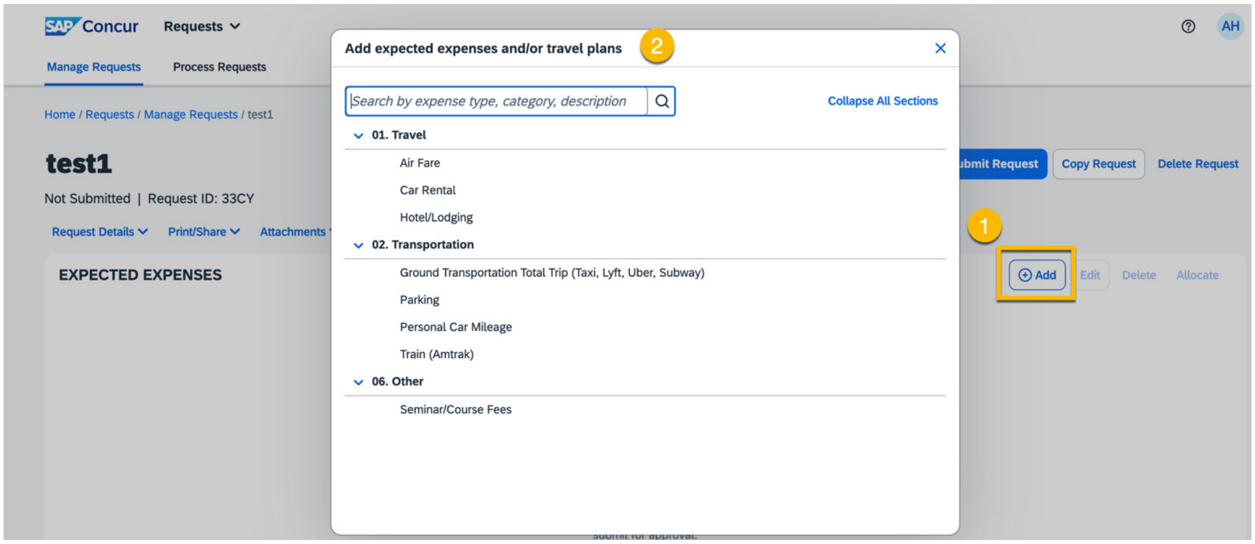


Step 4: Enter Expected Expenses

***Please visit the travel booking tool before adding your expected expenses to obtain airfare, hotel, car rental, and train estimates.**

1. Click the **Add** button in the middle of the screen (in blue letters).
2. Select from the available expense types.
    - Airfare
    - Car Rental (Insurance Included)
    - Hotel/Lodging
    - Ground Transportation (Tip Included) (Taxi, Lyft, Uber, Subway)
    - Parking
    - Personal Car Mileage
    - Train (Amtrak)
    - Seminar/Course Fees

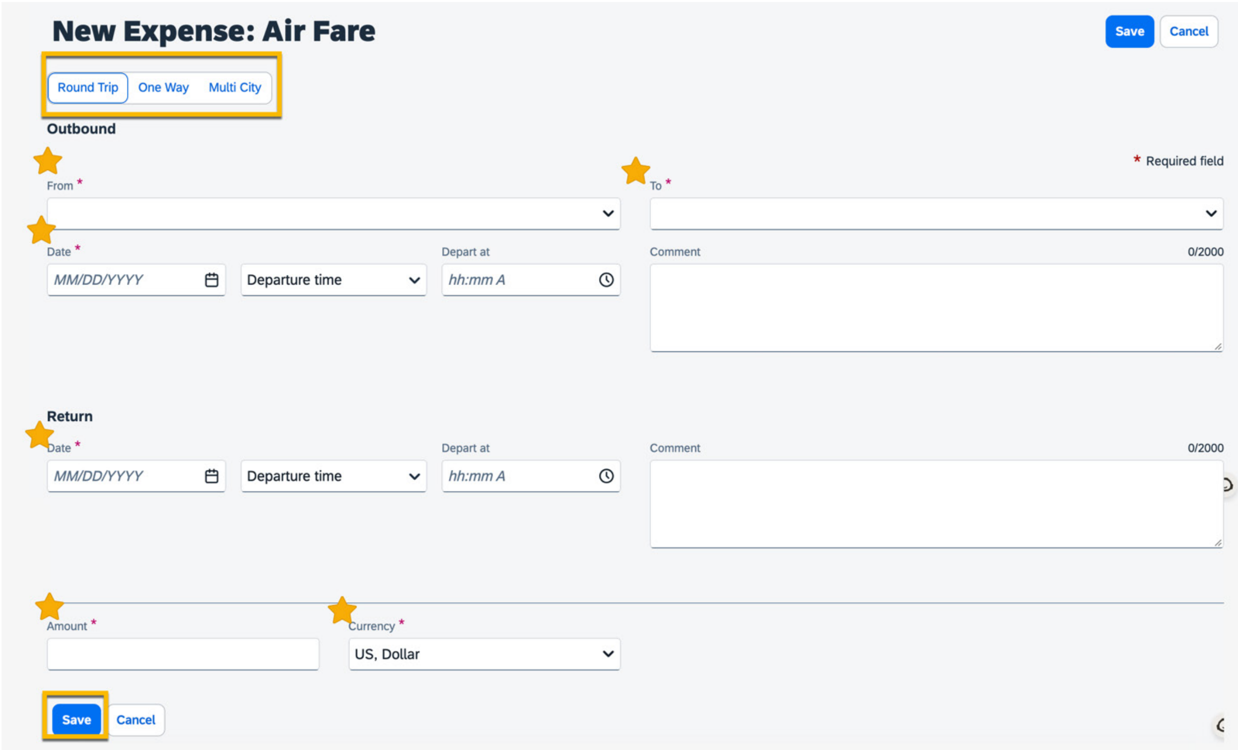
3. Enter all the required information for each expense type denoted with a *red asterisk. Keep in mind that each expense type will require different information. See each expected expense type below.



Add Airfare

1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The "Add expected expenses and/or travel plans" screen will display.
3. Scroll down and select the **Airfare** expense type. The **Airfare expense screen** will appear.
4. Select from **Round Trip, One Way,** or **Multi-City flights**.
5. Enter the **From** and **To** locations from the dropdown.
   - If you can't find your city because it is a smaller city, choose the closest major city to your location.
6. Enter the **Outbound Date** and the **Return Date**.
   - The departure time is not required.
7. Enter the estimated **Amount**.
   - Please visit the travel booking tool to obtain airfare, hotel, car rental, and train estimates.

8. Click **Save** when complete.

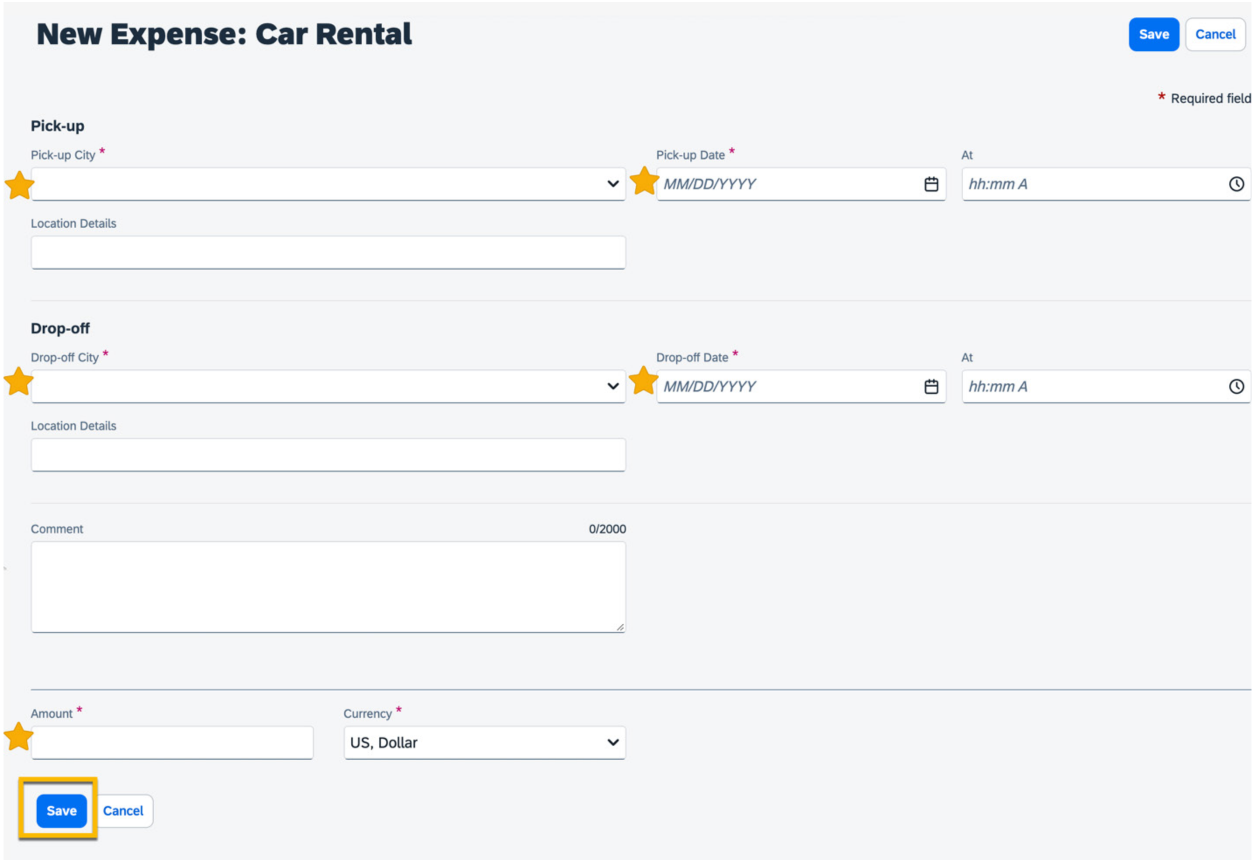


Add Car Rental

All required insurance will be added to the reservation at the rental car counter when the car is picked up. Do not add insurance costs to the Request.

1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The "Add expected expenses and/or travel plans" screen will display.
3. Scroll down and select the **Car Rental** expense type. The **Car Rental expense screen** will appear.
4. Enter the **Pick-up City**.
   - If you can't find your city because it is a smaller city, choose the closest major city to your location.
5. Enter the **Pick-up Date**. *At field is not required.
6. Enter the **Drop-off City**.
7. Enter the **Drop-off Date**. *At field is not required.
8. Enter the estimated **Amount**.
   - Please visit the travel booking tool to obtain estimates for airfare, hotel, car rental, and train.

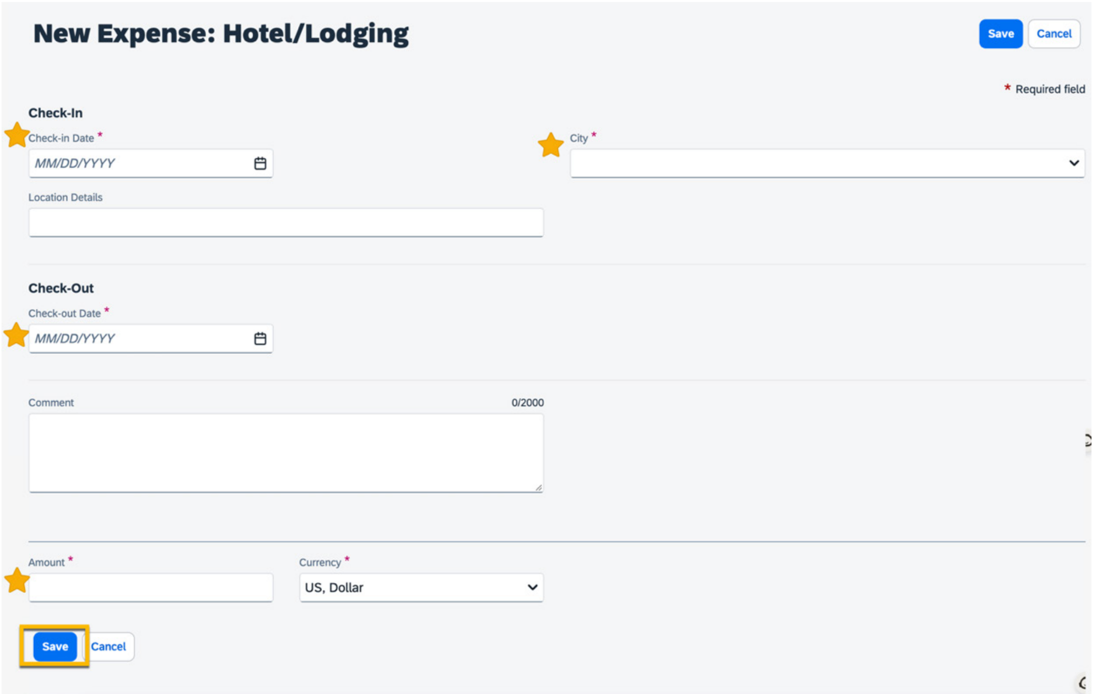
9. When complete, click **Save**.



Add Hotel/Lodging

1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The "Add expected expenses and/or travel plans" screen will display.
3. Scroll down and select the **Hotel/Lodging** expense type.
   - The **Hotel/Lodging expense screen** will appear.
4. Enter the **Check-in Date**.
5. Enter the **City**.
   - If you can't find your city because it is smaller, choose the closest major city to your location.
6. Enter the **Check-out Date**.
7. Enter the estimated **Amount**.
   - Please visit the travel booking tool to obtain airfare, hotel, car rental, and train estimates.

8. When complete, click **Save**.

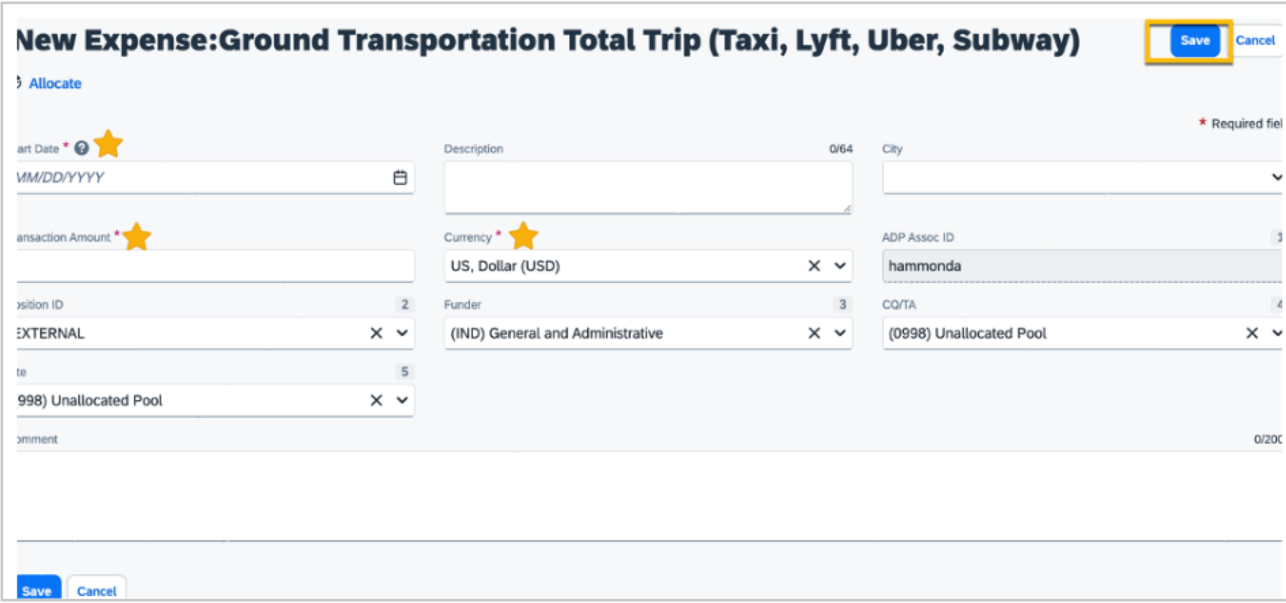


Add Ground Transportation Total Trip (Taxi, Lyft, Uber, Subway)

This is the total amount of ground transportation for the entire trip. Ground transportation can be challenging to estimate. Do the best you can. You can add additional Ground Transportation expenses when the expense report is created.

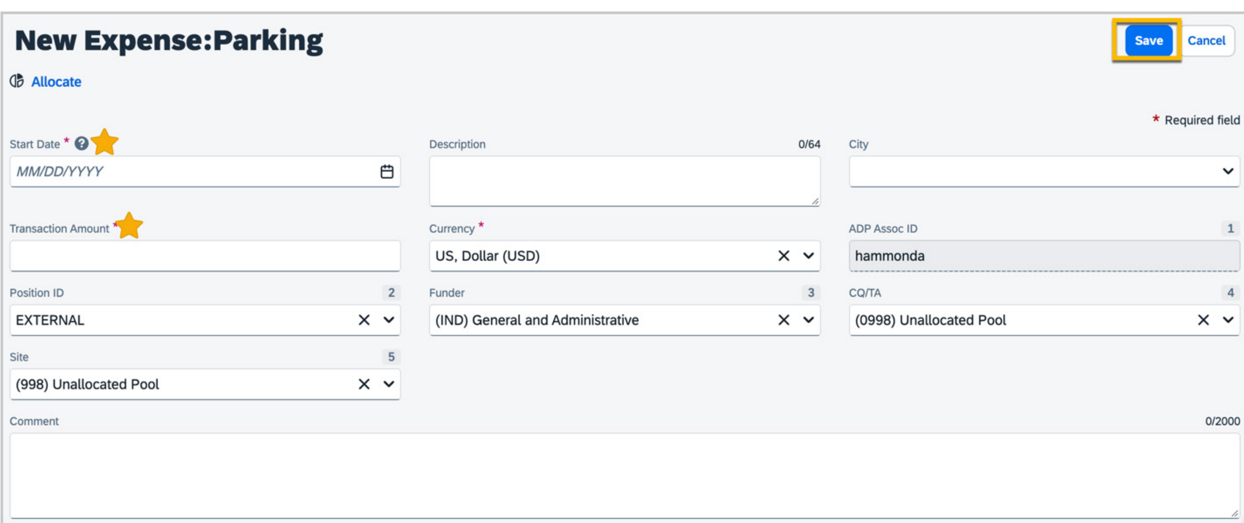
1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The "Add expected expenses and/or travel plans" screen will display.
3. Scroll down and select the **Ground Transportation Total Trip** expense type. The **Ground Transportation Total Trip expense screen** will appear.
4. Enter the **Start Date**.
5. Add the estimated **Transaction Amount**.
6. The **Comment** is not a required field but adds additional context.

7. When complete, click **Save**.



Add Parking

1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The “Add expected expenses and/or travel plans” screen will display.
3. Scroll down and select the **Parking** expense type. The **Parking expense screen** will appear.
4. Enter the **Start Date**.
5. Enter the estimated **Transaction Amount** for the parking expense.
6. When complete, click **Save**.



Add Personal Car Mileage (POV Mileage)

When the operation of a POV is required for business use, you may expense the miles within Concur. The GSA rates are pre-loaded into Concur, so reimbursements are automatically calculated based on the miles entered.

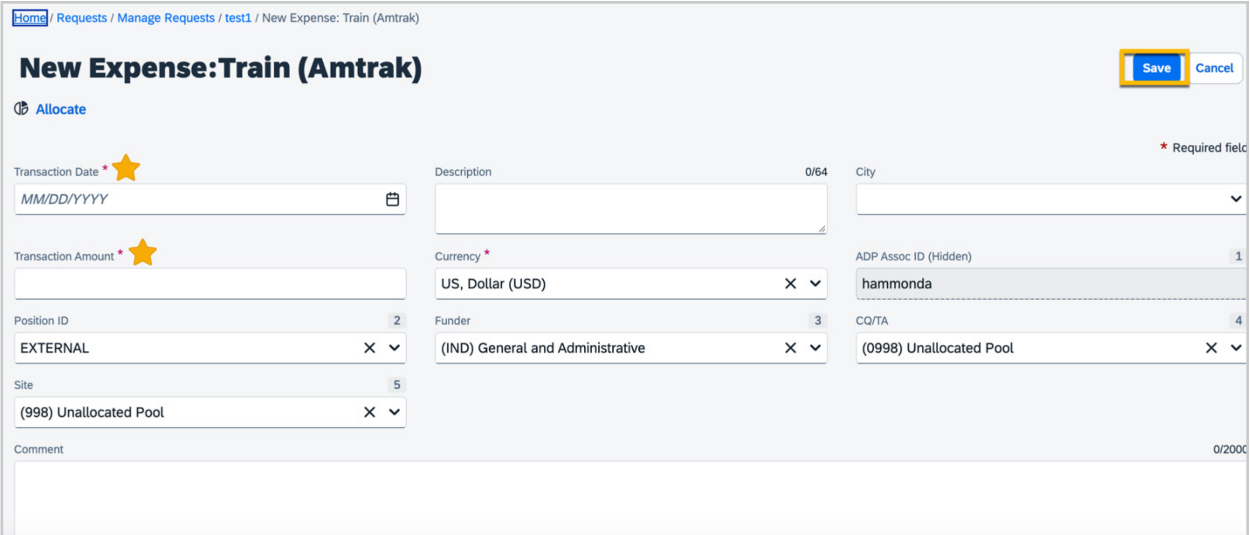
To add Personal Car Mileage:

1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The “Add expected expenses and/or travel plans” screen will display.
3. Scroll down and select the **Personal Car Mileage** expense type. The **Personal Car Mileage expense screen** will appear.
4. Enter the **Transaction Date**.
5. Select the **Mileage Calculator** at the top left side of the expense screen.
    - Enter the waypoints.
    - There is an option to make this a round trip and to add as many stops as needed.
    - When complete, select **Calculate Route**.
    - The distance and amount reimbursed are automatically calculated and added to the request entry.

