SAP® Concur®

ENROLLEES

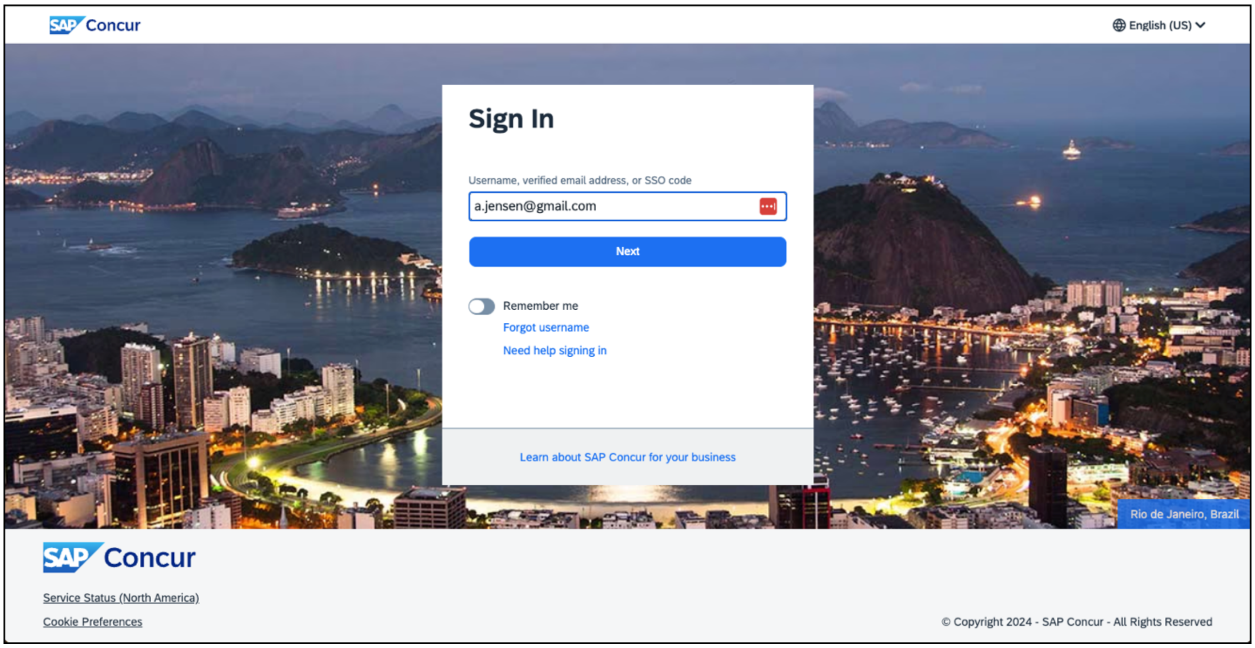
REQUEST, TRAVEL, & EXPENSE

Table of Contents

Signing into SAP Concur

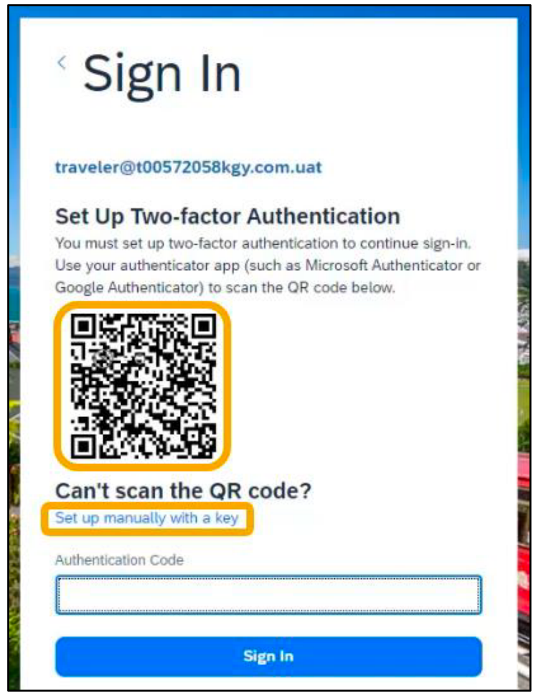
1. Visit http://www.concursolutions.com/
2. To sign into SAP Concur, on the Sign-in screen, enter your email address, and then click **Next.**

   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.

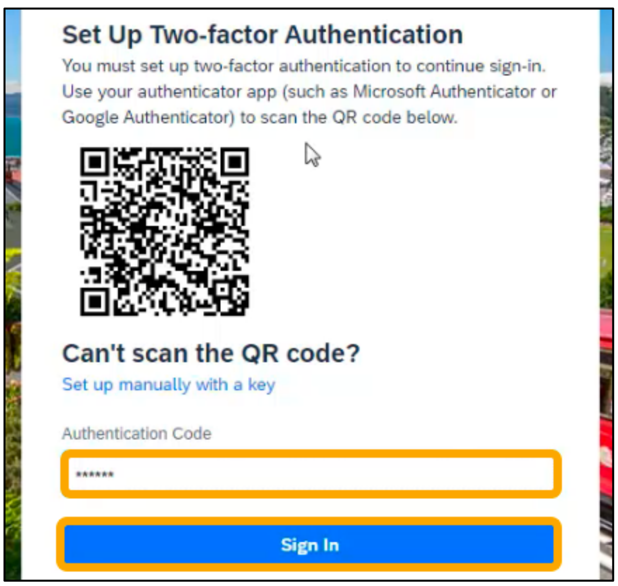


3. Enter your password.
   a. If this is your initial login to SAP Concur, you will enter the temporary password provided to you.
4. After you enter your password, select Sign In.
5. You must set up two-factor authentication, on your mobile device and/or computer, to continue signing in. Use any authenticator app, such as Microsoft.

a. To add your SAP Concur to your authenticator app, scan the QR code on the **Sign-in** page with your mobile device.
b. If you can't scan the QR code, select **Set up manually with a key** link.



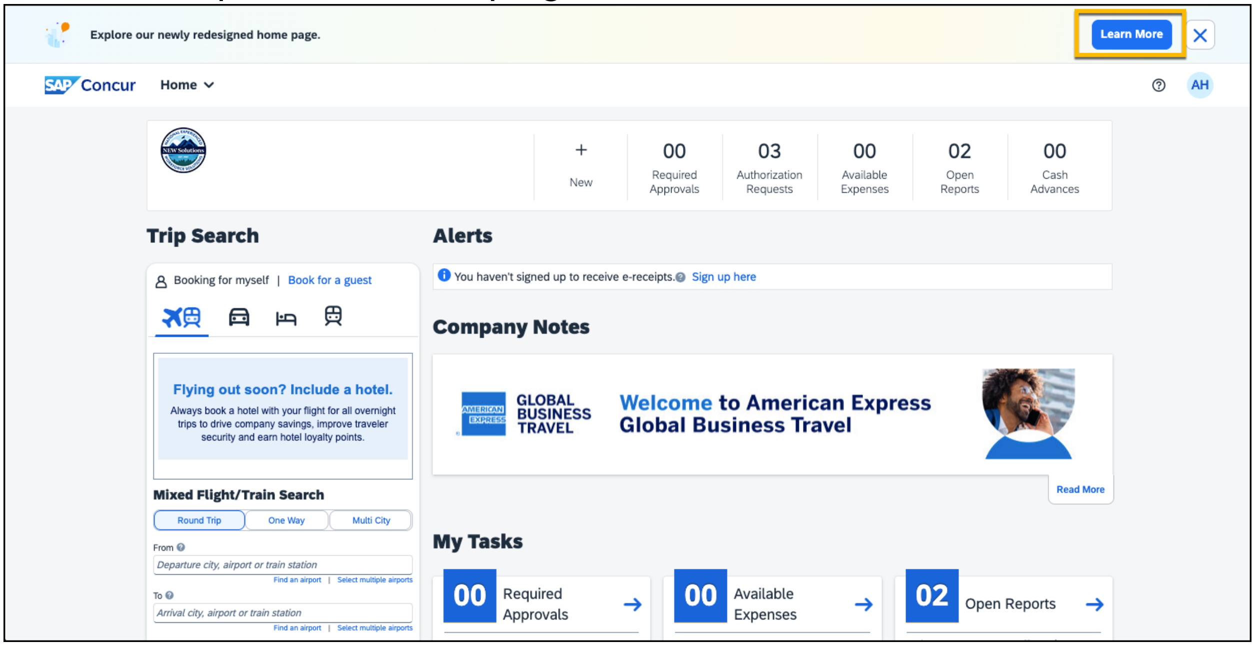
6. Copy the six-digit code generated from the app into the **Authentication Code** field, and select **Sign In**.



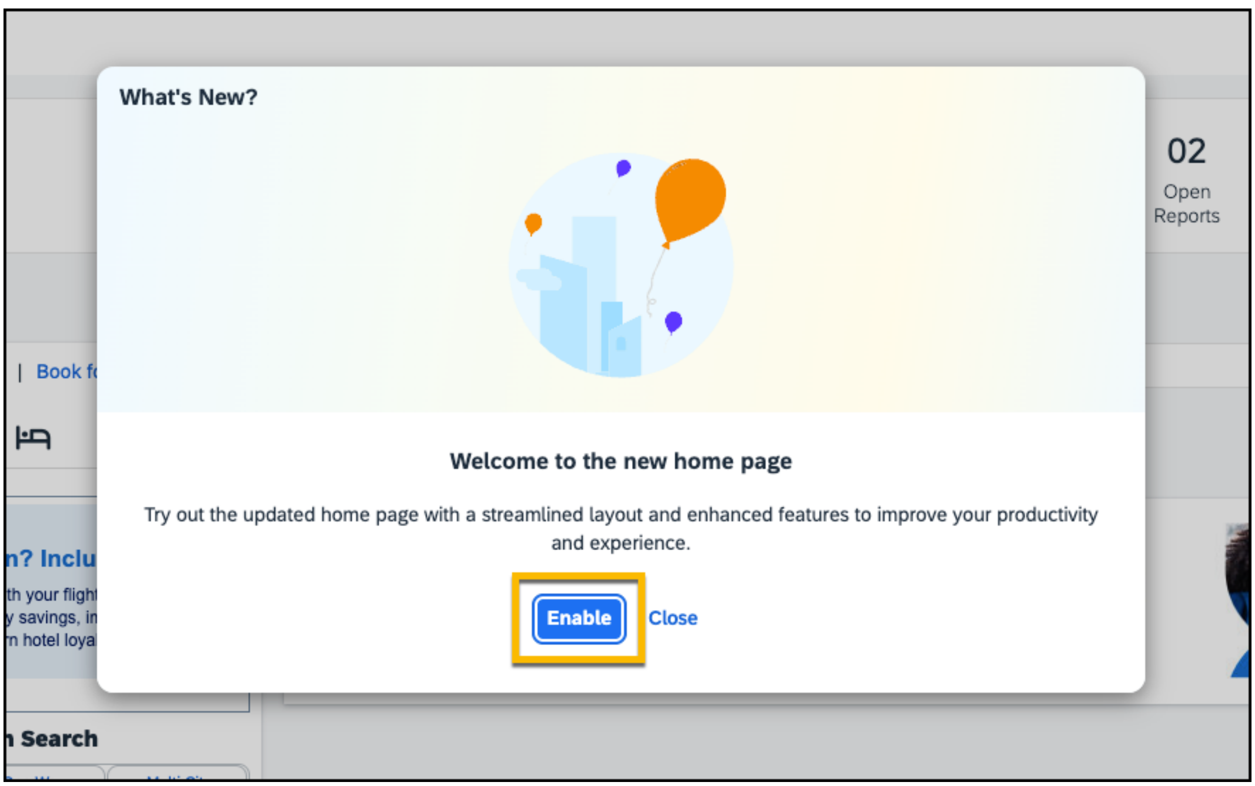
Concur Home Page Update

Note: This training guide has been crafted using the updated home page design. Users have the option to switch to the new home page now by following the instructions provided below. Please note, that starting **January 2025**, the switch to the new design will be automatic for all users.

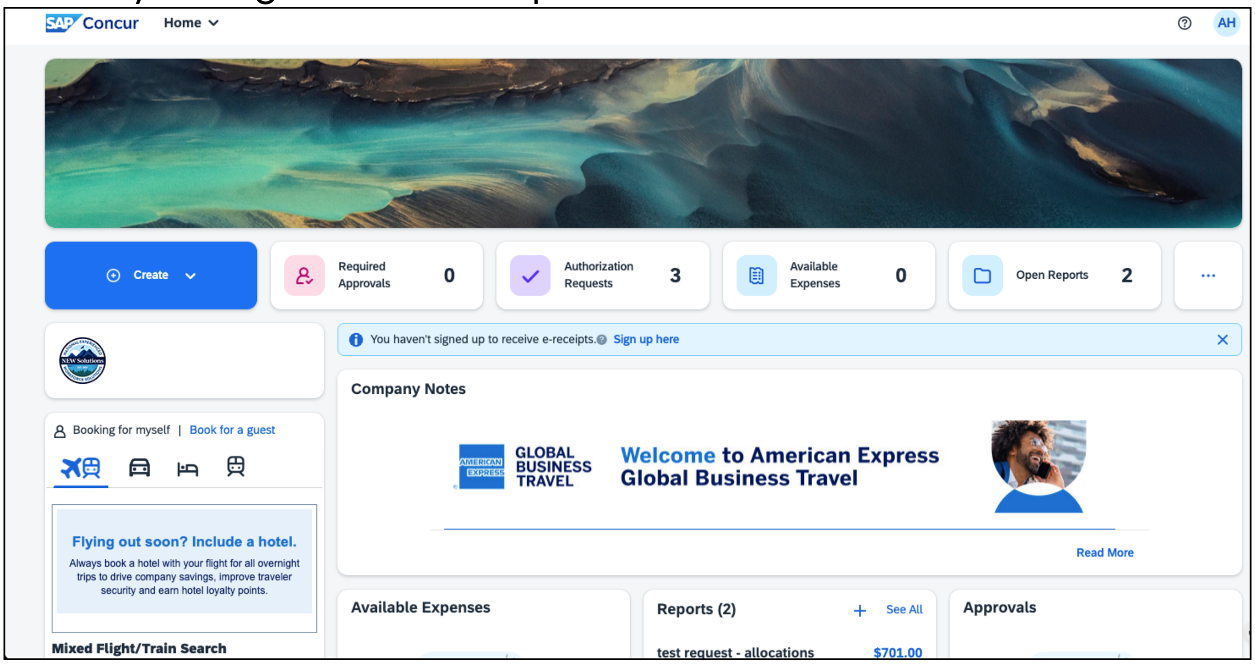
1. From the top of the home page, click **Learn More.**



