



MISSISSIPPI STATE
UNIVERSITY™

TRAVEL SERVICES



Concur Expense User Guide

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What is Concur?

Concur is an online tool that fully integrates all aspects of preparing for and processing travel for Mississippi State University employees and students. Concur allows for electronic processing for all travel requests, travel reservations, and travel reimbursements.

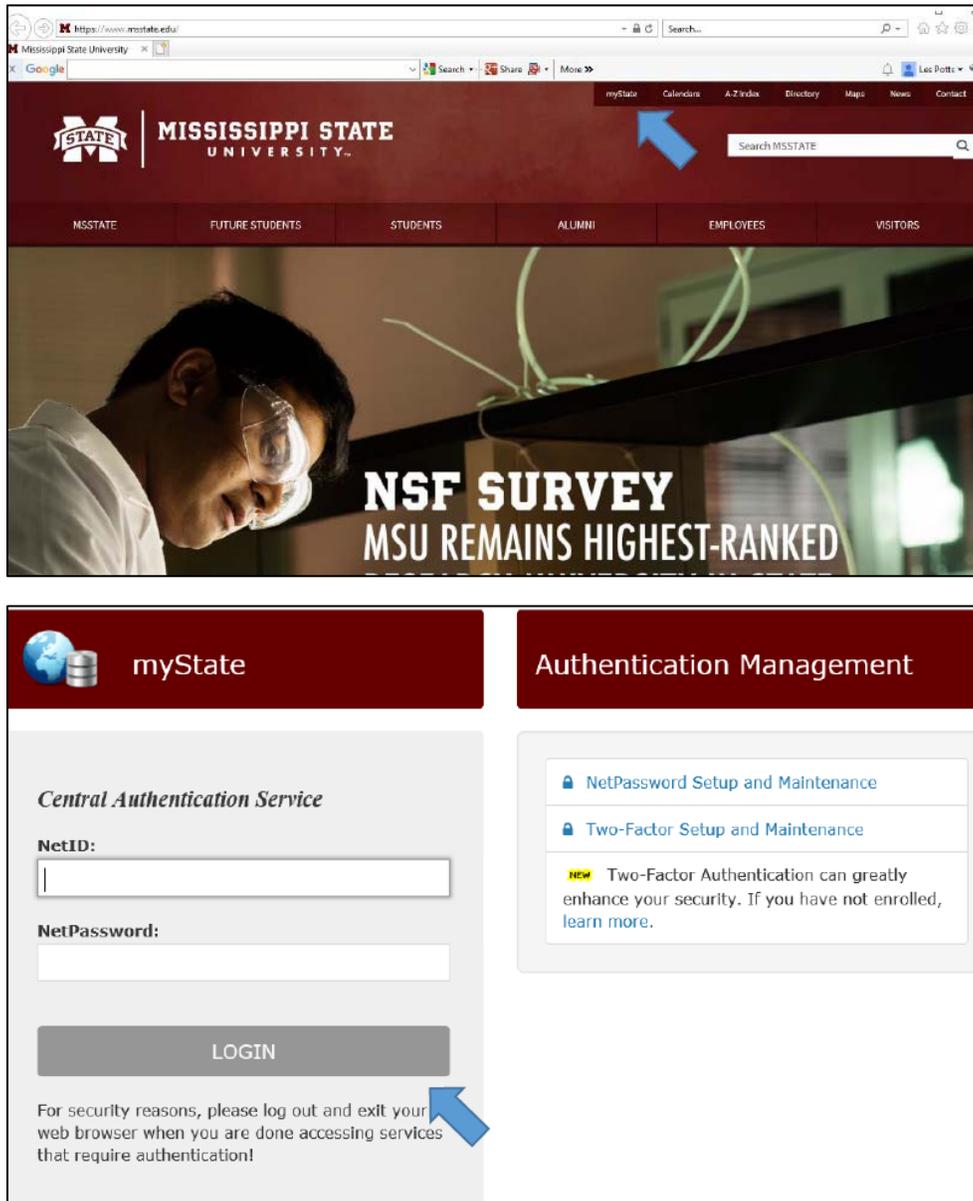
Concur Modules

- Request
 - Concur Request should be used to create a report showing an estimated cost of a potential trip that will be forwarded to the traveler's next higher administrator for approval/disapproval.
 - If the traveler needs a cash advance, he/she should request the cash advance within the request prior to submitting the request for approval/disapproval. Once the request is approved by the next higher administrator, the cash advance will go to Travel Services to be issued. If the traveler is self-booking in Concur, the cash advance will go to Travel Services to be issued after he/she completes the booking.
 - The Request module replaces Section C signatures on the MSU A-03; a request should be created in any instance in which you would need permission to travel (out-of-state, conference, seminar, annual meeting, cash advance).
- Travel
 - The Travel module is used to reserve air/rail, hotel, and car once the Request to travel has been approved by the next higher administrator.
 - The Travel module gives travelers an online view of Travel Leaders inventory. Selections made are strictly reservations. A representative from Travel Leaders will complete all bookings.
- Expense
 - The Expense module is used to create a report with all expenses incurred while traveling on behalf of MSU. This report will be forwarded to the traveler's next higher administrator for approval/disapproval prior to being sent to Travel Services for final approval/disapproval.
 - The Expense module replaces Sections D-H on the MSU A-03.