Add Train (Amtrak)

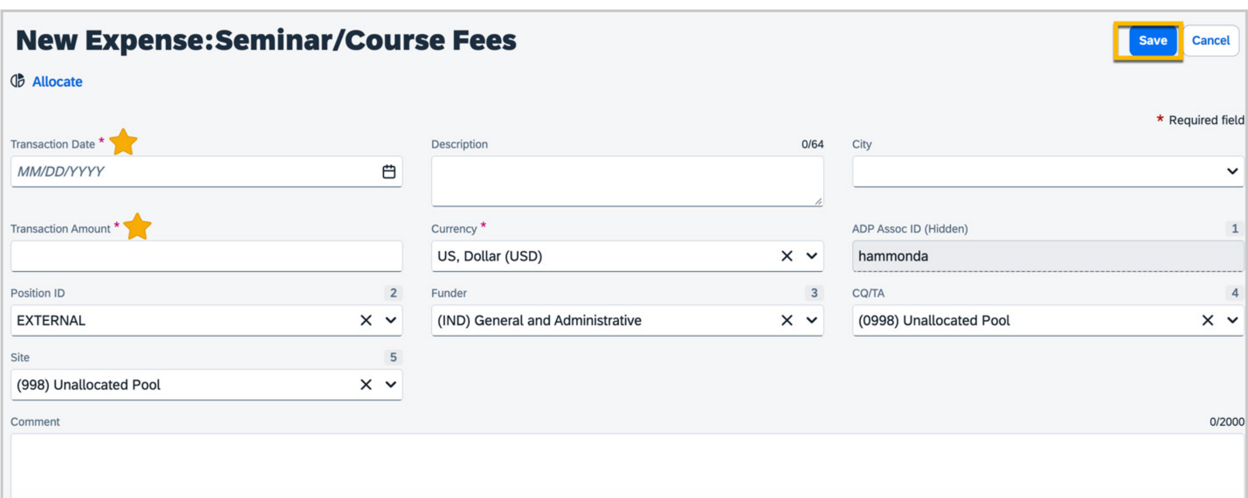
1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The “Add expected expenses and/or travel plans” screen will display.
3. Scroll down and select the **Train (Amtrak)** expense type. The **Train (Amtrak) expense screen** will appear.
4. Enter the **Transaction Date**.
5. Enter the estimated Transaction Amount.
    - Please visit the travel booking tool to obtain airfare, hotel, car rental, and train estimates.

6. When complete, select **Save**.



Add Seminar/Course Fees

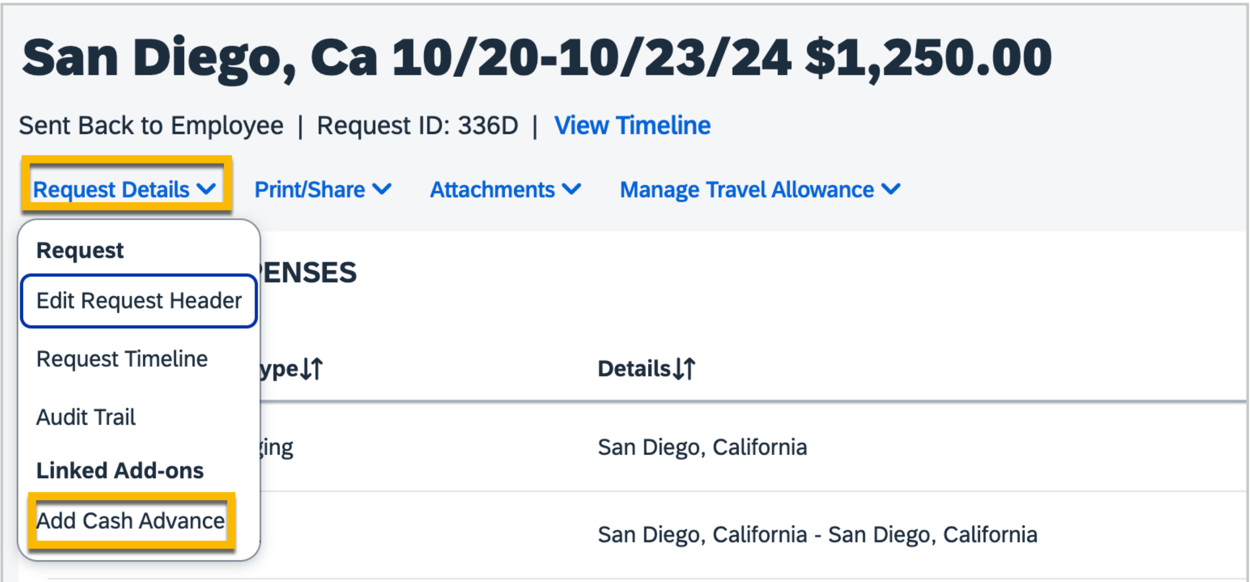
1. Click the **Add** Button in the middle of the screen (in the blue letters).
2. The "Add expected expenses and/or travel plans" screen will display.
3. Scroll down and select the **Seminar/Course Fee**s expense type. The Seminar/ Course Fees expense screen will appear.
4. Enter the **Transaction Date**.
5. Enter the estimated **Transaction Amount**.
6. When complete, click **Save**.



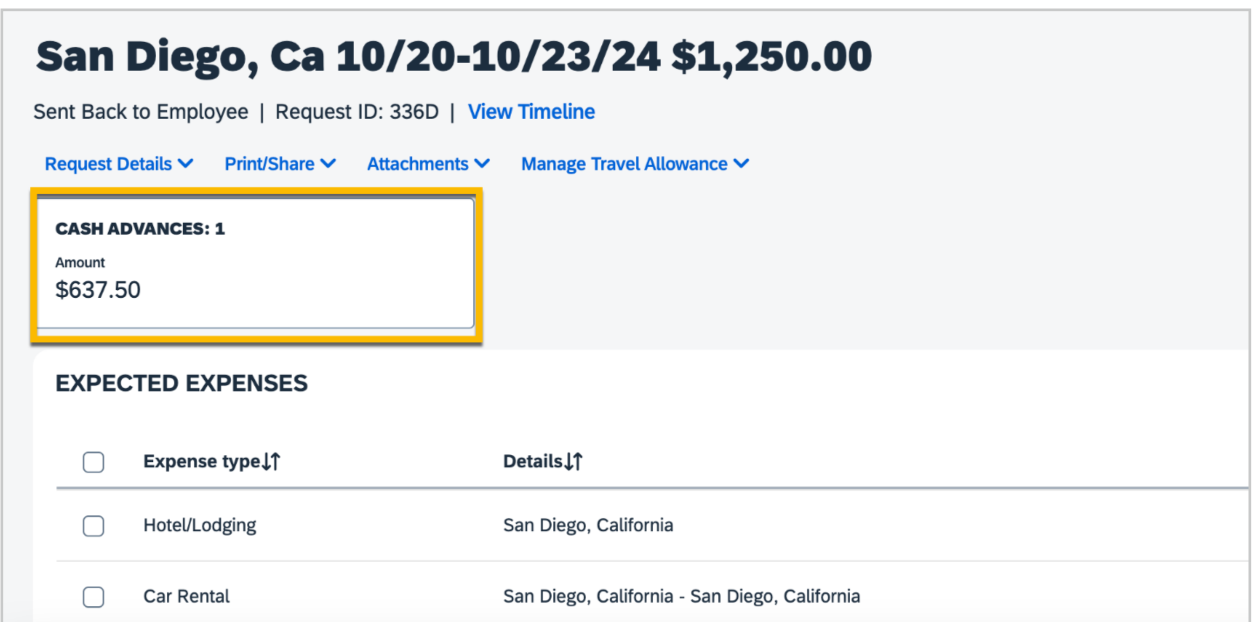
Step 5: Adding a Cash Advance to the Request

You can request a cash advance for your upcoming business trip or expenses. Cash advances are reimbursed at 85% of the requested amount.

1. After entering your expected expenses, select **Add Cash Advance** from the **Request Details** drop-down.

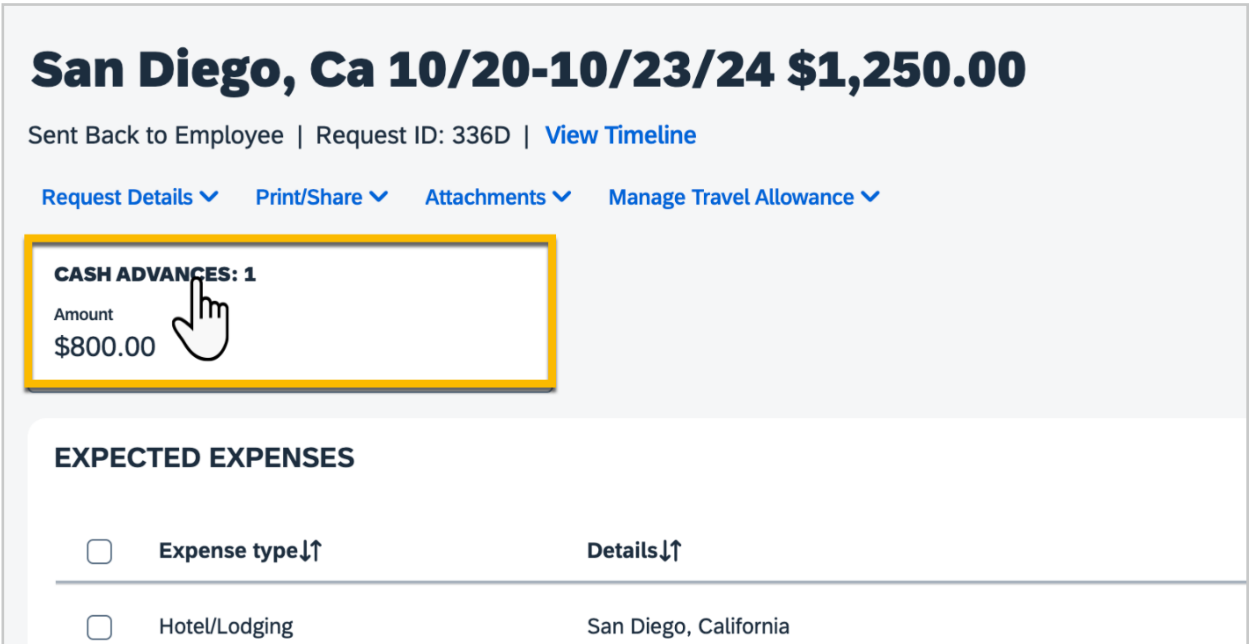


2. The requested cash advance has been added to the Request. The cash advance amount is shown above the expected expenses.

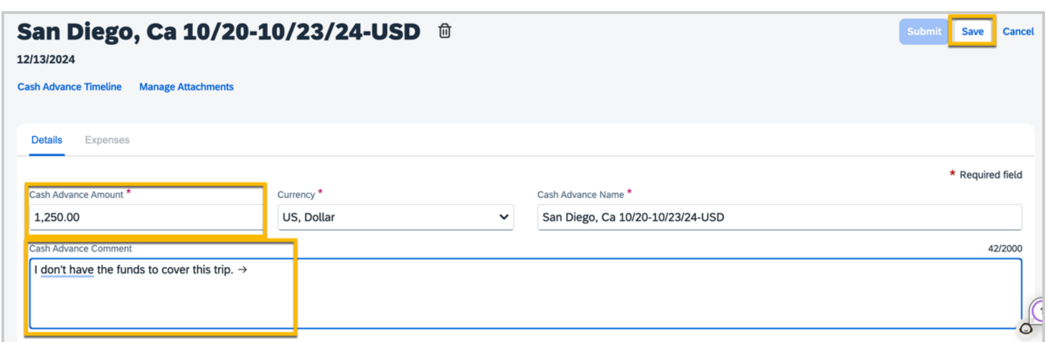


If you need to request more than 85% of the total amount, follow these steps:

1. From inside the Request, open the **Cash Advance** you just created by clicking Cash Advance.
   - This brings you into the **Cash Advance**.



2. Adjust the **Cash Advance Amount** to the desired amount. The amount can’t exceed the total Request amount.
3. Leave a detailed comment in the **Cash Advance Comment** section on why you request a cash advance greater than 85%.

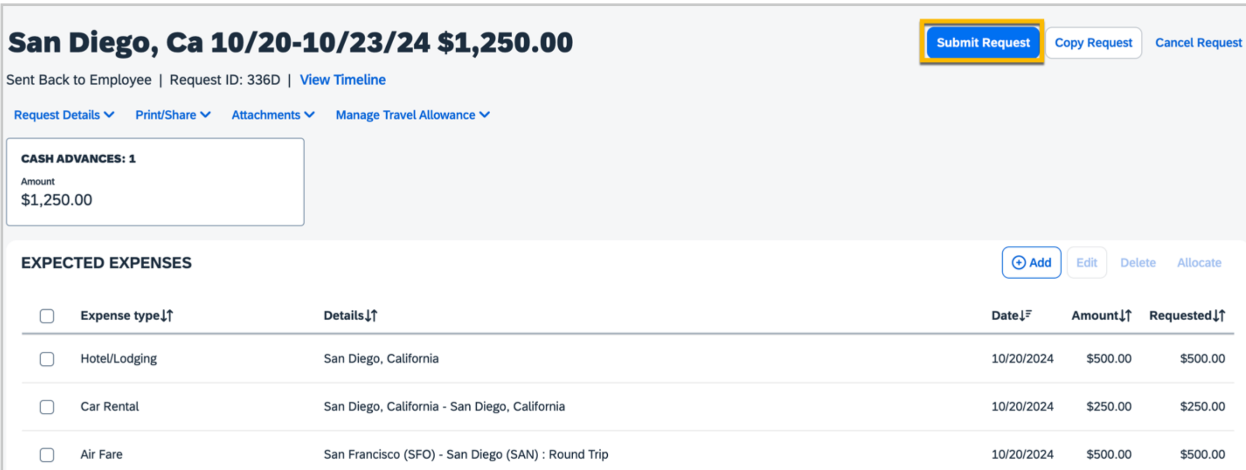


4. When complete, click **Save** at the top right of the screen in blue.

Step 6: Submitting a Request

When all expected expenses, travel allowances, and/or cash advances have been added to the Request, you can submit it.

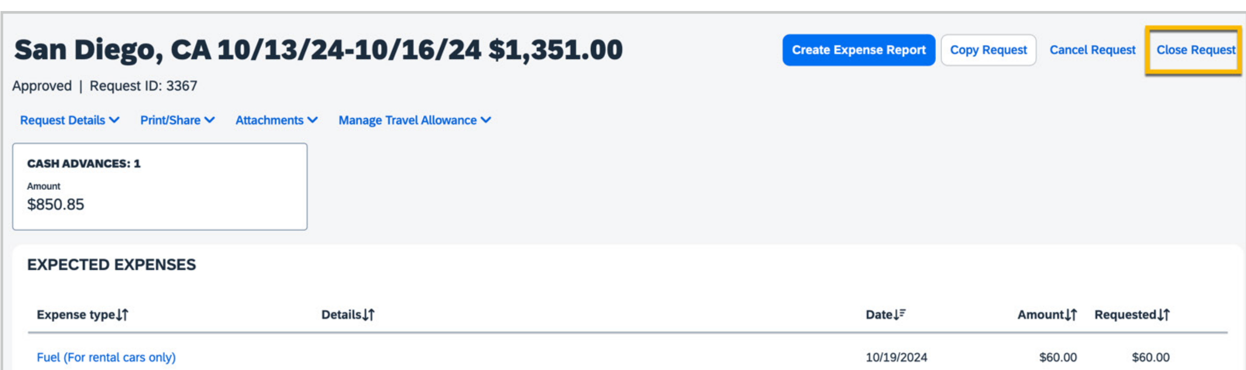
- To submit the Request, click the blue **Submit Request** button.



Closing a Request

Once the approved Request has been associated with a report, you can close the Request.

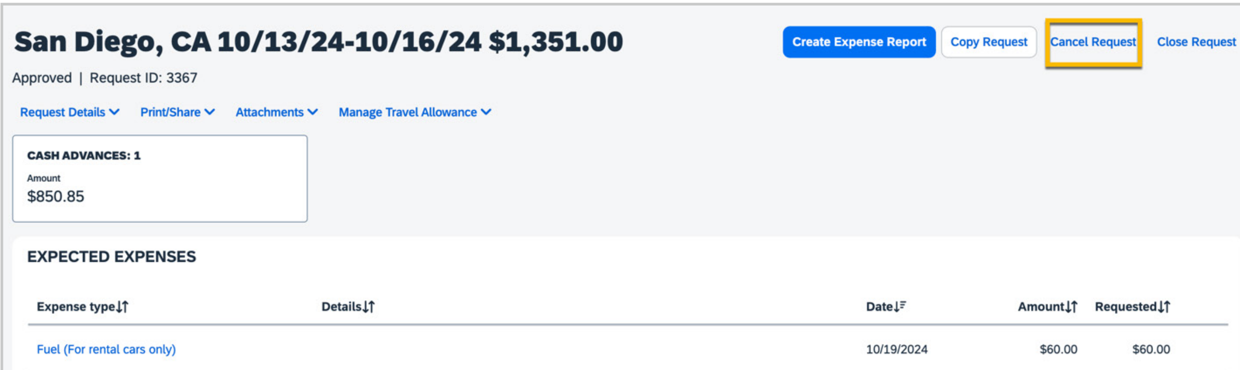
1. Click on the **Request**
2. Select the **More Actions** dropdown menu.
3. Select **Close Request**.



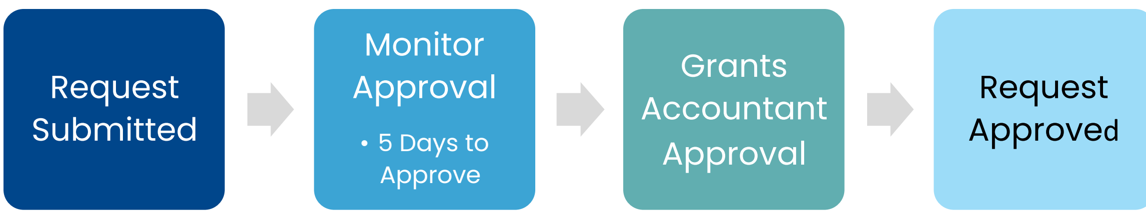
Cancelling a Request

If your trip is canceled or changed, a Request can be canceled. To cancel a Request:

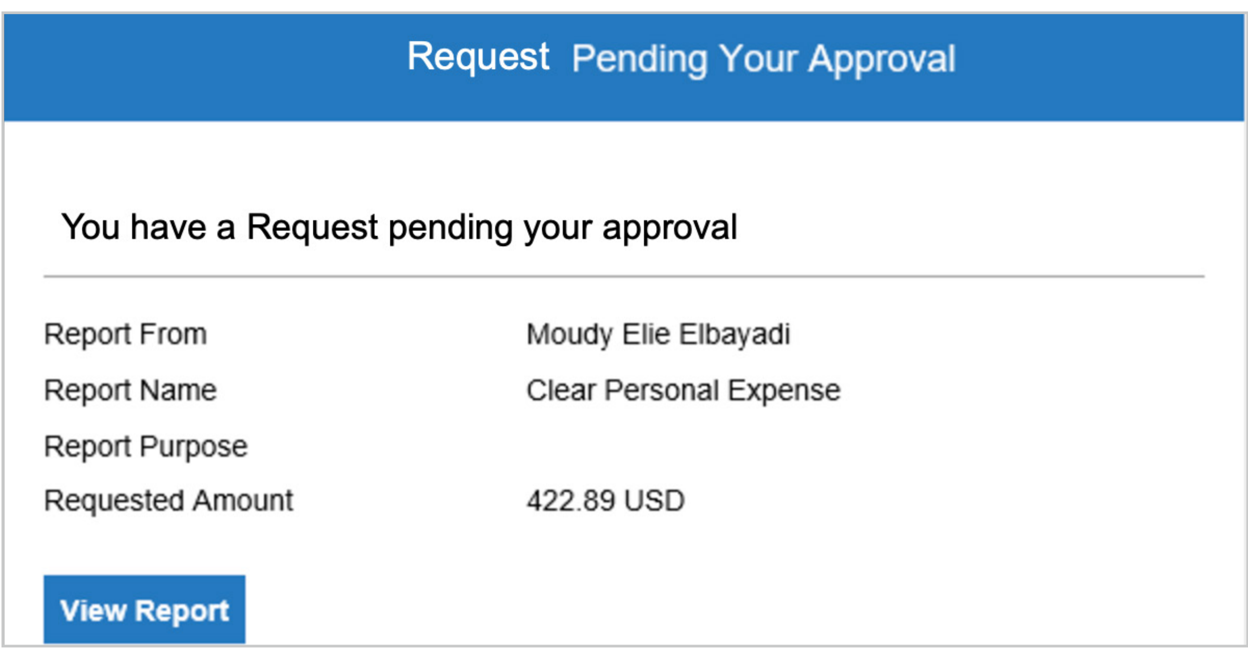
1. From the Manage Request page, open the Request you wish to cancel.
2. Click the Cancel Request button at the top right-hand area of the page.



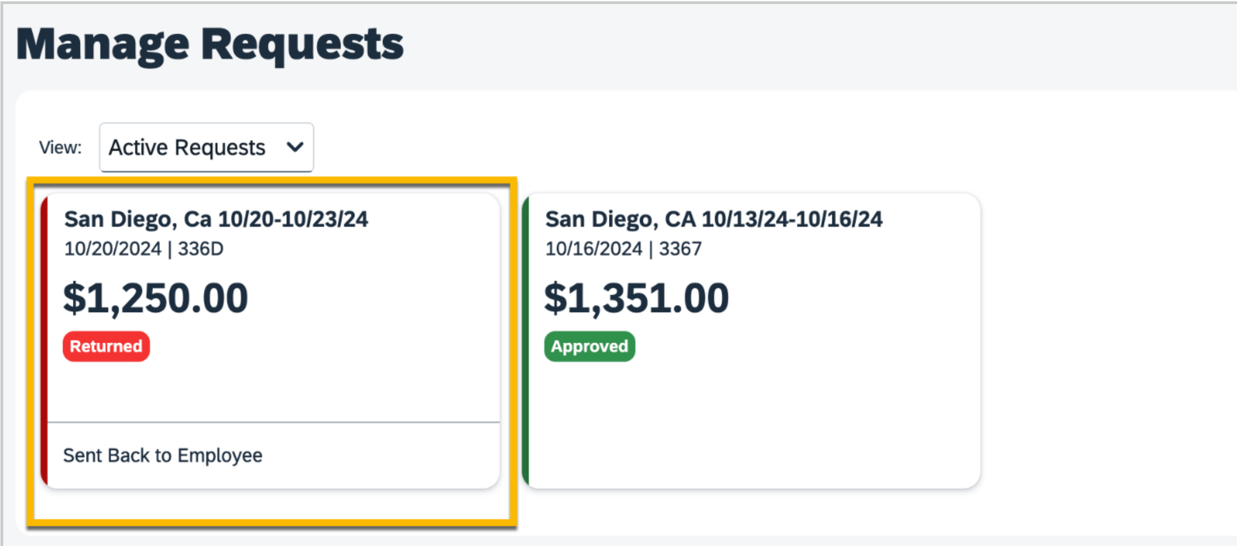
Request Approval Flow



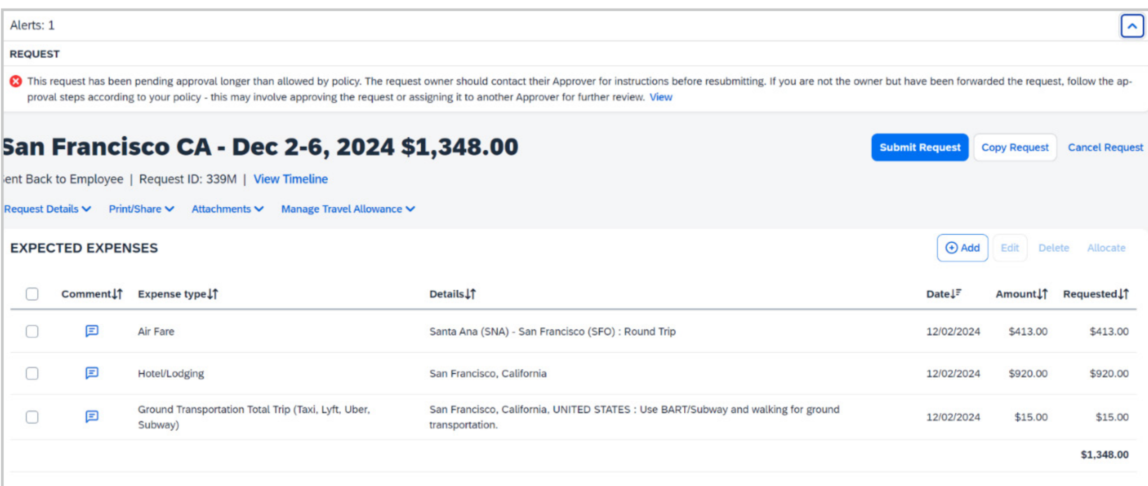
1. Once the Request is submitted, it flows to the monitor for approval.
2. The monitor receives an email from Concur informing them that a request awaits approval.