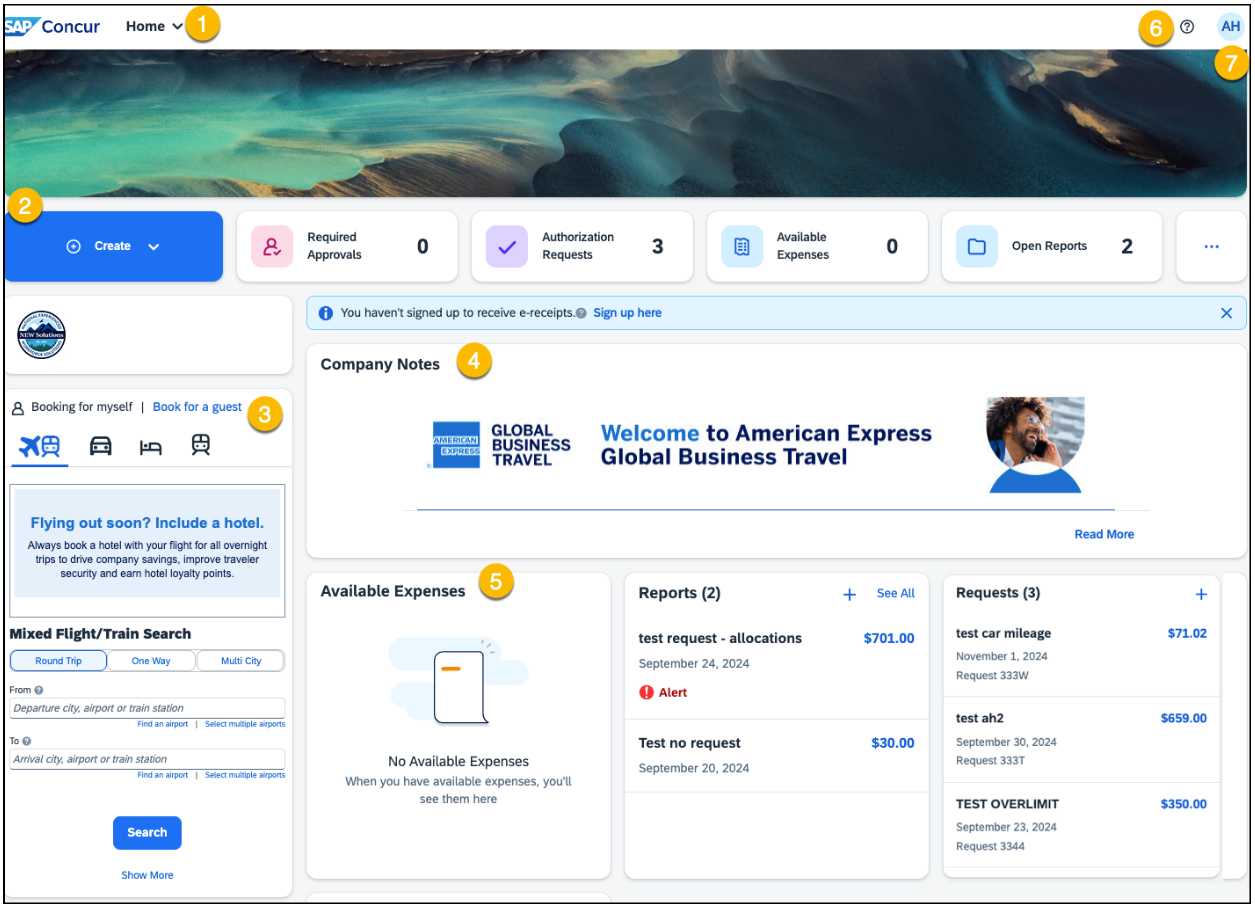
2. Click **Enable.**



3. The new home page has been enabled and can be switched back by taking the same steps listed above.



Exploring the Home Page



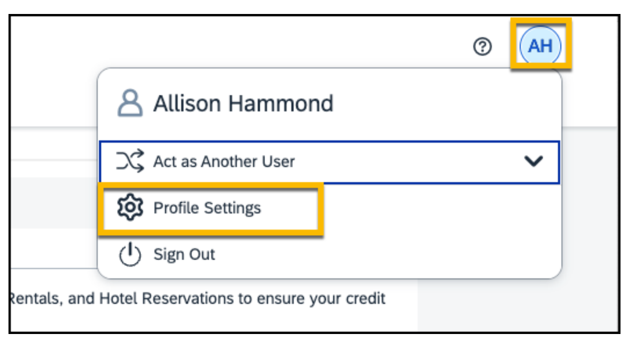
Section	Description
1. Application Drop Down	This area houses all the applications that you have access to, such as Expense, Travel, Request, approvals, etc.
2. **Create Button/Quick Access Tasks**	Create Requests, Cash Advances, Expense Reports, & enter Travel Reservations by clicking **Create**. View any Authorization Requests, Cash Advance, Trips, Available Expenses, and Open Reports.

3. Trip Search	Search and book airfare, hotel and car rental from this section.
4. Company Notes	Traveler Information including contact and link information to Amex GBT, as well as links to training materials and user support contact information.
5. Activity Cards	Browse open items such as Available Expenses, Reports, and Requests.
6. Help Section	Get assistance, product resources, and access the SAP Concur Community.
7. Profile Icon	Denoted with your initials, here you can **go to Profile Settings or Sign Out**

Updating Your Profile

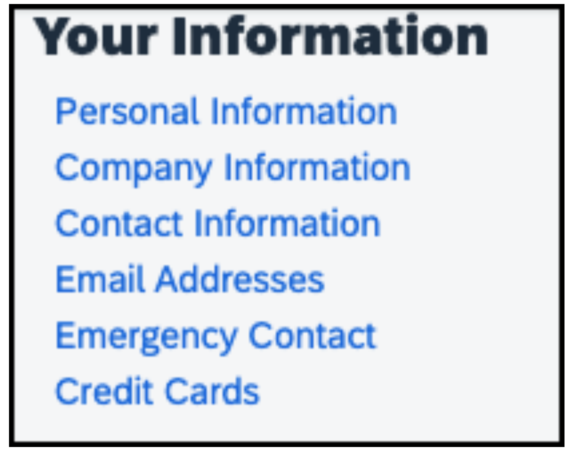
When you log in to Concur for the first time, an important and often overlooked step is updating your profile. While we will be touching on the most important areas of the profile to update, we highly encourage you to add as much information as possible to each profile section.

1. The profile is available by clicking the **profile icon** and choosing **Profile Settings**.
2. Verify or add information to the following areas:



Personal Information

Navigate to **Profile › Profile Settings › Your Information › Personal Information**



a) Verify your personal information is correct.
b) Your name must be identical to what is shown on your photo ID that you present at the airport.

Company Information

Profile › Profile Settings › Your Information ›Company Information

c) Verify your employee ID, Manager and Employee Position/Title are correct.

*If there is a discrepancy in Personal or Company information, please reach out to concursupport@newsolutions.org. This information is imported to Concur nightly from EMS and can't be manually altered in Concur.

Contact Information

Navigate to **Profile › Profile Settings › Your Information › Contact Information**

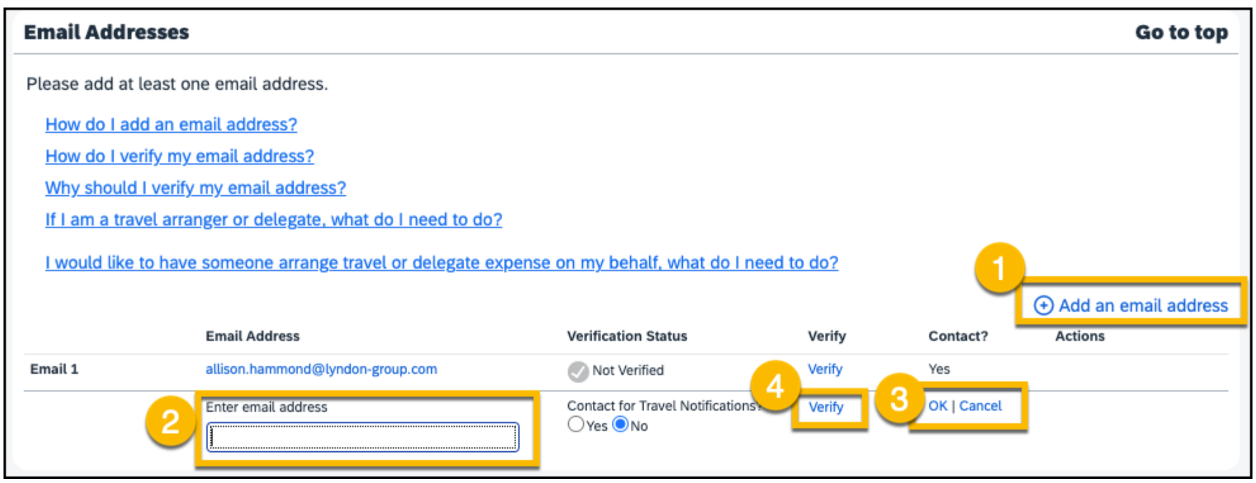
d) A home or work phone number must be entered.
e) Mobile phone is required, but you must select the country/region from the drop-down.

Email Addresses

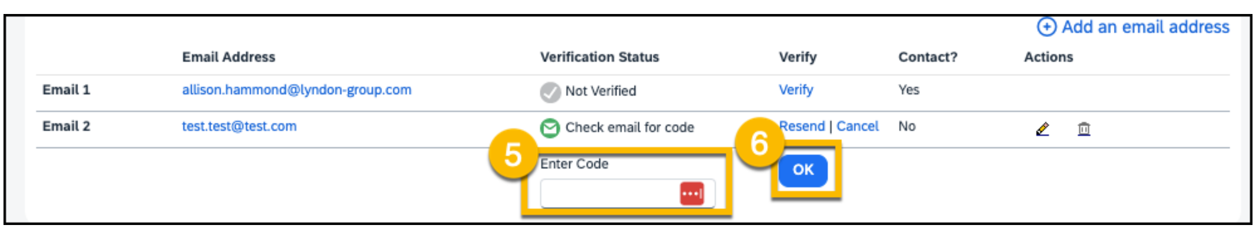
Navigate to **Profile › Profile Settings › Your Information › Email Addresses**

f) 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 **Add an email address.**
2. **Enter email address.**
3. Click **OK.**
4. Next, click **Verify.**



5. An email will be sent with a verification code. Copy the code and place it in the **Enter Code box.**
6. Click **OK.**



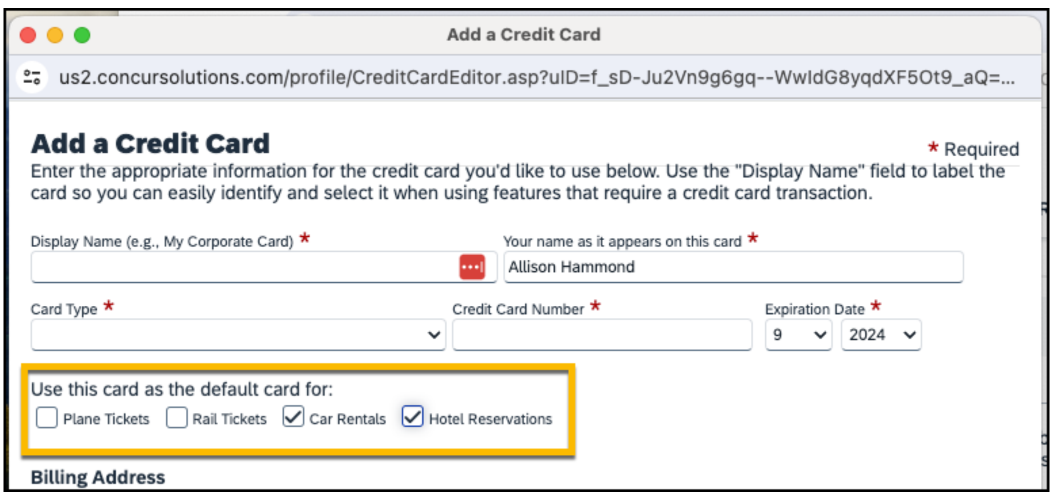
Credit Cards

Navigate to **Profile > Profile Settings > Your Information > Credit Cards**

g) 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 tool.

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.



Travel Settings

Navigate to **Profile > Profile Settings > Travel Settings**

h) Add any identification information, accommodation preferences, frequent traveler programs, TSA Secure Flight, and passport information. Even if fields aren't required, we suggest adding as much information as possible.

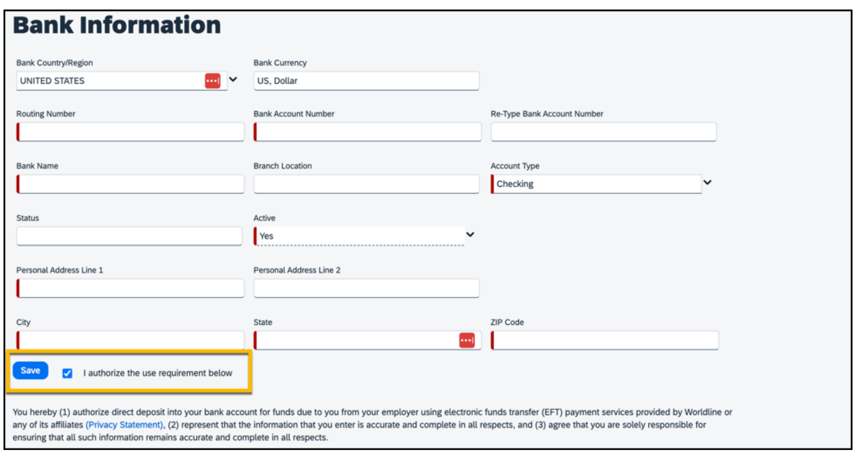
Bank Information

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

Navigate to **Profile › Profile Settings › Expense Settings › Bank Information**

i) 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**



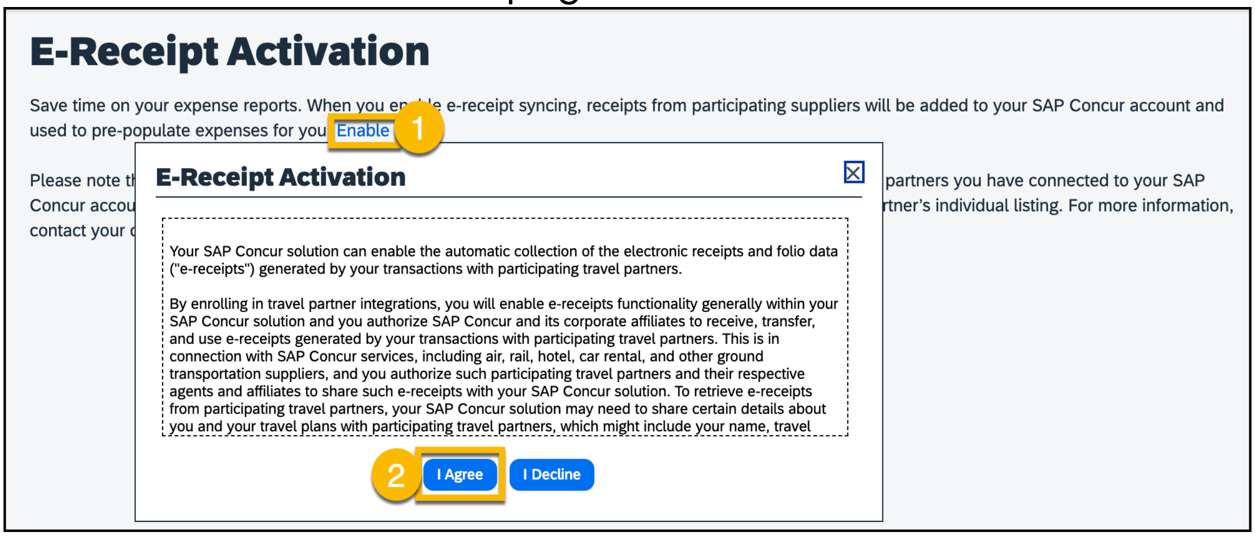
E-Receipt Activation

Navigate to **Profile › Profile Settings › Other Settings › E-Receipt Activation**

j) 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.

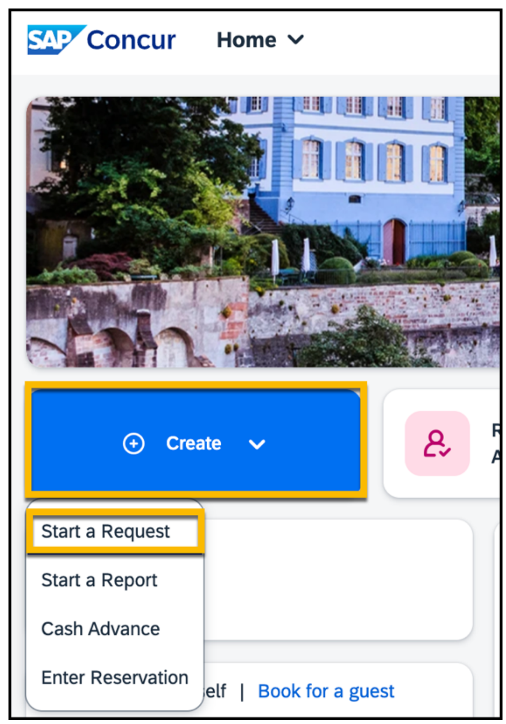


Travel, Conference, & Training Requests

All travel, conferences, and training are to be approved by creating a Request before booking or purchase.

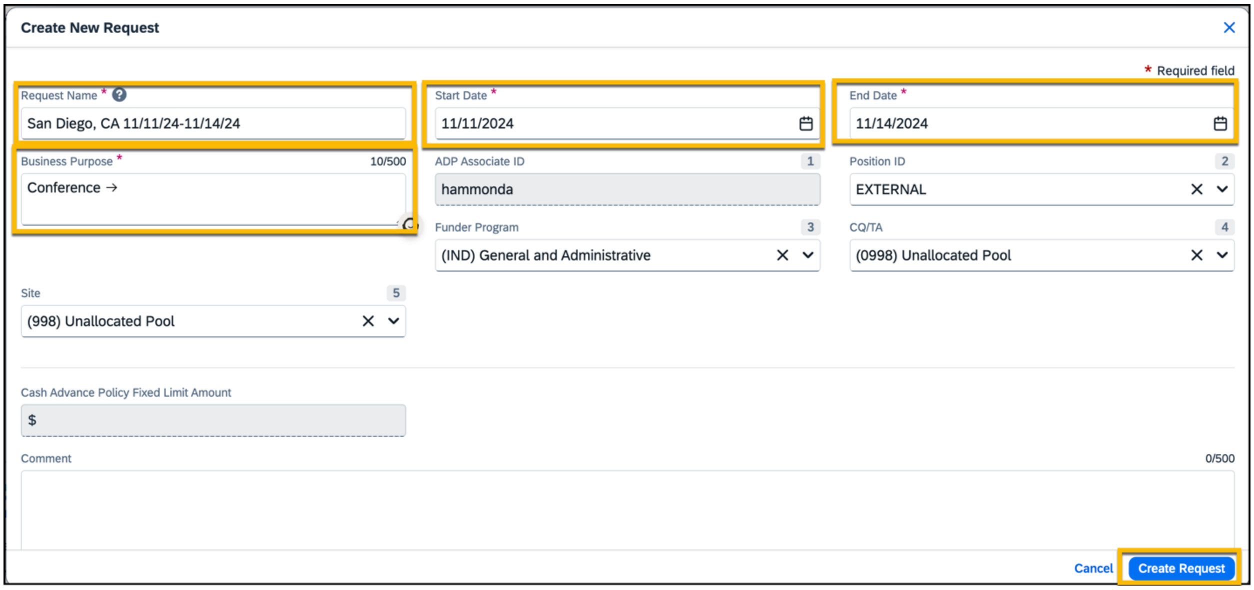
Creating a Request

1. To book travel or attend a conference/training you will first need to create a **Request.**
   a. From the **Home** Page, select the **Create** drop-down.
   b. Click **Start Request.**
   c. Enter all the required information denoted with a red asterisk *.