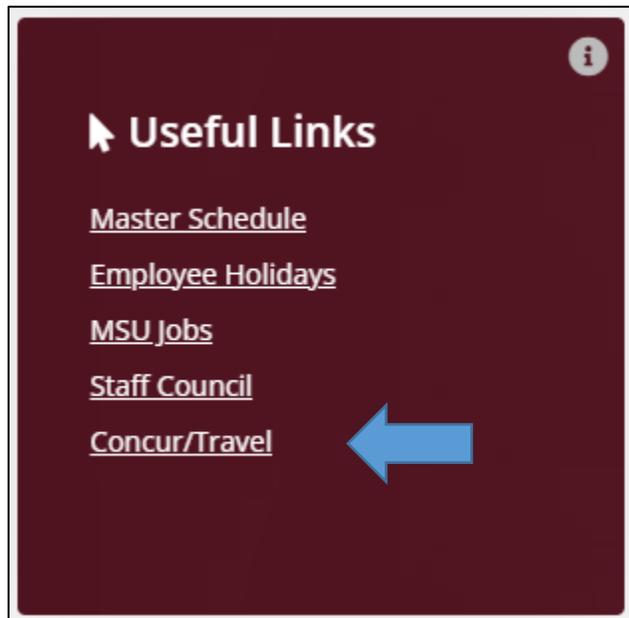
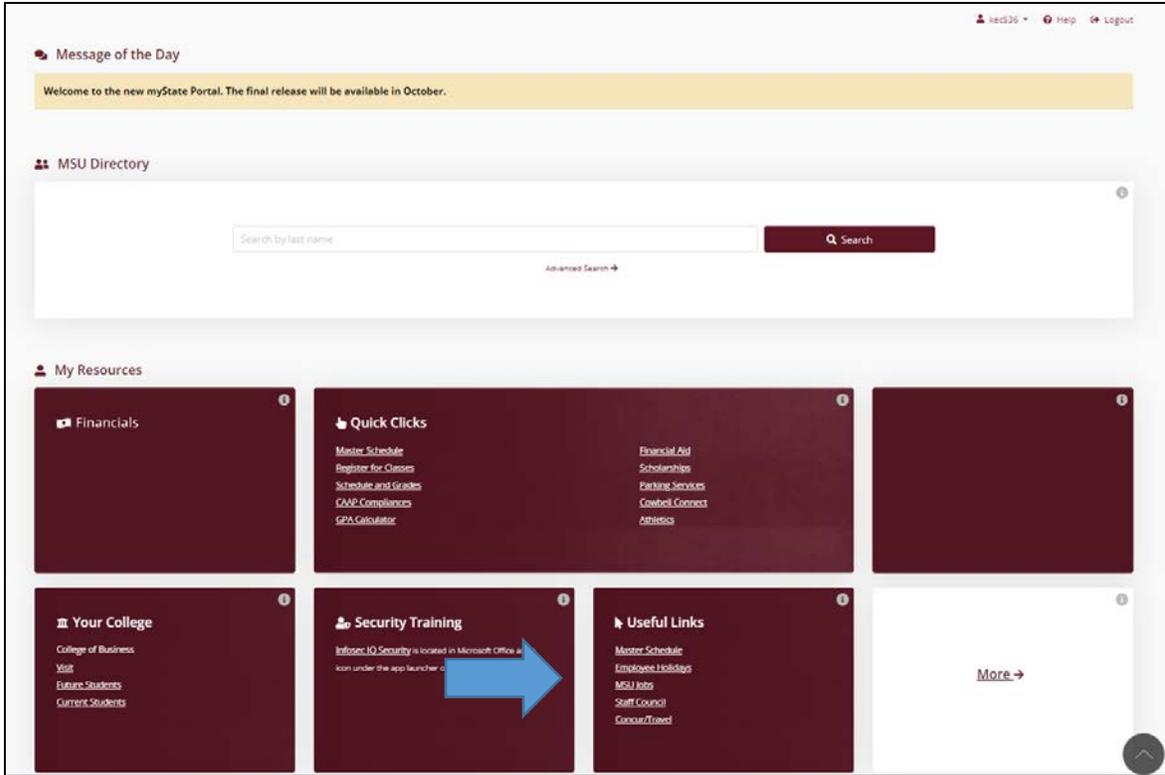
Logging in to Concur

- From the MSU homepage, select **myState**, and sign in with your **NetID** and **NetPassword**.



The screenshot shows the Mississippi State University homepage. At the top, there is a navigation bar with the MSU logo and the text "MISSISSIPPI STATE UNIVERSITY". A blue arrow points to the "myState" link in the navigation bar. Below the navigation bar is a banner image of a person wearing safety glasses, with the text "NSF SURVEY MSU REMAINS HIGHEST-RANKED". Below the banner is a navigation menu with links for "MSSTATE", "FUTURE STUDENTS", "STUDENTS", "ALUMNI", "EMPLOYEES", and "VISITORS". Below the navigation menu is a "myState" login portal. The portal has a header with the "myState" logo and the text "Authentication Management". The main content area is divided into two columns. The left column is titled "Central Authentication Service" and contains a "NetID:" field, a "NetPassword:" field, and a "LOGIN" button. A blue arrow points to the "LOGIN" button. Below the login fields is a message: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!". The right column is titled "Authentication Management" and contains two links: "NetPassword Setup and Maintenance" and "Two-Factor Setup and Maintenance". Below these links is a message: "Two-Factor Authentication can greatly enhance your security. If you have not enrolled, learn more."

- Complete the Two-Factor Authentication by the push notification on your cell phone or the token provided by MSU.
- Once Two-Factor Authentication is completed, you will be sent to the myState homepage.
- Under **My Resources**, scroll to the **Useful Links** section and click **Concur/Travel**.



Exploring the Home Page

The home page contains the following sections. To return to the home page from any other page, click the Concur logo on the top left of the screen.

Section	Description
Trip Search	This section provides the tools you search for quotes for upcoming trips: Flight: Use to search for flight quotes. Car, Hotel, or Rail: Use to search for hotel quotes, rental car quotes, and rail quotes. **If searching for multiple segment quotes (ex: air and car, car and hotel, etc.), search for them one at a time. Retrieve the first segment quote amount and go back to the home page and trip search box to search for the next segment quote. Remember, when searching for segments in Concur, you are viewing live inventory. If you see “Next” at the bottom right when searching for quotes, DO NOT CLICK . This pulls the actual reservation from the airline, hotel, etc.
Alerts	This section displays informational alerts about Travel features.
Company Notes	Important information from Travel Services.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists Required Approvals, Available Expenses, and Open Reports.

The screenshot shows the MSU Travel Services Home Page. At the top, there are navigation links: Start a Request, Start a Report, Upload Receipts, 01 Authorization Requests, 00 Available Expenses, and 01 Open Reports. Below this, the main content area is divided into several sections:

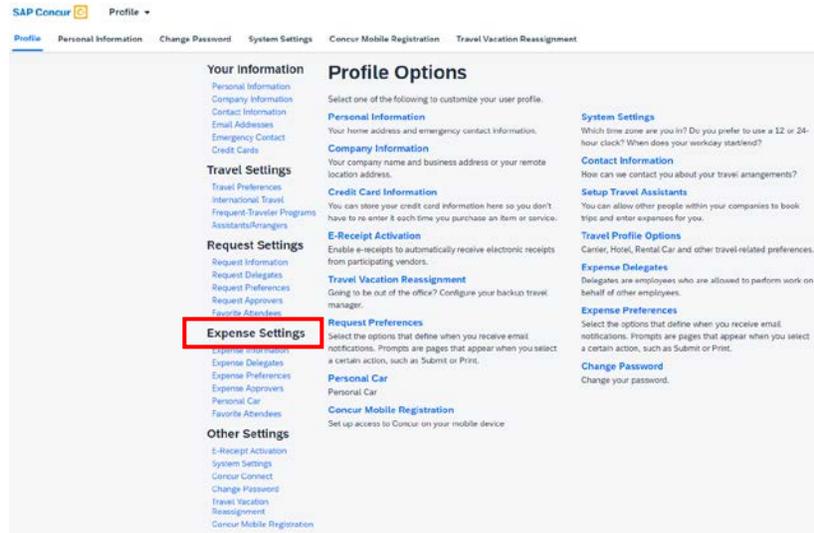
- Trip Search:** A search box with options for Round Trip, One Way, and Multi City. It includes fields for departure and arrival cities and a Search button.
- Alerts:** A section with informational messages, such as "Triptit creates a schedule with all your travel details in one place, accessible on Android or iPhone."
- Company Notes:** A section with a welcome message and travel considerations, including a note about booking travel.
- My Tasks:** A section with three task cards: "01 Open Requests" (with a sub-task for Clark_Pittsburgh,PA_05/01/20), "00 Available Expenses" (with a note that no expenses are available), and "01 Open Reports" (with a sub-task for Clark_G.Shores/Mobile,AL...).
- My Trips (0):** A section indicating that there are no upcoming trips.



