MISSISSIPPI STATE UNIVERSITY™

TRAVEL SERVICES

Concur Expense User Guide

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What is Concur?

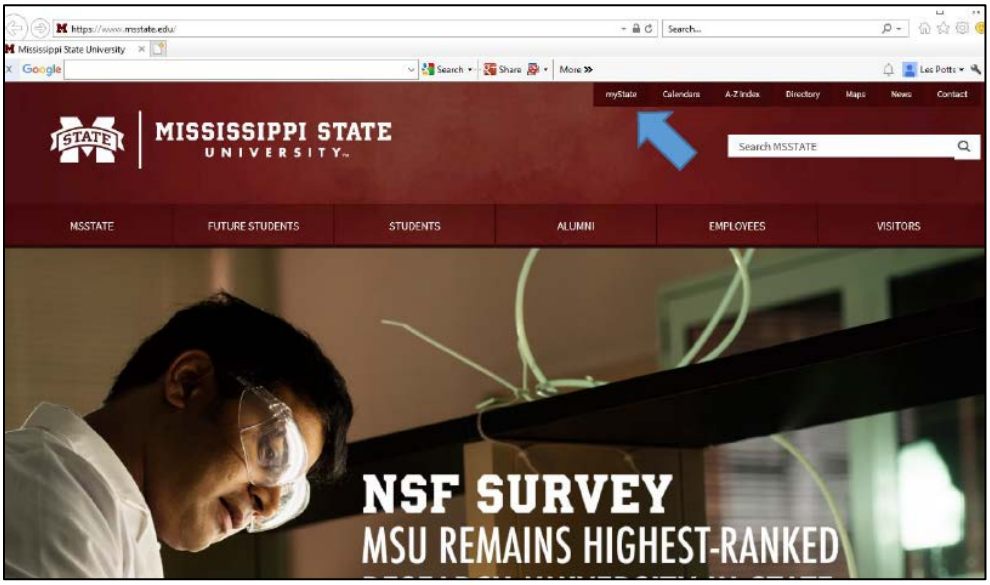
Concur is an online tool that fully integrates all aspects of preparing for and processing travel for Mississippi State University employees and students. Concur allows for electronic processing for all travel requests, travel reservations, and travel reimbursements.

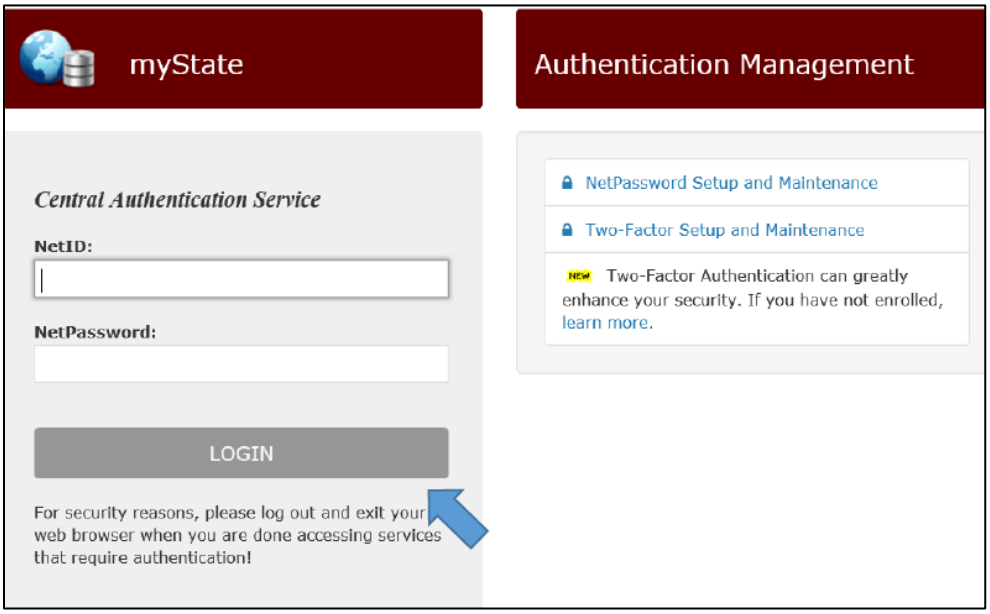
Concur Modules

- 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.