1. Request Name should always be City, State, and the dates of travel.

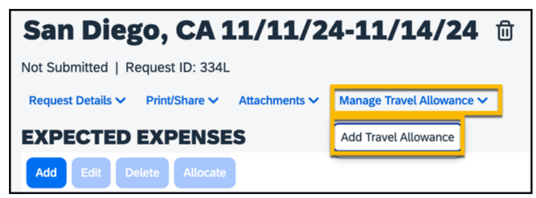
d. When complete, click **Create Request**.



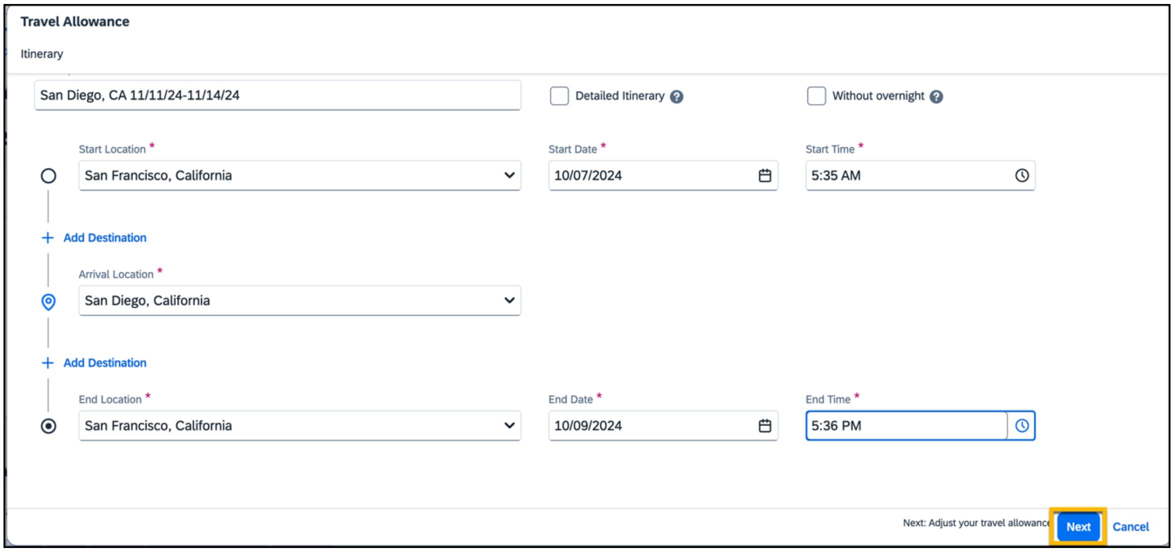
e. Create your travel allowance.

Adding Travel Allowance

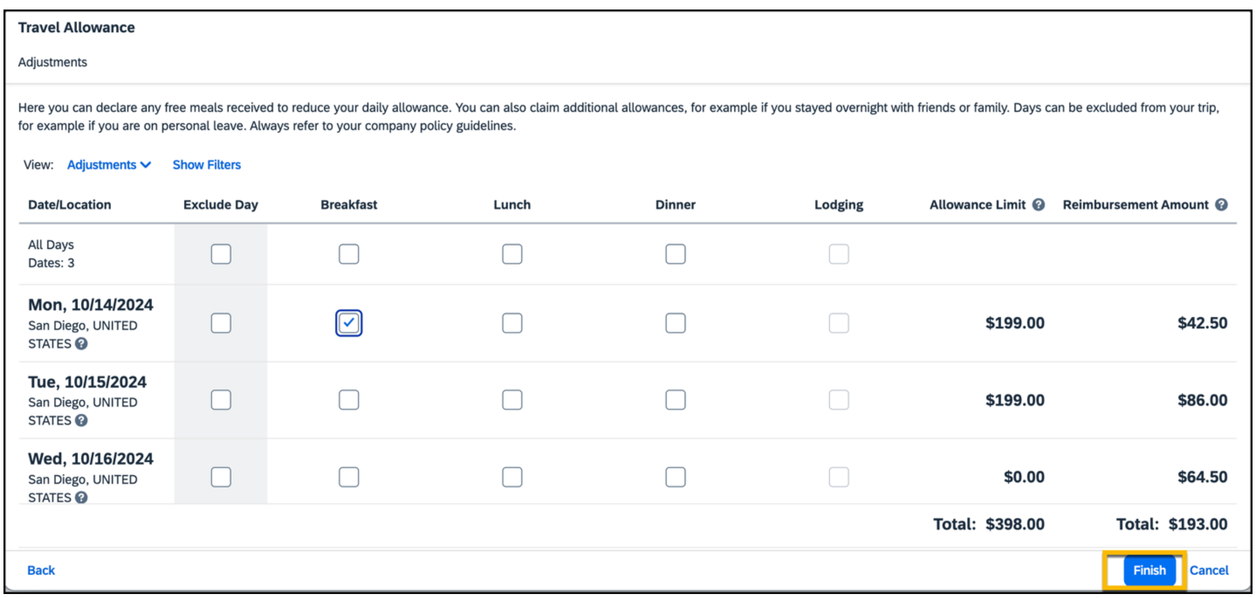
All travelers are entitled to a daily allowance, also known as Per Diem, to cover travel expenses, such as lodging, meals, and incidentals.



1. From the **Expected Expenses** page, select the **Manage Travel Allowance** drop-down.
2. Select **Travel Allowance**.
3. Select the locations, dates, and times of your travel.
   - Times are required but irrelevant. For ease of use, enter 8:00 am start time and 10:00 pm end time.
4. Select **Next**.



5. Declare any Included meals you received on this trip or completely exclude meals for the day if needed. This will reduce your daily allowance.
6. Select **Finish**.



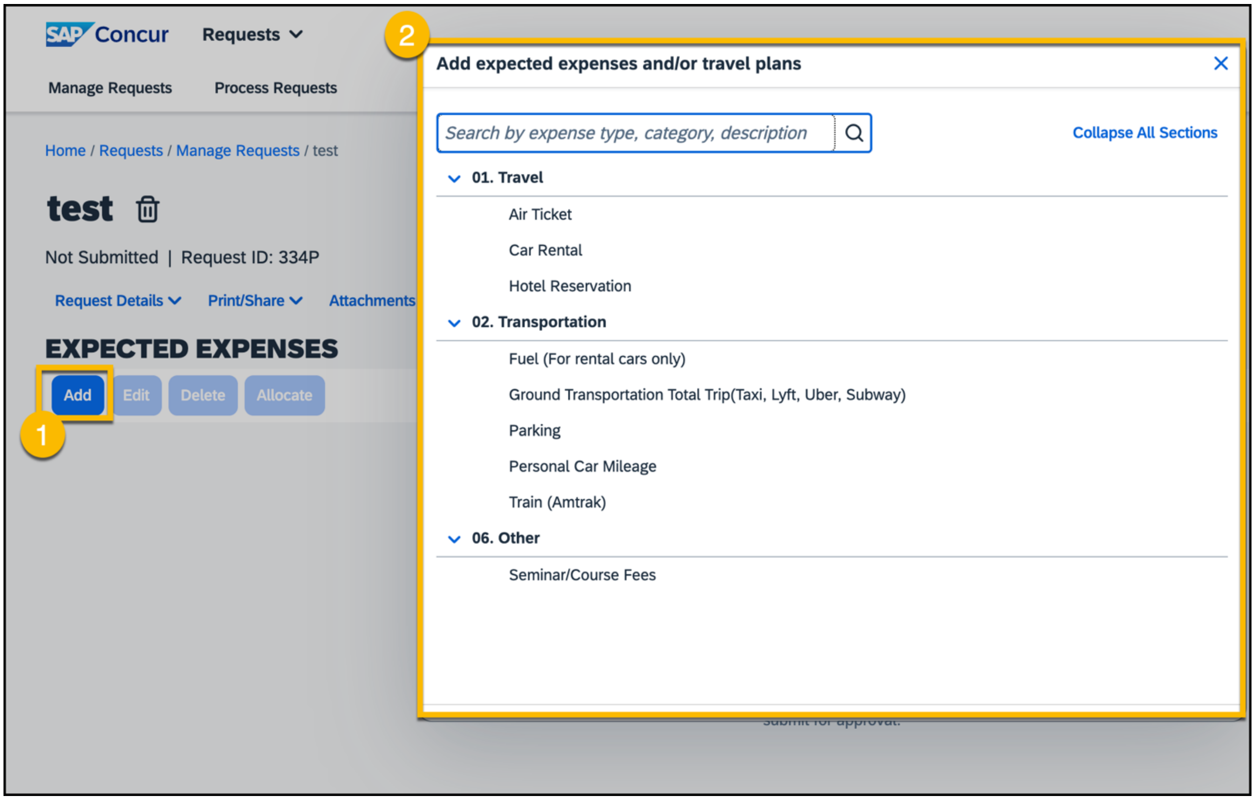
Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Allowance Limit	Reimbursement Amount
All Days Dates: 3	☐	☐	☐	☐	☐		
Mon, 10/14/2024 San Diego, UNITED STATES	☐	☑	☐	☐	☐	$199.00	$42.50
Tue, 10/15/2024 San Diego, UNITED STATES	☐	☐	☐	☐	☐	$199.00	$86.00
Wed, 10/16/2024 San Diego, UNITED STATES	☐	☐	☐	☐	☐	$0.00	$64.50
						Total: $398.00	Total: $193.00

f. Next, enter all expected expenses.

Entering Expected Expenses

Before adding your expected expenses, please visit the travel booking tool to obtain estimates for airfare, hotel, car rental, and train.

1. Click the blue **Add** button.
2. Select from the available expense types.



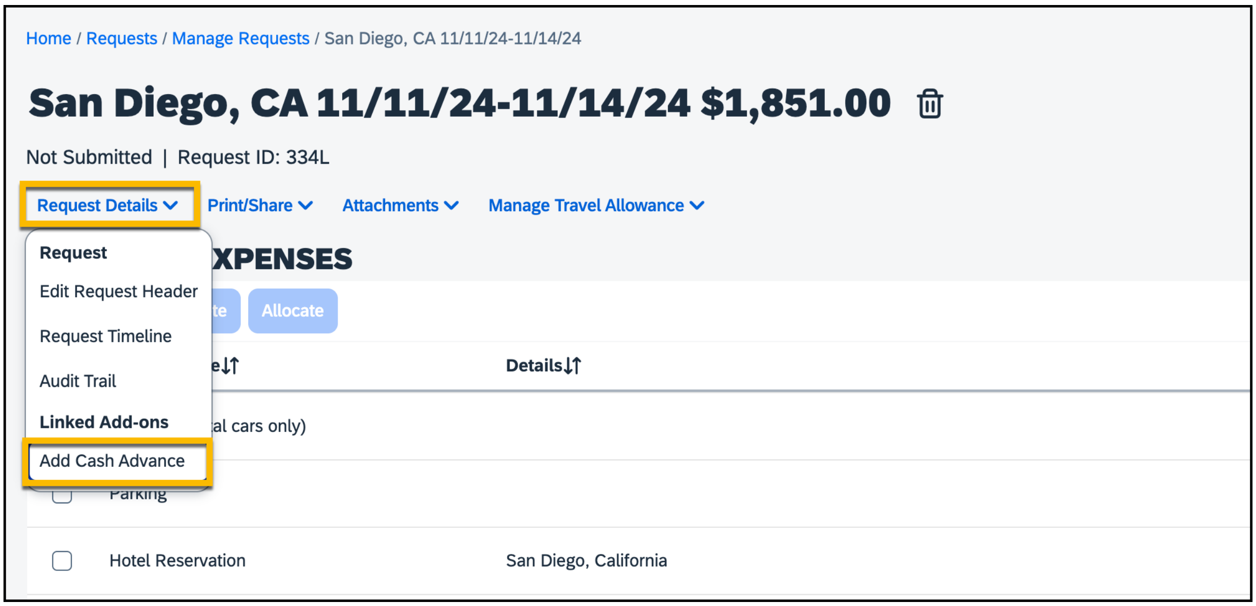
3. Enter all the required information for each expense type denoted with a *red asterisk. Keep in mind that each expense type will require different information.
4. Click **Save**

g. Enter your cash advance request.

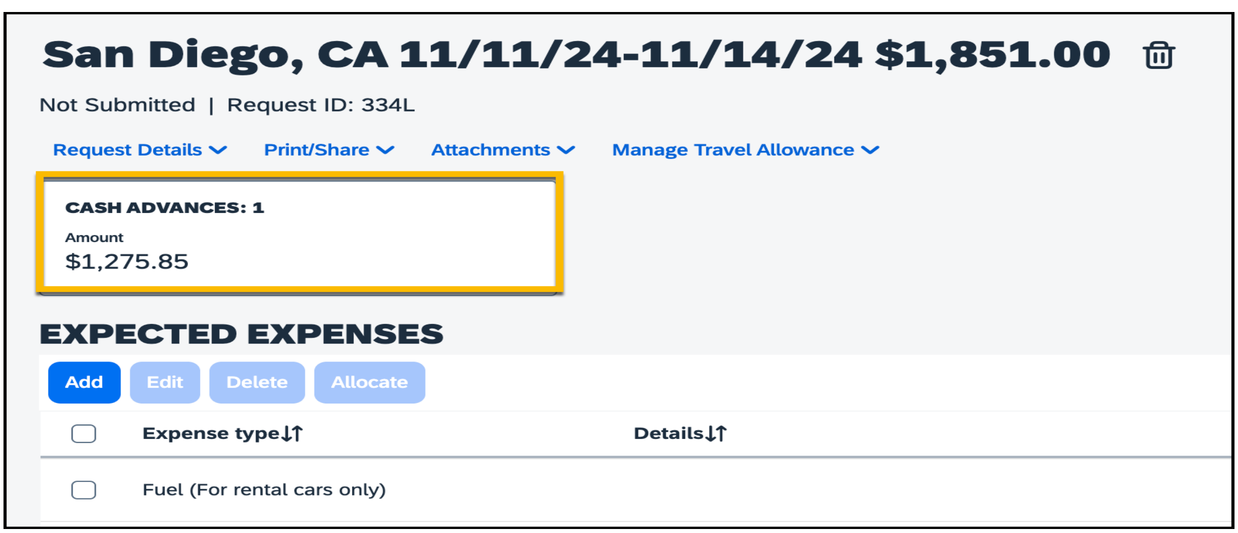
Adding a Cash Advance

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

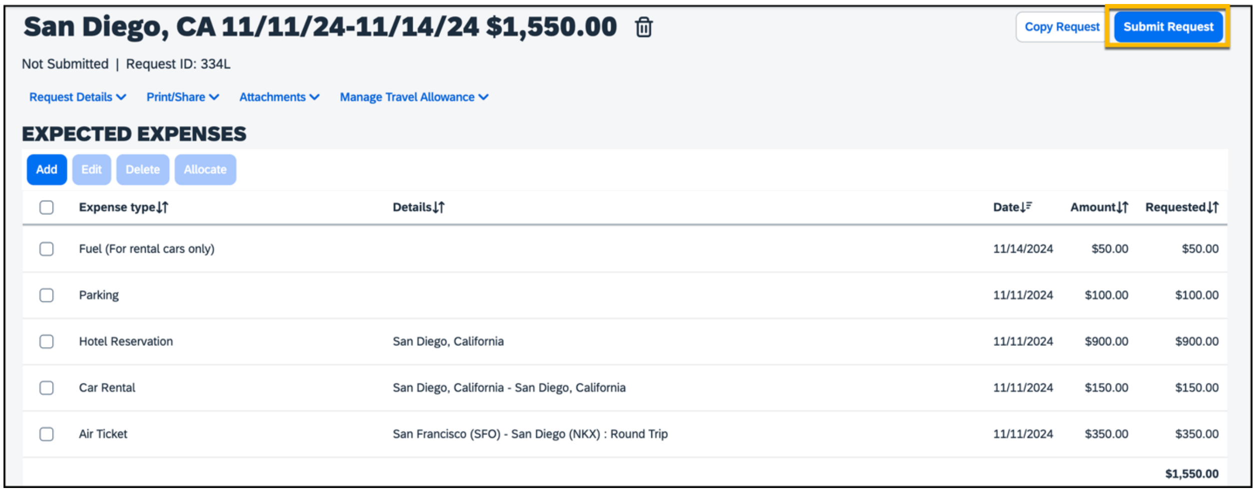
1. After entering your expected expenses, select **Add Cash Advance** from the **Request Details** drop-down.