Reviewing and Updating Your Expense Profile

Use the profile options to set or change your personal preferences. To access your profile information:

1. Click **KC** (your initials in upper-right hand corner) and then **Profile Settings**.
2. Click the appropriate option from the menu on the left-hand side under **Expense Settings**.



Any updates that are made to your Expense Profile will be reflected in your Request Profile.

If you are updating a profile as an expense delegate for another employee, any changes made will only affect that employee's profile. Your profile as the delegate will not be changed.

Expense Information

Use the **Expense Information** screen to set your default FOAPAL information. The FOAPAL noted here will be applied to all Expense reports.

Expense Delegates

Use the **Expense Delegates** screen to add delegates, edit, or remove delegates. Request and Expense share delegates. By assigning permissions to a delegate, you are assigning permissions for both Request and Expense.

To add a delegate:

1. On the **Expense Delegates** page, click **Add**. The search area appears.
2. Type at least the first three letters of the search criteria (name, email address, etc.).
3. When the desired employee appears, click the name.
4. Select the desired delegate options.
5. Click **Save**.



Option	Description
Can prepare	If selected, the delegate can create requests and expense reports on your behalf.
Can view receipts	If selected, the delegate can view receipt images on your behalf.
Received emails	If selected, the delegate receives a copy of each Expense-related email that you receive, with the exception of approval emails.
Can approve*	If selected, the delegate can approve requests and expense reports on your behalf, without date constraints.
Can approve temporary	If selected, the delegate can approve requests and expense reports on your behalf for a specified period of time. You must also select a beginning and ending date.
Delegate can preview for approver	If selected, the delegate can preview requests and expense reports on behalf of another employee.
Receives approval emails	If selected, the delegate receives a copy of each Expense-approval-related email that you receive.

****The option to delegate approver rights will only be available for approvers. The approver's rights can also be delegated to another user who also has approver rights in Concur.***

To edit delegate information:

1. On the **Expense Delegates** page, make the desired permission changes.
2. Click **Save**.

To delete a delegate:

1. On the **Expense Delegates** page, select the check box to the left of the desired delegate.
2. Click **Delete**.

Expense Preferences

On the **Expense Preferences** screen, you can select the options that define when you receive email notifications and prompts.

Expense Approvers

On the **Expense Approvers** screen, you can view your approver. **This section no longer plays a role/updates in Concur as the approval flow is a manual push system.**

Personal Car

Use the **Personal Car Registration** screen to enter information about your personal car.

Registering a car is required to be reimbursed for vehicle mileage. Since the State of Mississippi requires MSU to reimburse an employee for mileage based on whether there is a State-Owned Vehicle available, you must register twice – one for when there is a SOV available (low mileage rate) and one for when there is no SOV available (high mileage rate).



To register a car:

1. On the **Personal Car Registration** page, click **New**.
2. Type “No State Car Available” in the **Was a State Car Available?** field.
3. Choose **No State Car Available** in the dropdown box titled **Vehicle Type**.
4. Click **Save**.
5. Repeat steps 1-3 choosing the opposite **Vehicle Type**. (Example: If you chose **No State Car Available** on the first entry, repeat steps 1-3 and choose **State Car Available**).
6. Click **Save**.

Favorite Attendees

The attendee functionality in Concur can be used in two ways:

- to enter attendees who are present at a business meal.
- to enter attendees who are part of a group trip.

To add an attendee:

1. Select **Favorite Attendees** (in the Expense Settings section of the left-side menu)
2. On the **Attendees** tab, click **New Attendee**. The **Add Attendee** window appears.
3. Select the appropriate type from the **Attendee Type** list. The page refreshes with the fields appropriate for the selected attendee type.
4. Complete the remaining required fields and other optional fields as desired.
5. Click either:
 - **Save** to save the current attendee.
 - **Save & Add Another** to save the current attendee and add another.

When saving, Expense checks for duplicate attendees. If it finds one or more potential duplicates, you will be prompted to:

- Use the existing attendee information (if the attendee you are adding and the duplicate are, in fact, the same person)
-or-
- Continue adding the attendee (if the attendee you are adding and the duplicate are not the same person)

To delete an attendee:

1. Select **Favorite Attendees** (in the Expense Settings section of the left-side menu).
2. On the **Attendees** tab, select the check box to the left of the attendee you want to delete/hide.
3. Click **Delete**.



Enabling E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace paper receipts. The availability and content of e-receipts vary depending on the vendor. Hotel e-receipts can be used to automatically itemize hotel expenses.

To sign up for e-receipts:

1. Either:
 - On the home page, click **Sign up here**. The **E-Receipt Activation** page appears.
 - or-
 - Click **KC** (your initials in upper-right hand corner) and then **Profile Settings > E-Receipts Activation** (in the Other Settings section of the left-side menu).
2. Click **E-Receipt Activation**. The **E-Receipt Activation and User Agreement** appears.
3. Click **I Accept**. The E-Receipts confirmation appears.
4. Once you have accepted the user agreement, all your corporate cards are opted in. You can choose to opt-out a particular card in **Profile > Credit Cards**. Select the **Edit** icon for the card and uncheck the **Receive e-receipts for this card** check box.

[Profile](#) [Personal Information](#) [Change Password](#) [System Settings](#) [Concur Mobile Registration](#) [Travel Vacation Reassignment](#)

Your Information

- [Personal Information](#)
- [Company Information](#)
- [Contact Information](#)
- [Email Addresses](#)
- [Emergency Contact](#)
- [Credit Cards](#)

Travel Settings

- [Travel Preferences](#)
- [International Travel](#)
- [Frequent-Traveler Programs](#)
- [Assistants/Arrangers](#)

E-Receipt Activation

Save time on your expense reports. When you enable e-receipt syncing, receipts from participating suppliers will be added to your SAP Concur account and used to pre-populate expenses for you. [Enable](#)

Please note that this setting does not control all e-receipts. E-receipts will continue to sync for any participating partners you have connected to your SAP Concur account. Settings for these partners can be managed directly in the SAP Concur App Center under a partner's individual listing. For more information, contact your company's SAP Concur account administrator.