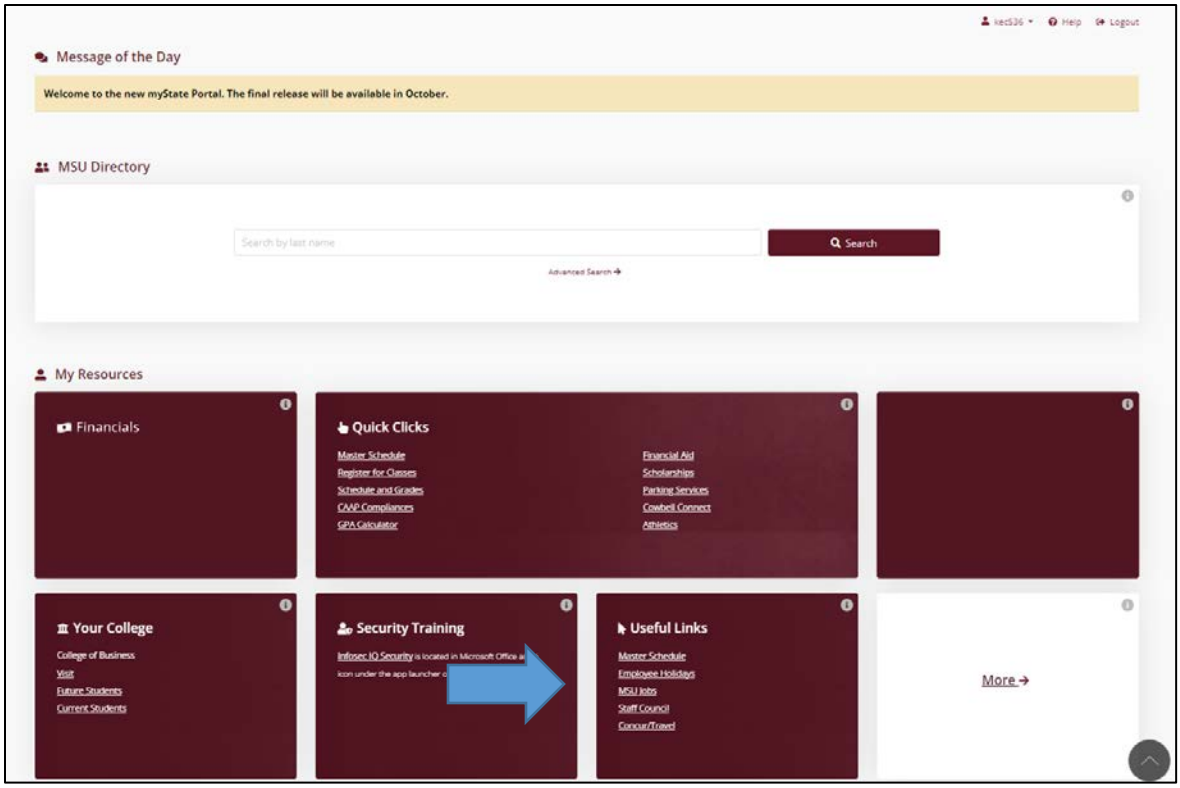
Logging in to Concur

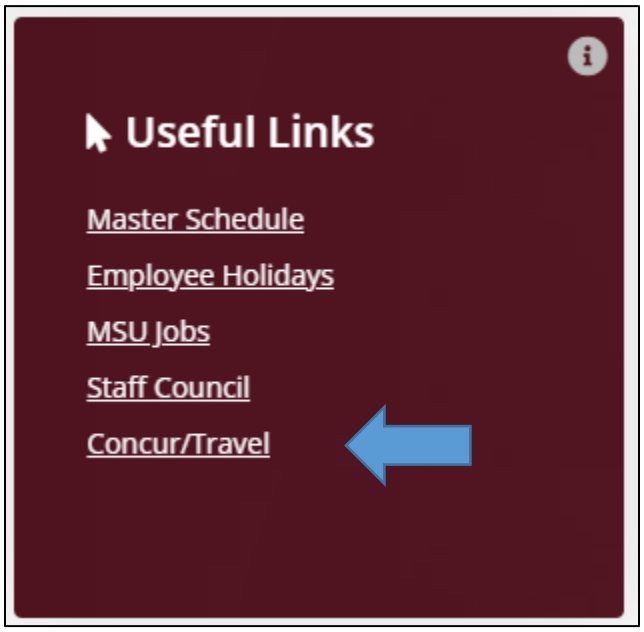
- From the MSU homepage, select **myState**, and sign in with your **NetID** and **NetPassword**.





- 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.**

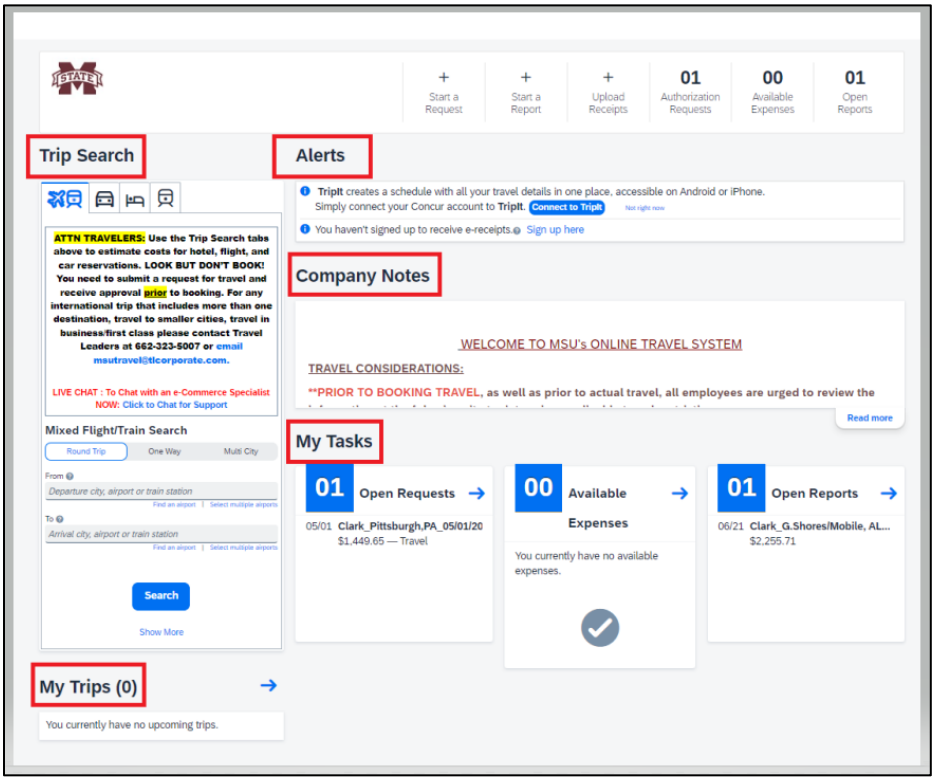

Message of the Day
Welcome to the new myState Portal. The final release will be available in October.
MSU Directory
Search by last name
Search
Advanced Search
My Resources
Financials
Quick Clicks
Master Schedule
Register for Classes
Schedule and Grades
CAAP Compliances
GPA Calculator
Financial Aid
Scholarships
Parking Services
Cowbell Connect
Athletics
Your College
College of Business
Visit
Future Students
Current Students
Security Training
Useful Links
Master Schedule
Employee Holidays
MSU Jobs
Staff Council
Concur/Travel
More


Useful Links
Master Schedule
Employee Holidays
MSU Jobs
Staff Council
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.