3. If the monitor doesn't approve in 5 days, the Request will be returned to the Enrollee/User, and they will see the Request status changed to **Returned**. The enrollee will get an email notifying them that their Request has been returned.



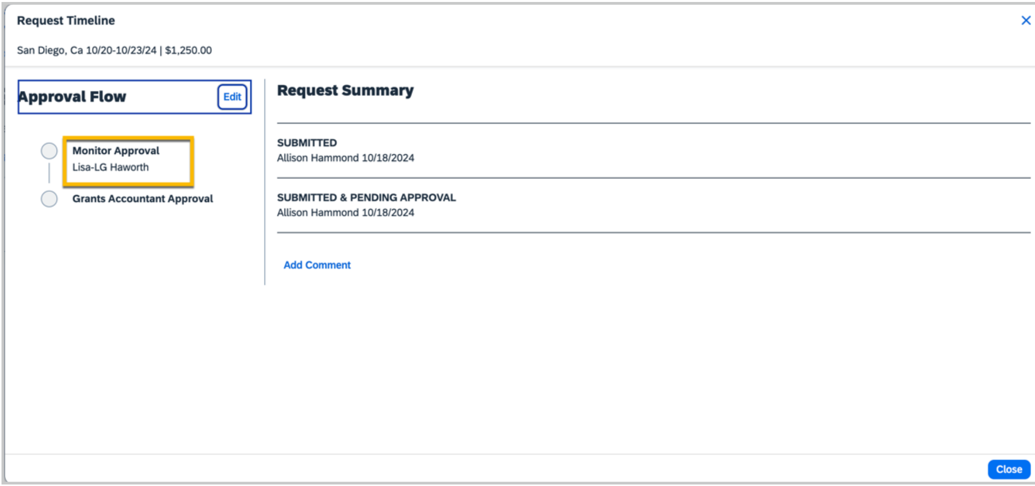
- If the Request was returned to you due to lack of monitor approval within 5 days, email your monitor a gentle nudge to approve the Request as soon as possible.



To locate your monitor for your Request:

1. From the **Manage Request** page, open the **returned Request** by clicking on the tile.
2. Select the **Request Details** drop-down and choose **Request Timeline**.

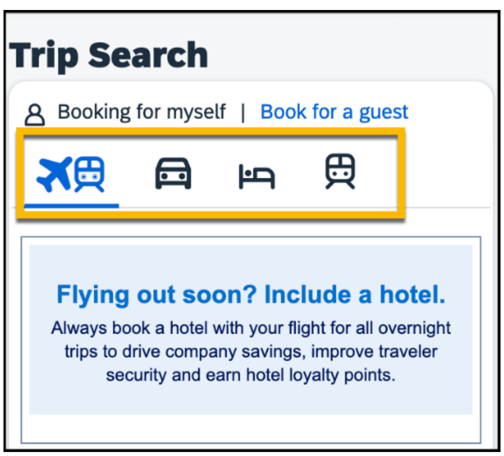
3. Your assigned monitor is listed under **Monitor Approval**.



Your monitor is assigned a delegate, a secondary monitor, to approve on their behalf. There is no indication to the enrollee which secondary monitor is assigned. However, the secondary monitor will also receive email notifications that the Request is pending approval.

Step 7: Booking Travel

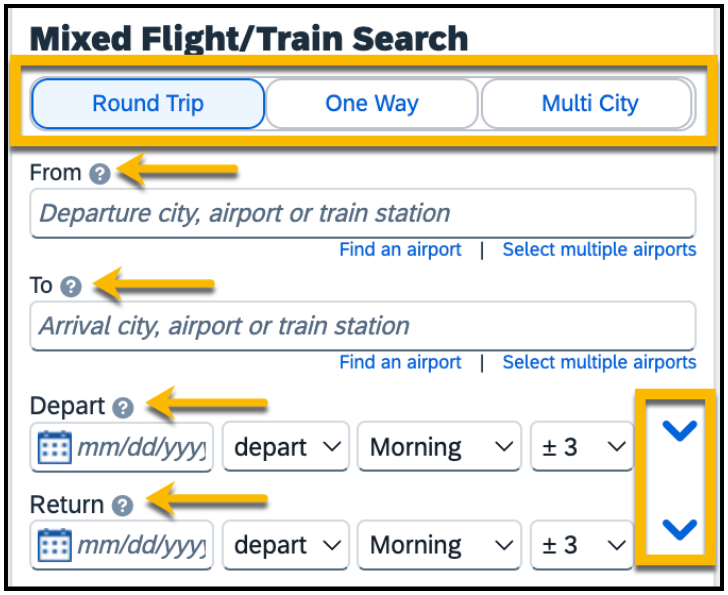
After you've obtained Travel Request approval, you may book your travel through the SAP Concur Travel Online Booking Tool.



- Have your 4-digit Request ID ready and available. To complete a flight, train, hotel, and/or car rental reservation, the Request ID must be entered during the booking process.
- **Note:** Please remember that airfare and rail are paid for with the New Solutions credit card. Adding a personal credit card to your profile is required to book Hotel and Car Rental reservations. See the profile section of the guide for more details.

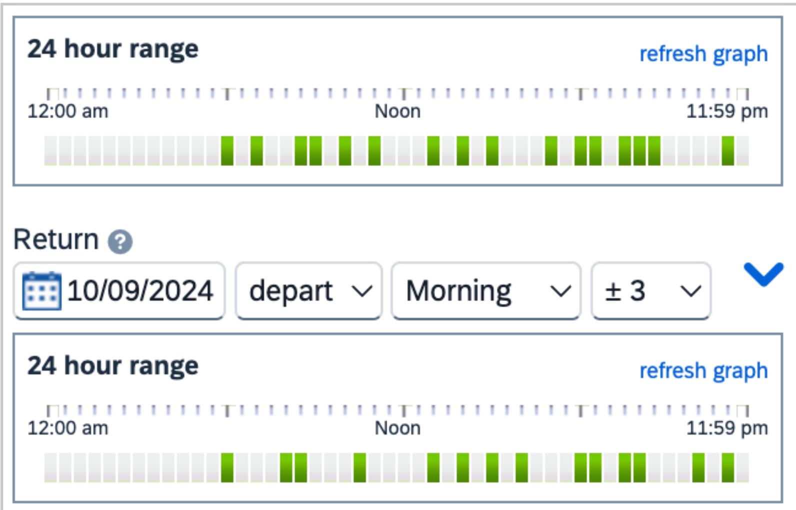
Booking a Flight

From the SAP Concur home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations without a flight, use the Hotel and Car Search tabs, respectively.



1. Select one of the following flight options.
   - Round Trip
   - One Way
   - Multi City
2. In the **From** and **To** fields, enter the departure and arrival cities for your travel. When you enter a city, airport name, or airport code, SAP Concur automatically searches for a match. Note: Use the Find an airport and select multiple airports links as needed.

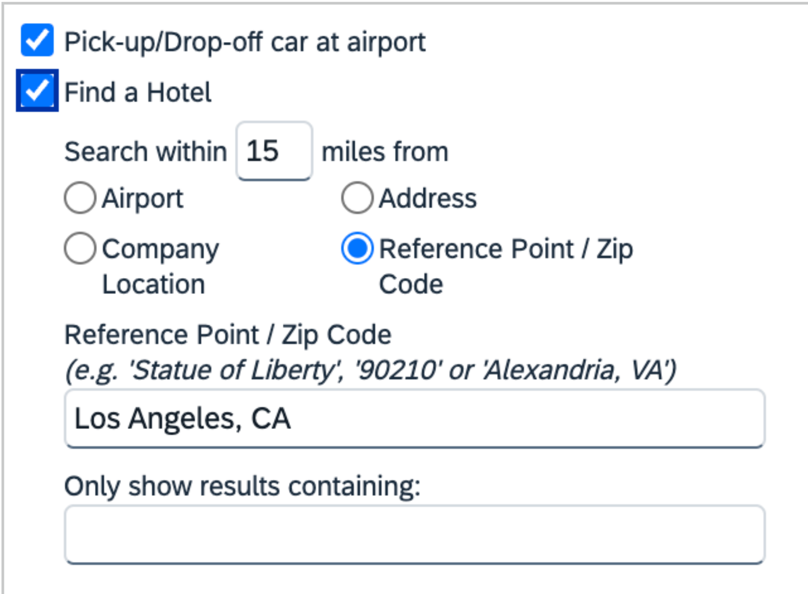
3. Click in the **Depart** and **Return** date fields, and then select the appropriate dates from the calendar.
    - Use the remaining fields in this section to define the appropriate time range for the flight.
    - Click the arrow to the right of the time window to see a graphical display of nonstop flights available for the route and date you have selected. This allows you to adjust your search criteria and, if necessary, to see/reserve nonstop flights.



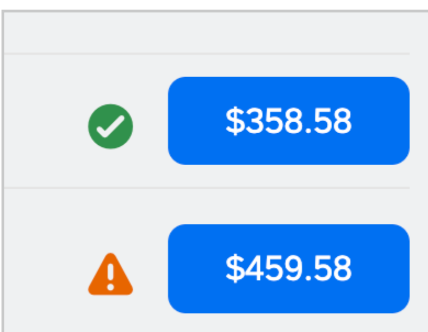
Notes:

- The graphical display is based solely on flight schedule data.
- Each green bar represents 30 minutes of time. Place your mouse pointer over the green bar to see all the flights available for that time slot.
- If you change locations or dates, click refresh graph for more data.

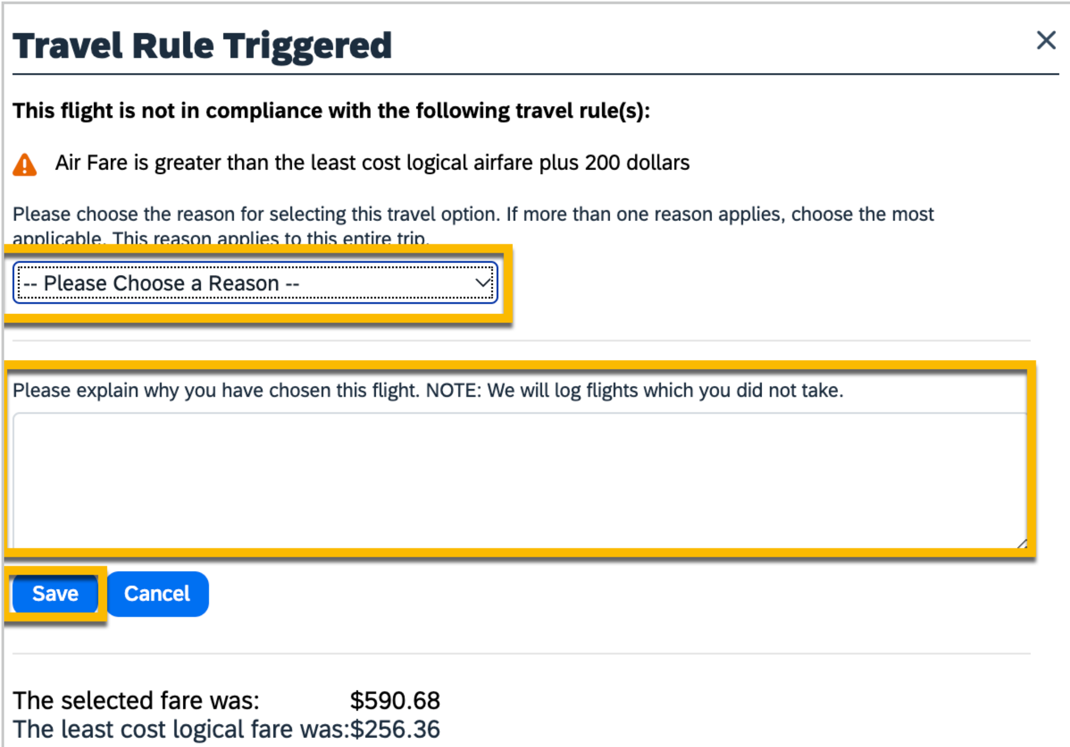
4. If you need a car, click **Pick-Up/Drop-off car at airport** check box. If you require a hotel for this stay, check off **Find a Hotel**.



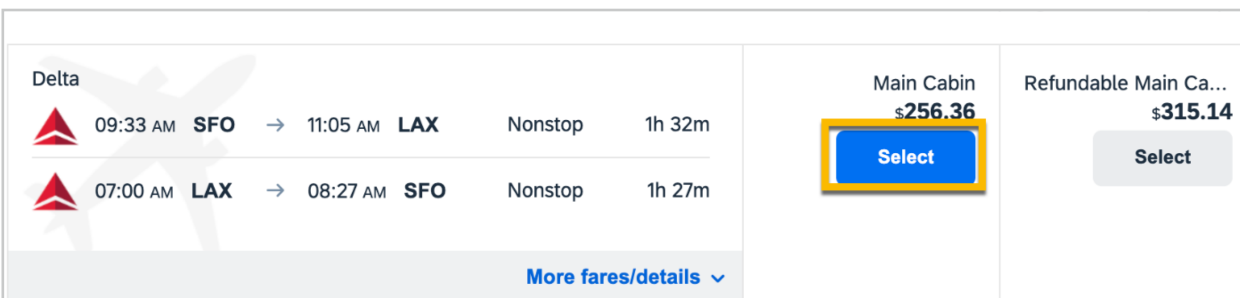
5. Choose if you want to search by **Schedule** or **Price**.
6. When complete, click **Search**.
7. View flights on **Shop by Fares** tab or the **Shop by Schedule** tab.
   - Flights within the policy will have a green check mark next to the fare.
   - Flights with an orange triangle warning next to the fare have triggered a policy rule.



- If you choose an out-of-policy fare, fill out the **Travel Rule Triggered** page.



8. Choose the flight by clicking the blue **Select** button.



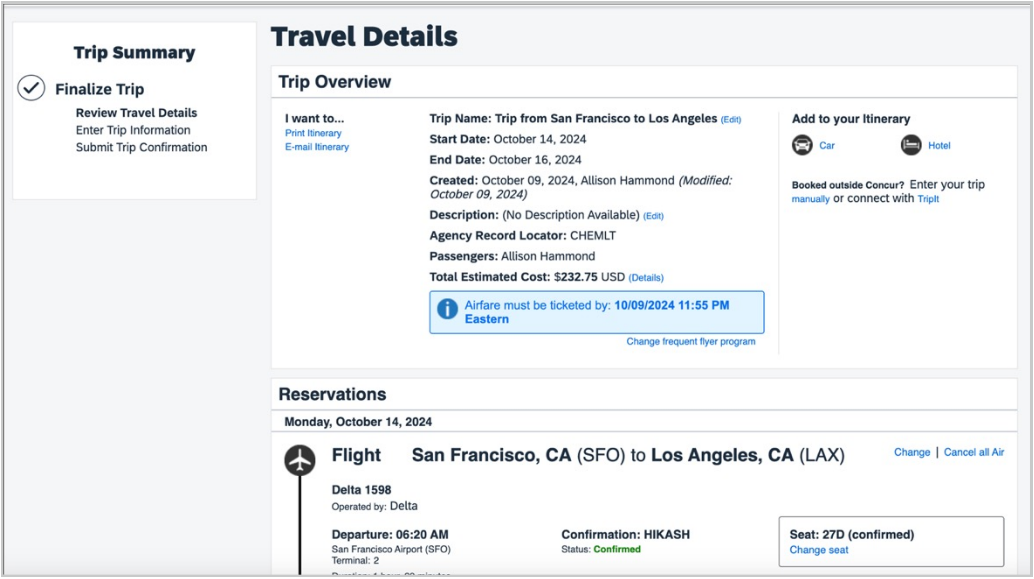
9. Review the flight(s) on the **Review and Reserve Flight page**.
   - Enter Traveler Information
   - Select Seats
   - Review Price Summary

Note: The payment method for airfare/rail will always be the Company Corporate Card.

10. Click **Reserve Flight and Continue**.

Note: If you requested a car or a hotel on the flight (Air/Rail) search, those results appear. For information about separately booking a rental car or a hotel, see Booking a Car and/or Booking a Hotel in this document.

11. Review the Travel Details page (Itinerary), then click **Next**.



In the **Trip Overview** section:

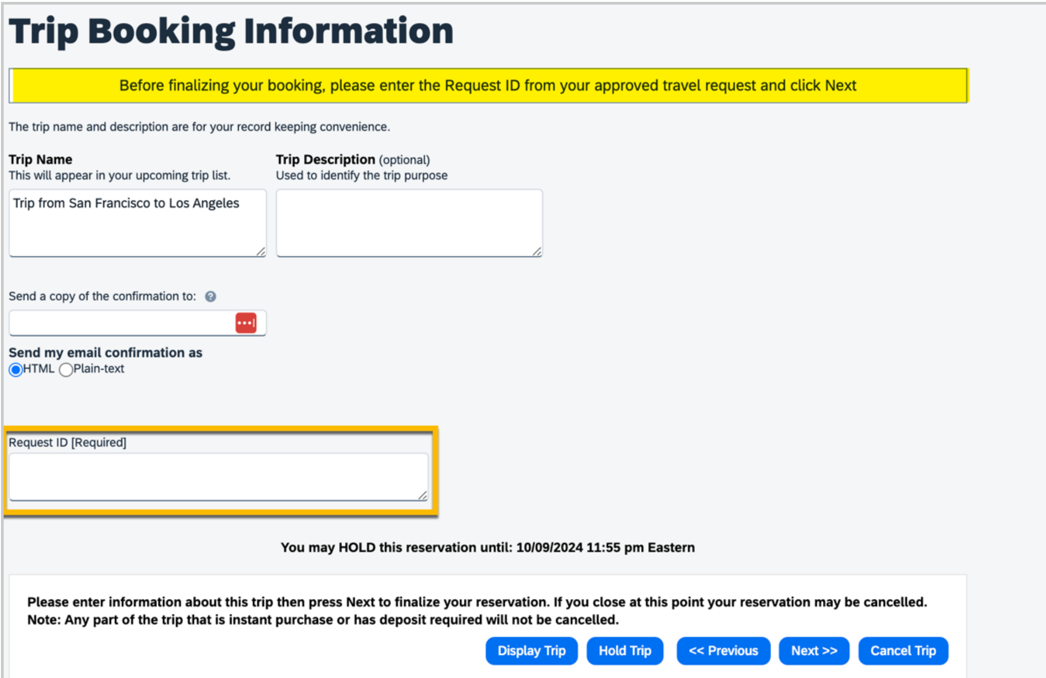
- Review the information for accuracy.
- In the I want to section, print or email your itinerary as appropriate.
- In the Add to your Itinerary section, add a car, hotel, Wi-Fi, etc., as needed.

In the **Flight** section:

- Verify the information for accuracy.
- Click **Select Seats** or **Change Seats** to select or change your seat option (depending on the airline).
- Review all the **Total Estimated Cost** section.

12. Review the **Trip Booking Information** Page, then click **Next**.
    - Enter additional information about your trip.
    - Enter or modify the trip name.
    - Enter a trip description.
    - Indicate if anyone else besides you should receive the initial confirmation email.
    - Enter the 4-digit **Request ID*** in the **Request ID** field - How to find the Request ID

*This is required. You cannot book travel without submitting a Request and entering the **Request ID**.

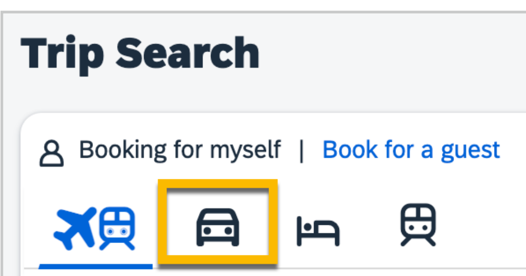


- You may hold the reservation by selecting **Hold Trip**.

13. Purchase the Ticket and click **Finish**.
    - Click **Confirm Booking** to send your request to Amex GBT.

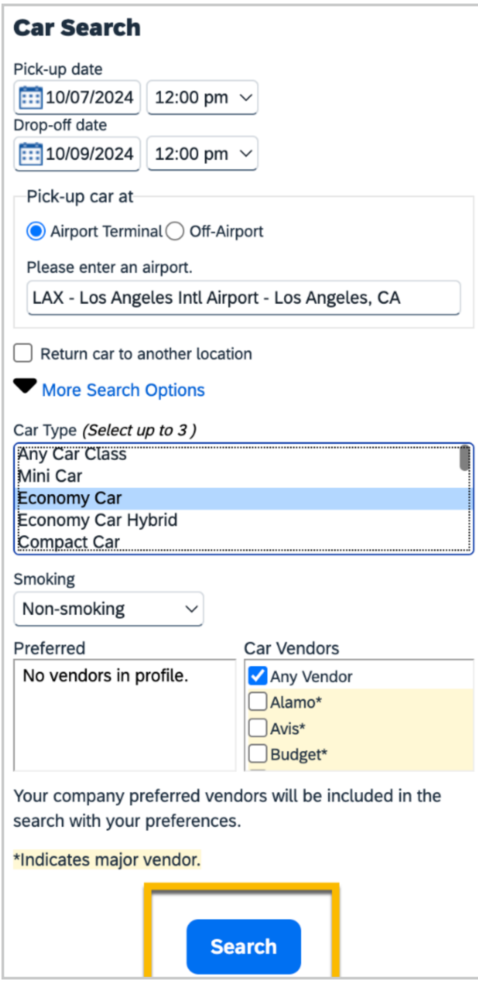
Booking a Car

If you require a car but not airfare, click the **Car** tab.