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



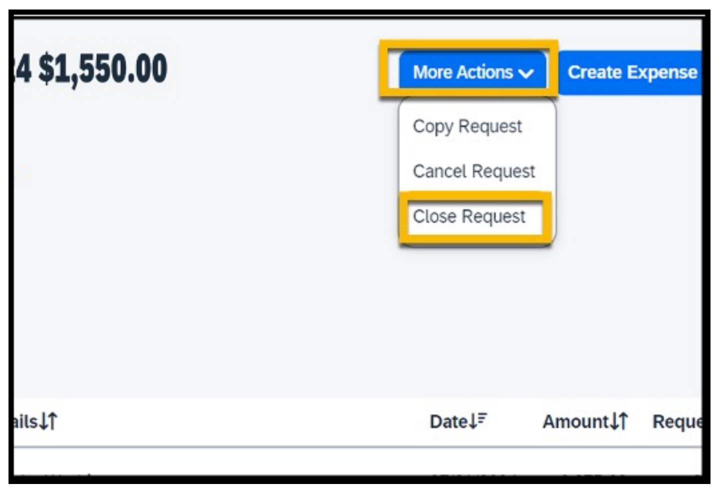
3. When all expected expenses are added, click **Submit Request.**



Once the Request is approved, you can move forward with booking travel via the Concur Travel Booking Tool.

Closing a Request

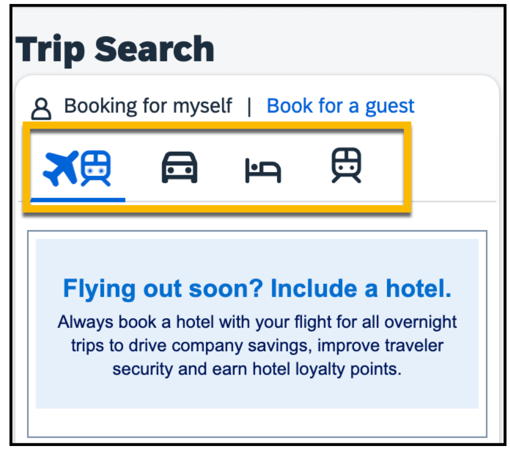
1. Once the approved Request has been associated with a report, you can close the Request.
   a. Click on the Request
   b. Select the **More Actions** dropdown menu.
   c. Select **Close Request**.



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 will need to be entered during the booking process.

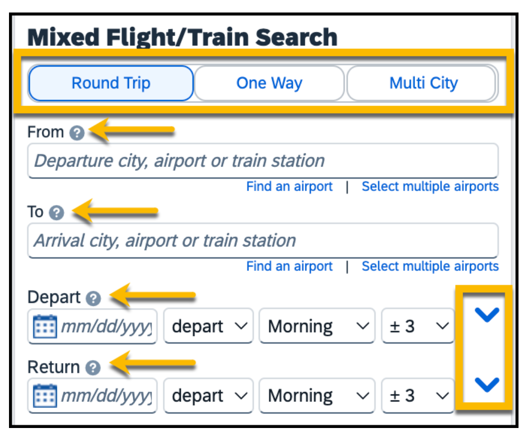


Note: Please keep in mind that airfare and rail are paid for with the New Solutions credit card. Adding a personal credit card to your profile is required to book Hotel and Car Rental reservations. See the profile section of the guide for more details.

Booking a Flight

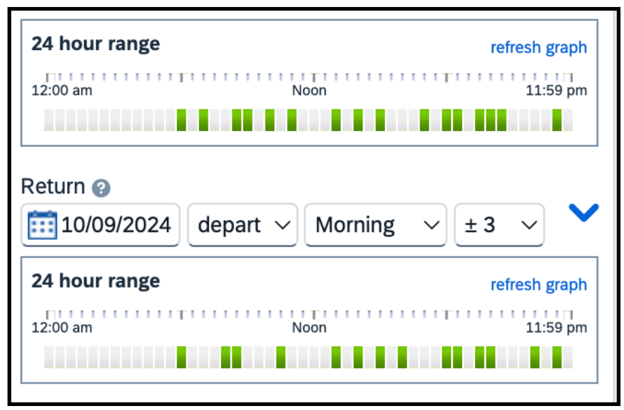
From the SAP Concur home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations *without* a flight, use the Hotel and Car Search tabs, respectively.

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 will automatically search for a match.



Note: Use the *Find an airport* and *select multiple airports* links as needed.

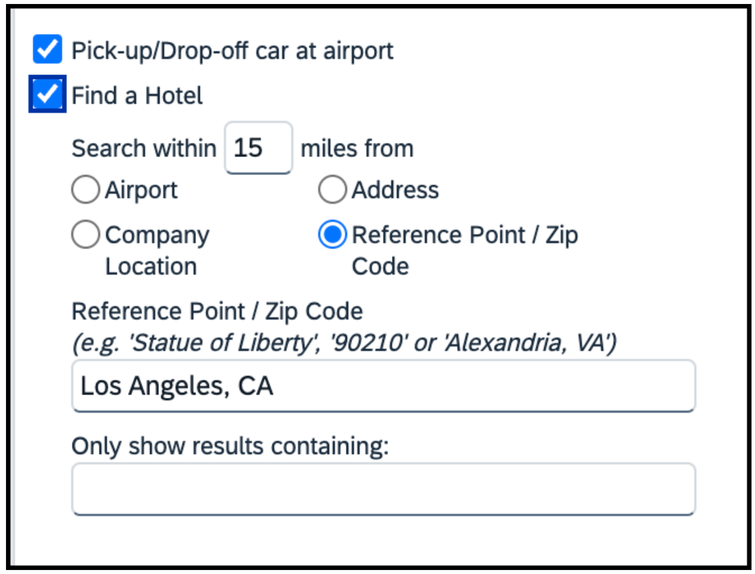
3. Click in the **Depart** and **Return** date fields, and then select the appropriate dates from the calendar.
    1. Use the remaining fields in this section to define the appropriate time range for the flight.
    2. Click the arrow to the right of the time window to see a graphical display of nonstop 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.

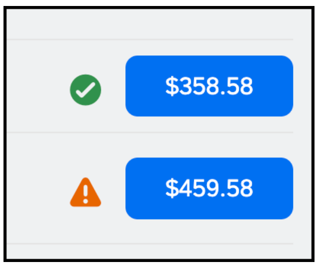


Notes:

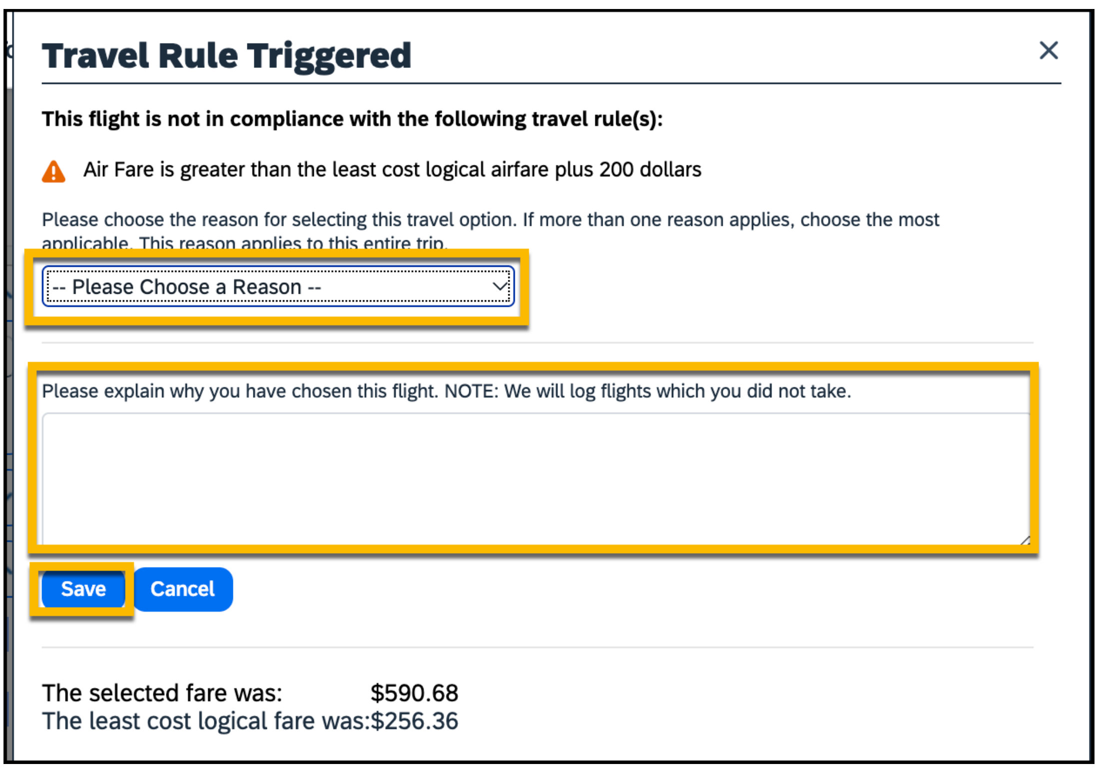
- The graphical display is based solely on flight schedule data.
- Each green bar represents 30 minutes of time. Place your mouse pointer over the green bar to see all the flights available for that time slot.
- If you change locations or dates, click refresh graph for more data.

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.

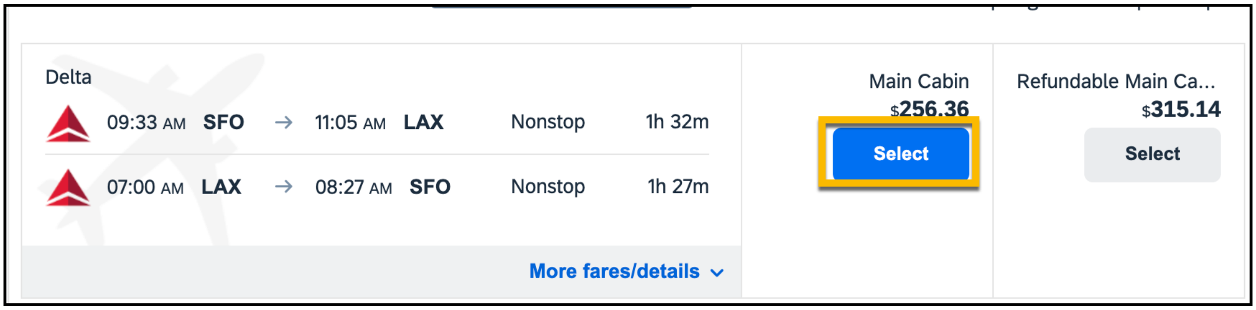




- Flights that are within the policy will have a green check mark next to the fare.
- Flights that have an orange triangle warning next to the fare have triggered a policy rule.
- If you choose an out-of-policy fare, fill out the **Travel Rule Triggered** page.



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

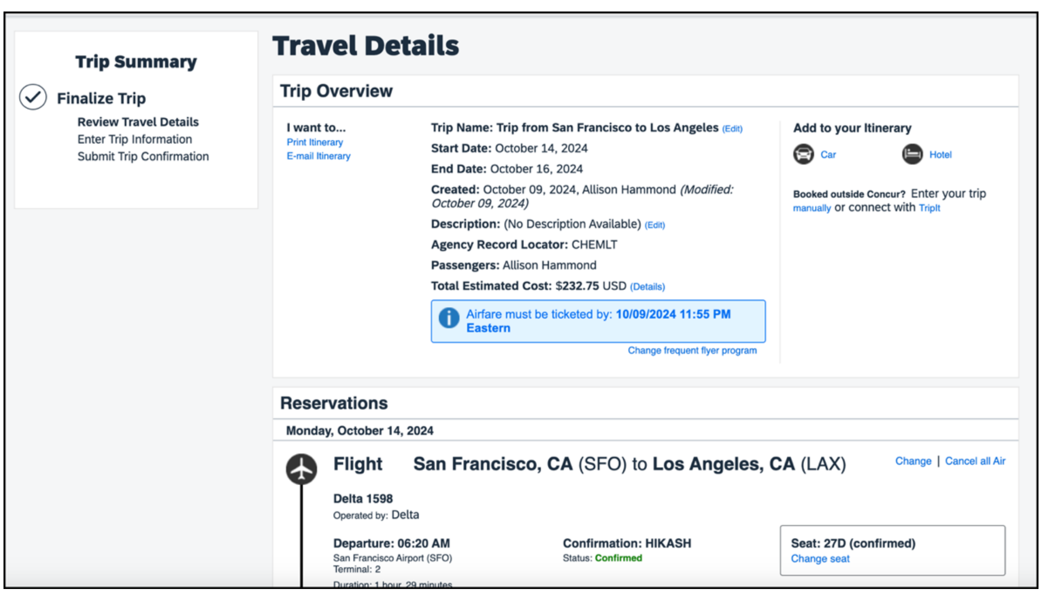


9. Review the flight(s) on the **Review and Reserve Flight** page.
    - Enter Traveler Information
    - Select Seats
    - Review Price Summary

   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 booking a rental car or a hotel separately see Booking a Car and/or Booking a Hotel in this document.

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



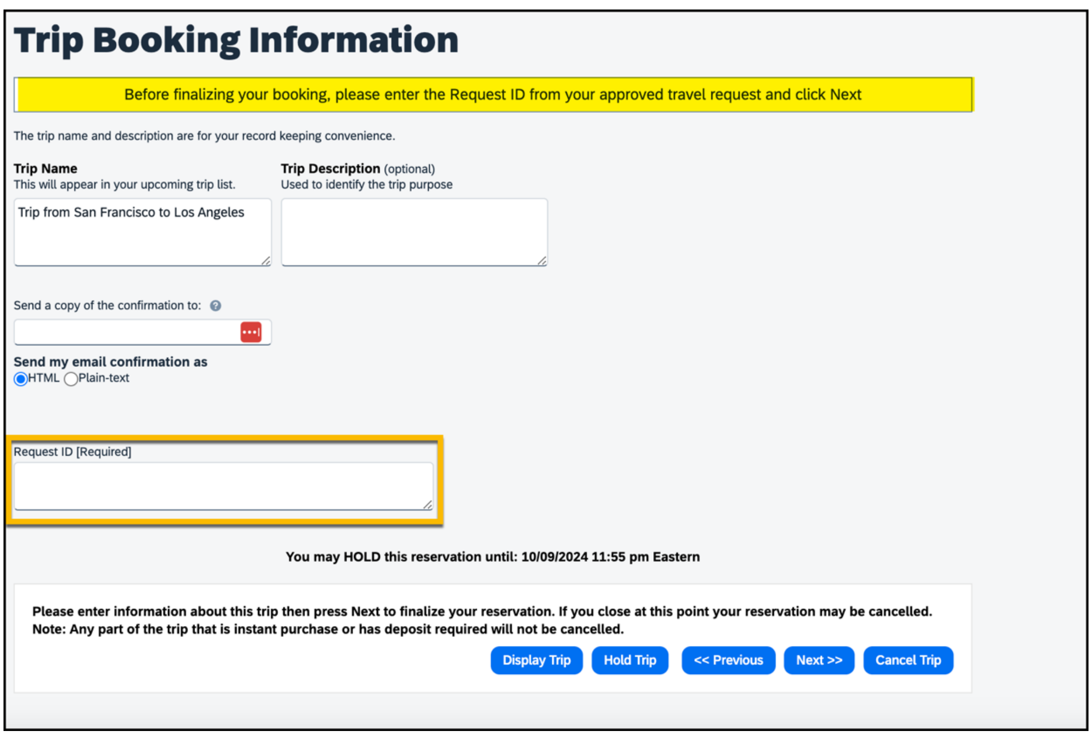
In the **Trip Overview** section:

- 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.

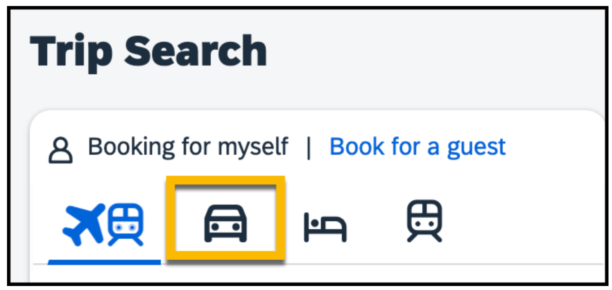
12. Review the Trip **Booking Information** Page, then click **Next**.
    - Enter additional information about your trip.
    - Enter or modify the trip name.
    - Enter a trip description.
    - Indicate if anyone else, besides you, should receive the initial confirmation email.