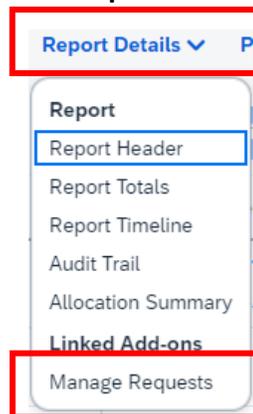
Creating a New Expense Report

Ways to create an expense report from an approved request:

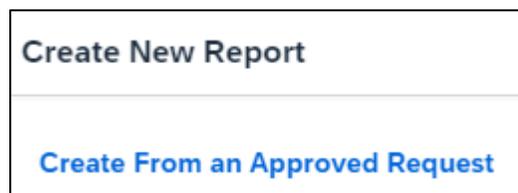
- Click the **Home** dropdown menu (upper-left hand corner) and select **Expense**. Open the appropriate request and click the **Create Expense Report** button at the top right-hand corner.



- Click the **Home** dropdown menu (upper-left hand corner) and select **Expense**. Click the **Create New Report** tile under **Manage Expenses** (on the sub-menu). Under **Request Details**, select **Manage Requests**. From the **Requests** window, click **Add**. Select the appropriate request and click **Add to Report**.



- Click the **Home** dropdown menu (upper-left hand corner) and select **Expense**. Click the **Create New Report** button under **Manage Expenses** (on the sub-menu). Click the **Create From an Approved Request** link in the upper-left hand corner. A window will appear asking if you wish to continue, click **Create From an Approved Request**. Select the appropriate request and then **Create Report**.



To create a stand-alone report:

1. Select from the following options:
 - On the home page, on the **Quick Task Bar**, place your mouse pointer over **New**, and then click **Start a Report**.
 - On the home page, in the **My Tasks** section, click **Open Reports**, and then click the **Create New Report** tile.
 - Click the **Expense Tab** then click the **Create New Report** tile under **Manage Expenses** (on the sub-menu).
2. Complete all required fields (marked with red asterisks) and optional fields in the **Report Header** as needed.
3. Be sure to scroll down under the **Additional Comments** section of the **Report Header** to view the **Travel Allowance** section.

Travel Allowance

Will this report have any travel allowance meals? If international travel, select NO.

Yes, I require Travel Allowance

No, I do not require Travel Allowance

4. Click **Save** or **Next** (depending on selection in **Travel Allowance** section).
5. If you selected **Yes** to claiming travel allowance, you'll be asked to complete a travel allowance itinerary and must enter the **Departure City**, **Date**, and **Time** along with the **Arrival City**, **Date**, and **Time**.

The screenshot shows a web application interface for creating a travel allowance report. The title bar reads "Travel Allowances For Report: Clark_G.Shores/Mobile, AL_04/23". The main content area is titled "Itinerary Info" and includes a form with the following elements:

- Itinerary Name:** A text input field containing "Travel".
- Selection:** A dropdown menu showing "MSU PER DIRM".
- Buttons:** "Add Stop", "Include Itinerary", and "Import Itinerary".
- Table:** A table with columns for "Departure City*", "Arrival City", and "Arrival Date Location". The table is currently empty, with the message "No Itinerary Rows Found" below it.
- New Itinerary Stop:** A section for adding a new stop, containing two rows of input fields for "Departure City", "Date", and "Time".
- Footer:** A "Save" button and a navigation bar with "Go to Single Day Itineraries", "Next >>", and "Cancel".

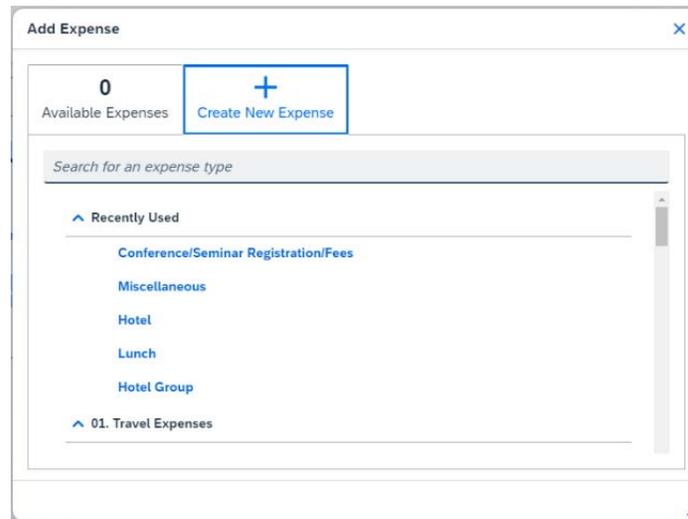
6. If you selected **No**, the travel allowance itinerary will not be required.
7. At this point, you will add an out-of-pocket expense to your expense report.



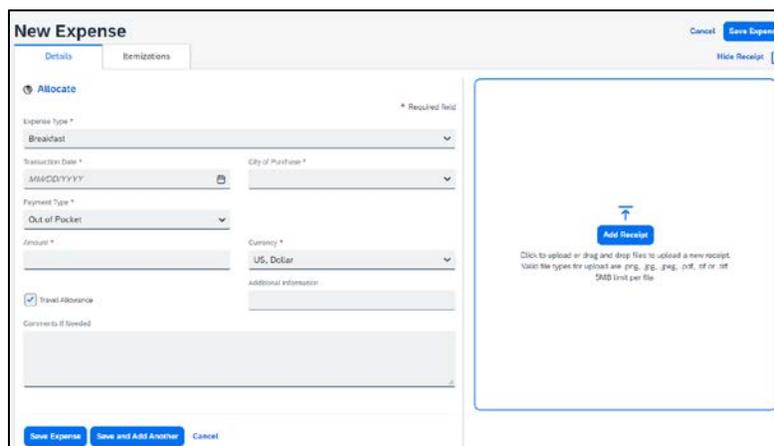
Adding an Out-of-Pocket Expense to an Expense Report

To add an expense to a report:

1. From the open report, click **Add Expense**.
2. On the **Add Expense** window, search for the appropriate expense type.



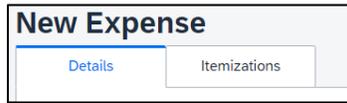
3. Complete the required and optional fields.
 - Click the appropriate option as needed:
 - **Itemizations** tab (to itemize the expense). See page 13 and 16.
 - **Allocate** link (to split the cost between multiple accounts). See page 14.
 - **Upload Receipt Image** (to upload and attach receipt images).
 - **Cancel** (to exit without saving this expense).
 - **Save and Add Another** (to save expense and select a new expense to add).
 - **Save Expense** (to save expense and go back to list of expenses within report).