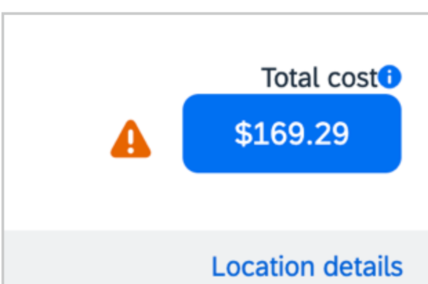


1. Enter your **Pick-up** and **Drop-off** dates and times.
2. In the Pick-up car at section, select either:
    - Airport terminal, and then type the city or airport code.
    - Off-airport, and then enter (or search for) the location.
3. Select the **Return car to another location** check box, if needed.

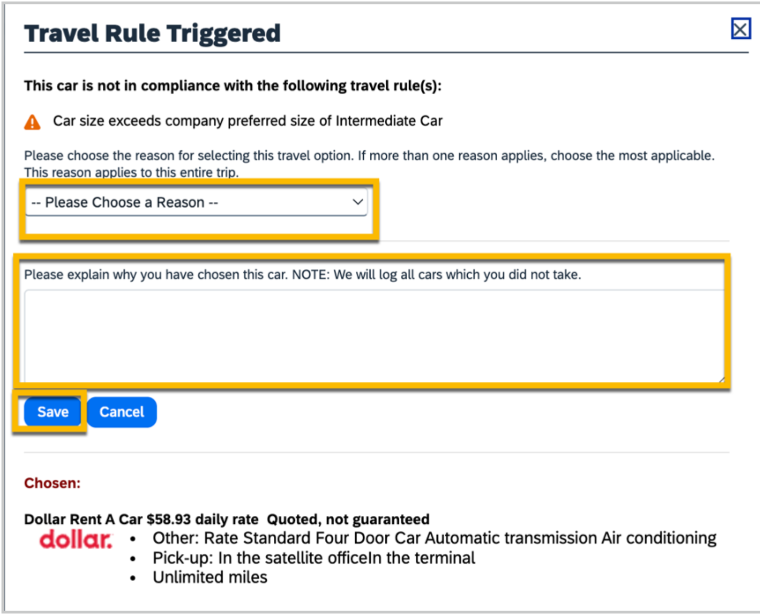
4. To see additional search preferences, click **More Search Options**.
   - Select the Car Type.
   - Select smoking or non-smoking.
   - Select the preferred vendors.
5. Click **Search**.



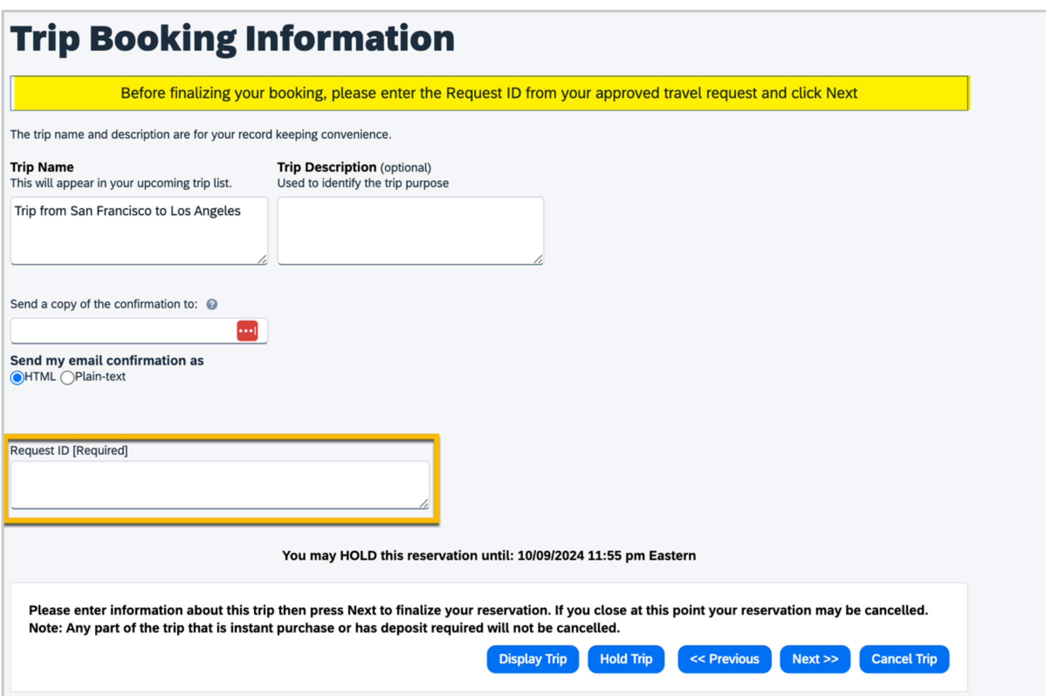
6. Review the search result and choose the vehicle by clicking the blue **price button**.
   - If a travel rule is triggered, an orange triangle warning will appear.



- If you choose an out-of-policy fare, fill out the **Travel Rule Triggered** page.



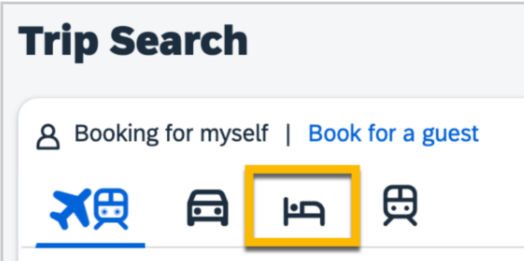
7. From the **Review and Reserve** page, select the appropriate options, enter payment information, click **Reserve Car and Continue**.
8. On the **Travel Details** page, adjust the information as needed, click **Next**, and then **Reserve Car and Continue**
9. Look over the **Trip Booking Information page**, add your **4-digit Request ID** (Locate the Request ID) in the **Request ID** field, and click **Next**.



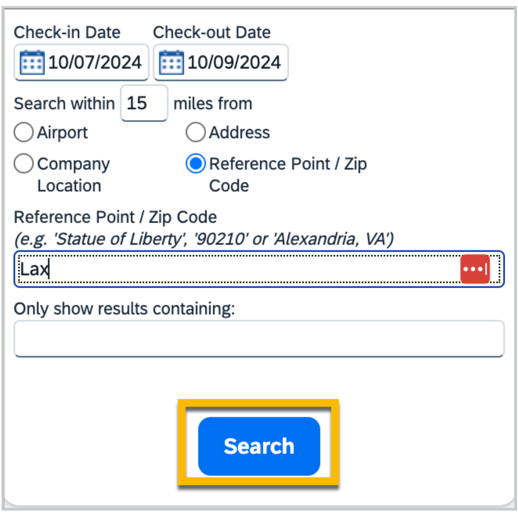
10. On the **Trip Confirmation** page, review your trip details, click **Confirm Booking**, and click **Save**.

Booking a Hotel

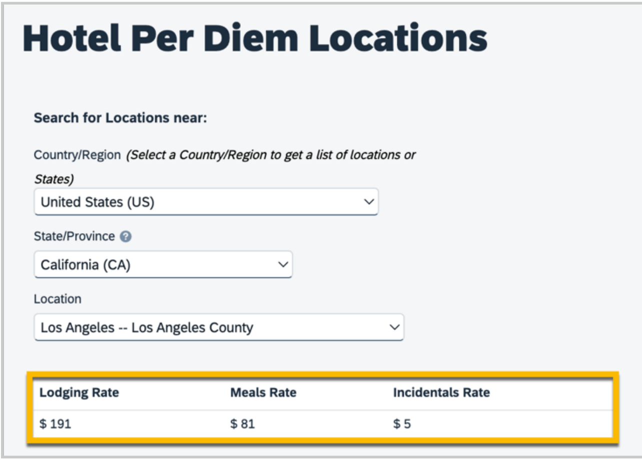
If you require a hotel but not airfare, click the **Hotel** tab.



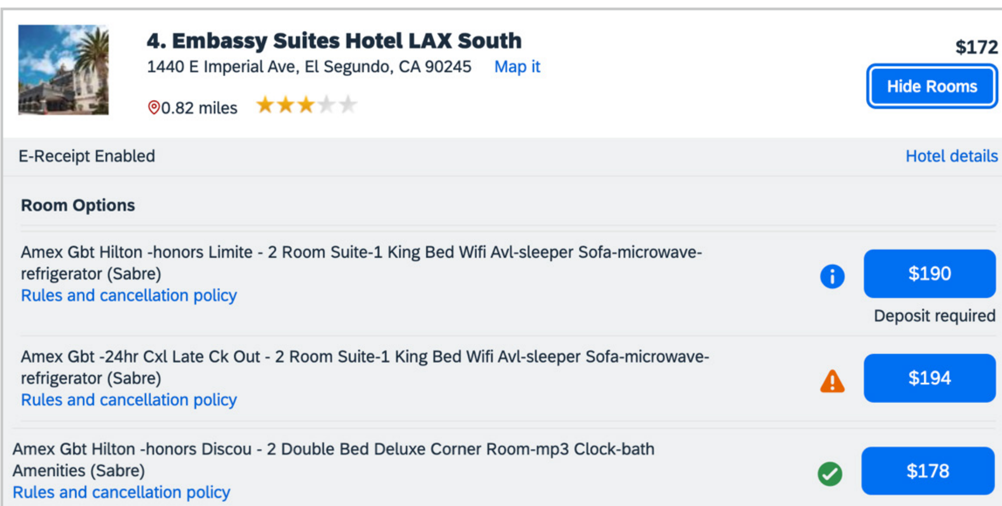
1. Enter the **Check-in** and **Check-out** Dates.
2. Enter the **search radius**.
3. Choose to search near an airport, an address, company location or near a reference point/zip code (a city or neighborhood).



4. The **Hotel Per Diem Locations** Page displays the per diem rates for lodging, meals, and incidentals. Click **Next**.



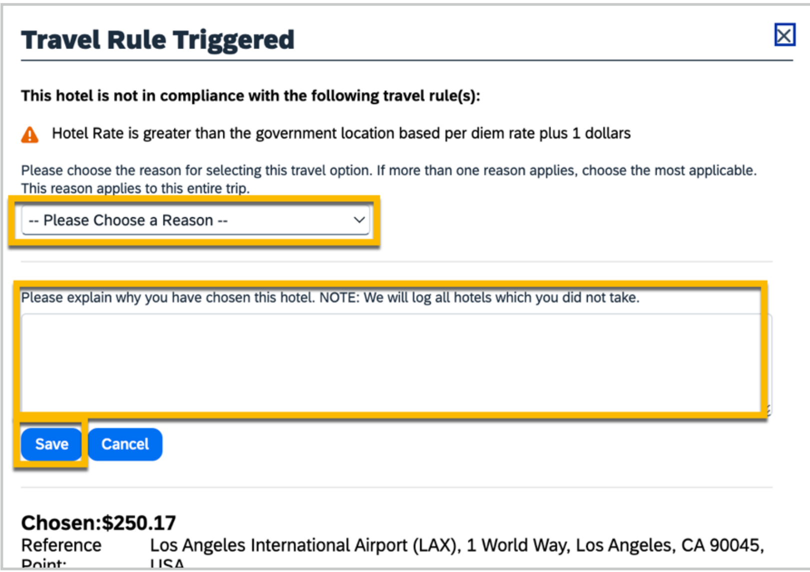
Look over the **Preferred Accommodation map**, click **View Rooms** to see room options, and click the blue **Price** box to select the room.



- A blue or green symbol means this room rate is within company policy.
- You will trigger a travel rule if you've gone over the per diem rate found on the previous page. This is denoted with an orange triangle warning.
- If you choose an out-of-policy room rate, fill out the **Travel Rule Triggered** page.

5. From the **Review and Reserve Hotel** page:
   - Review or modify any information.
   - Select the method of payment.
   - Review and accept the rate details and cancellation policy.
   - Select the I agree to the hotel's rate rules, restrictions, and cancellation policy checkbox.

6. Click **Reserve Hotel and Continue**.
7. Look over your **Travel Details page**, add your **4-digit Request ID** ([Locate the Request ID]) in the **Request ID field**, and click **Next**.
8. Review your trip details on the **Trip Confirmation page**, click **Confirm Booking**, and click **Save**.

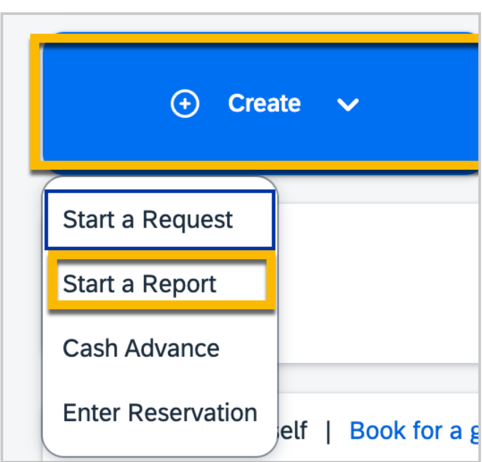


Step 8: Creating an Expense Report

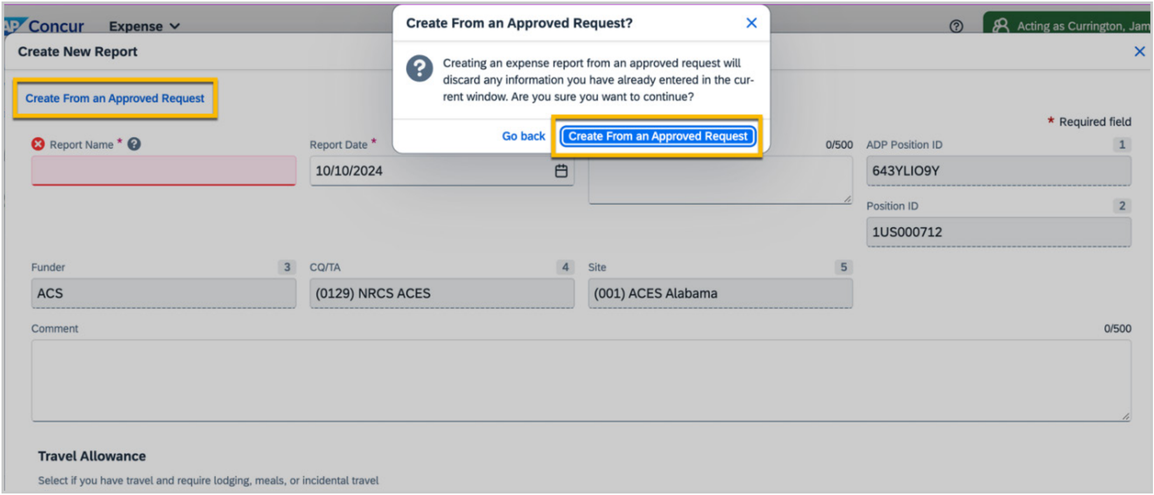
Creating an Expense Report from an Approved Request

Once the Request has been approved, you can create an Expense Report with the expected expenses. To create a new expense report from the Expense Application:

1. From the **Home** Page, select the **Create** drop-down.
2. Select **Start a Report**.



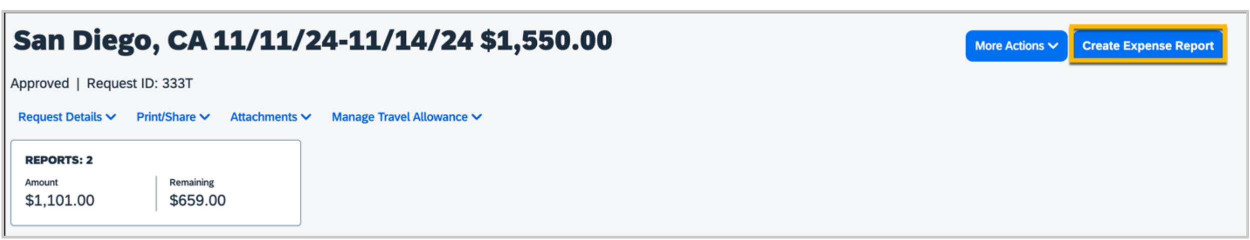
3. From the top of the **Report Header,** select **Create From an Approved Request**.



4. The expense report will have the same naming convention as the Request.
5. The approved request information, including expected expenses, cash advance, and travel allowance/per diem amounts, will be copied to the report.
6. Correct any alerts, add any additional expected expenses, attach your required receipts, and select **Submit Report**.

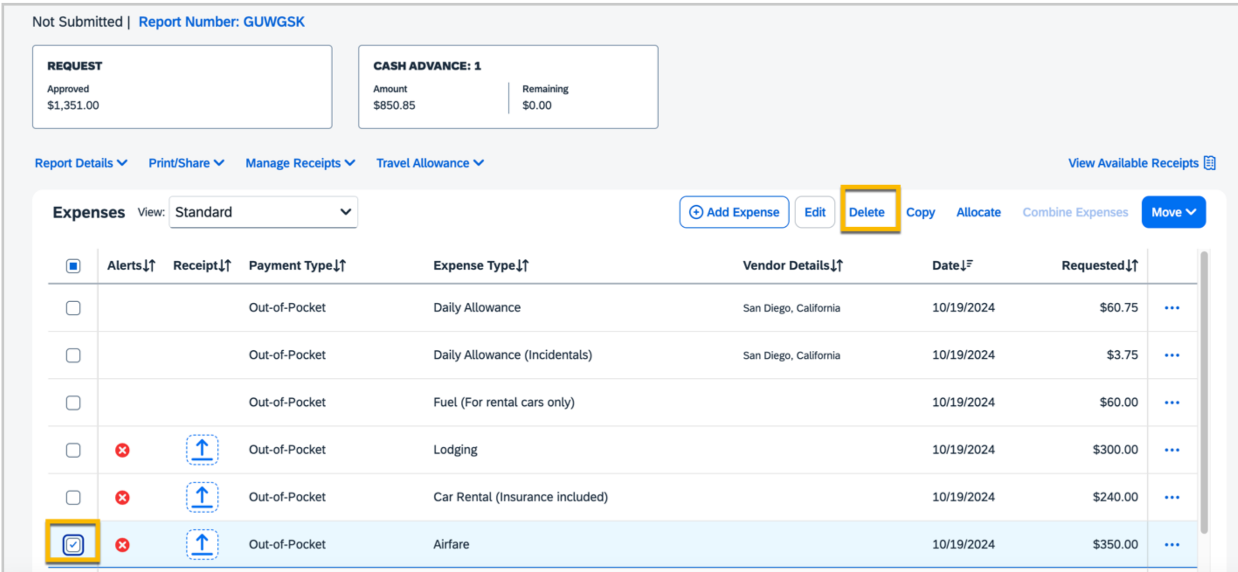
To create a new expense report from the Request application:

Once the Request has been approved, you can create an Expense Report with the expected expenses.



1. Click on the approved **Request**.
2. Click **Create Expense Report**.
3. The expense report will have the same naming convention as the Request.
4. The approved request information, including expected expenses, cash advance, and travel allowance/per diem amounts, will be copied to the report.

5. If an Airfare expense (commercial flights only) is on the report, delete it, as Airfare is paid for with the NEW Solutions company card, and reimbursement is not permitted.



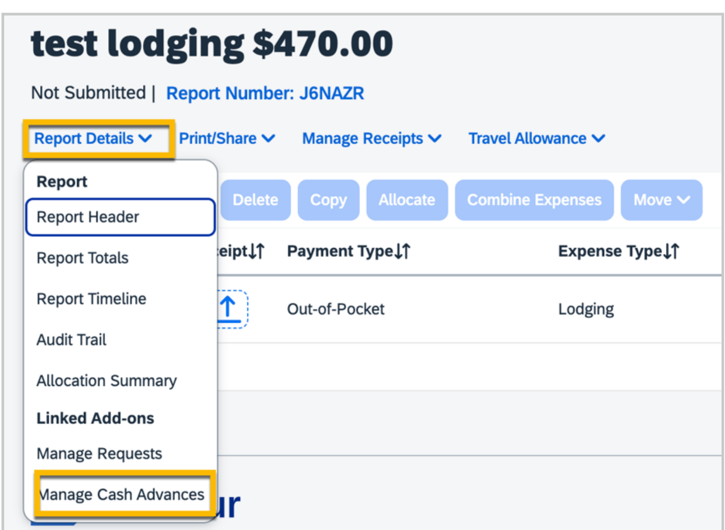
6. Match any Expected Expenses from the Request with any of the **Available Expenses**, or add all the **Available Expenses** for the trip and delete the expected expenses.

7. Correct any alerts, add any additional expected expenses, attach your required receipts, and then select **Submit Report**.

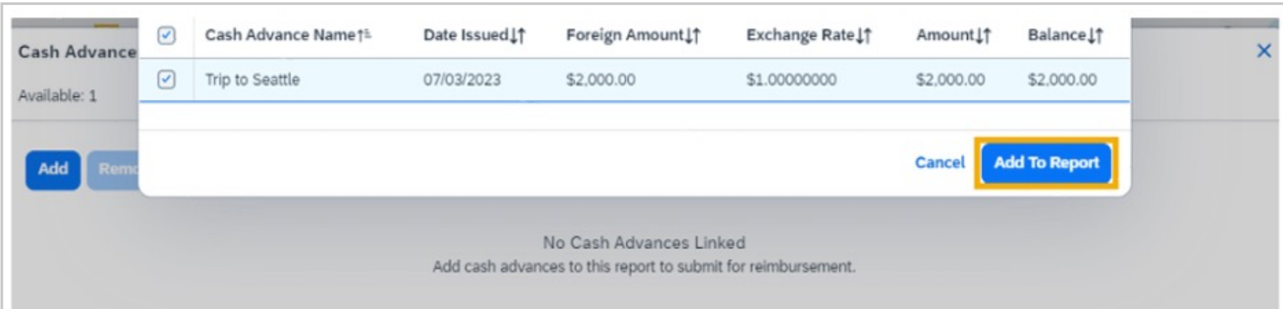
Adding or Removing Cash Advances from an Expense Report

If you requested a Cash Advance, the approved Cash Advance must be added to your Expense report. In the following example, you will see how to add or remove an approved cash advance.

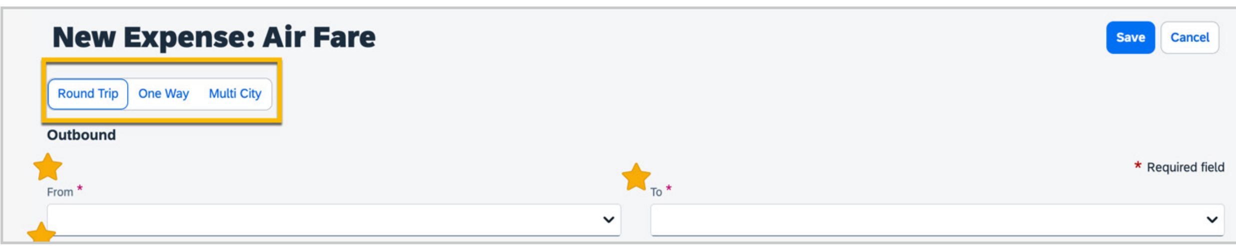
1. From the open Expense report, select the **Report Details** drop-down and select **Manage Cash Advances**.