- Enter the 4-digit **Request ID***
  *This is required. You will not be able to book travel without first submitting a Request and entering the Request ID.
- You may hold the reservation by selecting **Hold Trip**.

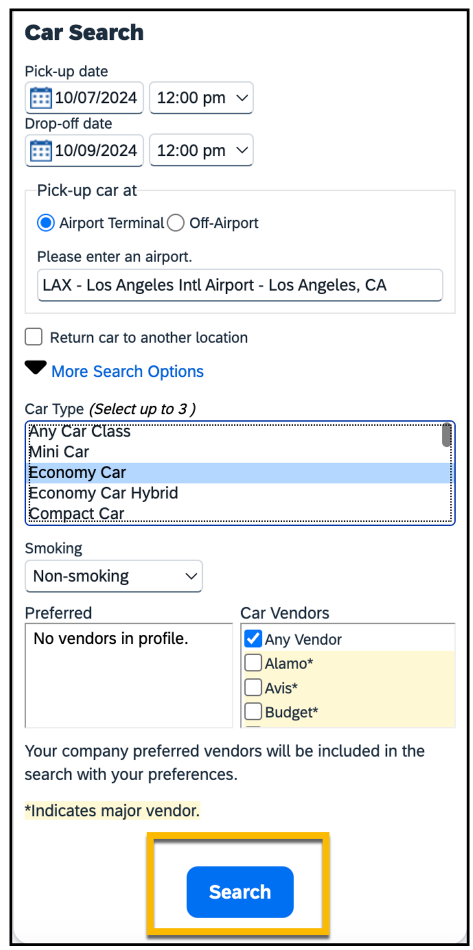
13. **Purchase the Ticket** and click **Finish.**
    - Click Confirm Booking to send your request to Amex GBT.

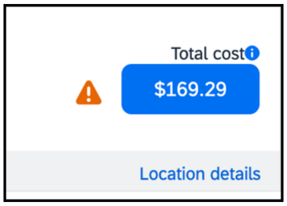
Booking a Car



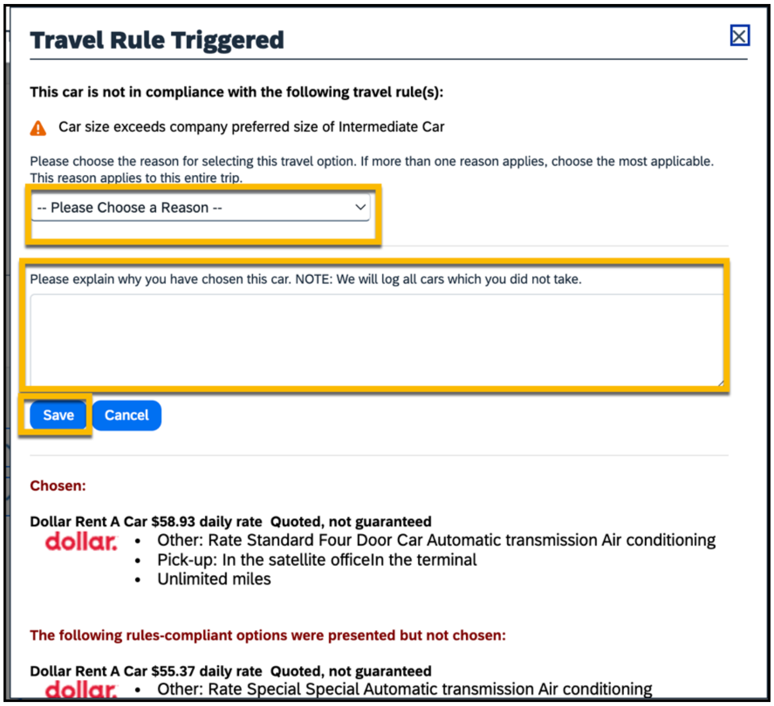
If you require a car *but not airfare*, click the Car tab.

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.



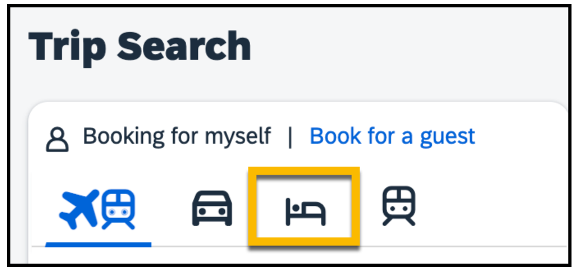


- If a travel rule is triggered, an orange triangle warning will appear.
- If you choose an out-of-policy fare, fill out the **Travel Rule Triggered** page.



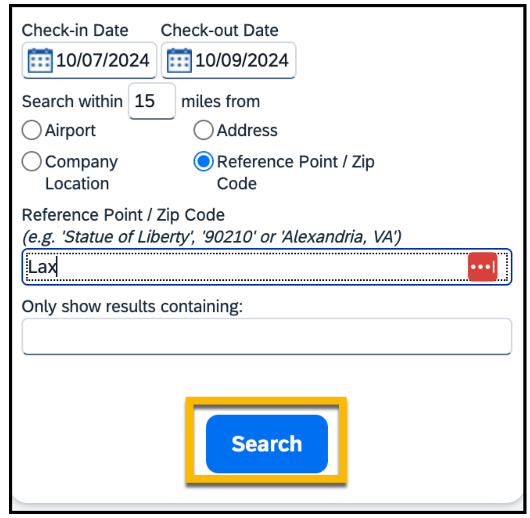
7. From the **Review and Reserve** page, select the appropriate options, enter payment information, click **Reserve Car and Continue.**
8. On the **Travel Details** page, adjust the information as needed, click **Next,** and then **Reserve Car and Continue**
9. Look over the **Trip Booking Information** page and click **Next**.
10. On the **Trip Confirmation** page, review your trip details, click **Confirm Booking,** and click **Save**.

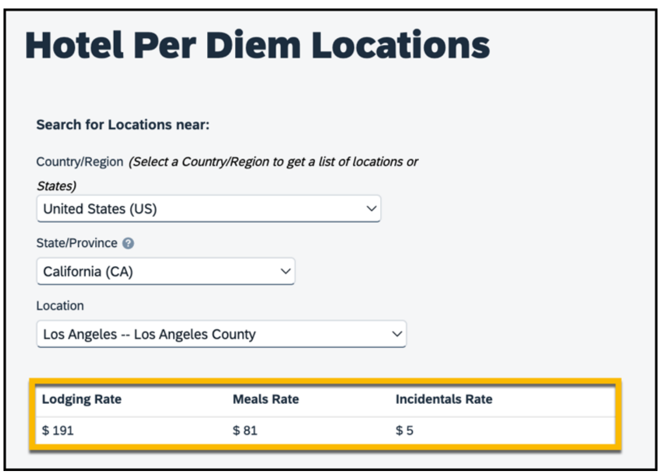
Booking a Hotel



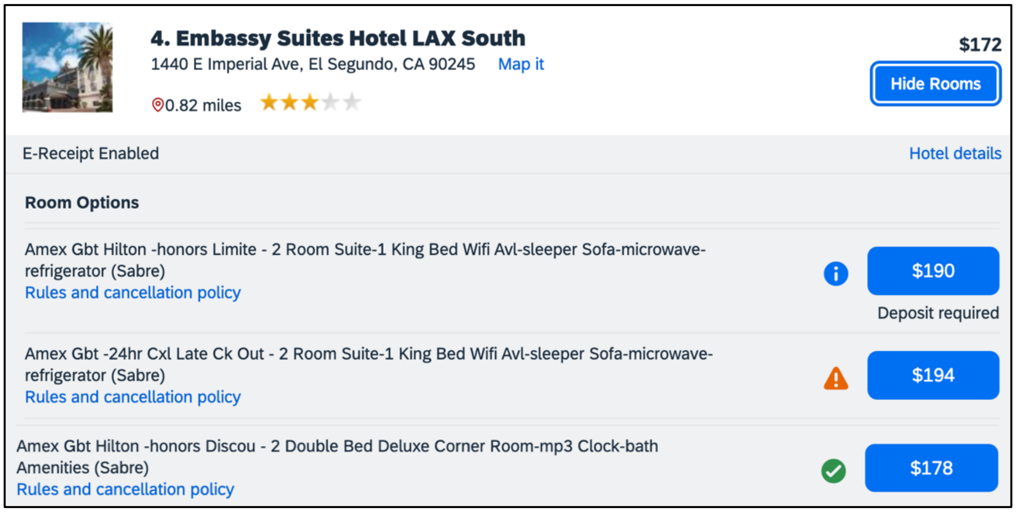
If you require a hotel *but not airfare*, click the Hotel tab.

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**.

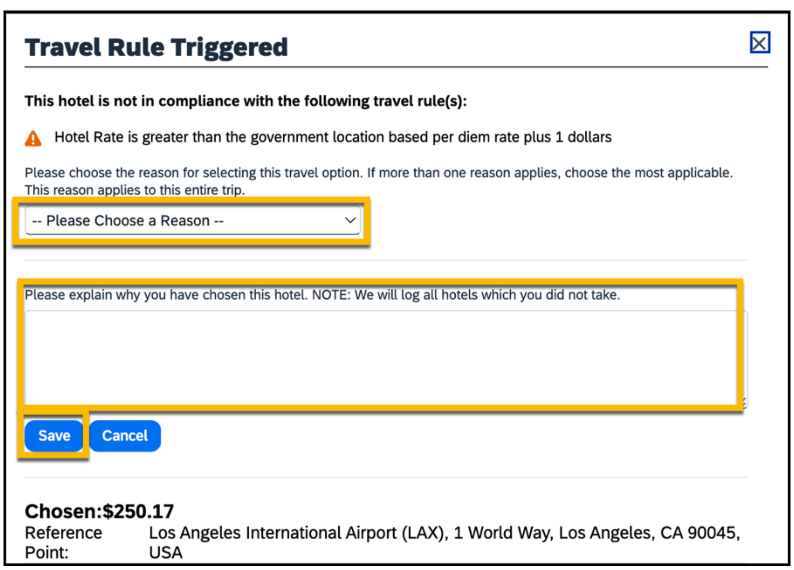




5. Look over the **Preferred Accommodation map**, click **View Rooms** to see room options, and click the blue Price box to select the room.



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



6. From the **Review and Reserve Hotel** page:
   - Review or modify any information.

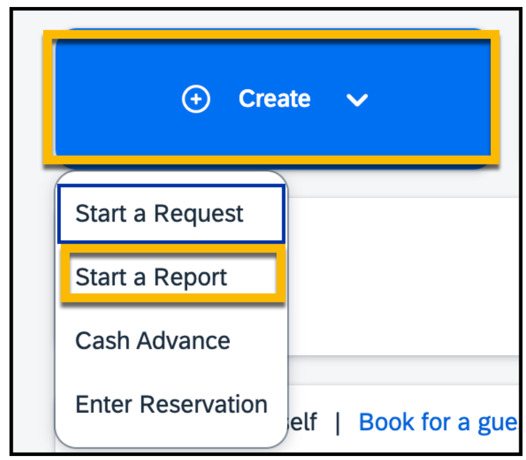
- Select the method of payment.
- Review and accept the rate details and cancellation policy.
- Select the I agree to the hotel's rate rules, restrictions, and cancellation policy checkbox.

Click **Reserve Hotel and Continue.**

7. Look over your **Travel Details** page.

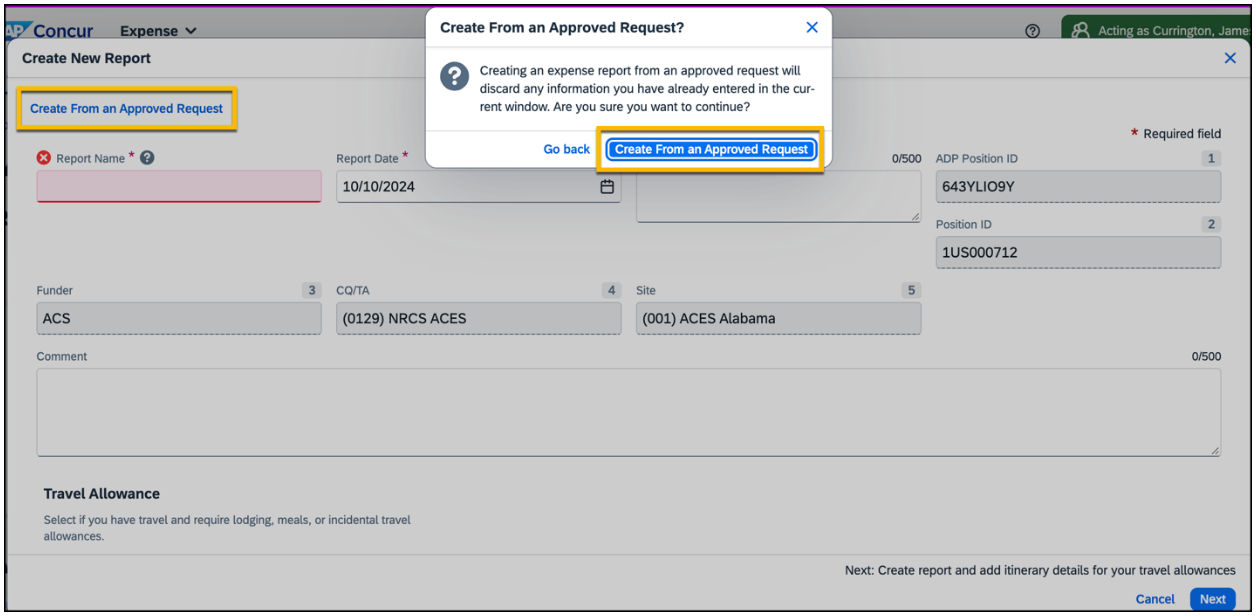
Expense Reports

Creating an Expense Report from an Approved Request



To create a new expense report from the Expense Application:

1. Once the Request has been approved you can create an Expense Report with the expected expenses.
   a. From the **Home** Page, select the **Create** drop-down.
   b. Select **Start a Report**.
   c. From the top of the Report Header, select **Create From an Approved Request**.



1. The expense report will have the same naming convention as the Request.
2. The approved request information, including expected expenses, cash advance, and travel allowance/per diem amounts, will be copied over to the report.
3. 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:

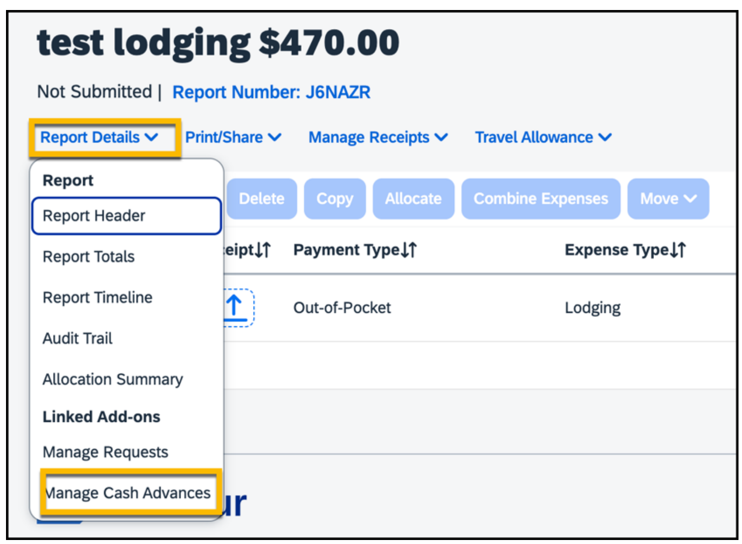
1. Once the Request has been approved you can create an Expense Report with the expected expenses.
    a. Click on the approved Request.

b. Click **Create Expense Report.**

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

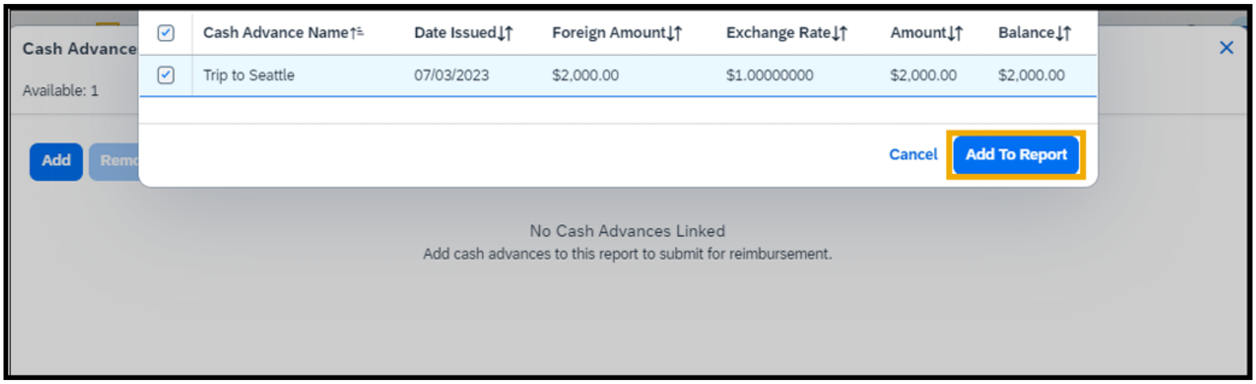
Adding or Removing Cash Advances from an Expense Report

In the following example, you will see how to add or remove an approved cash advance.