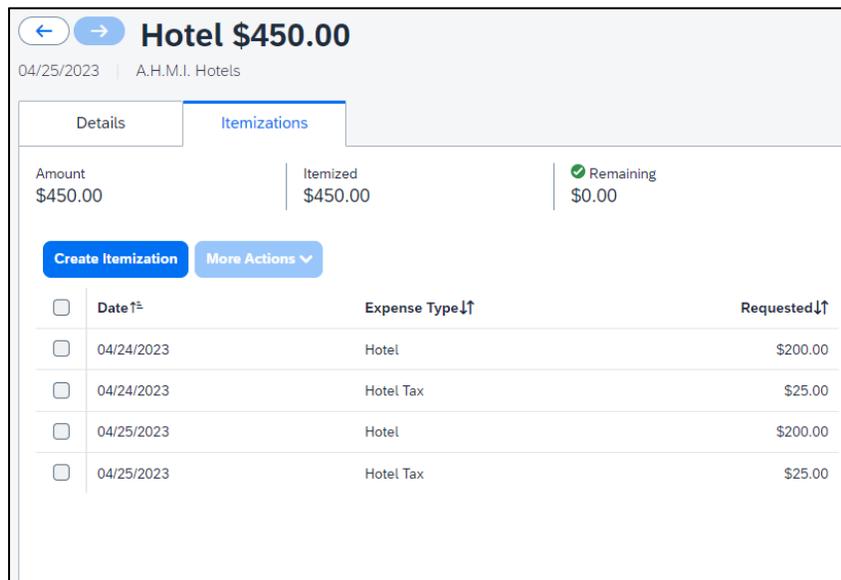
Itemizing Expenses

To itemize an expense:

1. Create the expense as usual, and then click the **Itemizations** tab (instead of Save Expense). The page updates and shows the amount of the expense and what is remaining to itemize.



2. Click **Create Itemization**, select the expense type that applies to the first itemization. The page refreshes, displaying the required and optional fields for the selected expense type.
3. Complete the required fields.
4. Click **Save Itemization**.
5. The page refreshes with the newly created itemization.
6. The total amount, the itemized amount, and the remaining amount appear above the new itemized entries.
7. For each additional itemization, click on the Create **Itemization** button, select the appropriate expense type, and complete the appropriate fields.
8. Once you have itemized the **Total Amount** of the charge, click **Save Expense**.
9. You'll be brought back to the list of expenses you've entered in this report.

A screenshot of a web application interface for itemizing an expense. The title is "Hotel \$450.00". Below the title, it shows the date "04/25/2023" and the vendor "A.H.M.I. Hotels". There are two tabs: "Details" and "Itemizations", with "Itemizations" selected. The summary section shows: "Amount \$450.00", "Itemized \$450.00", and "Remaining \$0.00" with a green checkmark. Below this are two buttons: "Create Itemization" and "More Actions". A table lists the itemizations:

<input type="checkbox"/>	Date↑	Expense Type↑	Requested↓
<input type="checkbox"/>	04/24/2023	Hotel	\$200.00
<input type="checkbox"/>	04/24/2023	Hotel Tax	\$25.00
<input type="checkbox"/>	04/25/2023	Hotel	\$200.00
<input type="checkbox"/>	04/25/2023	Hotel Tax	\$25.00

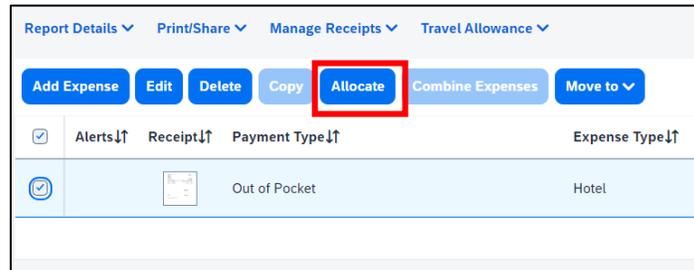


Allocating Expenses

The Allocations feature allows you to allocate expenses to projects or departments, which will be charged for those expenses. You can allocate a single expense or multiple expenses.

To allocate:

1. With the report open, click the checkbox next to the expense you wish to allocate, and then click **Allocate**.



2. From the **Allocate** window, select **Percentage** or **Amount**.



3. Add as many allocations as necessary.
 - You can adjust the amounts and percentages. The total amount must be allocated 100%, otherwise an audit rule is flagged and you will not be able to submit the report.
4. Click **Save**.
5. Review the allocations and click **Save**. The allocation icon appears with the expense.
 - If the expense is 100% allocated (fully allocated), **Allocated** will appear beneath the amount of the expense within the list of expenses in the report.

Requested	
\$450.00	
Allocated	
Itemized	

Copying an Expense

To copy an expense:

1. With the expense report open, select the expense you want to copy.
2. Click **Copy**.
 - Then the new expense is added to the Expenses list:
 - The original expense date is advanced by a day.
 - All allocations, attendees, expense-level comments, and value added tax (VAT) details from the original expense are copied to the new expense.
 - Credit card information, e-receipts, mobile entry information, and travel segments (associated with travel itineraries) from the original expense are **not** copied to the new expense.
NOTE: This type of information is generally associated with only one expense, so it is not copied to the new expense.
 - If the **Payment Type** of the original expense is a credit card, then the **Payment Type** of the new expense is editable using the dropdown list.



Itemizing Nightly Lodging Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Lodging Itemization allows you to quickly itemize recurring room rates and taxes. You can then itemize the remaining charges on your hotel bill and adjust for any rate changes during your stay.

To create a lodging expense:

1. With the expense report open, click **Add Expense**, and select the **Hotel** expense type. The page refreshes, displaying the required and optional fields for the selected expense type.
2. Complete the fields as required.
3. Click the **Itemizations** tab. You will see the total amount of the expense that needs to be itemized.
4. Click **Create Itemization**.
5. Click the down arrow on the drop down under Expense Type. Select **Hotel**.
6. Concur will pull in the dates from the report header. You will have the option to select whether the itemization you are creating is recurring or single.

The screenshot shows the 'Itemizations' tab of a Concur expense report. At the top, there are three columns: 'Amount' with a value of \$450.00, 'Itemized' with a value of \$0.00, and 'Remaining' with a value of \$450.00. Below this is a 'New Itemization' section. The 'Expense Type' is set to 'Hotel'. The 'Entry Type' is 'Recurring Itemization' with dates '04/24/2023 - 04/26/2023 (Nights: 2)'. There are two radio buttons for 'Your hotel room rate was': 'The Same Every Night' (selected) and 'Not the Same'. Below these are four input fields for 'Room Rate (per night)*', 'Room Tax (per night)', 'Tax 2 (per night)', and 'Tax 3 (per night)'. At the bottom left are 'Save Itemization' and 'Cancel' buttons. At the bottom right is an 'Add Tax Fields' link.

7. Enter the **Room Rate**, **Room Tax**, **Tax 2**, and **Tax 3** if applicable.
8. Click **Save Itemization**.

If there is a remaining amount to be itemized (other charges, for example, for incidentals or room service), the remaining amount is displayed in the **Remaining** field on the right side of the **Itemization** pane once you've saved the previous itemization. Continue to itemize the amounts until the balance is \$0.00.



Entering Personal Car Mileage

To create a car mileage expense:

1. With the expense report open, click **Add Expense**, and select the **Personal Car Mileage** expense type.
 - The page refreshes with the required and optional fields displayed, including the **Mileage Calculator** link which is connected to Google Maps.
 - In the **Vehicle ID** field, select the appropriate choice of whether a state car was available. This is how Concur determines the mileage rate to be used.
 - When done, Expense calculates the reimbursement amount based on the miles and the reimbursement rate.
2. Click **Save Expense**.