2. On the **Cash Advances** page, select **Add** and select the check box for the cash advance you want to add.
3. Select **Add To Report**, or



4. Select the check box for the cash advance that you'd like to remove and click **Remove**.



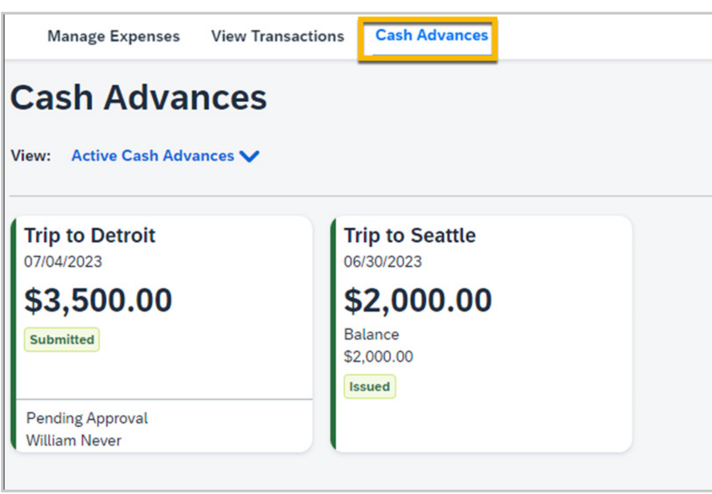
5. After the cash advance is added or removed from the report, select **Close**.

Recalling and Deleting Cash Advances

If you have requested a cash advance for a trip or business expense that you no longer need, you can recall it for edits or deletion.

To recall a cash advance:

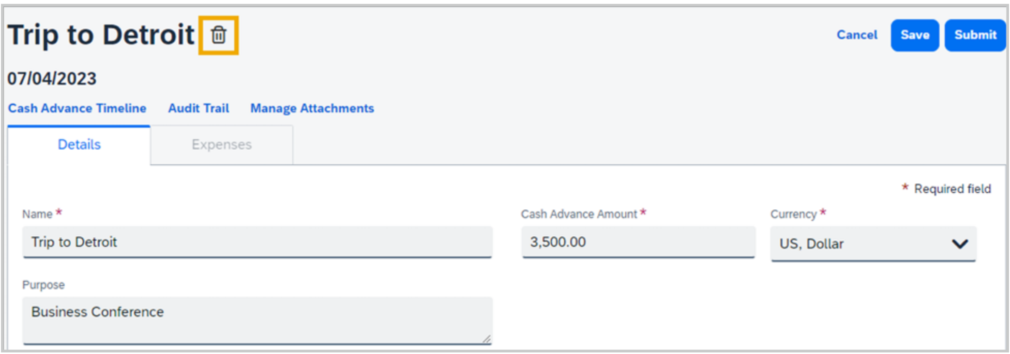
1. From the SAP Concur home page, select the **Home** drop-down and select **Expense.**



2. Select **Cash Advance**. The **Active Cash Advances** are displayed.
3. Select the appropriate cash advance.
4. Select **Recall**.
5. Select **Yes** to confirm that you want to recall the cash Advance. The cash advance is recalled.

To delete a cash advance:

1. Select the cash advance to open it.



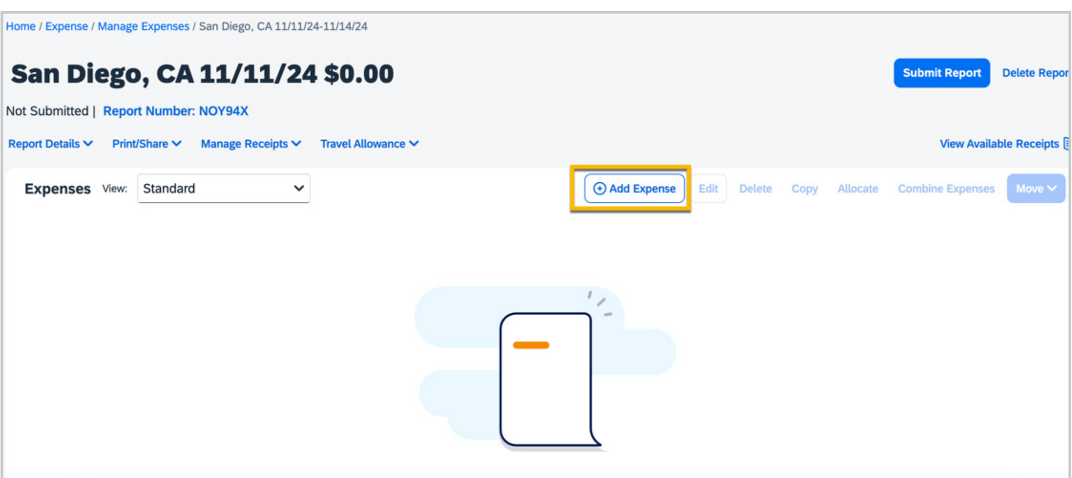
2. Select the **Bin** icon, and then select **Yes** to confirm the deletion of the cash advance.

Adding Additional Expenses to an Expense Report

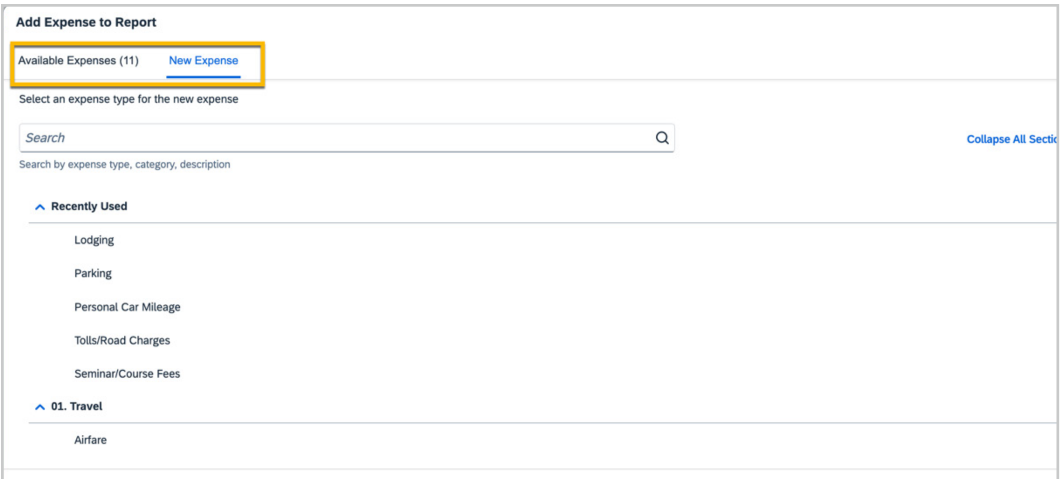
If an unexpected expense is not included in your Request, that's okay. How to add additional expenses:

From your open expense report:

1. Click the **Add Expense** button in the middle of the screen (in blue letters).



2. Select from your **Available Expenses** or Create a **New Expense**.
   - The **Available Expenses** library contains the items that are ready to become expense entries, such as:
     - E-Receipts
     - Mobile quick expenses
     - ExpenseIt expenses



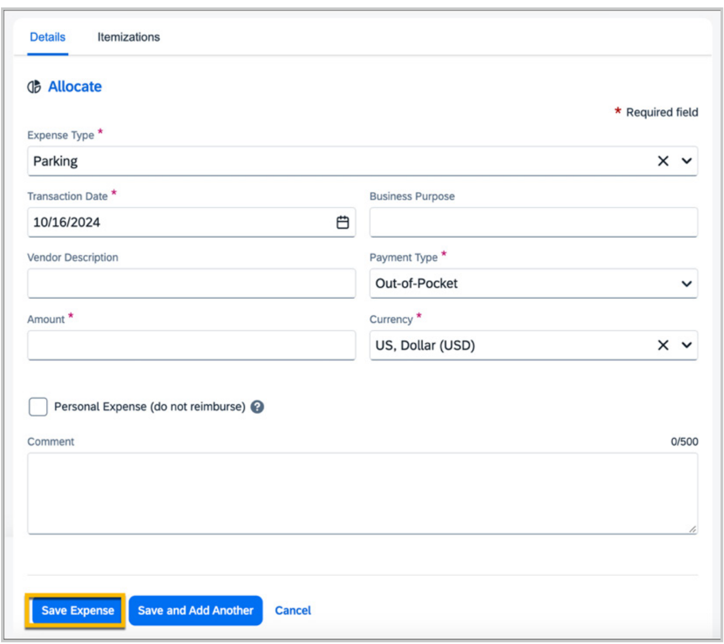
3. If you are creating a **New Expense**, search for the expense type.

   Available Expense Types

   - Travel
     - Airfare
     - Airline Fees
     - Baggage Fees
     - Car Rental (insurance included)
     - Lodging
   - Transportation
     - Fuel (For rental cars only)
     - Ground Transportation (Tip included) (Taxi, Lyft, Uber, Subway)
     - Parking
     - Personal Car Mileage
     - Tolls/Road Charges
     - Train (Amtrak)
   - Meals and Entertainment
     - Breakfast
     - Business Meals (Attendees)
     - Dinner
     - Lunch

- Office Expenses
- Courier/Shipping/Freight
  - Office Equipment/Hardware
  - Office Supplies/Software
  - Postage
  - Printing/Photocopying/Stationary
- Communications
  - Internet/Online Fees
- Other
  - Seminar/Course Fees
- Fees
  - Professional Subscription/Dues

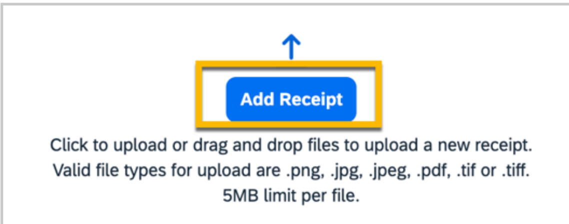
4. Complete all required Fields denoted by a *red asterisk.
5. Select **Save Expense** or **Save and Add Another** (if you have additional expenses to enter).



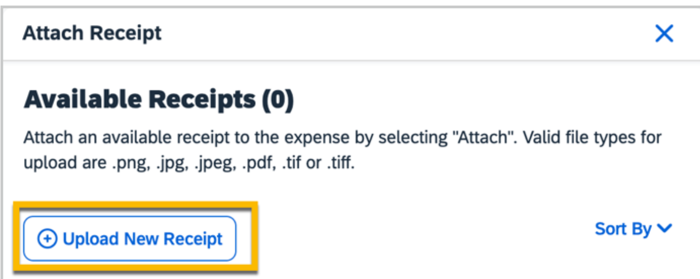
Attaching Receipt Images to an Expense Report

Receipts are required for all travel expenses over $25.

1. With the expense line item open, click on the **Add Receipt** on the right side of the screen.



2. Select **Upload New Receipt.**



Once attached, the receipt image will appear on the right side of the screen. If you attached the incorrect receipt, Select **Remove** at the bottom of the page. If you need to add additional receipt images, select **Add** and repeat the steps to attach another image or document.

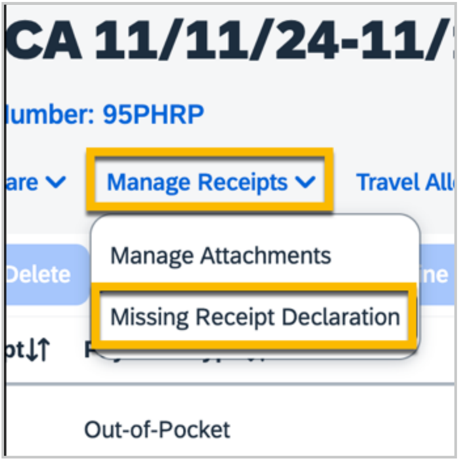
Missing Receipt Declaration

If you lose a receipt for a transaction over $25, you may use the Missing Receipt Declaration (MRD) form. ***Please keep MRD use to a minimum. It should not be used for Airfare, Hotel, or Car Rental expense types.**

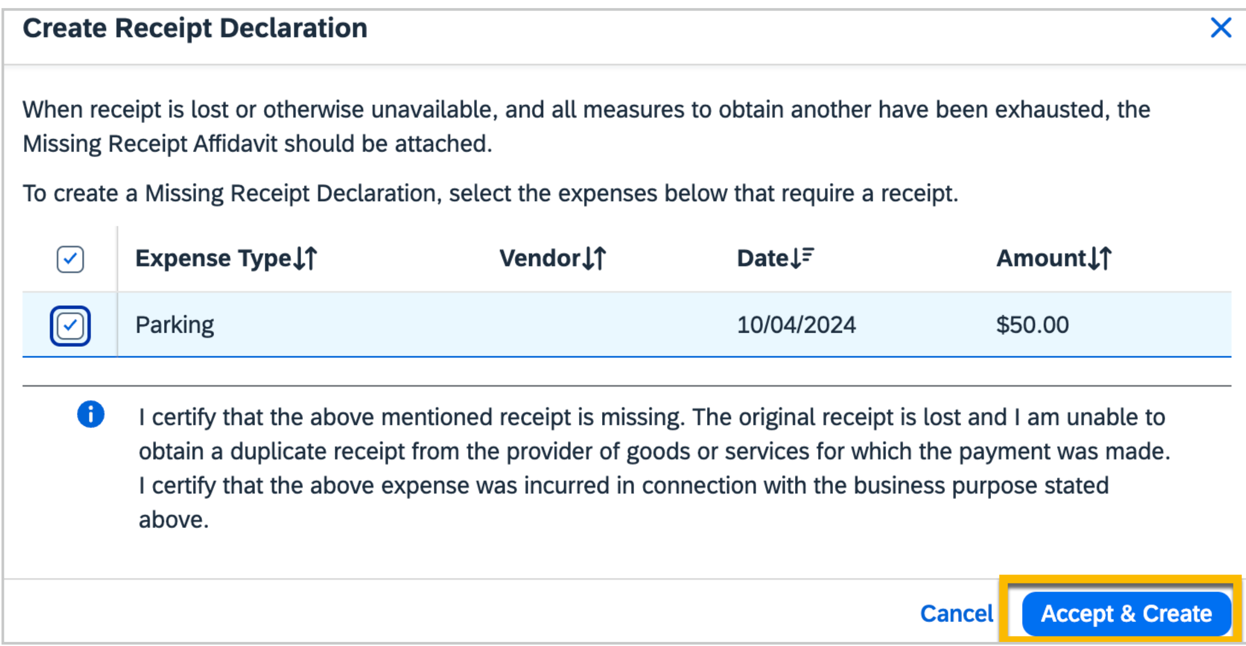
To add the MRD:

1. After completing the required expense entry information, select **Save Expense**. This will bring you back to the expense report summary, where you will see all transactions.

2. Select the **Manage Receipts** drop-down menu.



3. Select **Missing Receipt Declaration** and select the expense for which you need to use the declaration. Only expenses greater than $25 will appear on the list.
4. Select **Accept & Create**.



On the expense report summary screen, all expenses with a declaration will have a stamp icon in the receipt column.

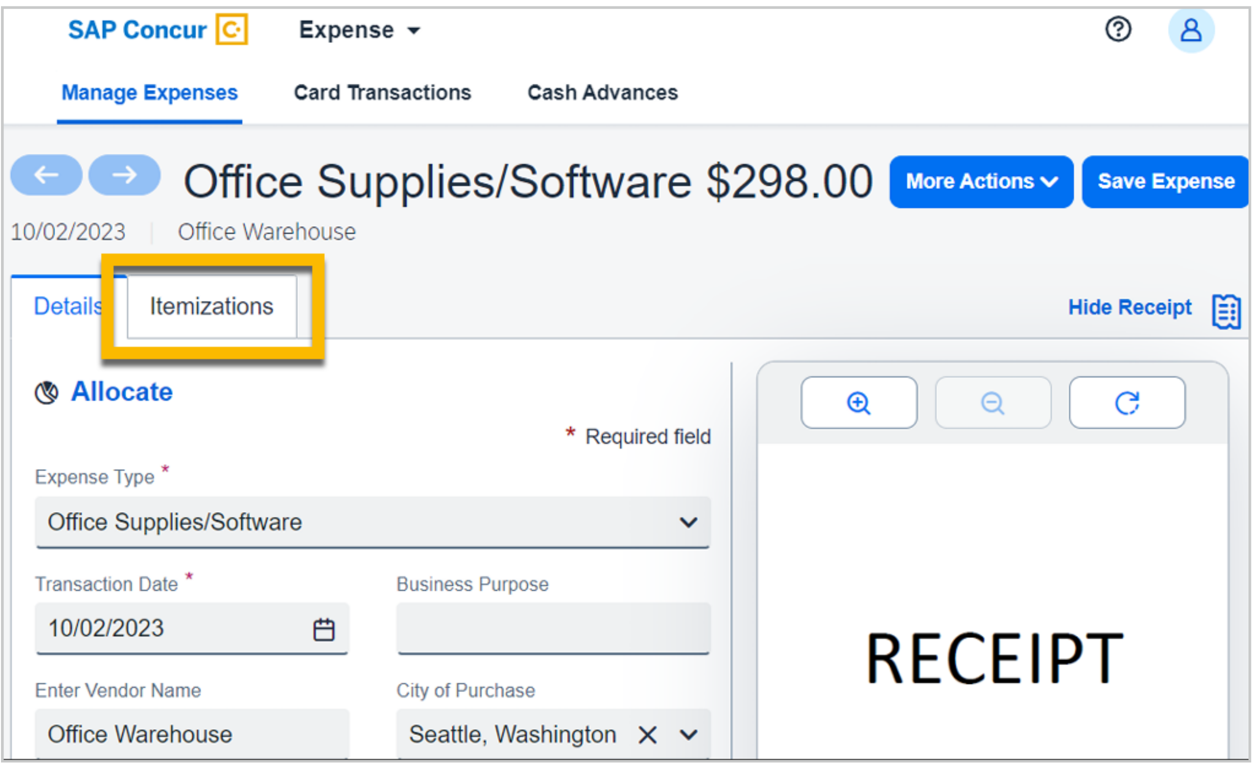
Additional Expense Report Actions

Itemization

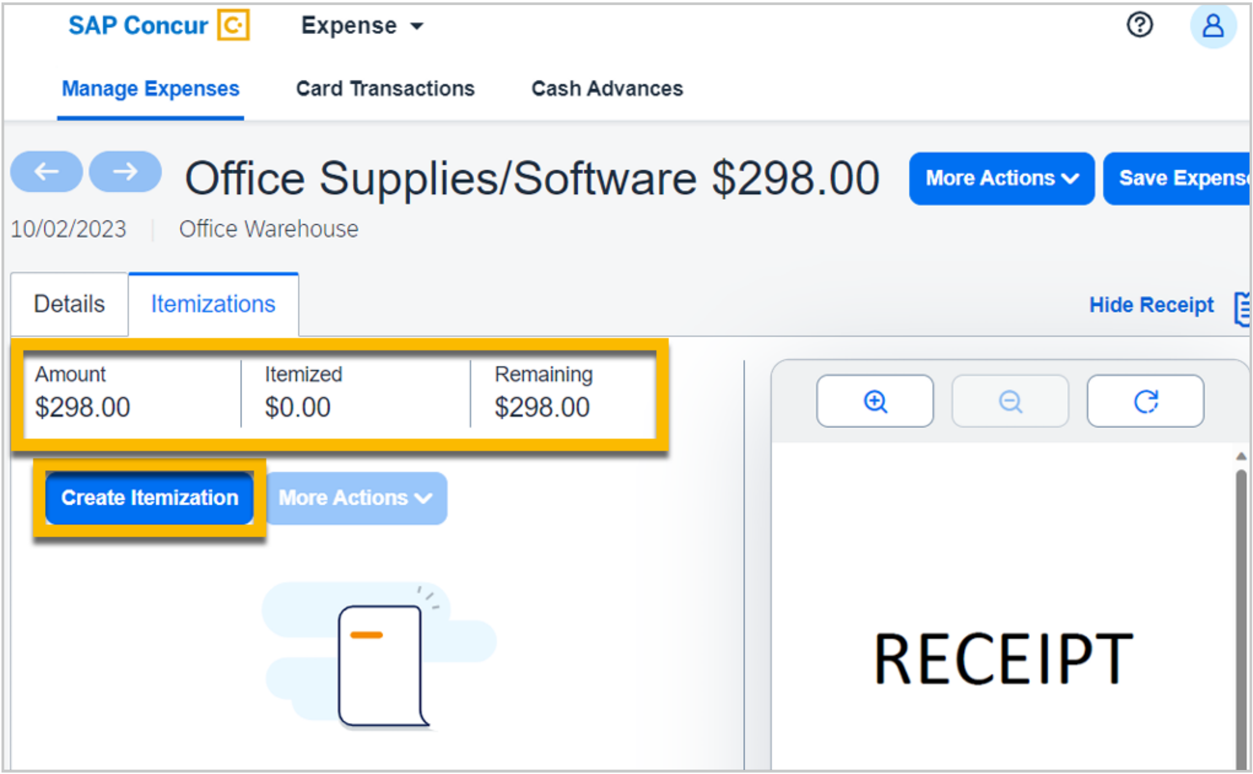
You itemize expenses to account for receipts to ensure that each of your expenses, such as hotel expenses, is accounted for correctly.

Note: NEW Solutions uses Concurs ExpenseIt technology. The system will automatically itemize your expenses when added to your **Available Expenses**. However, you will be required to look over the itemizations for accuracy.

1. To manually itemize an expense in your expense report, select the expense to open the expense details.
2. Select the **Itemizations** tab.

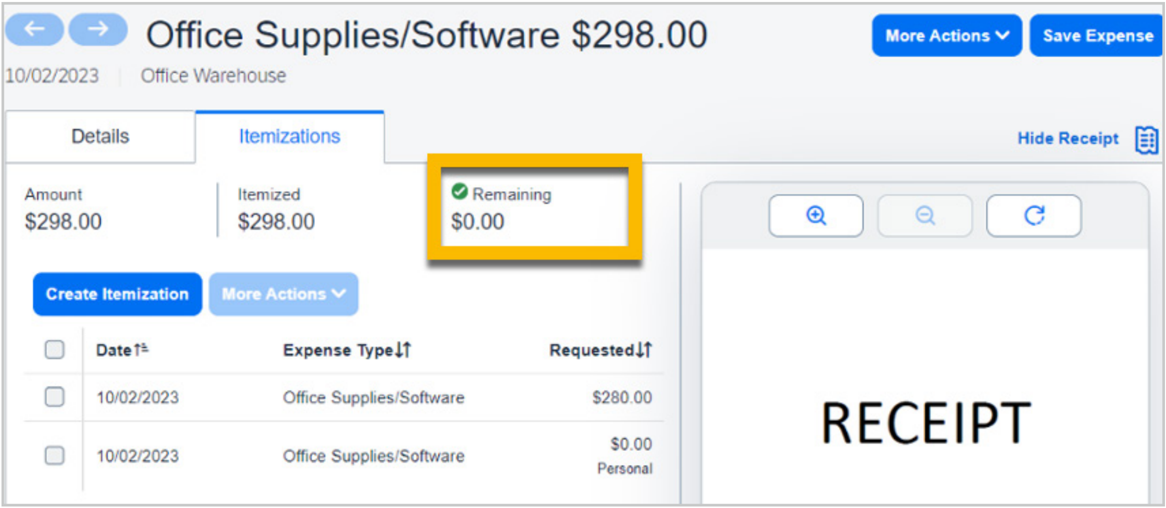


3. On the **Itemizations** tab, select **Create Itemization**. The expense **Amount**, the **Itemized** amount, and the **Remaining** amount are listed on the Itemizations tab.