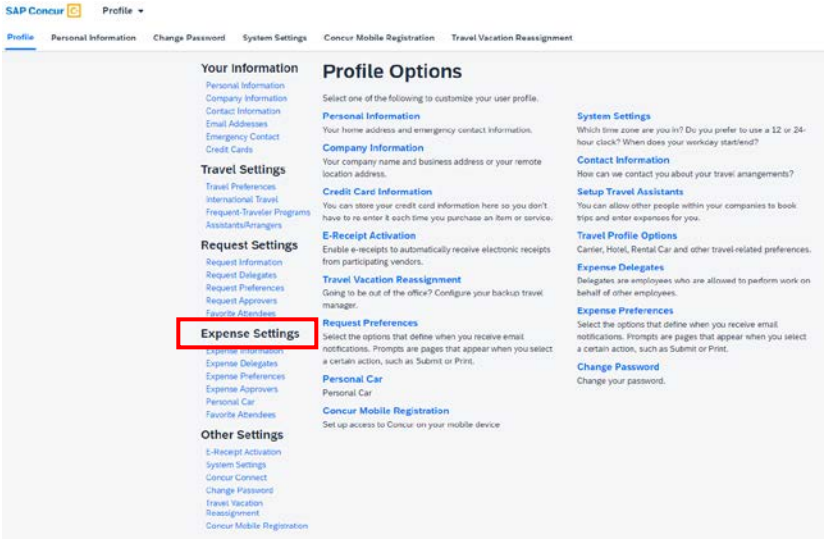
Section	Description
Trip Search	This section provides the tools you search for quotes for upcoming trips: **Flight:** Use to search for flight quotes. **Car**, **Hotel**, or **Rail:** Use to search for hotel quotes, rental car quotes, and rail quotes. **If searching for multiple segment quotes (ex: air 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**.



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 critieria (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 contraints.
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 begginning 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:

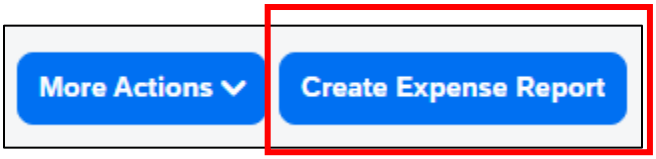
1. Either:
   - On the home page, click **Sign up here**. The **E-Receipt Activation** page appears.

     -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.

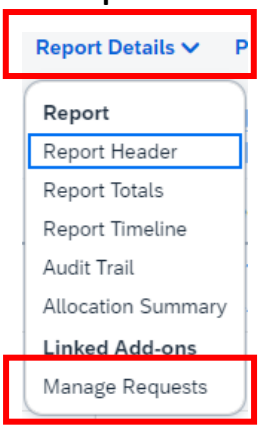
Creating a New Expense Report

Ways to create an expense report from an approved request:

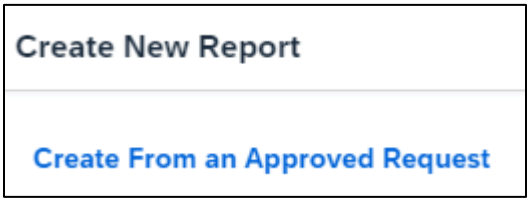
- Click the **Home** dropdown menu (upper-left hand corner) and select **Expense.** Open the appropriate request and click the **Create Expense Report** button at the top right-hand corner.



- 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**.

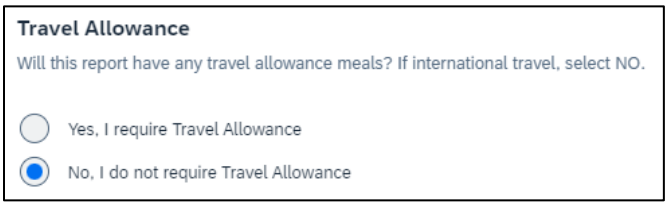


- Click the **Home** dropdown menu (upper-left hand corner) and select **Expense.** Click the **Create New Report** button under Manage Expenses (on the sub-menu). Click the **Create From an Approved Request** link in the upper-left hand corner. A window will apper asking if you wish to continue, click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

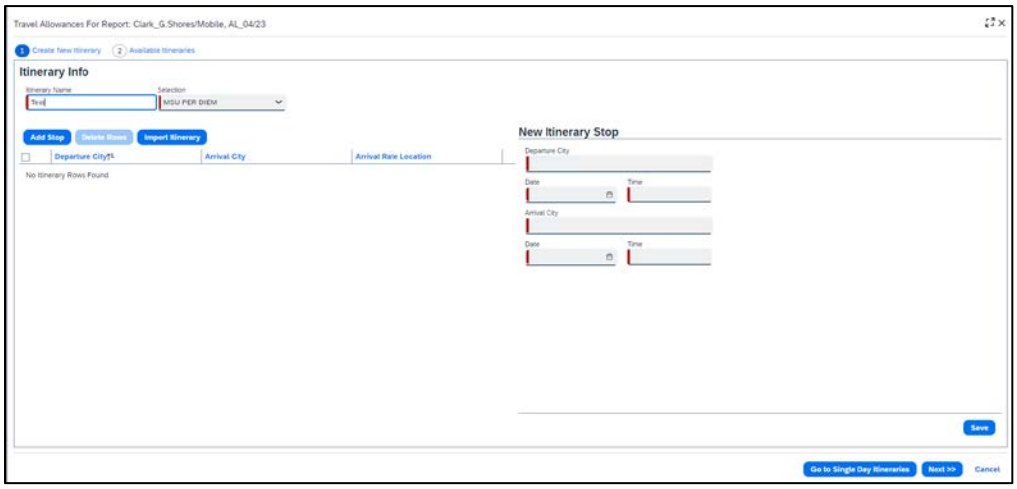


To create a stand-alone report:

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.



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**.

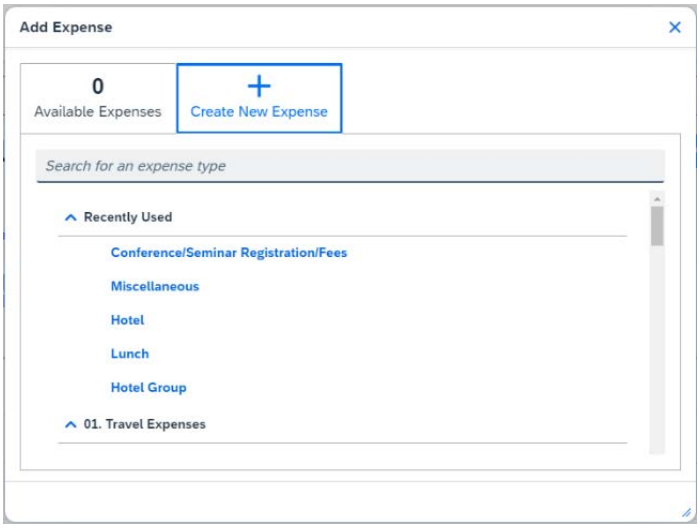


6. If you selected **No**, the travel allowance itinerary will not be required.
7. At this point, you will add an out-of-pocket expense to your expense report.