New Expense Cancel Save Expense

Details Itemizations Show Receipt

[Mileage Calculator](#) [Allocate](#)

Expense Type * **Personal Car Mileage** Transaction Date * **04/24/2023** Report/Trip Purpose * **Conference Attendee**

From Location * To Location * Do you have an A-09 Form on file? **None Selected** Payment Type **Out of Pocket**

Attending multiple meetings? * **None Selected** Additional Information Request * **05/01/2020, \$301.60 - Corder_Bloxi...**

Comments

Vehicle ID * **No State Car Available** Distance to Date **0** Distance * **0** Number of Passengers **0**

Amount **0.00** Currency **US, Dollar** Reimbursement Rates **USD 0.655 per mile**

[View all reimbursement rates](#)

Save Expense Save and Add Another Cancel

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

- Seattle, WA, USA
- Tacoma, WA, USA

33.5 MI Personal

[Calculate Route](#) [Make Round Trip](#)

Directions

Suggested routes:

- NE-S 33.6 mi - about 33 mins
- WA-167 S and I-5 S 38.0 mi - about 44 mins

448-498 Madison St, Seattle, WA 98164, USA

33.0 mi - about 30 mins

1. Head southwest on Madison St toward 4th Ave 197 ft
2. Turn right at the 1st cross street onto 4th Ave 365 ft
3. Turn right at the 1st cross street onto Spring St 0.1 mi

Deduct Commute

TOTAL PERSONAL 0.0 MI TOTAL BUSINESS 33.5 MI

[Add Mileage to Expense](#) Cancel



Attaching Receipts

Uploading Receipts

Files saved to a folder on your computer may be uploaded directly into an Expense Report using the following steps:

Scan the documentation into a .png, .jpeg, .pdf, .html, .tif, or .tiff file; 5 MB limit per file.

1. Click on the **Attach Receipt** icon next to the expense.

<input type="checkbox"/>			Out of Pocket	Hotel	Hampton Inn & Suites Biloxi, Mississippi	04/24/2023	\$450.00 Itemized	▼
--------------------------	--	---	---------------	-------	---	------------	----------------------	---

2. Browse your computer to find the scanned document.
3. Click **Attach**.

Attach Receipt

Don't have a receipt? You'll need to create a missing receipt declaration. [Missing Receipt Declaration](#)

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. [Upload New Receipt](#)

Editbale-Hotel-Receipt-Template-Word-D...
Uploaded: 01/23/2020 11:31 AM

Guest Name :	Conf No :
Address :	Room # :
Arr date :	
Arr Time :	Dep Time :
Dep date :	Guest /Chat
Company :	Invoice No :

Billing Instruction :

Date	Description	Qty	Rate	Amount	Total
20/03/2022	Room Charge	1	200.00	200.00	



Uploading receipts using Available Receipts

Users can upload images to the **Available Receipts** library which stores the receipt until the user is ready to attach it to an Expense Report. Receipts can be uploaded to **Available Receipts** using different methods.

To upload images from the Expense home page:

1. Click the **Home** dropdown menu (upper-left hand corner) and select **Expense**.
2. At the bottom of the page in the **Available Receipts** section, click **Upload Receipt Image**. Your My Computer window appears.
3. Locate the desired image and click **Open**. The image is then available to be attached at any time.

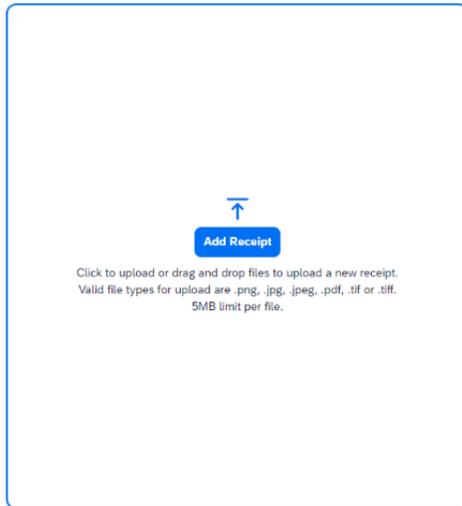
To email images to Available Receipts:

1. Before emailing receipts to the **Available Receipts** library, you must submit your email address for verification in the **Personal Information** section of your Profile.
2. Click **KC** (your initials in upper-right hand corner) > **Profile Settings**. The **Profile Options** page appears.
3. On the left-hand side of the screen, click **Personal Information**.
4. On the **Personal Information** screen, scroll down to the **Email Addresses** section and click **Add an Email Address**.
5. Follow the below steps to verify your email address:
 - Once you have saved an email address, click **Verify**.
 - Check your email for a verification.



Attaching a receipt image to an expense entry using Available Receipts:

1. Select an entry to open it in **Detail** view.
2. Click **Add Receipt**.
3. Locate the receipt image in the **Attach Receipt** window.
4. Click **Attach**.
5. The receipt image is attached to the expense entry.



Delegates and Available Receipts

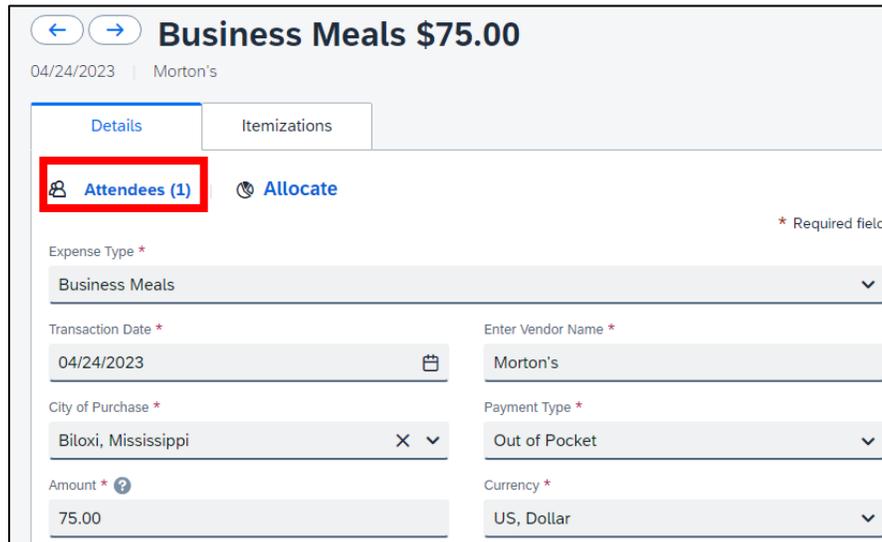
The delegate cannot set up an email account when they are delegating, nor can they use the verified email account they have set up for their own expense reports to populate another user's Available Receipts Gallery. However, the delegate can upload receipt images to Concur for attachment to the line item of the user's report they are acting on.