4. Select the **Expense Type** that applies to the first itemization. The page refreshes, displaying the required and optional fields for the selected expense type (required fields are marked with a red asterisk).
5. Complete the appropriate fields.
6. After you complete entering the information for each itemization, select **Save Itemization**.

7. Continue itemizing the expense until the **Remaining** amount is $0.00.



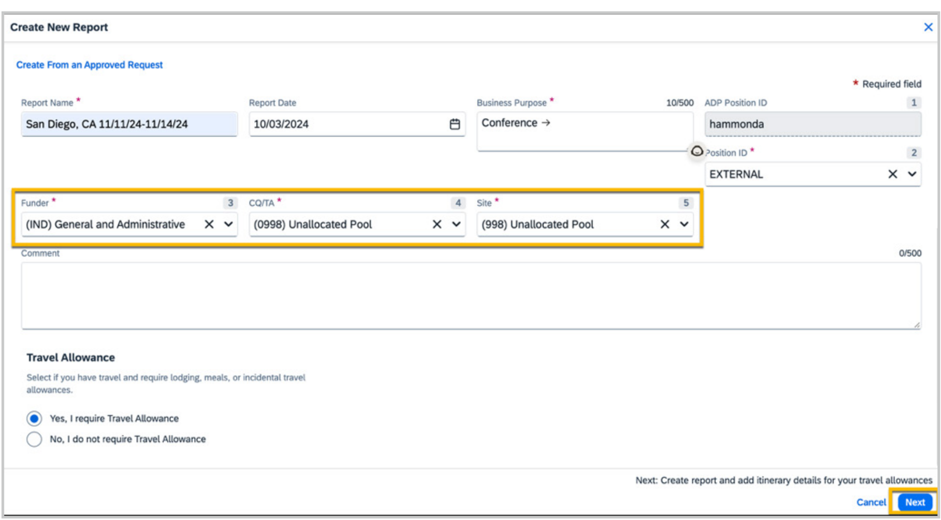
Once you have completed itemizing this expense, a green checkmark appears next to the Remaining amount of $0.00, indicating that you have completed itemizing this expense.

Allocating an Expense Report to Another Fund

Multi-funded users can allocate an expense to different funds.

To Allocate an entire report to a different fund:

1. From the **Home** Page, select the **Create** drop-down.
2. Select **Start a Report**.
3. Complete the information on the report header, including what fund this report should be charged to.



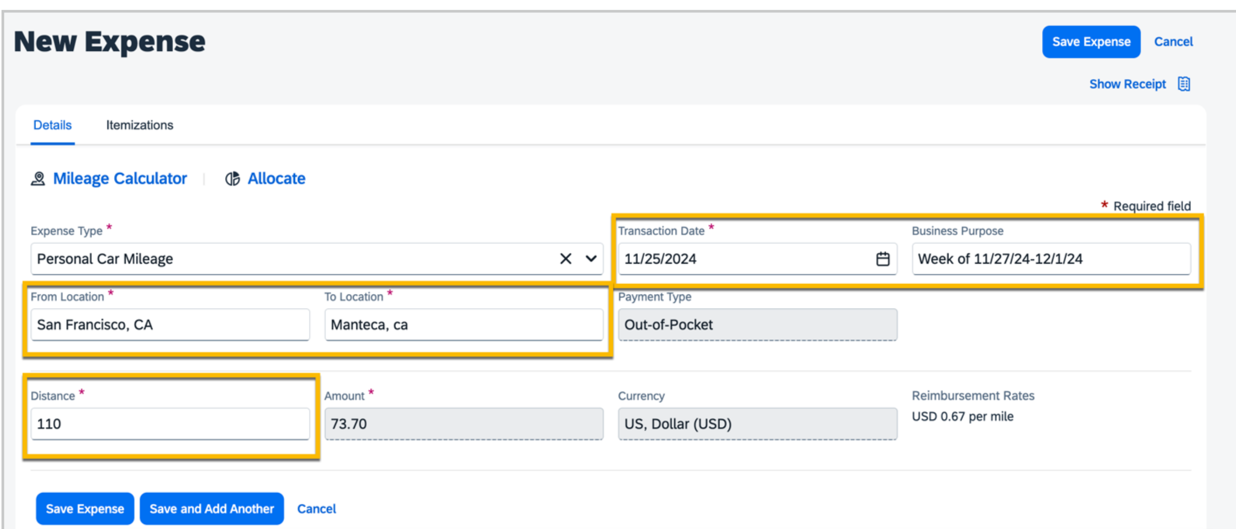
4. Click **Create Report**.

Adding Personal Car Mileage

When the operation of a POV is required for business use, you may expense the miles within Concur. The GSA rates are pre-loaded into Concur, so reimbursements are automatically calculated based on the miles entered.

To add Personal Car Mileage:

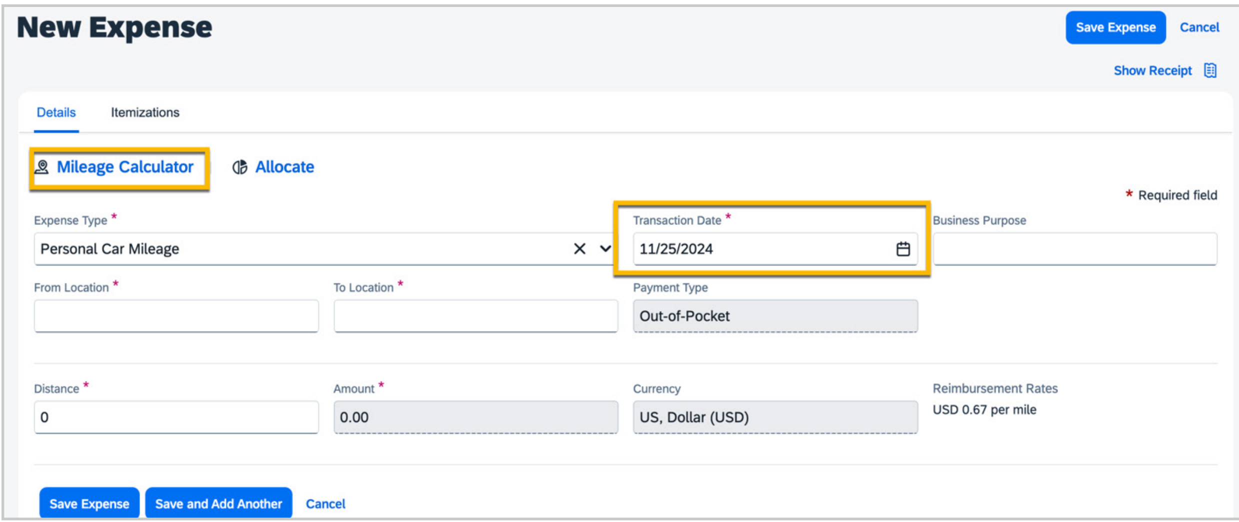
1. Click the **Add Expense** Button in the middle of the screen (in the blue letters).
2. The "Add Expense to Report" screen will display.
3. Scroll down and select **Personal Car Mileage** expense type. The "Personal Car Mileage expense screen" will appear.
4. Enter the **Transaction Date,** which is the date of the local travel. *If you combine multiple days' worth of miles in this expense, enter the transaction date of the first day of travel.
5. Enter the **Business Purpose** to note if the travel is for multiple dates (I.e., For the week of 12/1/24-12/6/24). This is not a required field.
6. For the **Distance** field you can either a) enter the miles captured from the vehicle speedometer or b) use the Mileage Calculator to bring up a map.
   a. If you are entering miles captured from your speedometer or your mileage records:
      - Enter the **From Location** – This can be an exact address or a city. For example, San Francisco, CA.
      - Enter the **To Location** – This can be an exact address or a city. For example, San Francisco, CA.
      - Enter the miles in the **Distance** field.



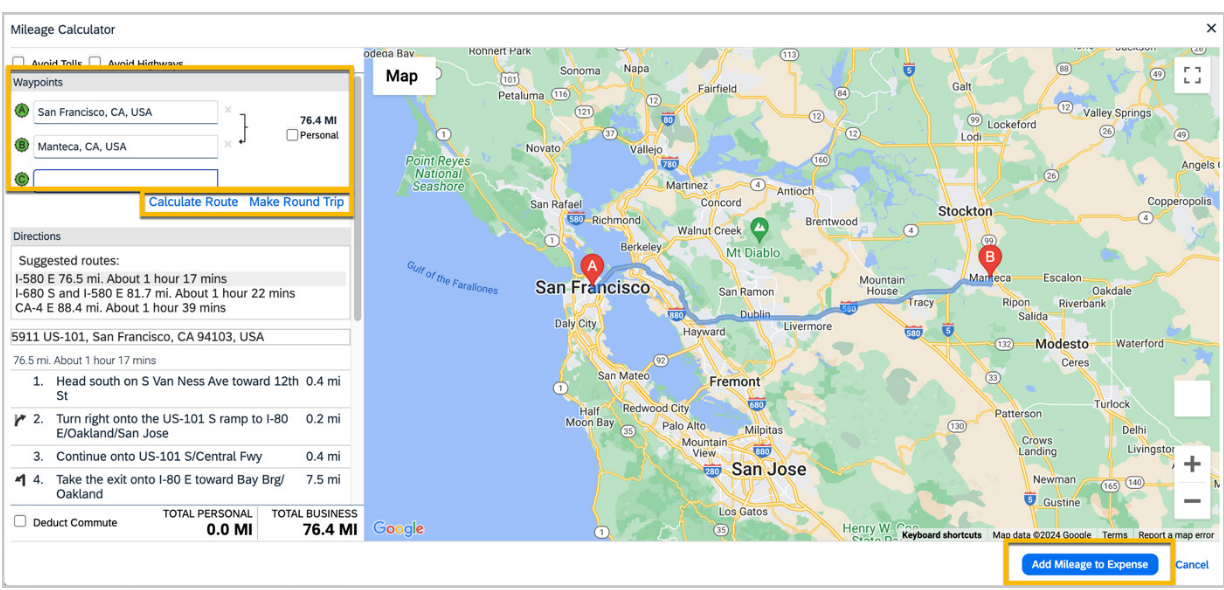
- Then hit the **Tab** key on your computer, and the system will automatically calculate the **Amount** based on the GSA rate pre-loaded in Concur.
- When complete, choose the **Save Expense** button on the top right of the screen.

b. If you are using the Mileage Calculator to determine your distance/miles:

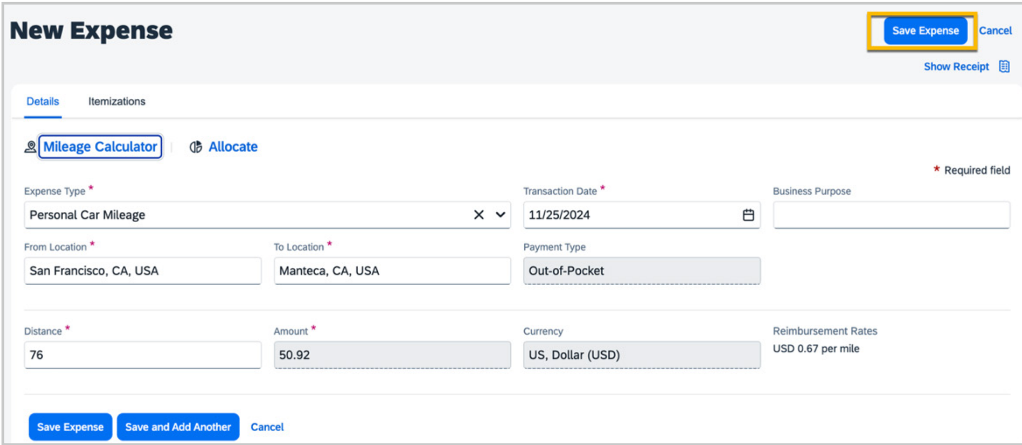
- Enter the **Transaction Date.**
- Click on the **Mileage Calculator** link at the top of the screen (in blue font). The mileage calculator will appear.



- Enter your Waypoints. You can add as many locations as you need.
- Select either **Calculate Route** or **Make Round Trip**.
- Click the **Add Mileage to Expense** button on the bottom right of the screen. The distance and amount are automatically calculated and added to the expense entry. The Expense screen will display.



- When you have completed entering the expense, click the **Save Expense** button on the top right of the screen.



Copying, Deleting, or Editing an Expense

On your expense report home page, you will see a few additional actions you take with your expenses, such as copying, deleting, editing, or moving line items.

Copying an Expense or Report

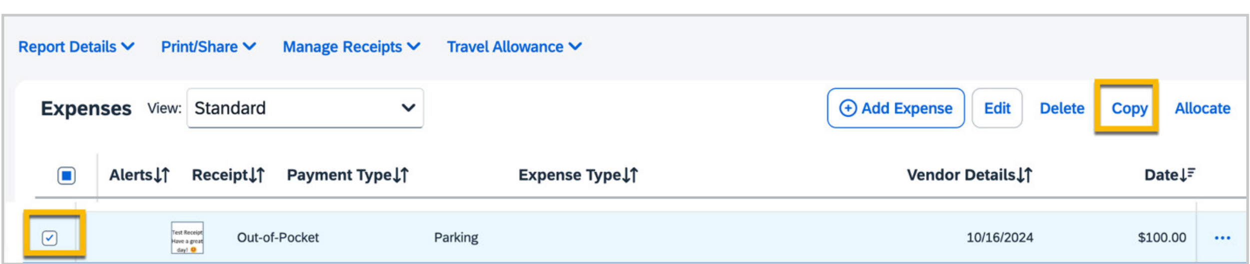
You can copy an expense and then update the expense details to quickly enter a new expense. This is especially useful for recurring business expenses.

To copy an expense line item:

1. With the expense report open, select the expense you want to copy using the check box.
2. Select the blue **Copy** button.
3. The new expense is created. The Expense Type and Amount are copied to the new line item.

   Note the following:

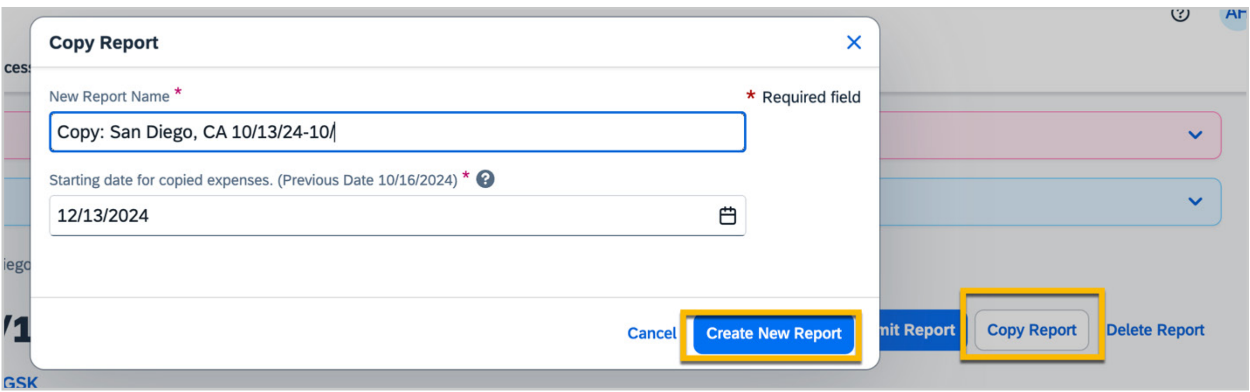
   - The original expense date is advanced by a day.
   - The expense-level comments from the original expense are copied to the new expense.



- You can also copy an entire expense report – regardless of the report status – and then edit the copy as needed. Information that is unique to each expense is not copied (e.g., images, post-submission comments, payment confirmation history, etc.). In addition, travel allowance entries, such as daily allowances, are not copied.

To copy an expense report:

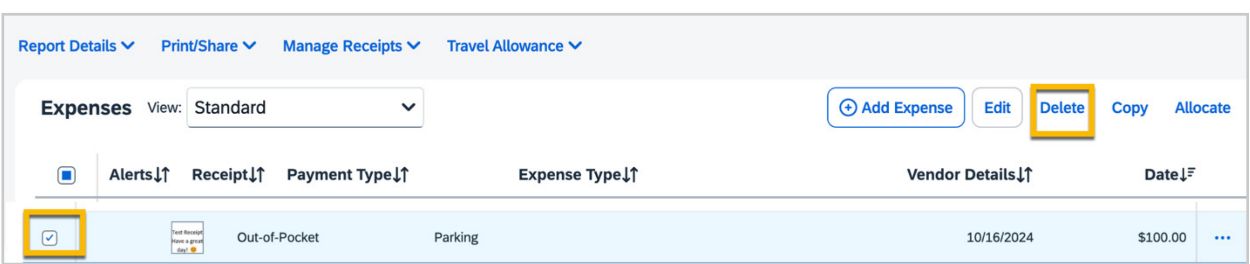
1. With the expense report open, select the blue **Copy Report** button on the right side of the screen.
2. Enter the **New Report Name** and the **Starting Date** for the copied expenses.
3. Select **Create New Report**. Your new report has been created and can be modified and adjusted as needed.



Deleting an Expense Line Item or Report

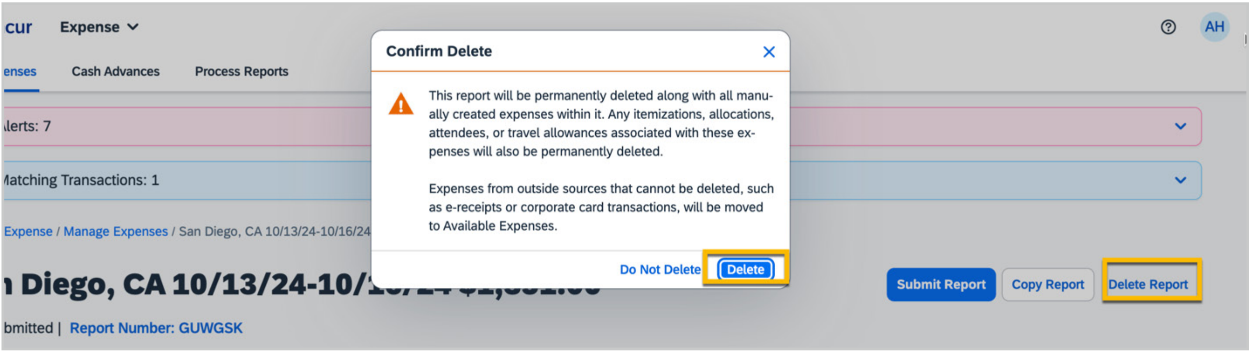
If you need to remove an expense line item from your expense report:

1. With the expense report open, select the expense you want to delete using the check box.
2. Select the blue **Delete** button.
3. Confirm you want to delete the expense by selecting **Delete from Report**.



Deleting an entire expense report:

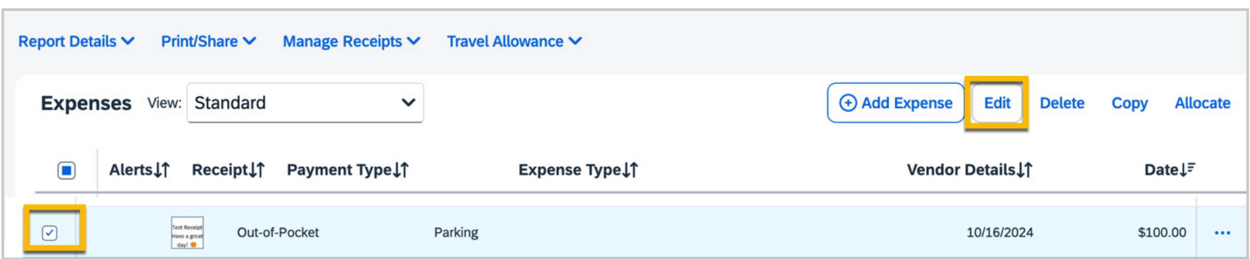
1. With the expense report open, select **Delete Report**.
2. Confirm you want to delete the expense report by selecting **Delete.**



Editing Expenses

To make changes or update an expense line item:

1. With the report open, select the expense you need to edit using the check box.
2. Select the **Edit** button.



3. Once you are finished making any updates or modifications, select **Save Expense**.

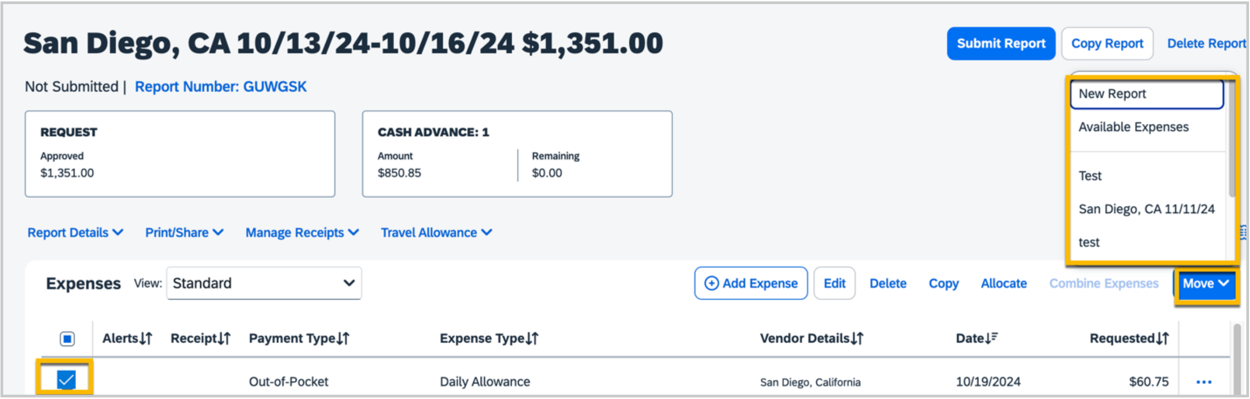
NOTE: You can also open a line item on your expense report by clicking anywhere on the line item, such as the Expense Type, Date, Amount, etc.