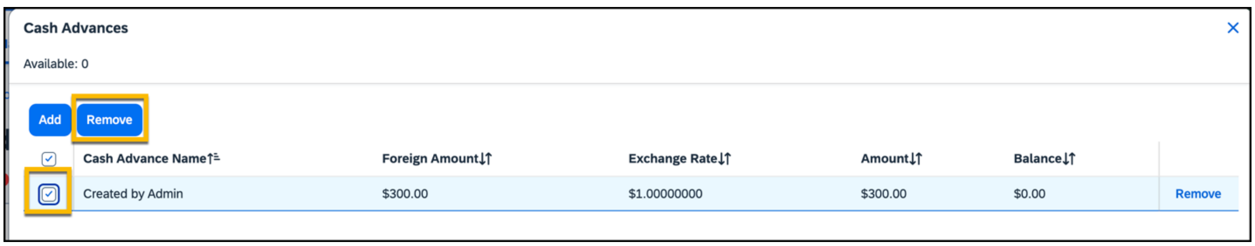


1. On the **SAP Concur** home page, in the **Open Reports** section, select the report to which you want to add/remove the cash advance.
2. From the **Report Details** drop-down, select **Manage Cash Advances**.
3. On the **Cash Advances** page, select **Add** and select the check box for the cash advance you want to add.

4. Select **Add To Report**, or



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



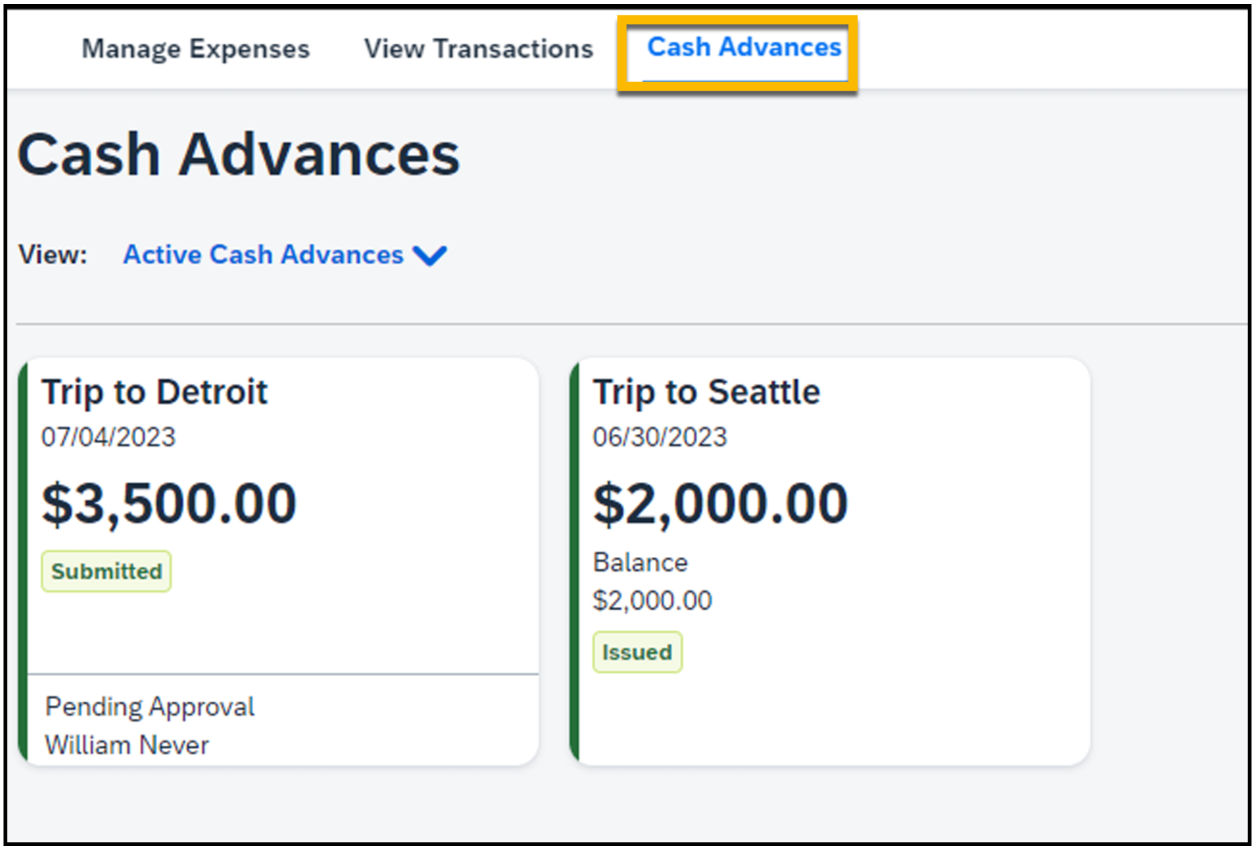
6. After the cash advance is added to the report, select **Close**.

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:

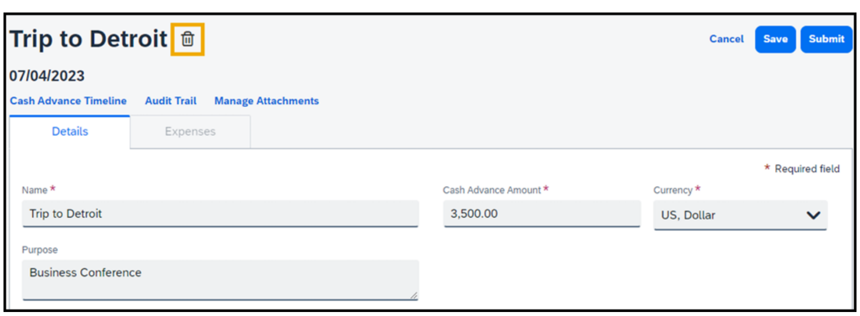
1. From the SAP Concur home page, select the **Home** menu and select **Expense.**
2. Select **Cash Advance**. The **Active Cash Advances** are displayed.



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:

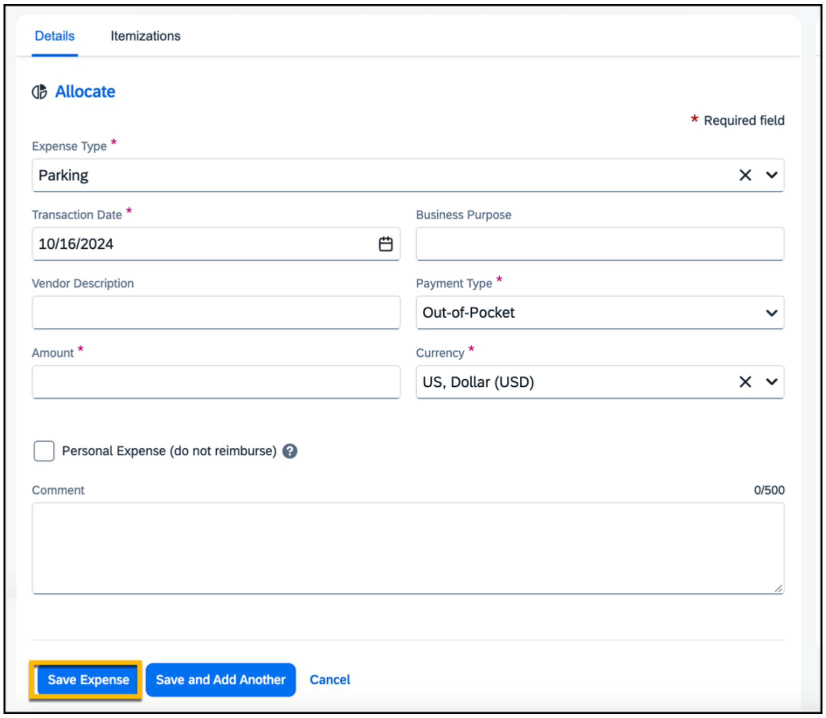
1. Select the cash advance to open it.
2. Select the **Bin** icon, and then select **Yes** to confirm the deletion of the cash advance.



Adding Additional Expenses to an Expense Report

From your open expense report:

1. Select the blue **Add Expense** button on the left side of the screen.
2. On the new window that appears, select from:
   a. **+ Create New Expense** - You will see a list of all available expense types. Recently used expense types will appear at the top of the list. Either search for the Expense Type name using the Search Feld or scroll to Find and select the expense type that best classifies the transaction.
   b. **Available Expenses** – All expenses here have been emailed to your profile, added via the Mobile App, or uploaded from your computer.
3. Complete all required Fields denoted by a red asterisk.
4. Select **Save Expense** (if you only have one out-of-pocket expense to enter) or **Save and Add Another** (if you have additional expenses to enter).

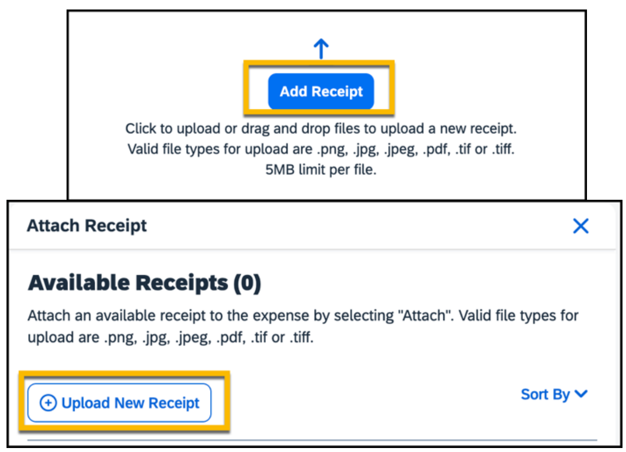


Attaching Receipt Images to an Expense Report

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.



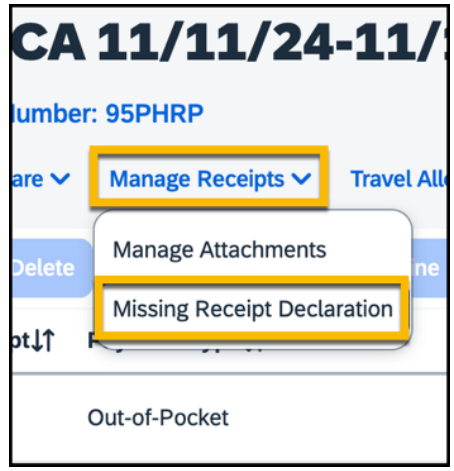
Missing Receipt Declaration

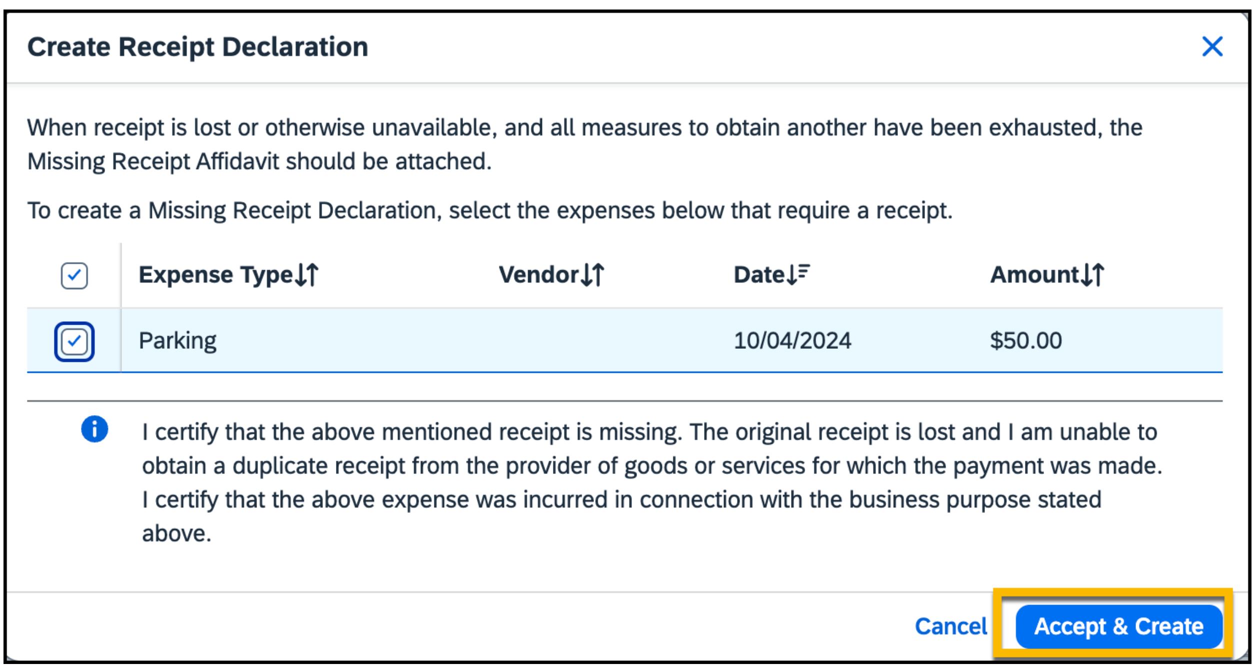
If you lose a receipt for a transaction over $25, you may use the Missing Receipt Declaration (MRD) form.

***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**.





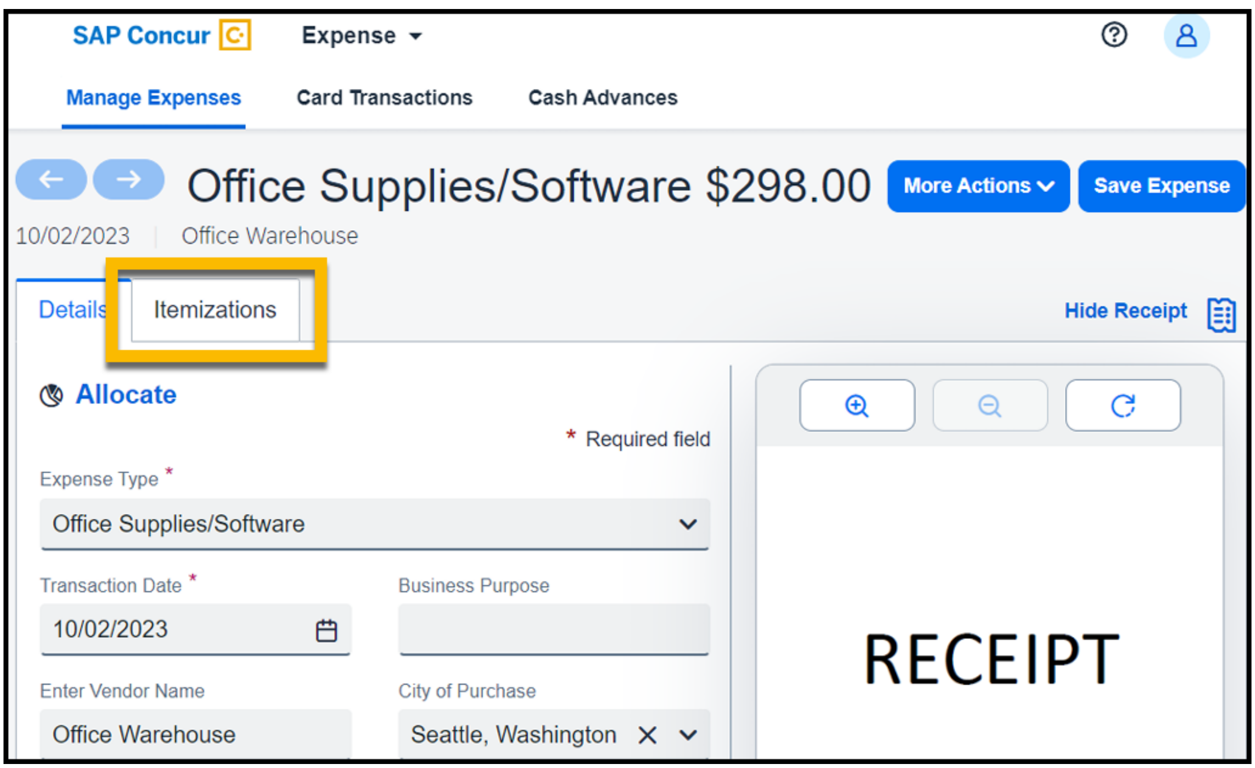
Back on the expense report summary screen, all expenses with a declaration will have a stamp icon in the receipt column.