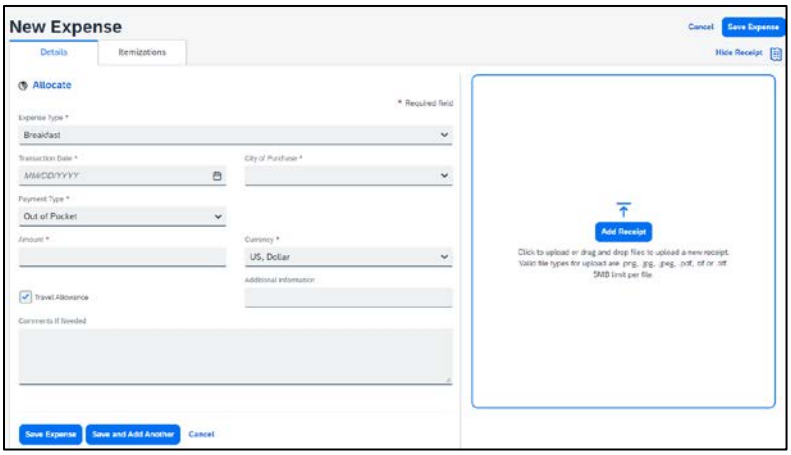
Adding an Out-of-Pocket Expense to an Expense Report

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.



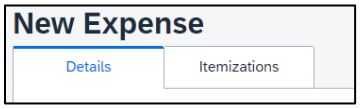
3. Complete the required and optional fields.
   - Click the appropriate option as needed:
     - **Itemizations** tab (to itemize the expense). See page 13 and 16.
     - **Allocate** link (to split the cost between multiple accounts). See page 14.
     - **Upload Receipt Image** (to upload and attach 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).



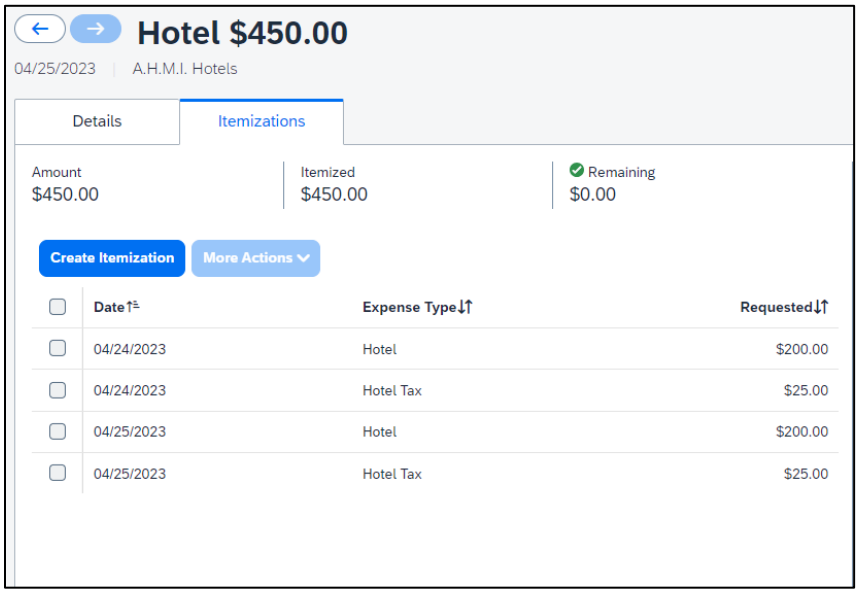
Itemizing Expenses

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.

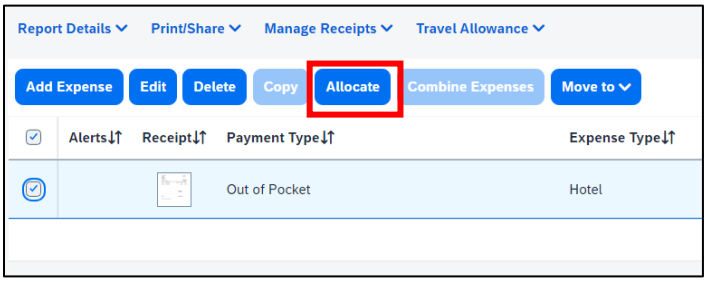


Allocating Expenses

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.

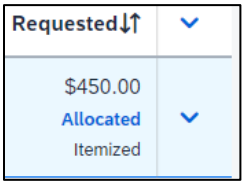
To allocate:

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.



Copying an Expense

To copy an expense:

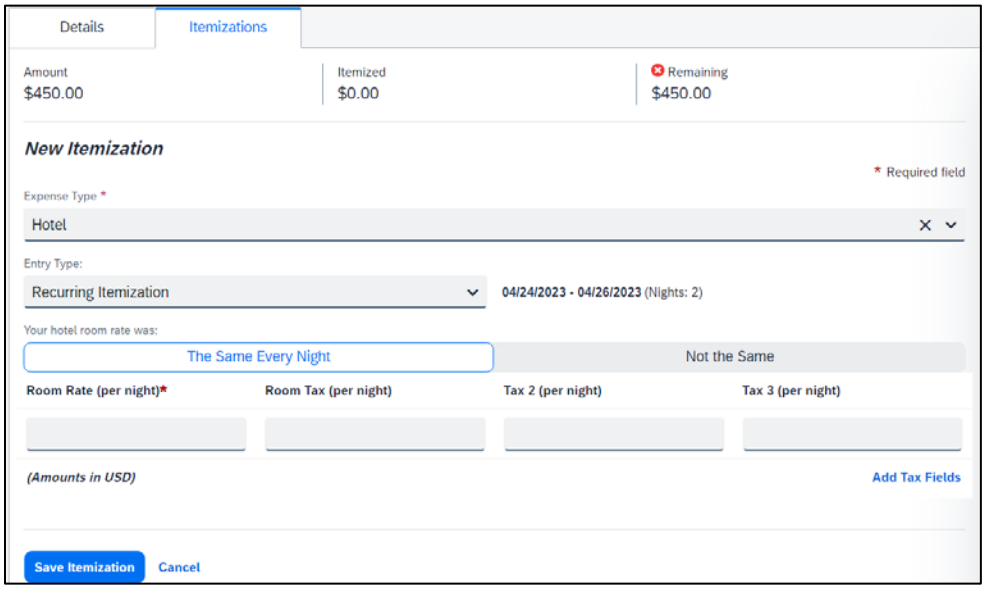
1. With the expense report open, select the expense you want to copy.
2. Click **Copy**.
    - Then the new expense is added to the Expenses list:
        - The original expense date is advanced by a day.
        - All allocations, attendees, expense-level comments, and value added tax (VAT) details 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.