Moving an Expense

If you ever need to move an expense from one report to another:

1. With the report open, select the expense you need to move using the check box.
2. Select the blue **Move to** drop-down menu.

3. Select an existing report, a new report, or move the expense to your Available Expenses section to move to a report at a later date.

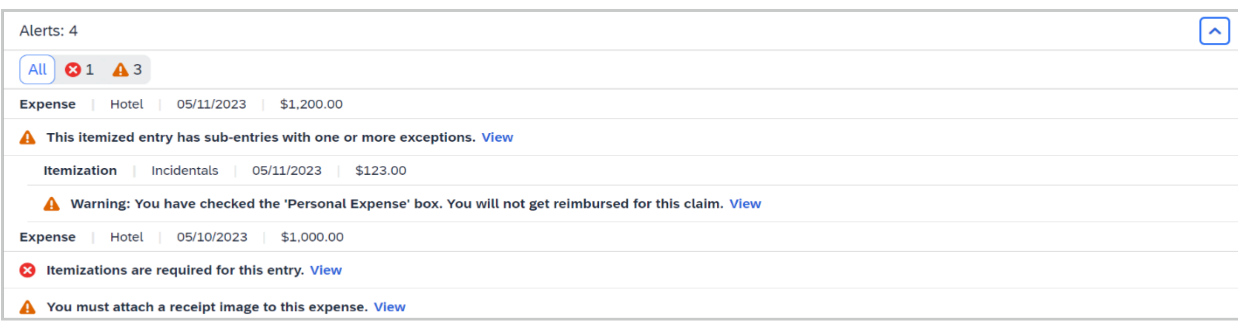


Reviewing and Resolving Exception Messages

Before submitting your expense report, address all warning and exception messages for your expenses.

To read the exception text, click the red or yellow alert icon on the expense report home page or click on the expense line item and view the Alerts section at the top of the page.

1. **Red Exceptions** – Any warning messages with a red error symbol require you to solve an issue. You cannot submit your expense report until the error is corrected.
2. **Orange Exceptions** – Any warning messages with an orange symbol give advice or policy guidance. You will be able to submit your expense report, but it may be returned for correction.



Report Details

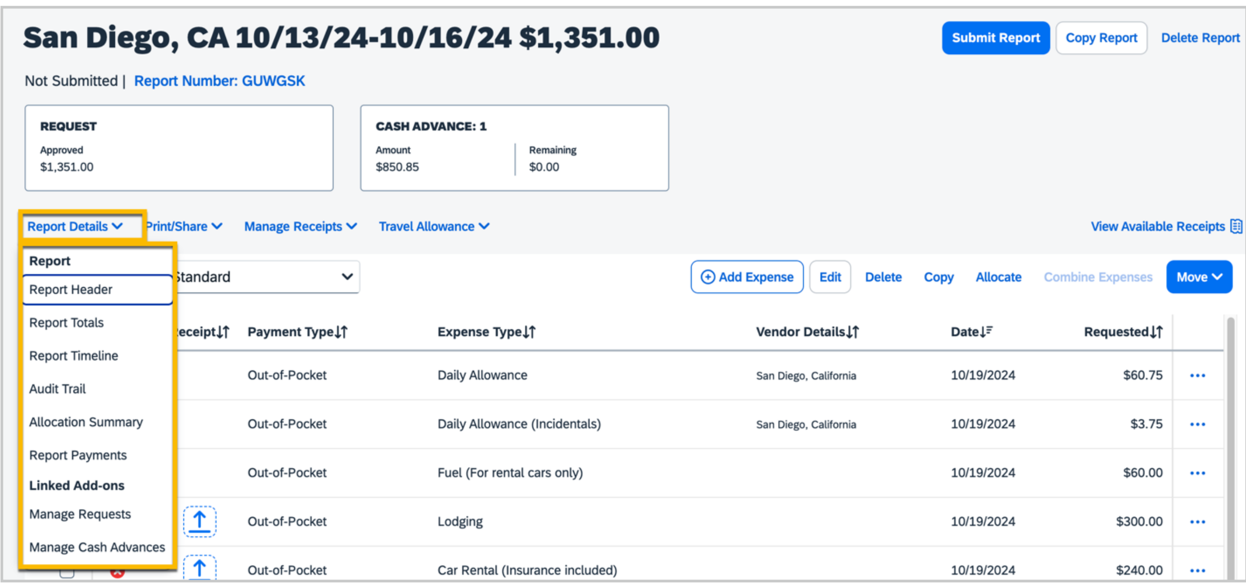
To edit your expense report header information or view additional details about your expense report:

1. Open your expense report.

2. Select the **Report Details** drop-down menu.

3. Select the report information you wish to see:

   - **Report Header** – This is where you can adjust your expense report Policy, Report Name, Business Purpose, Report Date, Cost Center, etc. If you make a change, select **Save** in the bottom right corner.
   - **Report Totals** – This is where you can see how the expense report will be paid and to whom.
   - **Report Timeline** – This will show you how the expense report will be routed and any comments entered by approvers or processors.
   - **Audit Trail** – This will show you more details on where your expense report is at any given time (i.e., with your approver, with a processor when it was approved, sent back, etc.)



Step 9: Submitting an Expense Report

To submit your expense report:

1. On your expense report home page, select **Submit Report** on the right side of the screen.

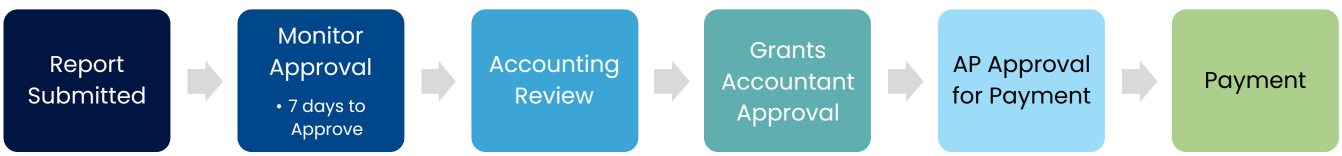
2. Review the User Electronic Agreement and then click **Accept & Continue**.

3. Review the Report Totals screen and then select **Submit Report**.

Once submitted, the expense report is automatically routed to your monitor for approval.

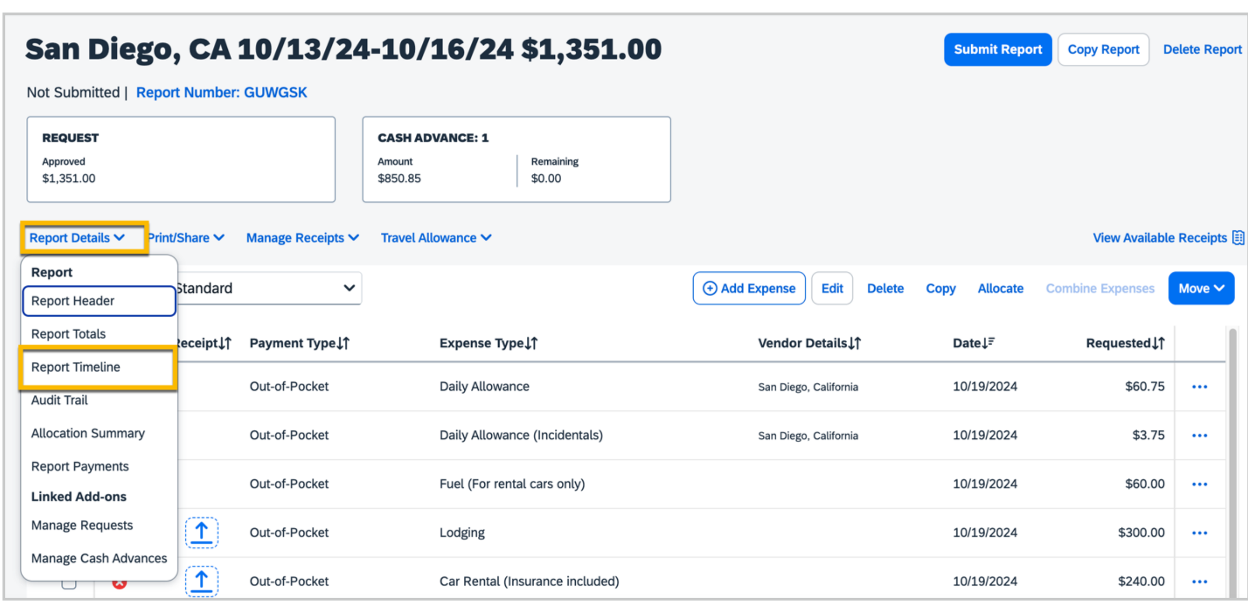
Expense Report Approval Flow

Monitors have 7 days to approve. If the Report was returned to you due to lack of monitor approval within 7 days, email your monitor a gentle nudge to approve the Request as soon as possible

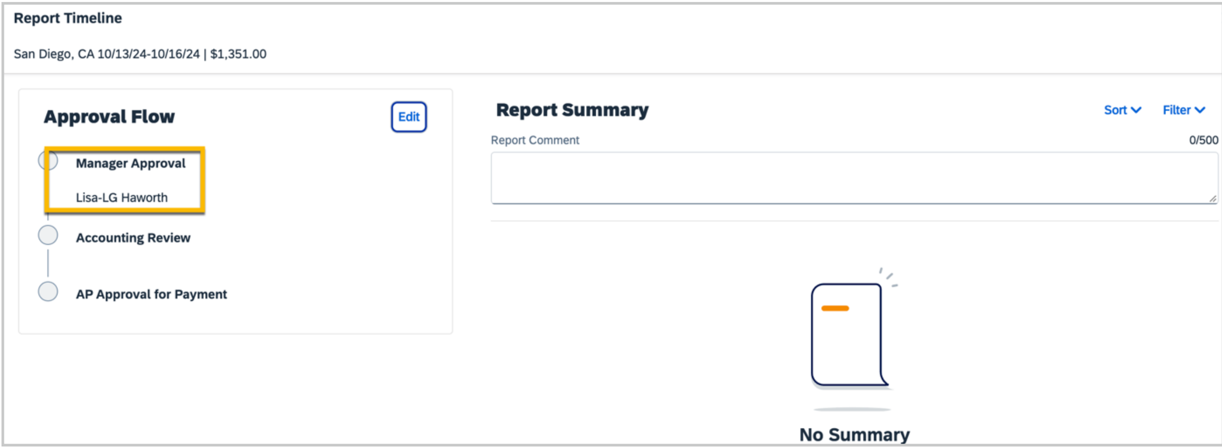


To locate your monitor for your Request:

1. From the **Manage Expenses** page, open the returned **Report** by clicking on the tile.
2. Select the **Report Details** drop-down and choose **Report Timeline.**



3. Your assigned monitor is listed under **Manager Approval**.



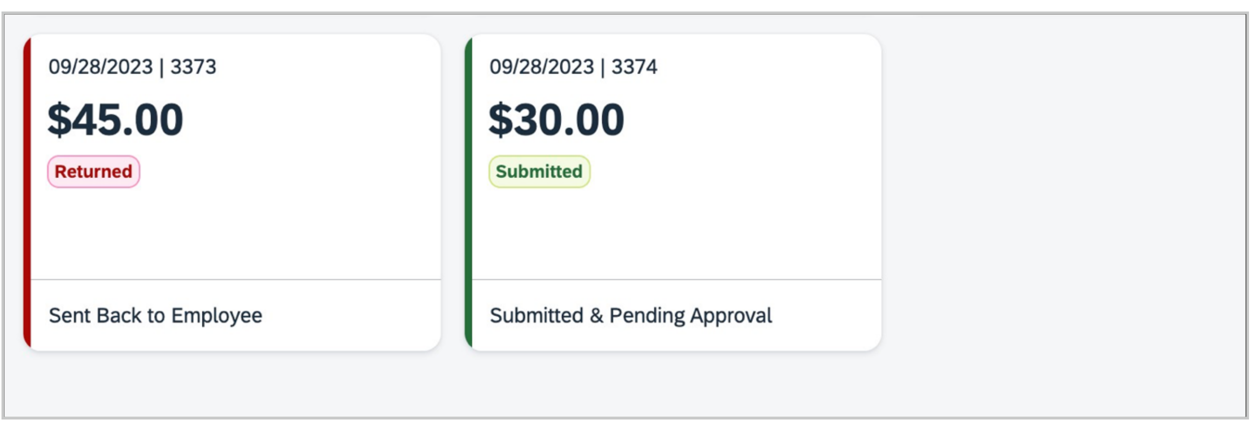
Note: In the event you submit your report prematurely or need to correct something before your manager approves it, you can re-open the report and select Recall Report in the upper right corner. This will return the report back to open status for correction.

Correcting and Resubmitting an Expense Report

Your expense approver may send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

To correct and resubmit an expense report:

1. To open the report, on the Concur home page, on the **Quick Taskbar**, click the **Open Reports task**.
2. In the Active Reports section of the page, the report appears with **Returned** on the report tile.



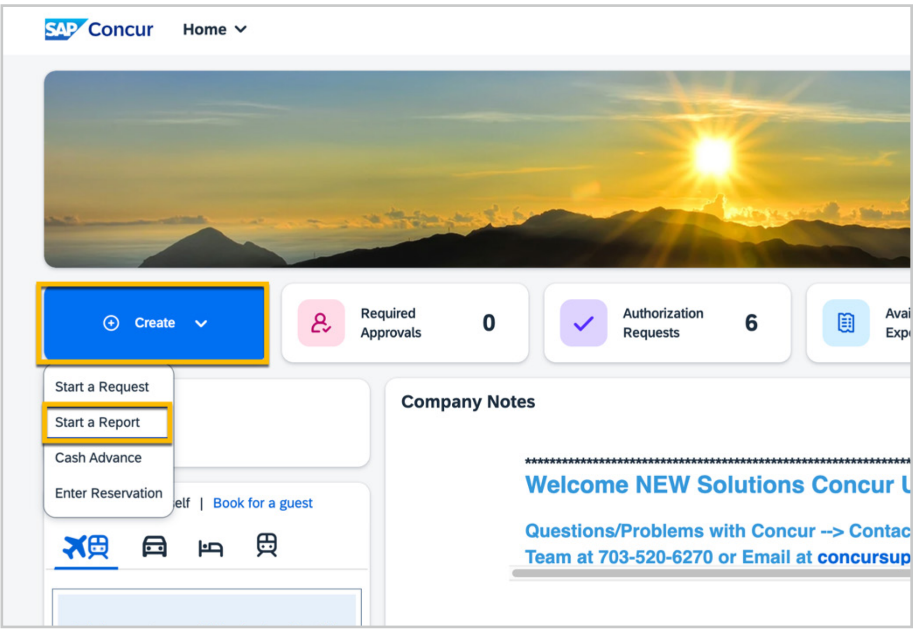
3. Click the returned report tile to open the report.
4. Make the requested changes and then click **Submit Report**.

Appendix A: Local Travel/POV Mileage Reimbursement

Step 1: Create your Expense Report

An expense report can be created on the Home Page, from the **Create dropdown > Start Report**

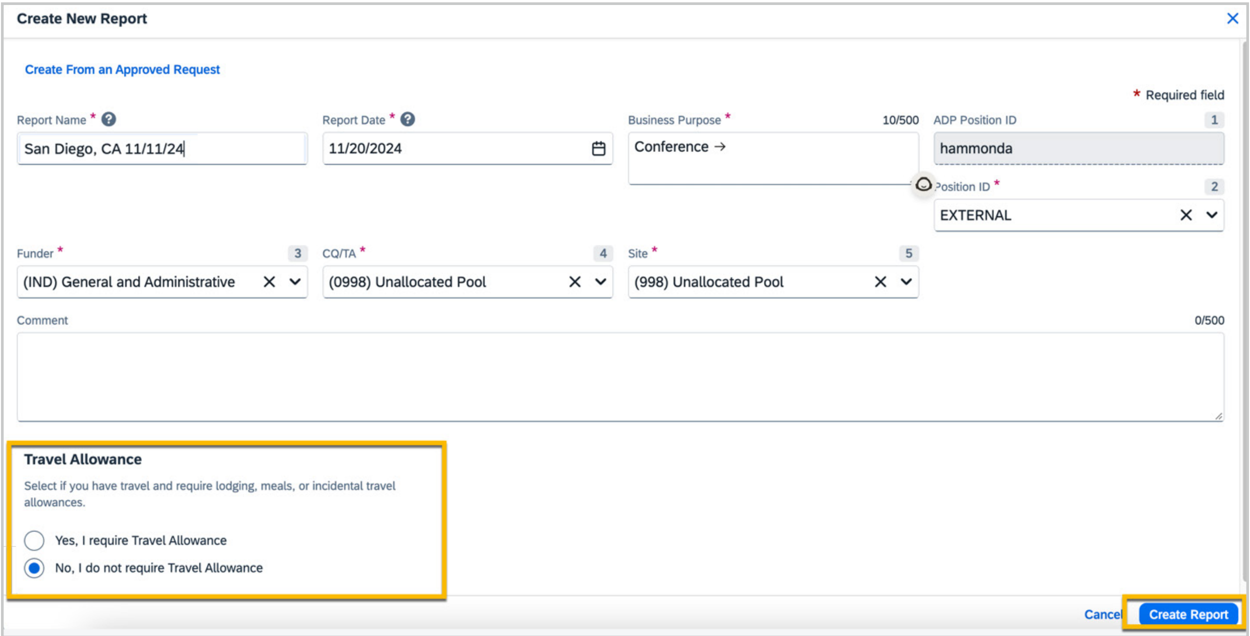
1. Sign into Concur (concursolutions.com)
2. From the home page, click on the **Create** dropdown button and choose **Start Report**.



Step 2: Fill Out the Create New Report Page

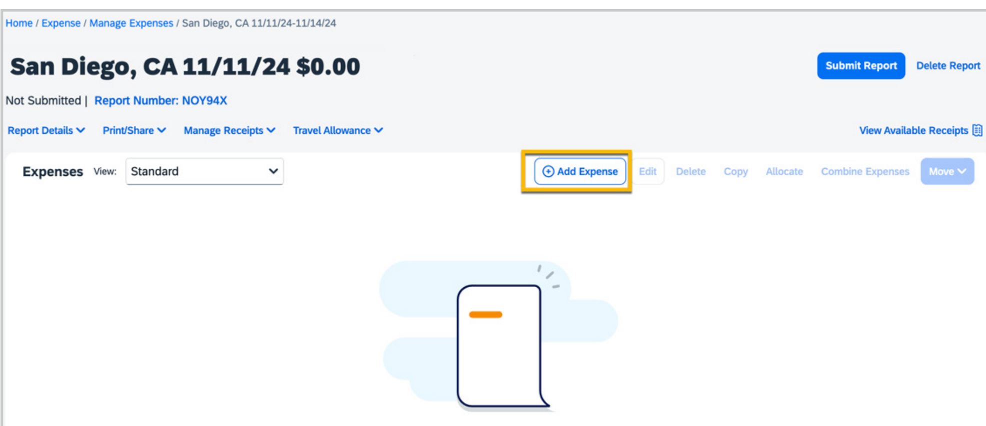
1. Enter a **Report Name** using the format of City, State, Start Date, and End Date (i.e., Arlington, VA 12/15/24).
   - There are only 32 characters in this field, so please abbreviate.
   - If your expense report is for multiple travel days, your report name should also contain the start and end date of travel (i.e., Tulsa, OK 12/01/24-12/6/24).
2. The **Report Date** will default to today's date.
3. Enter a **Business Purpose**. This is a description of the local travel.
4. The **ADP Position ID** is automatically filled in. *If you have more than one Position, select the appropriate **Position ID** from the drop-down.
5. The **Funder** is automatically filled in. *Select the appropriate **Funder** from the drop-down if you are a multi-funded enrollee.
6. The **CQ/TA** and **Site** fields are automatically filled in.

7. Enter **Comments** to explain additional information (optional), such as when an expense report contains multiple days of local travel.
8. In the **Travel Allowance** section, select **No, I do not require Travel Allowance**.
9. When the form is complete, click **Create Report**.

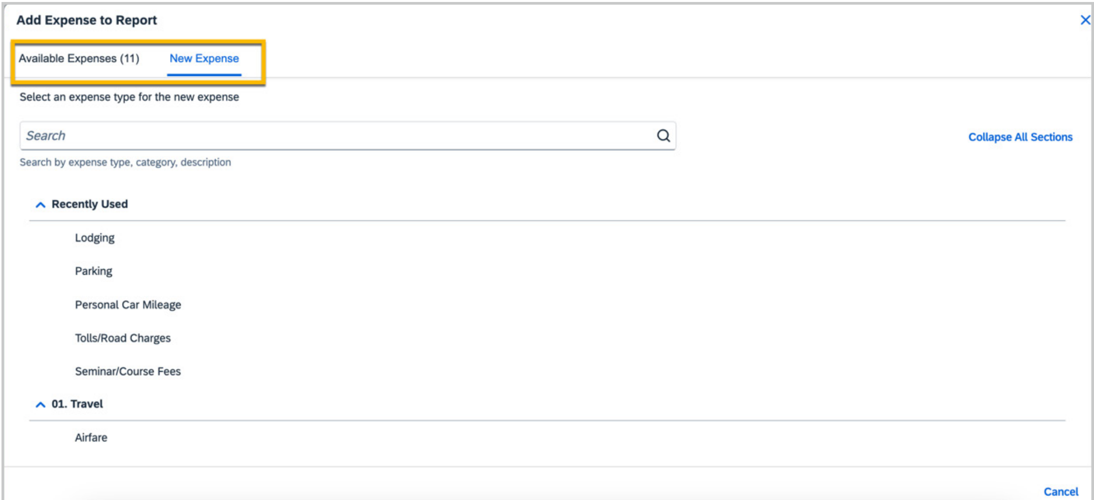


Step 3: Add Expenses to the Expense Report

1. Click the **Add Expense** button in the middle of the screen (in blue letters)



2. Select from your **Available Expenses** or Create a **New Expense**.



3. The **Available Expenses** library contains the items that are ready to become expense entries, such as:
   - E-Receipts
   - Mobile quick expenses
   - ExpenseIt expenses
4. If you are creating a **New Expense**, search for the expense type. *Due to the nature of Local Travel, you will be using the Parking, Personal Car Mileage, Car Rental (Requires a Request) & Tolls/Road Charges Expense types only.