Additional Expense Report Actions

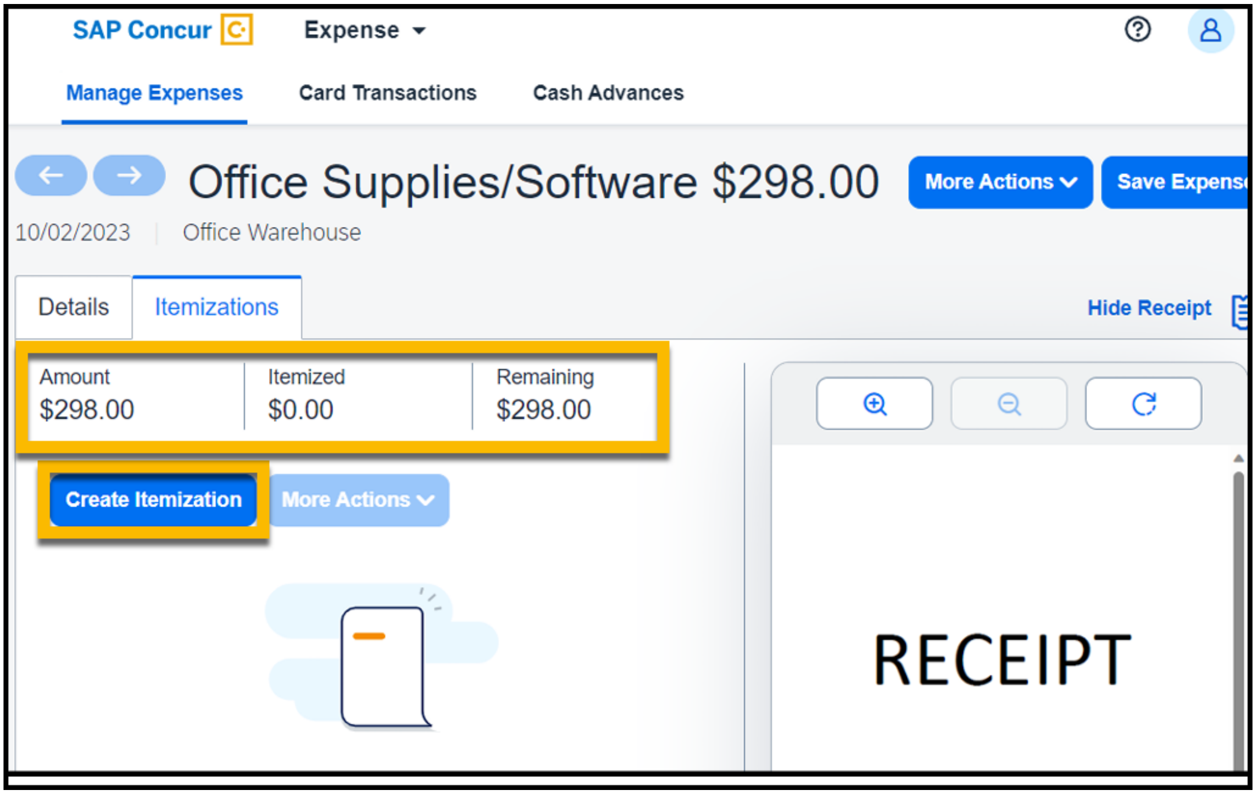
Itemization

You itemize expenses to account for receipts to ensure that each of your expenses is accounted for correctly, such as hotel expenses.
Note: NEW Solutions uses Concurs ExpenseIt technology. This means 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.

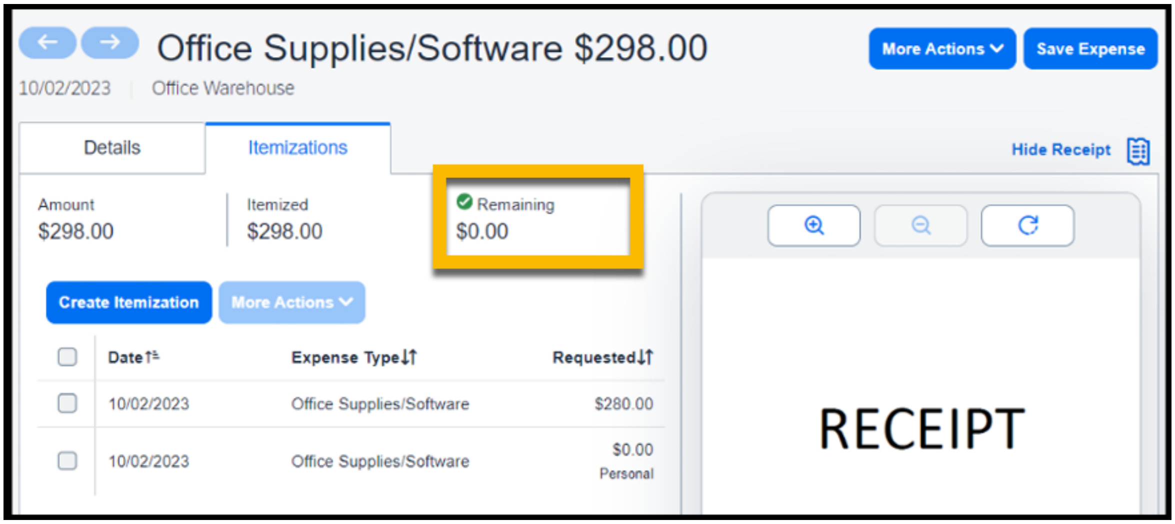
1. To itemize an expense, in your expense report, select the expense to open the expense details.
2. Select the **Itemizations** tab.



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.

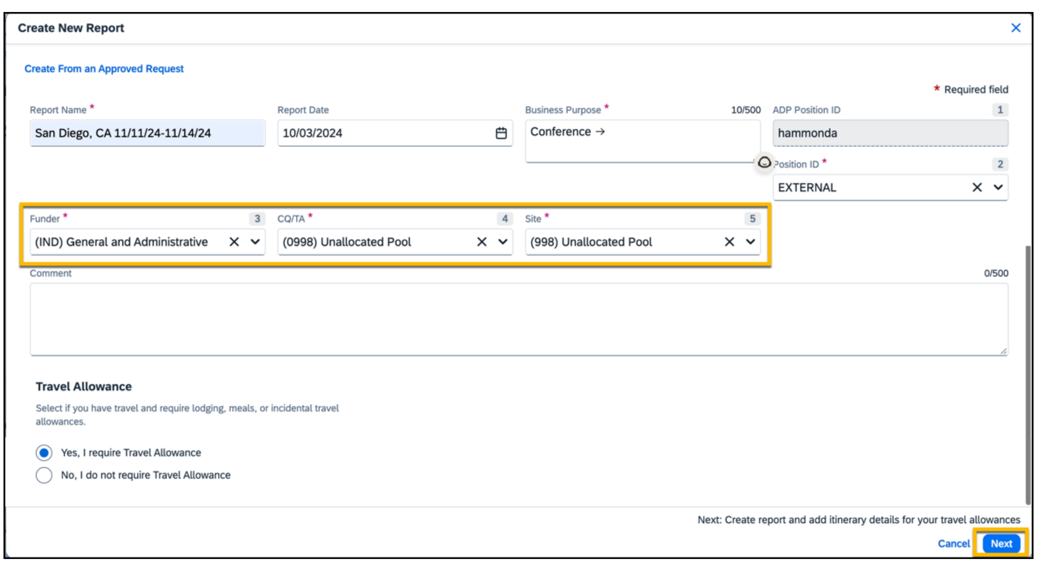


Once you have completed itemizing this expense, a green checkmark appears next to the Remaining amount of $0.00, indicating that you have completed itemizing this expense.

Allocating Expense

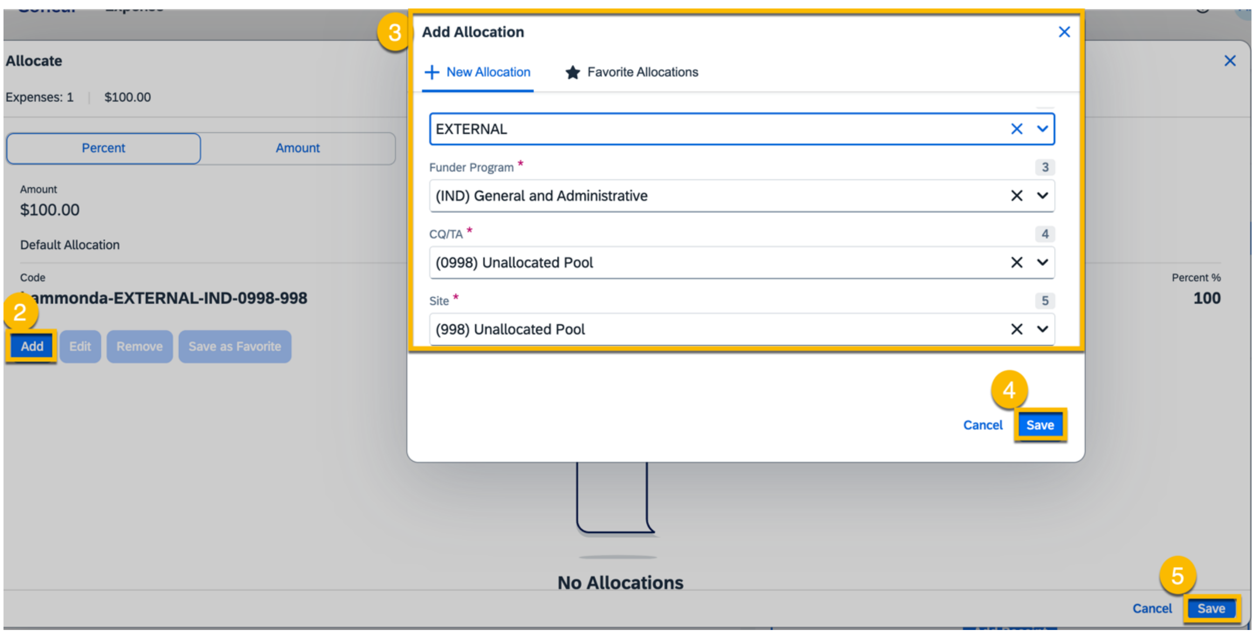
Multi-funded users can allocate an expense to different funds. To Allocate an entire report to a different fund:

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**.



To Allocate a single expense:

1. Open the expense line item on your report and select the **Allocate** link under the **Details** tab. This will open a separate allocate screen.
2. On this page, you can allocate by **Percent or Amount**. Once you make your allocation type selection (i.e., percent or amount), click the blue **Add** button.
3. Fill in the Fields that you wish to allocate to.
4. Once populated, select **Save**.
5. Back on the allocation screen, you can adjust the amount and select **Save**.

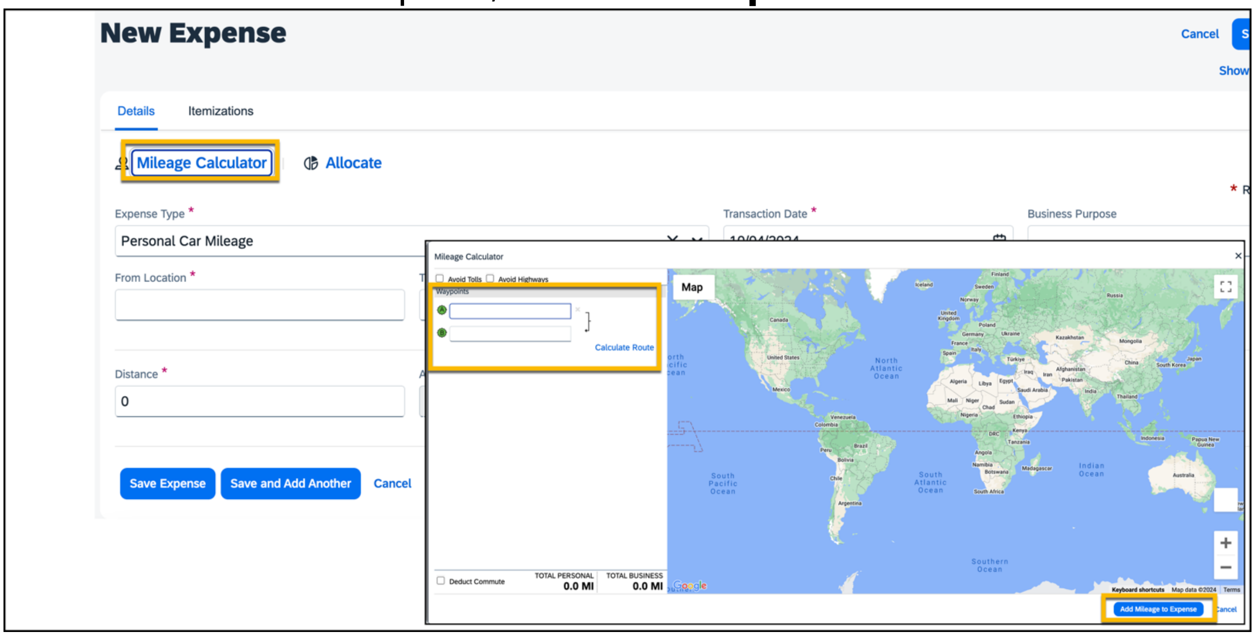


Adding Personal Car Mileage

To add Personal Car Mileage:

1. After creating your report, add the **Personal Car Mileage** expense type.
2. Click **Mileage Calculator**.
3. Enter your Waypoints.

4. There is an option to make this a round trip and to add as many stops as you need.
5. When complete select **Calculate Route.**
6. The distance & amount are automatically calculated and added to the expense entry.
7. Enter all the required expense information.
8. When complete, click **Save Expense.**



Copying, Deleting, or Editing an Expense

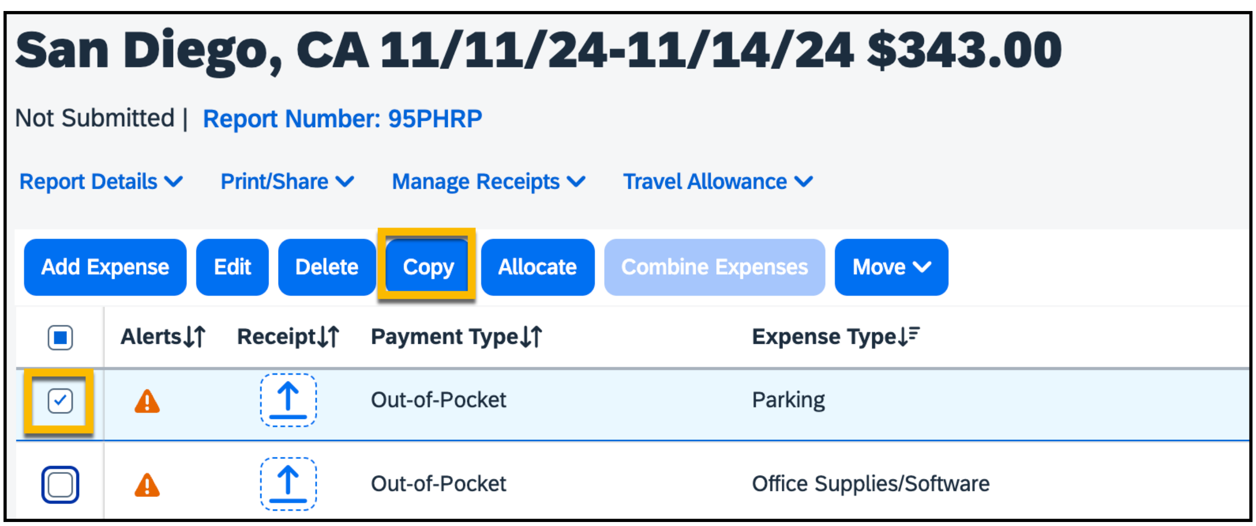
On your expense report home page, you will see a few additional actions that you take with your expenses such as copying, deleting, editing, or moving line items.