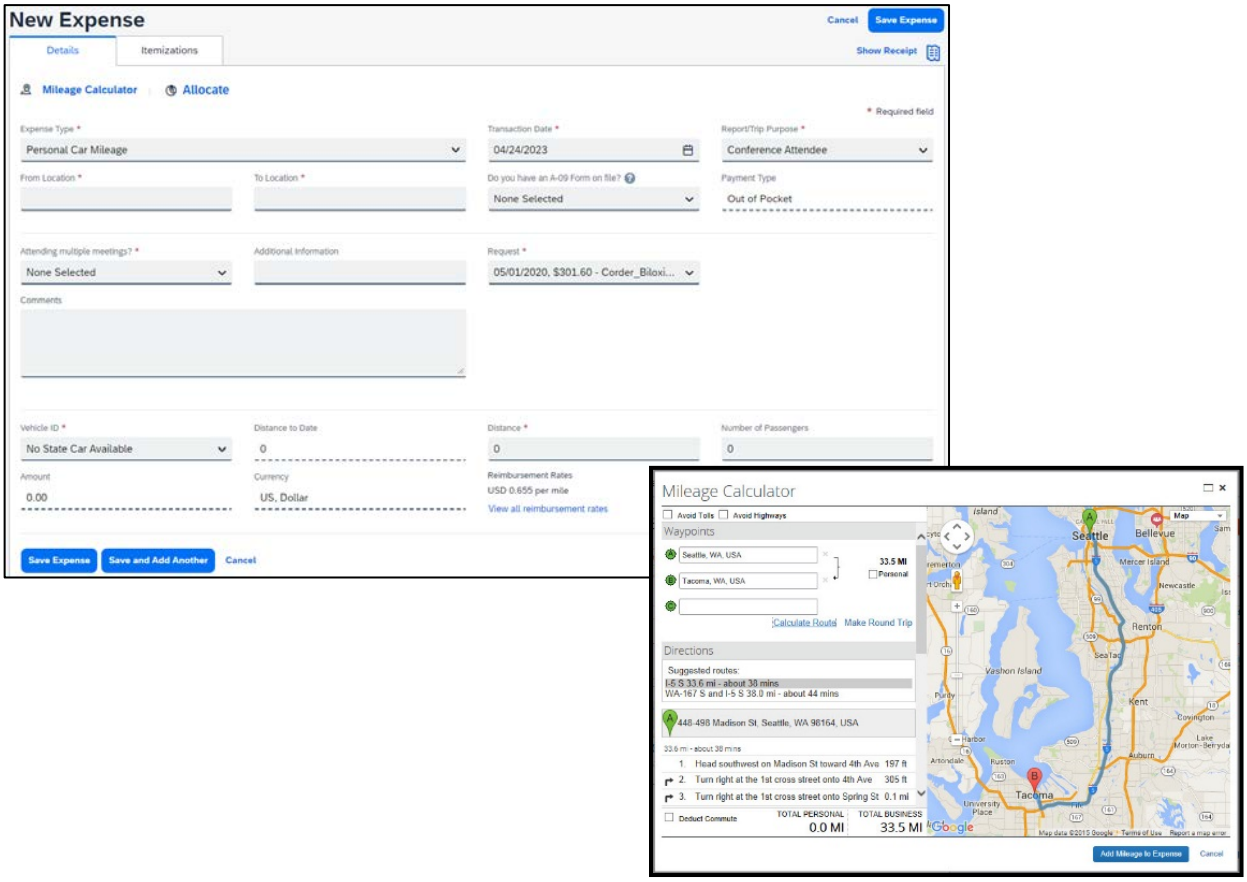
7. Enter the **Room Rate**, **Room Tax**, **Tax 2**, and **Tax 3** if applicable.
8. Click **Save Itemization**.

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**.



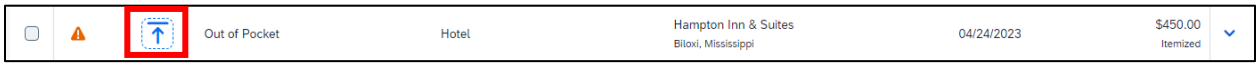
Attaching Receipts

Uploading Receipts

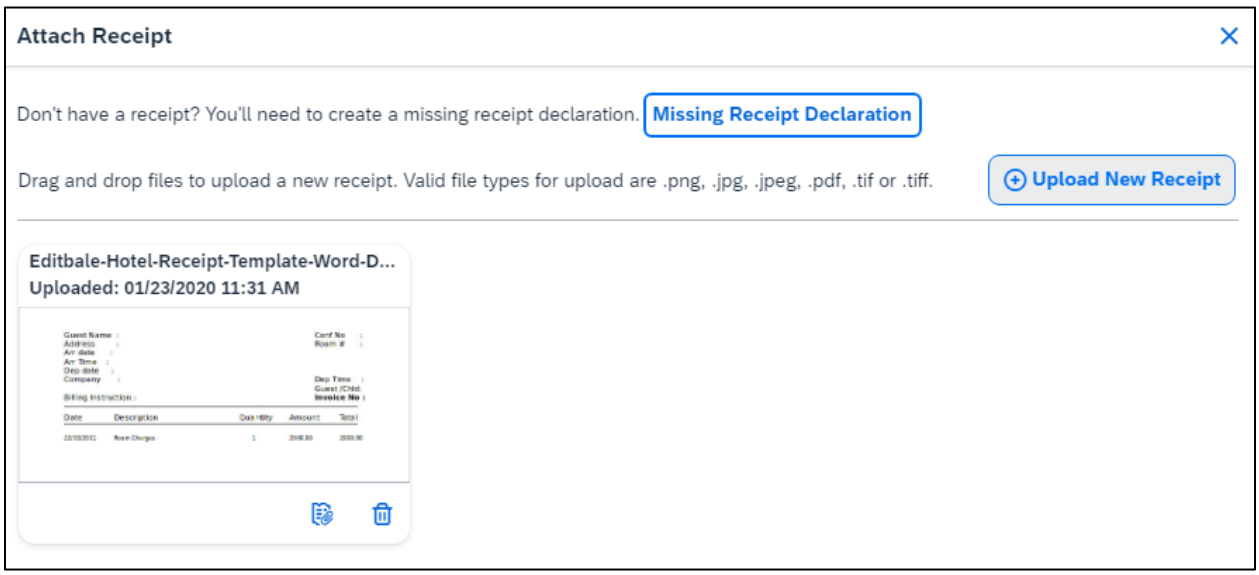
Files saved to a folder on your computer may be uploaded directly into an Expense Report using the following steps:

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.