   Available Expense Types

   - Travel
     - Airfare
     - Airline Fees
     - Baggage Fees
     - **Car Rental (insurance included)**
     - Lodging
   - Transportation
     - Fuel (For rental cars only)
     - Ground Transportation (Tip included) (Taxi, Lyft, Uber, Subway)
     - **Parking**
     - **Personal Car Mileage**
     - **Tolls/Road Charges**
     - Train (Amtrak)

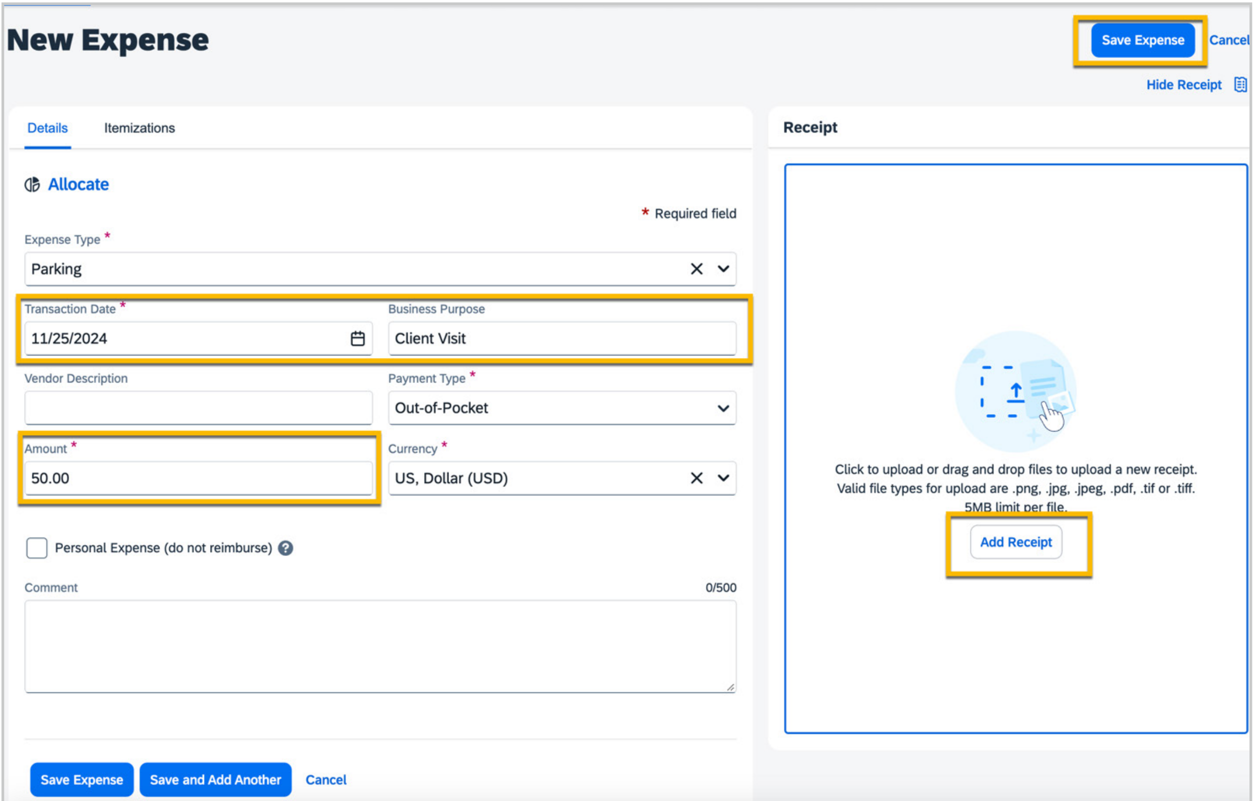
- Meals and Entertainment
    - Breakfast
    - Business Meals (Attendees)
    - Dinner
    - Lunch
- Office Expenses
    - Courier/Shipping/Freight
    - Office Equipment/Hardware
    - Office Supplies/Software
    - Postage
    - Printing/Photocopying/Stationary
- Communications
    - Internet/Online Fees
- Other
    - Seminar/Course Fees
- Fees
    - Professional Subscription/Dues

5. Every expense type has a different expense form with varying required information. At the minimum, please fill out all required fields denoted with a *red asterisk. However, entering all pertinent information is preferred.

Add a Parking Expense

1. Click the Add Expense Button in the middle of the screen (in the blue letters).
2. The “Add Expense to Report” screen will display.
3. Scroll down and select the **Parking** expense type. The **Parking expense screen** will appear.
4. Enter the transaction d**ate** for the parking expense.
5. Enter the **Business Purpose** (not required)
6. Enter the expense **amount** for the parking expense.
7. Add a receipt image by selecting **Add Receipt**.
    - This will bring you to the Attach Receipt screen.
    - Select **Upload New Receipt**.
    - This will bring you to your computer files. Select the receipt image that you saved to your computer files.

8. When the expense is complete, click the **Save Expense** button at the top right-hand of the expense screen.



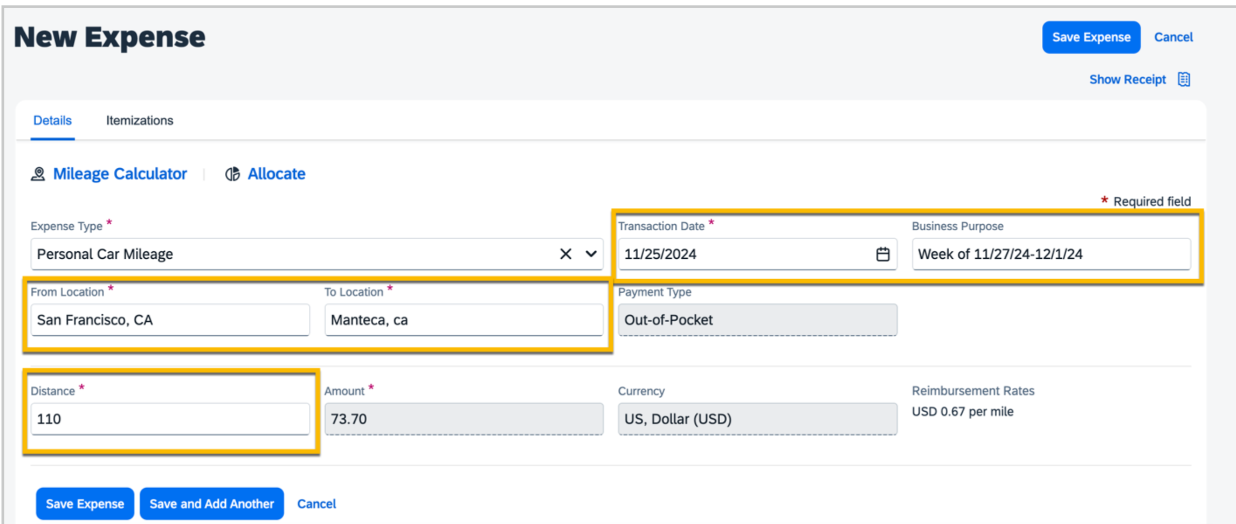
Add Privately Owned Vehicle (POV) Mileage Expense

When the operation of a POV is required for business use, you may expense the miles within Concur. The GSA rates are pre-loaded into Concur, so reimbursements are automatically calculated based on the miles entered.

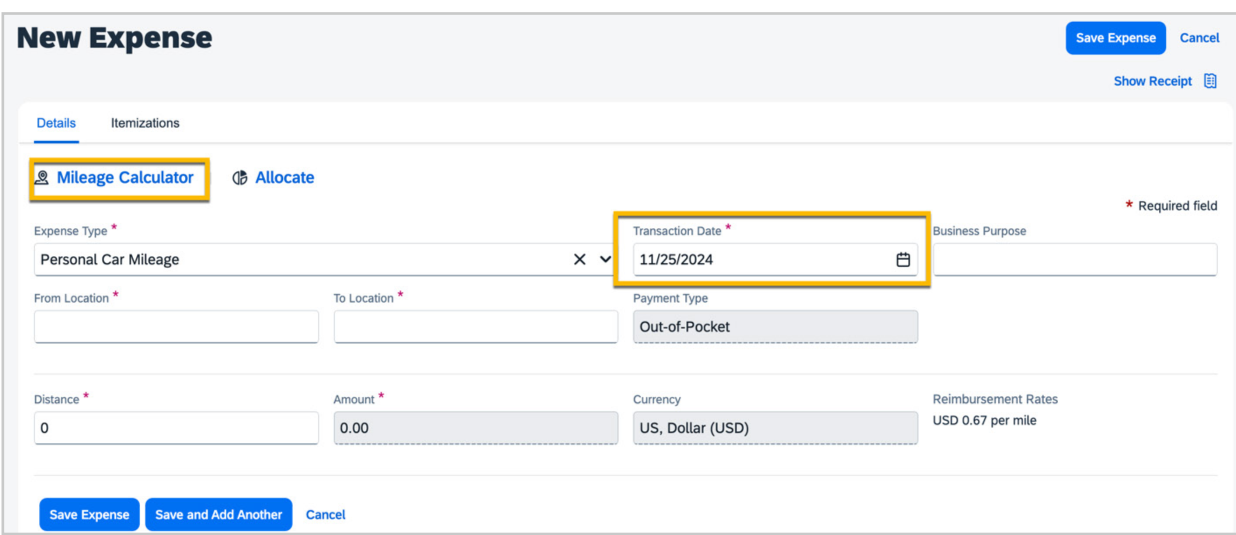
To add Personal Car Mileage:

1. Click the **Add Expense** Button in the middle of the screen (in the blue letters).
2. The “Add Expense to Report” screen will display.
3. Scroll down and select **Personal Car Mileage** expense type. The “Personal Car Mileage expense screen” will appear.
4. Enter the **Transaction Date** which is the date of the local travel. *If you combine multiple days’ worth of miles in this expense, enter the transaction date of the first day of travel.
5. Enter the **Business Purpose** to note if the travel is for multiple dates (I.e., For the week of 12/1/24-12/6/24). This is not a required field.
6. For the **Distance** field you can either 1) enter the miles captured from the vehicle speedometer or 2) use the Mileage Calculator to bring up a map.

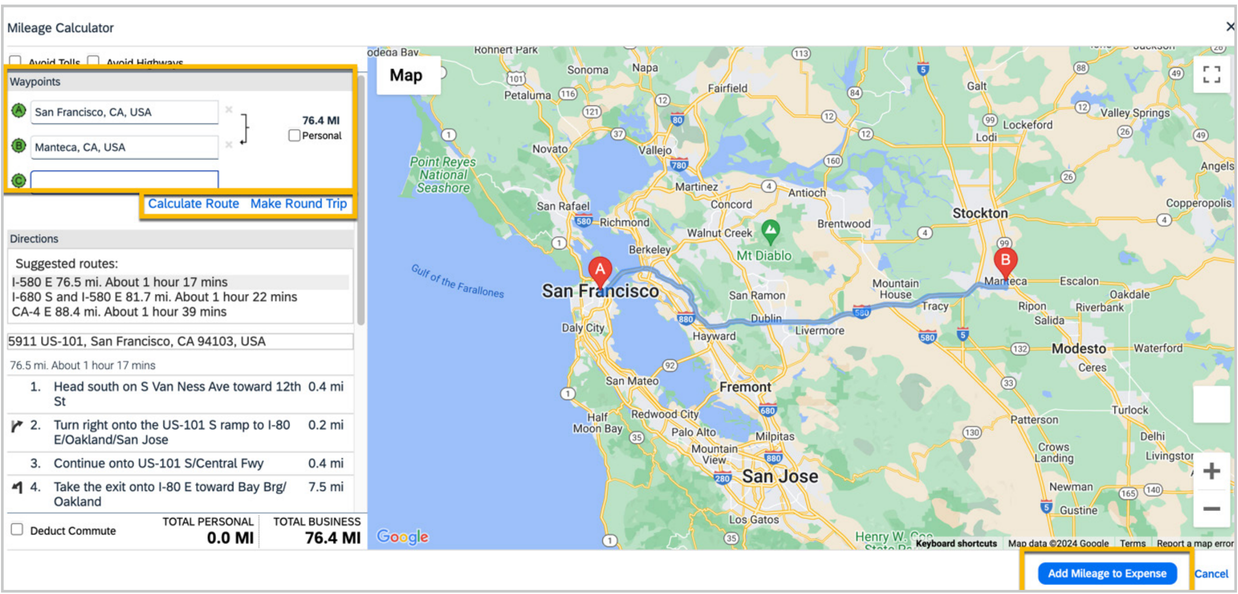
- If you are entering miles captured from your speedometer or your mileage records:
  - Enter the **From Location** – This can be an exact address or a city. For example, San Francisco, CA.
  - Enter the **To Location** – This can be an exact address or a city. For example, San Francisco, CA.
  - Enter the miles in the **Distance** field.
  - Then hit the **Tab** key on your computer, and the system will automatically calculate the **Amount** based on the GSA rate pre-loaded in Concur.
  - When complete, choose the **Save Expense** button on the top right of the screen.



- If you are using the **Mileage Calculator** to determine your distance/miles:
  - Enter the **Transaction Date**.
  - Click on the **Mileage Calculator** link at the top of the screen (in blue font).



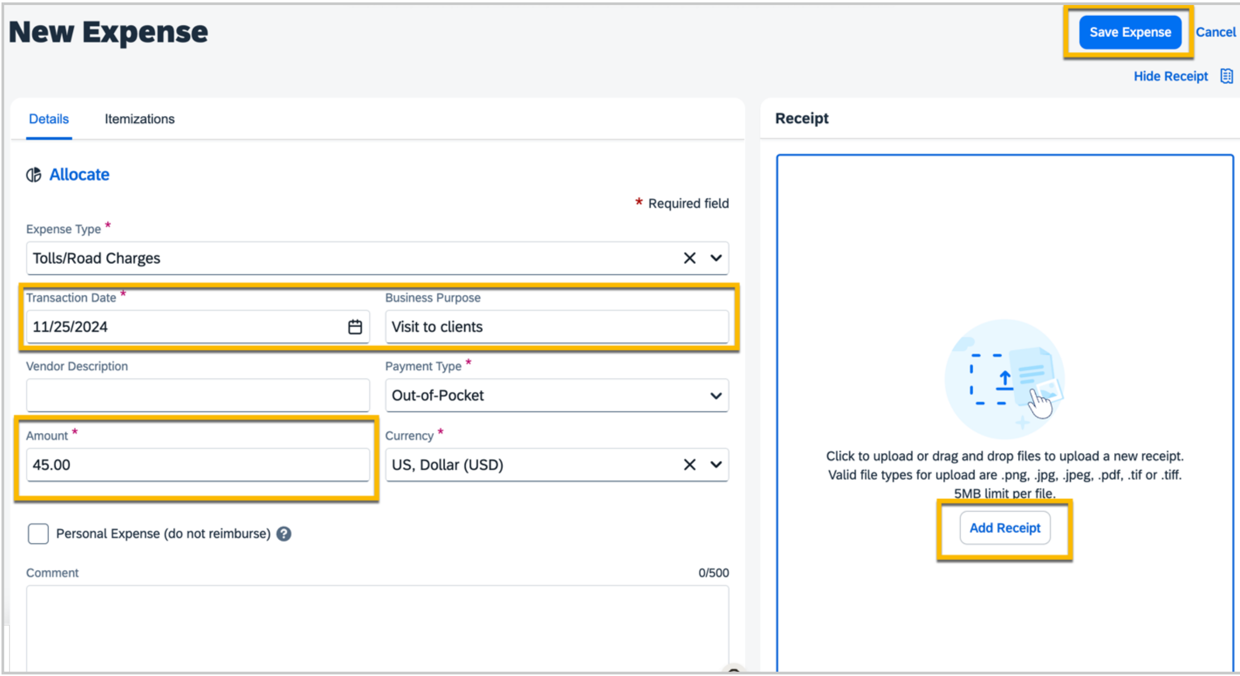
- The mileage calculator will appear.
- Enter your Waypoints. You can add as many locations as you need.
- Select either **Calculate Route** or **Make Round Trip**.
- Click the **Add Mileage to Expense** button on the bottom right of the screen. The distance & amount are automatically calculated and added to the expense entry. The Expense screen will display.
- When you have completed entering the expense, click the **Save Expense** button on the top right of the screen.



Add Tolls/Road Charges Expense

1. Click the **Add Expense** Button in the middle of the screen (in the blue letters).
2. The Add Expense to Report screen will display.
3. Scroll down and select **Tolls/Road Charges** expense type. The Tolls/Road Charges expense screen will appear.
4. Enter the **Transaction Date** of the Tolls/Road Charges expense. *If you are using the toll invoice for multiple dates, enter the transaction date of the first day of travel.
5. Enter the **Business Purpose** (not required).
6. Enter the expense **Amount**.
7. Add a receipt image by selecting **Add Receipt**.
   - This will bring you to the **Attach Receipt** screen.
   - Select **Upload New Receipt**.
   - This will bring you to your computer files. Select the receipt image that you saved to your computer files.

8. When the expense is complete, click the **Save Expense** button at the top right-hand of the expense screen.

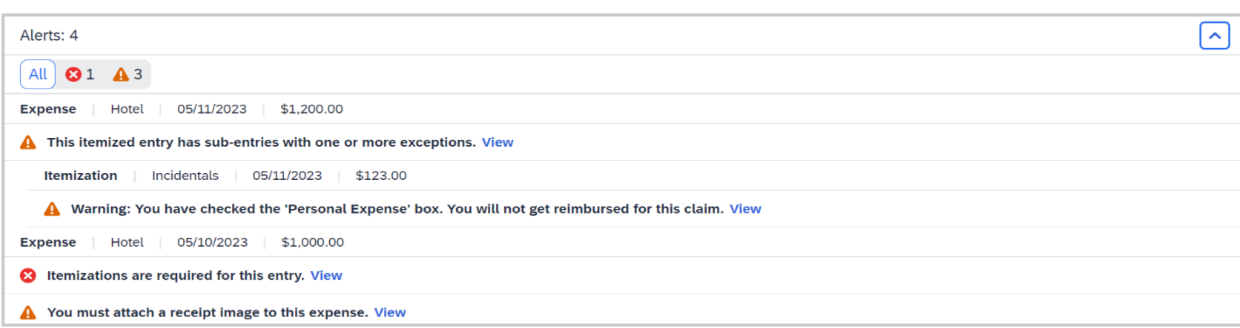


Step 4: Address all Alerts on the Report

Before submitting your expense report, address all warning and exception messages for your expenses.

To read the exception text, click the red or yellow alert icon on the expense report home page or click on the expense line item and view the Alerts section at the top of the page.

- **Red Exceptions** – Any warning messages with a red error symbol require you to solve an issue. You cannot submit your expense report until the error is corrected.
- **Orange Exceptions** – Any warning messages with an orange symbol give advice or policy guidance. You will be able to submit your expense report, but it may be returned for correction.

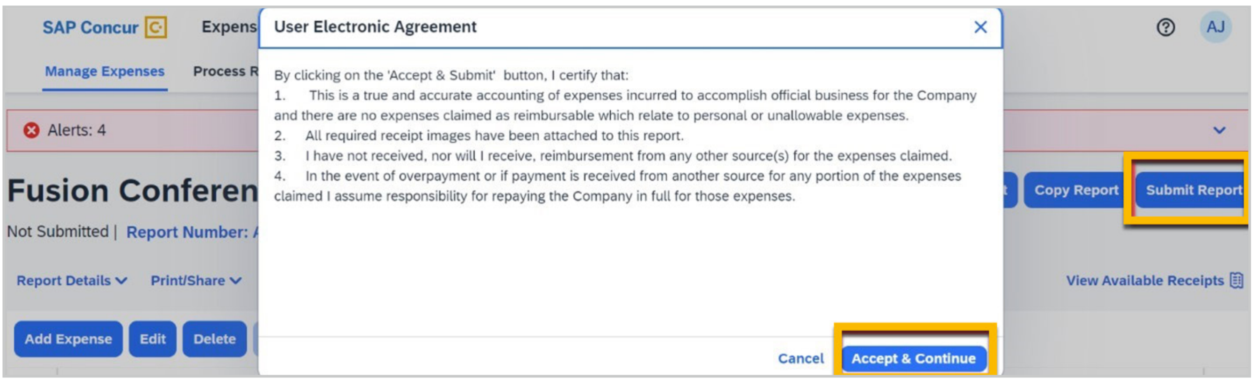


Step 5: Submitting Your Expense Report

Once all your expenses have been added, receipt images have been attached, and alerts have been addressed, it's time to submit the expense report.

To submit your expense report:

1. On your expense report home page, select **Submit Report** on the right side of the screen.
2. Review the User Electronic Agreement and then click **Accept & Continue**.



3. Review the Report Totals screen and then select **Submit Report**.

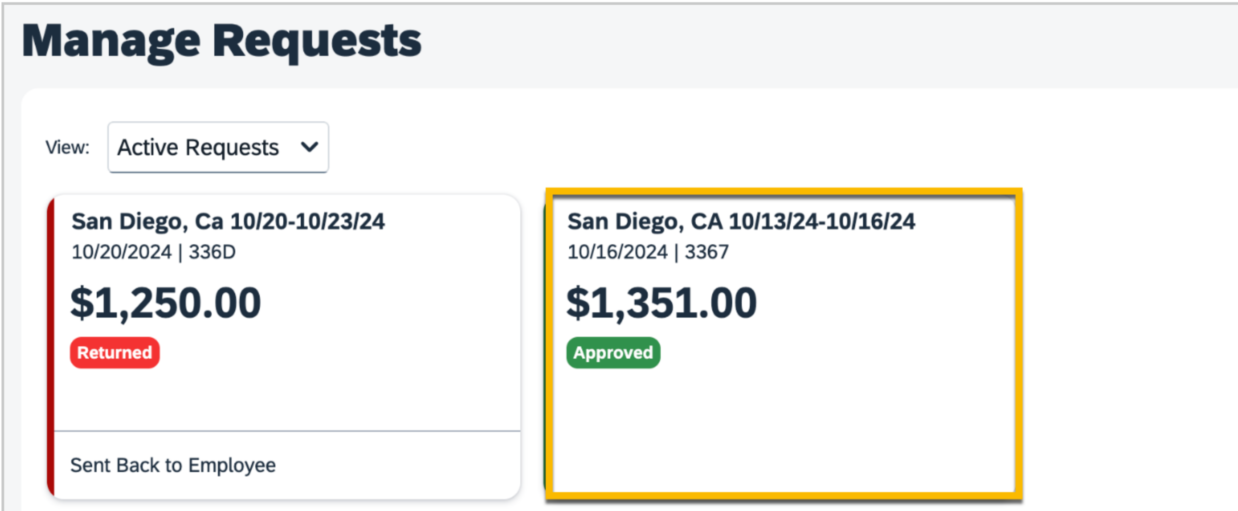
Once submitted, the expense report is automatically routed to your monitor for approval. The monitor will receive an email notification from Concur regarding the expense report needing approval. The secondary monitor will also receive an email regarding the expense report that needs approval.

Note: The monitor has 7 days to approve the expense report. The report will be returned to you if it is not approved within 7 days. Please submit the report again.

Note: If you submit your report prematurely or need to correct something before your manager approves it, you can re-open it and select **Recall Report** in the upper right corner. This will return the report to open status for correction.

Appendix B: Locating the Request ID to Book Travel

1. From the **Manage Requests** page, select the approved Request.



2. The 4-digit **Request ID** is listed at the top of the page under the Request name. It is a combination of letters and numbers.