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:

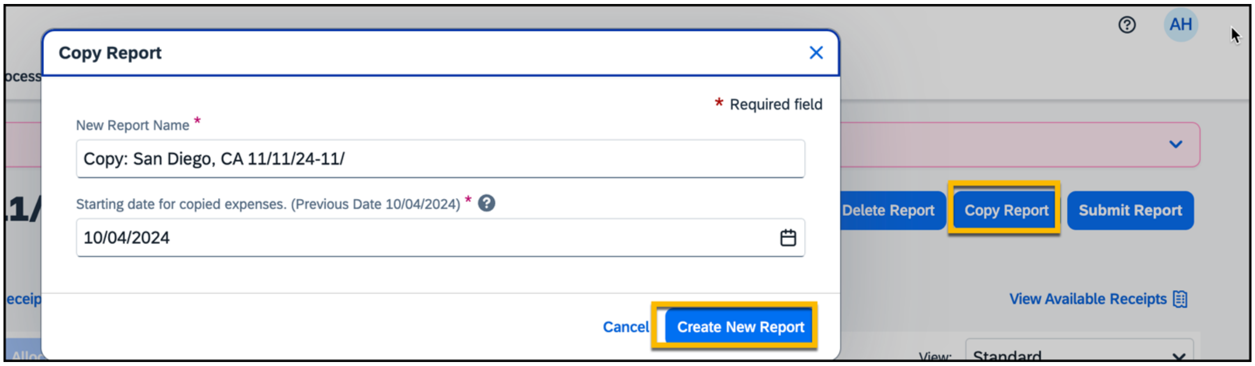
1. With the expense report open, select the expense you want to copy using the check box.
2. Select the blue **Copy** button.
3. The new expense is created. The Expense Type and Amount are copied to the new line item.
   Note the following:
   a. The original expense date is advanced by a day.
   b. The expense-level comments from the original expense are copied to the new expense.
   c. 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.

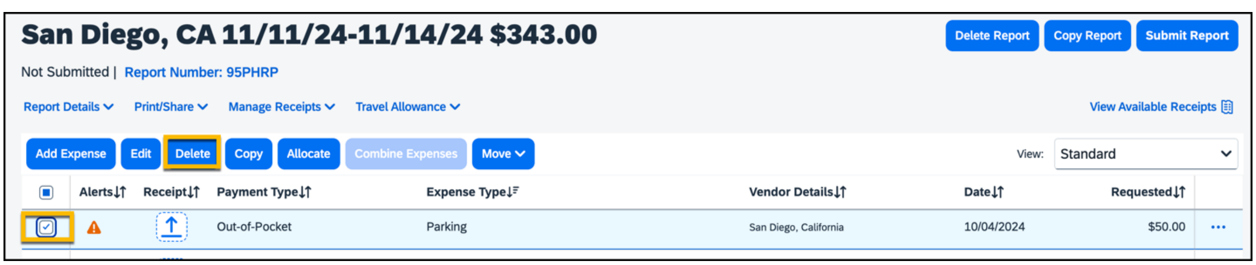
2. Enter the **New Report Name** and the **Starting Date** for the copied expenses.
3. Select **Create New Report**. Your new report is now created and can be modified and adjusted as needed.



Deleting an Expense Line Item or Report

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

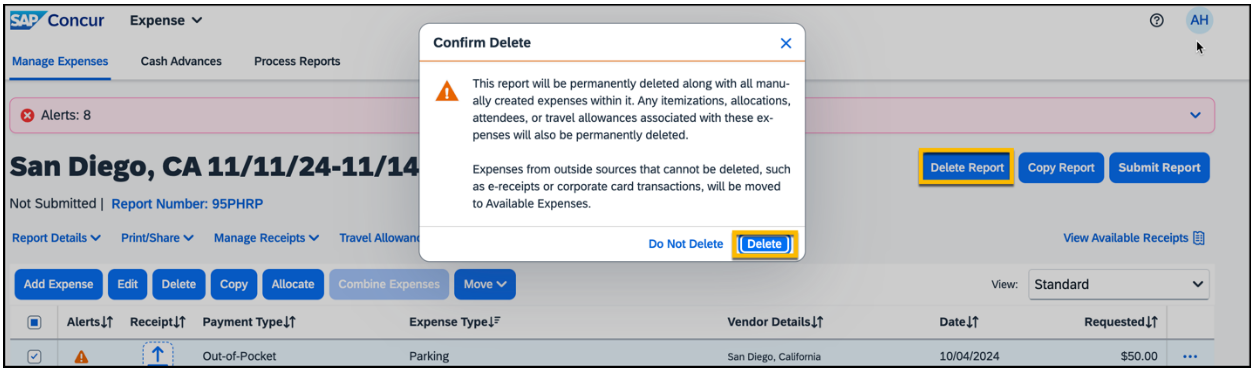
1. With the expense report open, select the expense you want to delete using the check box.
2. Select the blue **Delete** button.
3. Confirm you want to delete the expense by selecting **Delete from Report**.



Deleting an entire expense report:

1. With the expense report open, select **Delete Report**.

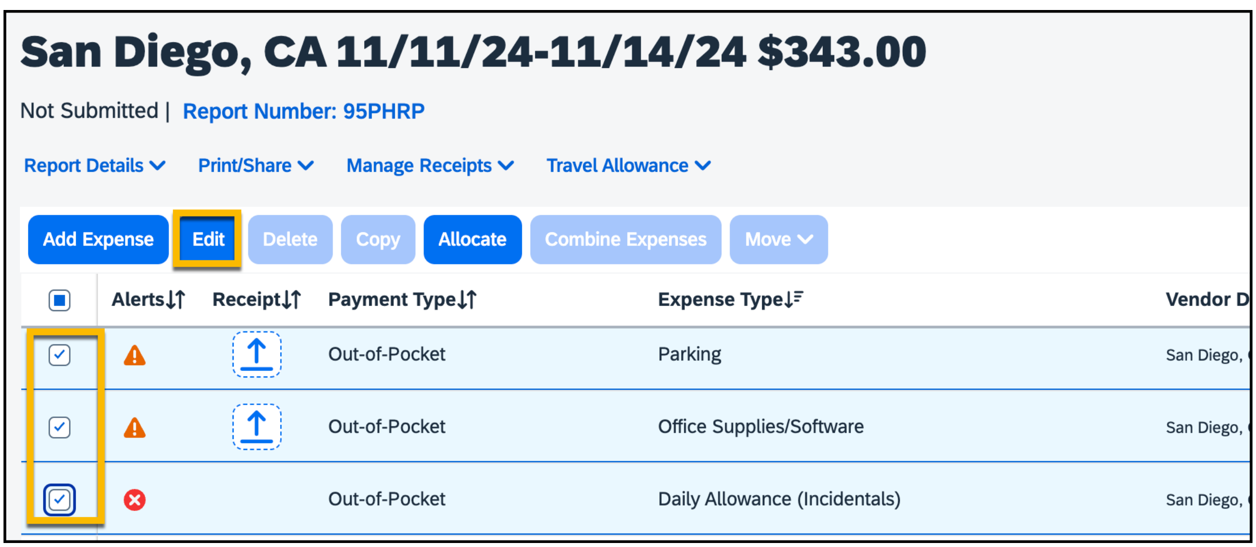
2. Confirm you want to delete the expense report by selecting **Delete.**



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 blue **Edit** button.
3. Once you are finished making any updates or modification's, select **Save Expense**.

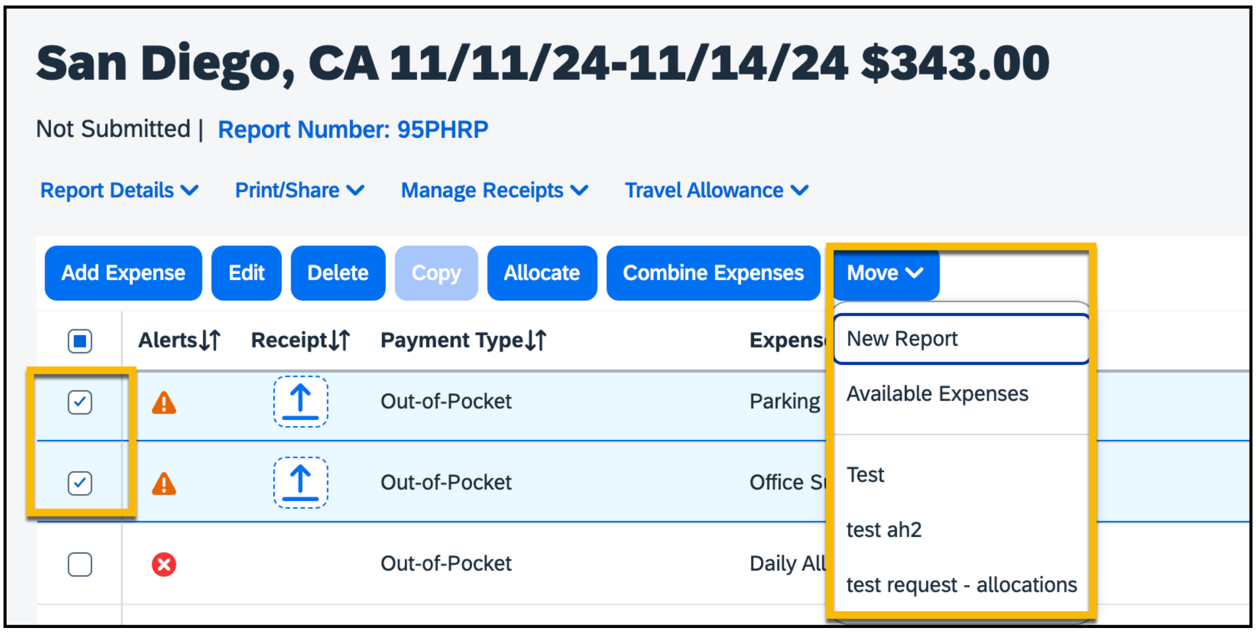


NOTE: You can also open a line item on your expense report by clicking anywhere on the line item such as the Expense Type, Date, Amount, etc.

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.



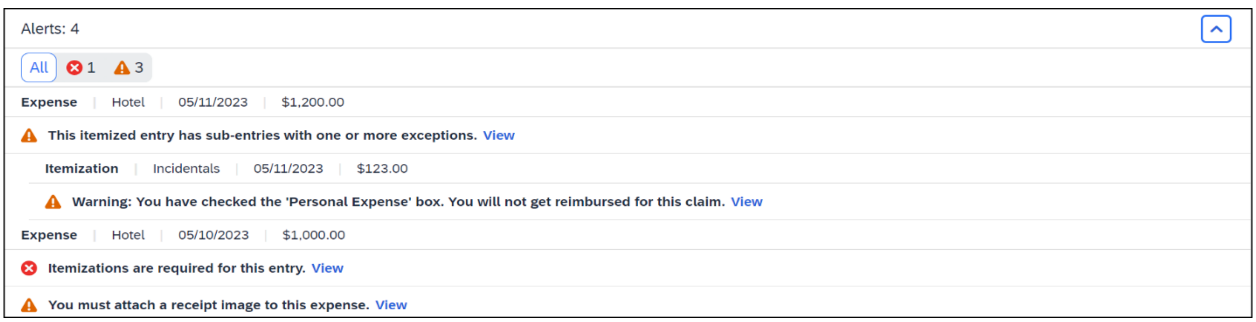
Reviewing and Resolving Exception Messages

Before submitting your expense report, ensure you 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 will not be able to 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.



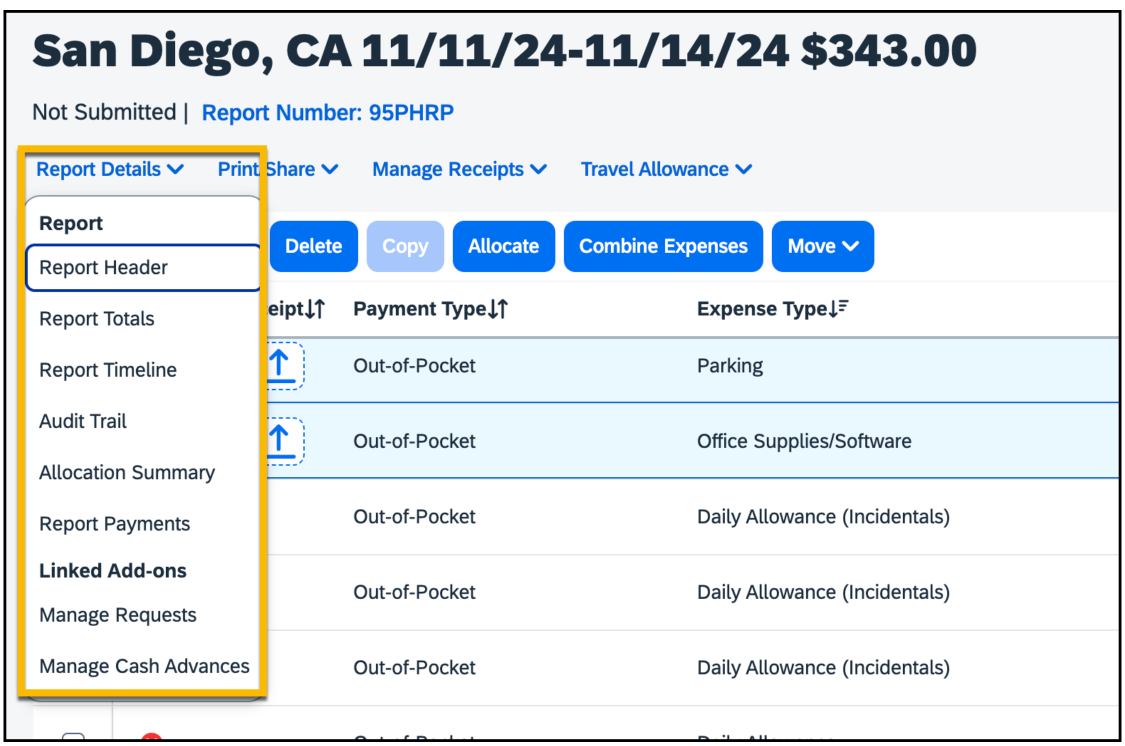
Report Details

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, be sure to 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.)



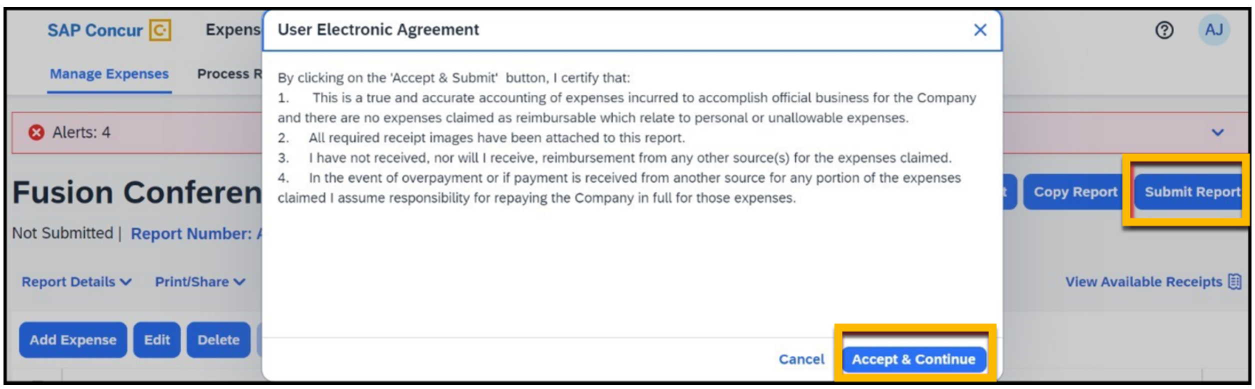
Submitting an Expense Report

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.

Note: In the event you submit your report prematurely or need to correct something before it is approved by your manager, 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.



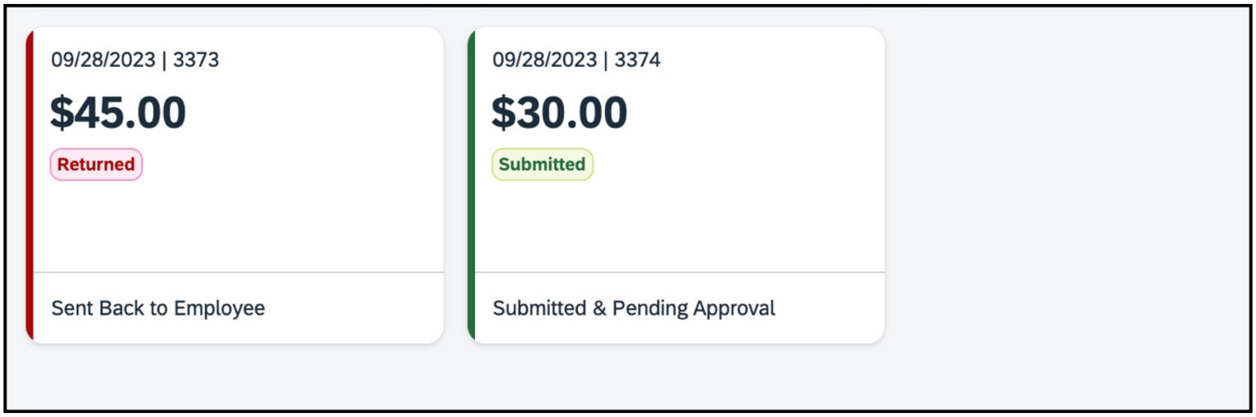
Correcting and Resubmitting an Expense Report

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**.