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



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:

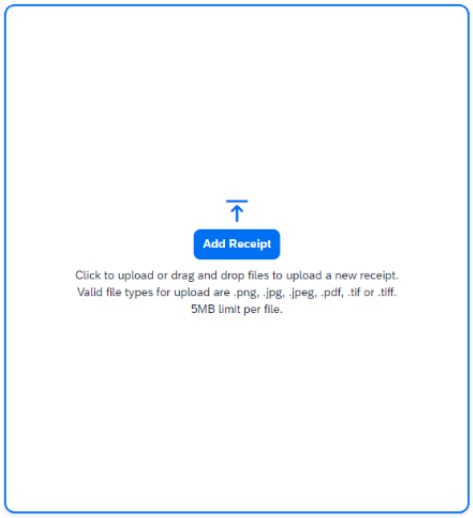
1. Click the **Home** dropdown menu (upper-left hand corner) and select **Expense.**
2. At the bottom of the page in the **Available Receipts** section, click **Upload Receipt Image**. Your My Computer window appears.
3. Locate the desired image and click **Open**. The image is then available to be attached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



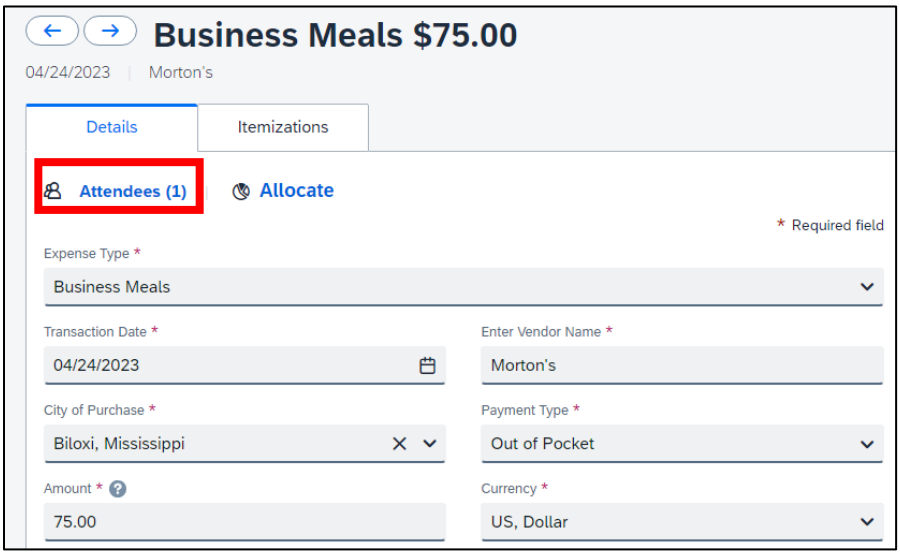
Delegates and Available Receipts

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.



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

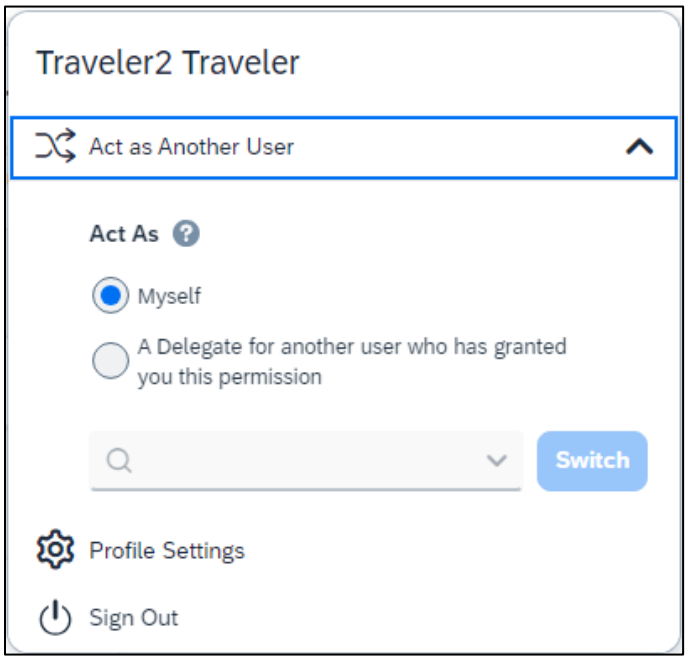
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

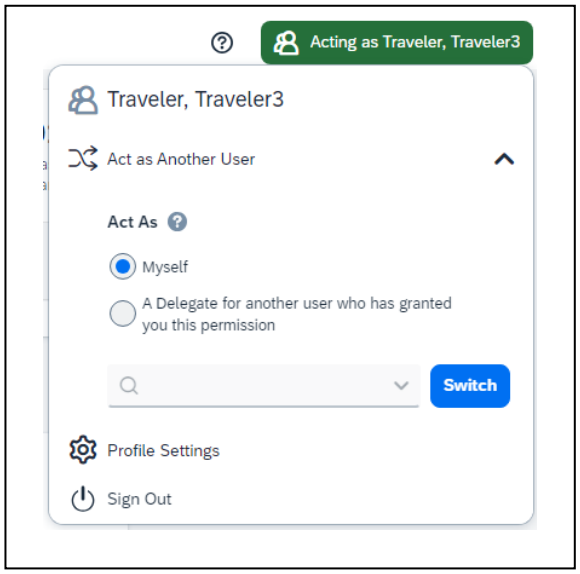
To work as a delegate:

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**.