Adding Attendees to a Business Meal

With the report open, to add an individual attendee to an expense:

1. Select the appropriate expense.
2. Click the **Attendees** link on the **Details** tab.



The screenshot shows a mobile application interface for a "Business Meals \$75.00" report. At the top, there are navigation arrows and the report title. Below the title, the date "04/24/2023" and the vendor "Morton's" are displayed. There are two tabs: "Details" (selected) and "Itemizations". Under the "Details" tab, there is a red-bordered button labeled "Attendees (1)" with a person icon, and a blue "Allocate" button with a clock icon. Below these buttons, there are several required fields marked with an asterisk: "Expense Type" (Business Meals), "Transaction Date" (04/24/2023), "Enter Vendor Name" (Morton's), "City of Purchase" (Biloxi, Mississippi), "Payment Type" (Out of Pocket), "Amount" (75.00), and "Currency" (US, Dollar). A small question mark icon is next to the "Amount" field.

3. Select **Add**.
4. Search your recent attendees or create a new one.
5. Click **Add to List**.
6. When all attendees have been listed, click **Save**.



Acting as a Delegate

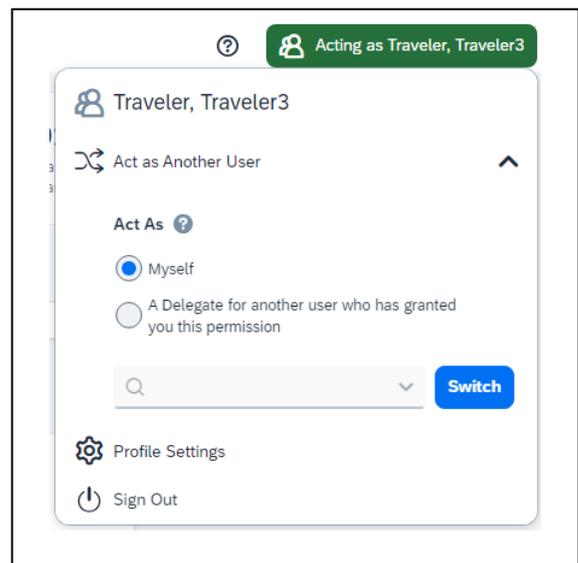
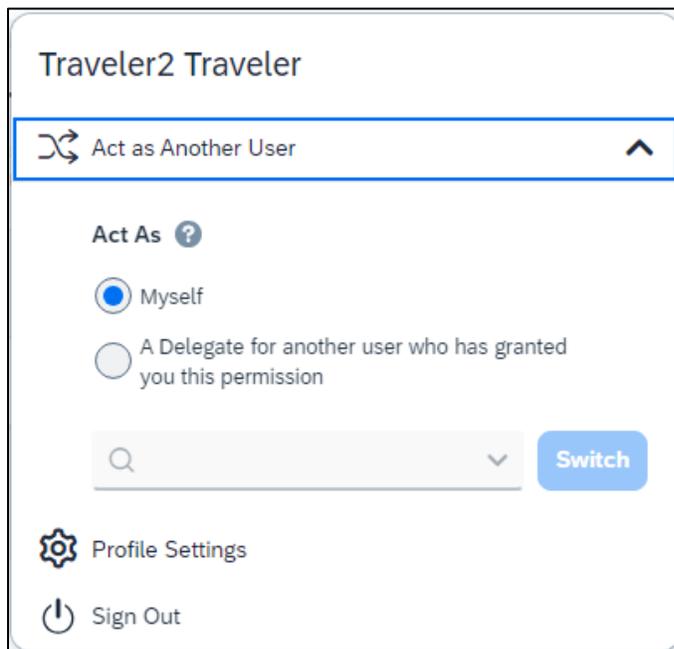
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

To work as a delegate:

1. Click **KC** (your initials in upper-right hand corner) > **Profile Settings** > **Act as Another User**.
2. Select **A Delegate for another user who has granted you this permission**.
3. Begin typing the user's name and select the appropriate user.
4. Click **Switch**.
NOTE: Notice that the Profile menu now displays Acting as and shows the name you just selected.
5. You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.

To select a different user, follow the same steps but select a different name.

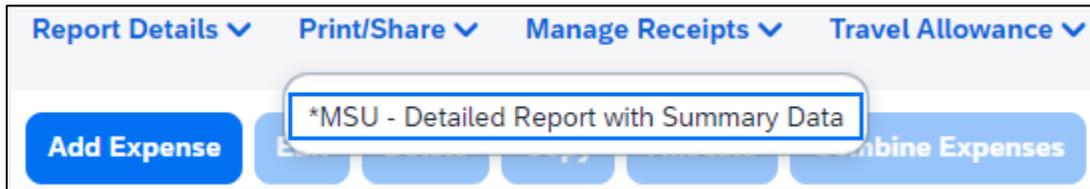
To return to your own tasks, click **Acting as**, and then click **Myself** and **Switch**.



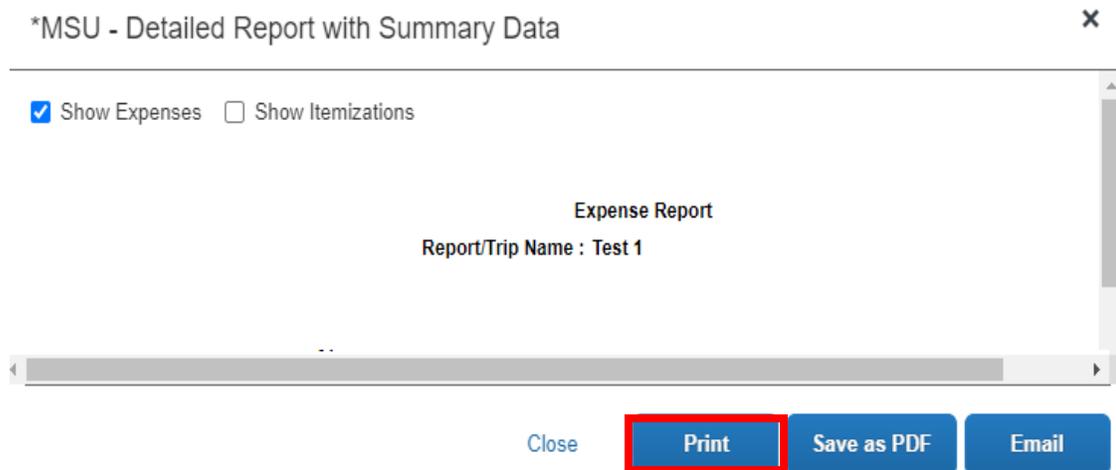
Printing an Expense Report

To preview and print the expense report:

1. On the expense report page, click **Print / Share**, and then select ***MSU- Detailed Report with Summary Data**.



2. Review the details, and then click **Print**.



Submitting an Expense Report

To submit an expense report:

1. After all the expenses have been entered into the expense report, click on the **Submit Report** button.

Alerts	Receipts	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Out of Pocket	Hotel	A.H.M.I. Hotels Meridian, Mississippi	04/25/2023	\$450.00 Itemized
<input type="checkbox"/>		Out of Pocket	Parking	Starkville, Mississippi	04/24/2023	\$24.53
						\$474.53

2. After the **Submit Report** button has been clicked, the **User Electronic Agreement** window will appear. Read the agreement and click the **Accept & Continue** button.

