



Concur Terminology Reference Guide

1. **Active Reports:** Reports in the Expense Module that are considered active by Concur. Concur considers active reports to be ninety days or less even if the reports have a status of completed, approved, and paid.
2. **Active Requests:** Requests in the Request Module that are considered active by Concur. Concur considers active requests to be ninety days or less even if the requests have a status of completed, approved, and expensed.
3. **Alert:** Indicates an exception, which is indicated by a yellow triangle, that does not prevent submission of the report. Serves as a reminder to double-check this exception before submitting the report.
4. **Approval Change:** Approval change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.
5. **Audit Trail:** A record of all changes made to a request and/or expense report. There are two types of items that appear in the Audit Trail: actions at the report level (approvals) and actions at the entry level (where changes are made).
6. **Cash Advance Administrator:** A Travel Services staff member who issues cash advances.
7. **Dashboard:** The dashboard is the main page of Concur which shows pending tasks, open reports, and upcoming trips.
8. **Delegate:** Delegates are assigned by the traveler in his/her profile settings to allow another user to build requests and expense reports on his/her behalf.
9. **E-Receipts:** E-receipts are electronic receipts that are automatically sent to Concur from participating suppliers. E-receipts will automatically match with the traveler's itinerary within a report if an expense report was created on a desktop prior to traveling.
10. **Exception:** An action, which is indicated by a red exclamation, that must be resolved before the traveler/delegate can submit the expense report.



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11. **Expense Report:** Formerly known as Sections D-H on the MSU A-03 (blue form), an expense report details pre-paid expenses and out-of-pocket expenses that occurred while the traveler was traveling on behalf of MSU. If the expense was pre-paid by the university (EBTA, procard, or direct pay), the traveler/delegate will need to choose “University Paid-Other” as the method of payment. If the expense was an out-of-pocket expense, the traveler/delegate will need to choose “Out-of-Pocket” as the payment method.
12. **Frequent Traveler Programs:** Programs such as frequent flyer miles, hotel points, parking discounts, and car rental discount programs that travelers have registered for.
13. **Mobile App:** The Concur mobile app allows travelers to build itineraries, take pictures of receipts, stores receipts, and submit reports.
14. **Payment Status Change:** Payment status change appears within the audit trail whenever the approval of an expense report is changed; either by the system or by a user.
15. **Reviewer:** An employee who can review (not approve) reports on behalf of an approver. This role must be assigned by the approver in his/her profile.
16. **Request:** A request is used to receive approval for an upcoming trip such as conferences, meetings, and out-of-state travel. It is used to estimate the cost of and upcoming trip, verify the funding/budget, and approval to travel and book travel if needed. Formerly known as Sections A-C on the MSU A-03 form (blue form).
17. **Segments:** Segments are used to add estimated expense amounts to the Request for airfare, hotel, rental car, and rail. Once the Request is approved, the segments will be used for booking. If the self-booked method was selected within the request, Concur will use the segments to make the traveler’s reservations through the Concur Travel Module. If the agency booking was selected, segments are still needed for the department head to approve and for Travel Leaders to book.
18. **Travel Allowance:** Travel Allowance is the daily meal allowance that is set forth by the State of Mississippi.
19. **Travel Assistants/Travel Arranger:** Travel Assistants/Arrangers are assigned by the traveler within his/her profile to allow another user to book travel on his/her behalf.



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