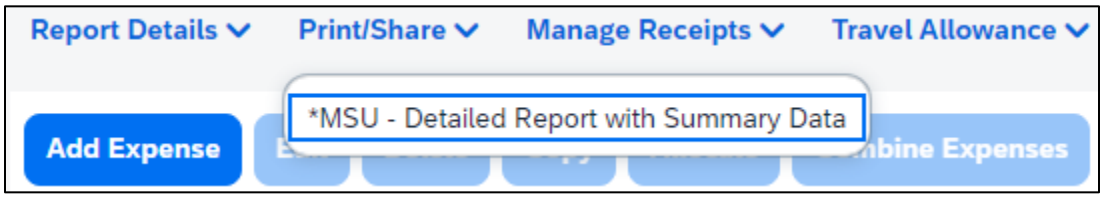




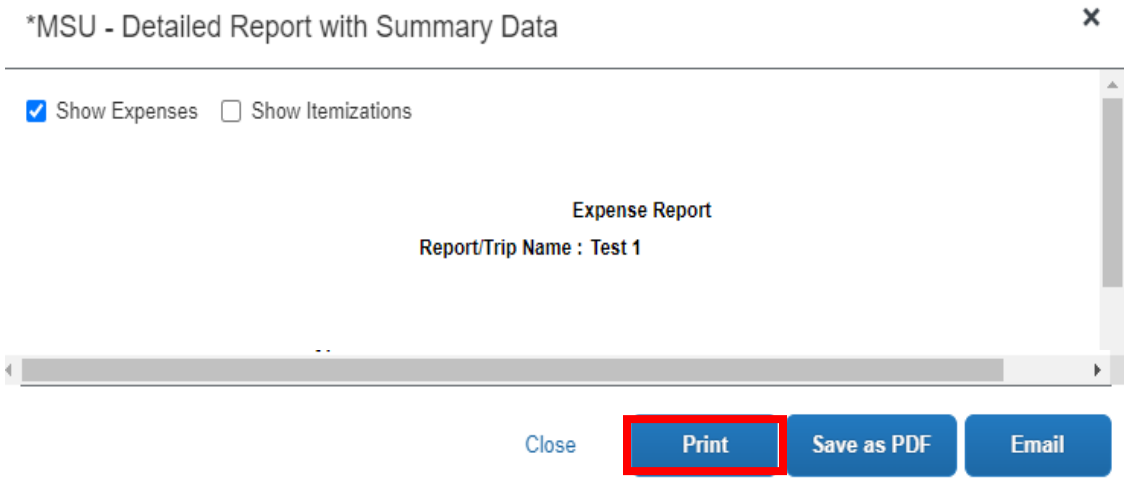
Printing an Expense Report

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**.



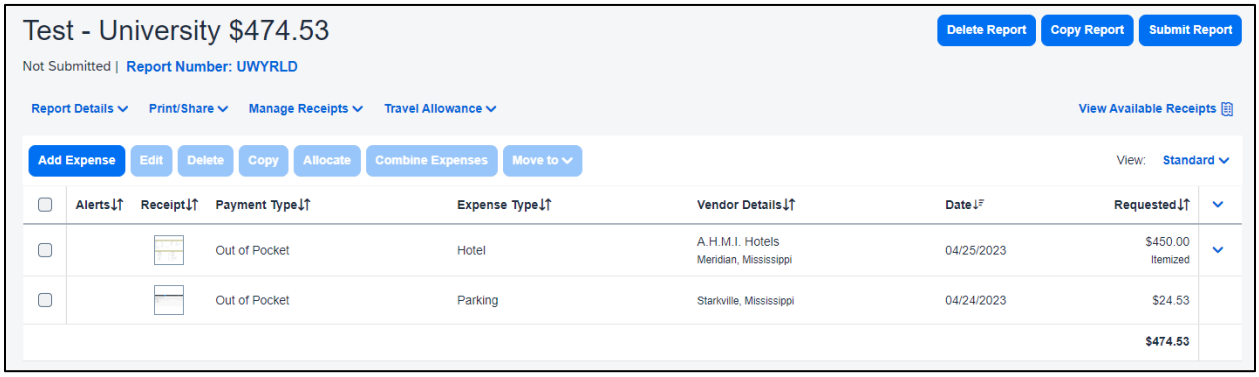
2. Review the details, and then click **Print.**



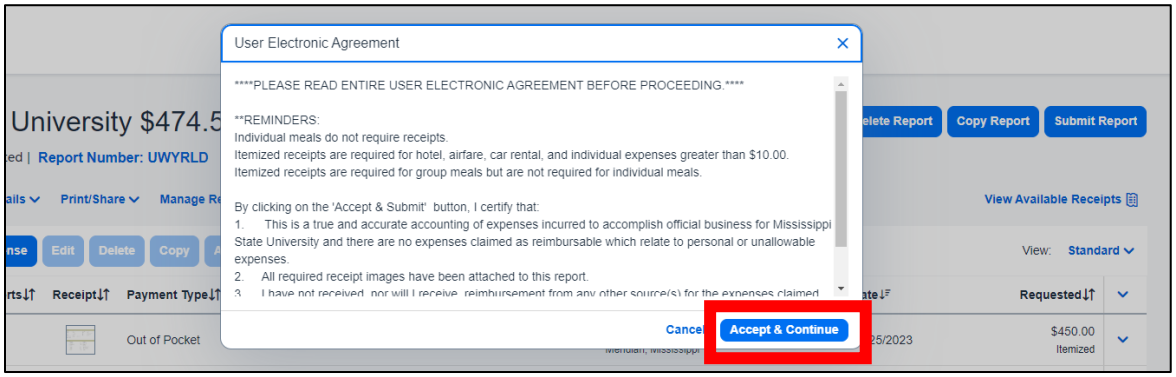
Submitting an Expense Report

To submit an expense report:

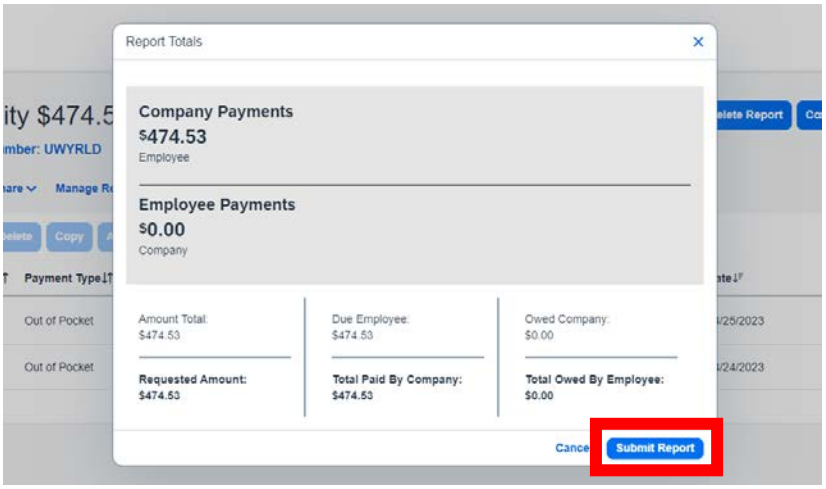
1. After all the expenses have been entered into the expense report, click on the **Submit Report** button.