****PLEASE READ ENTIRE USER ELECTRONIC AGREEMENT BEFORE PROCEEDING****

***REMINDERS:
Individual meals do not require receipts.
Itemized receipts are required for hotel, airfare, car rental, and individual expenses greater than \$10.00.
Itemized receipts are required for group meals but are not required for individual meals.

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for Mississippi State University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received nor will I receive reimbursement from any other source(s) for the expenses claimed.

Buttons: Cancel, **Accept & Continue**

3. After the **Accept & Continue** button has been clicked, the **Report Totals** window will appear. Verify the amounts listed. If errors are found, click **cancel**. Otherwise, click **Submit Report** to move forward with the submission.

Report Totals

Company Payments
\$474.53
Employee

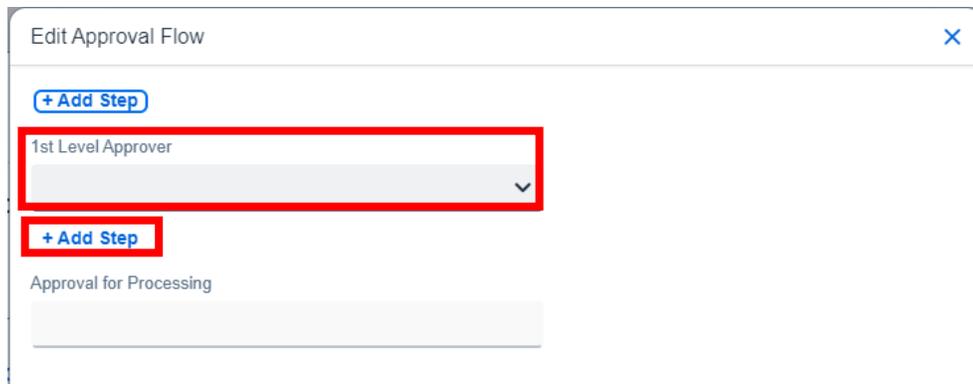
Employee Payments
\$0.00
Company

Amount Total: \$474.53	Due Employee: \$474.53	Owed Company: \$0.00
Requested Amount: \$474.53	Total Paid By Company: \$474.53	Total Owed By Employee: \$0.00

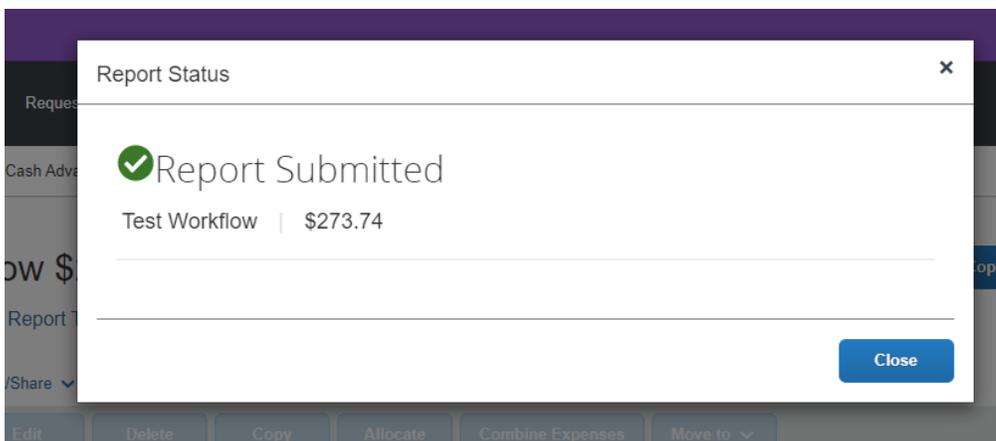
Buttons: Cancel, **Submit Report**



4. Once the **Submit Report** button has been clicked, an **Edit Approval Flow** window will appear. You will see an alert stating that it's required of you to enter an approver before moving forward with the report submission.
5. Enter the name of the approver who needs to approve the report in the **1st Level Approver** field.
 - Begin typing the first letters of his/her last name, and a drop-down box will appear showing names of individuals to choose from.
 - Find the correct approver and click on his/her name in the populated drop-down box.
 - **Note: please be patient and wait for Concur to populate the approvers name. It is important to make sure you are selecting the name in the drop-down box by clicking with your cursor.**
 - If there is more than one person to approve, after entering the first approver, click the **+Add Step** button. This will add a **User-Add Approver** field below the **1st Level Approver** field. Type the additional approver's name in the field and select from the drop-down list.



6. Once the appropriate approver(s) has been selected, click the **Submit Report** button.
7. A confirmation will appear, and the report will then be submitted and forwarded to the approver's queue.

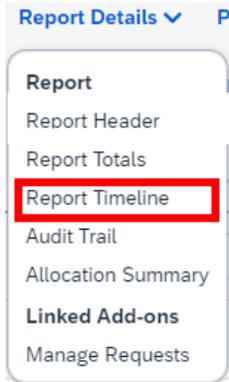


Review Approval Workflow

The Approval Flow window displays the route that your Expense Report will follow once it is submitted. The traveler/delegate can view the Approval Flow at any time for an Expense Report.

To view the Approval Flow:

With the Expense Report open, click **Report Details > Report Timeline**.



The **Report Timeline** window will open displaying the Approval Flow on the left-hand side.

Report Timeline

Test 1 | \$470.00

Approval Flow [Edit](#)



Correcting and Resubmitting an Expense Report

Your Expense approver might 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 identify and correct expense reports requiring resubmission:

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

The screenshot shows the SAP Concur home page. At the top left, it says "SAP Concur" with a logo and "Home" with a dropdown arrow. Below this is a navigation bar with the Mississippi State University logo and several task buttons: "Start a Request", "Start a Report", "Upload Receipts", "02 Authorization Requests", "00 Available Expenses", and "01 Open Reports". The "01 Open Reports" button is highlighted with a red box. Below the navigation bar is a report tile for a report titled "Test" dated "02/04/2021" with a value of "\$50.00". The tile has a red "Returned" label and a red "X" icon in the top right corner. Below the tile, it says "Sent Back to User".

2. Click the report tile to open the report.
3. Make the requested changes.
4. Click **Submit Report**.



Reviewing and Approving an Expense Report

To approve a report "as is":

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Review the report details, and then click **Approve**.

Sending Back an Expense Report

To return the entire expense report to the employee for correction:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Click **Send Back to Employee**. The **Send Back Report** window appears.
3. Enter a Comment for the employee, explaining why you are returning the report.
4. Click **OK**.

Adding an Additional Review Step

To approve and forward a report:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Review the report, and then click **Approve & Forward**. Enter the **User-Added Approver**, and add a comment, as needed.
3. Click **Approve & Forward** to approve the expense report and send to the next approver.