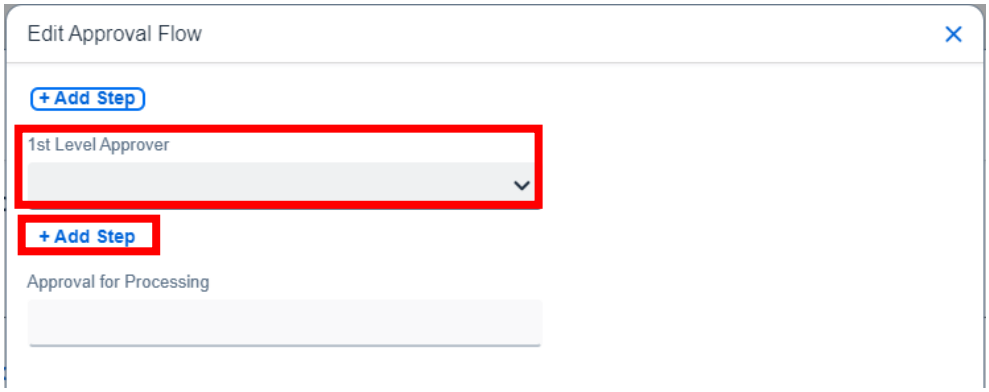
2. After the **Submit Report** button has been clicked, the **User Electronic Agreement** window will appear. Read the agreement and click the **Accept & Continue** button.



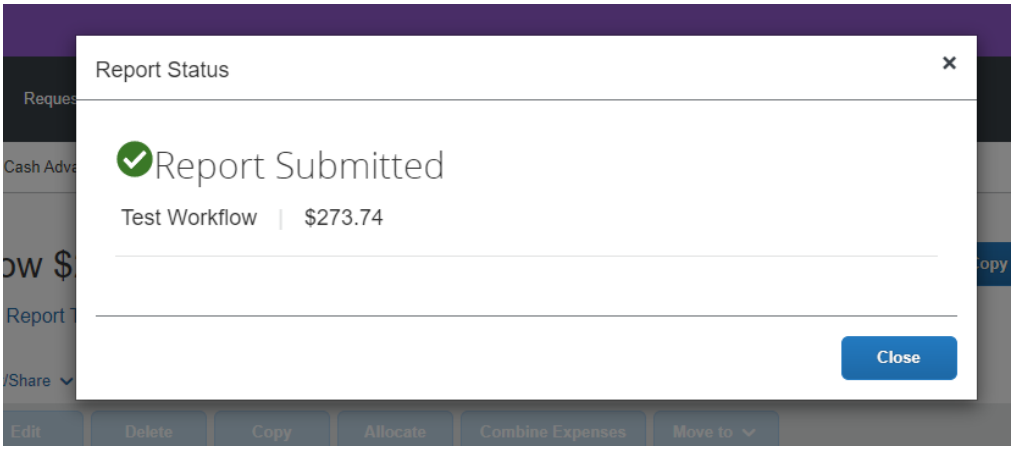
3. After the **Accept & Continue** button has been clicked, the **Report Totals** window will appear. Verify the amounts listed. If errors are found, click **cancel**. Otherwise, click **Submit Report** to move forward with the submission.



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.

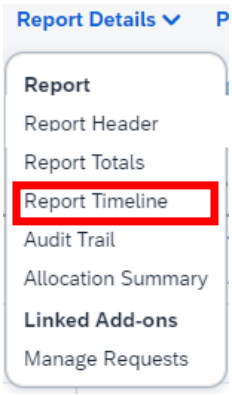


Review Approval Workflow

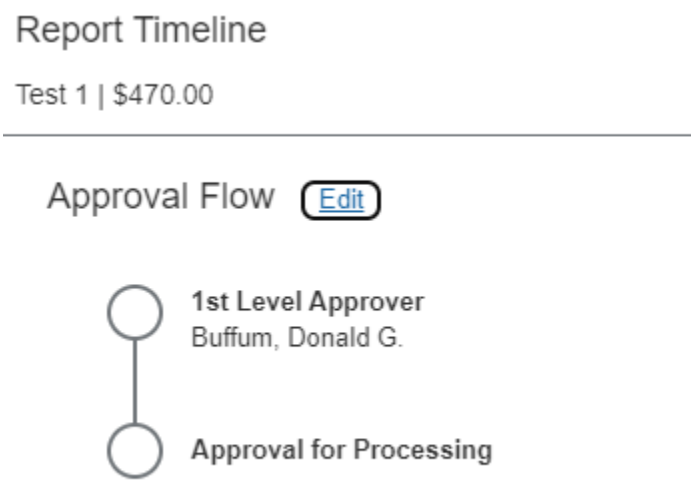
The Approval Flow window displays the route that your Expense Report will follow once it is submitted. The traveler/delegate can view the Approval Flow at any time for an Expense Report.

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.

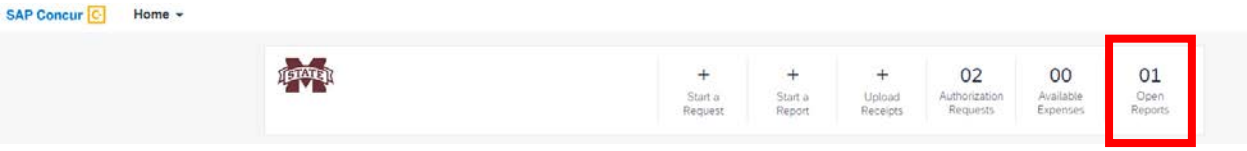


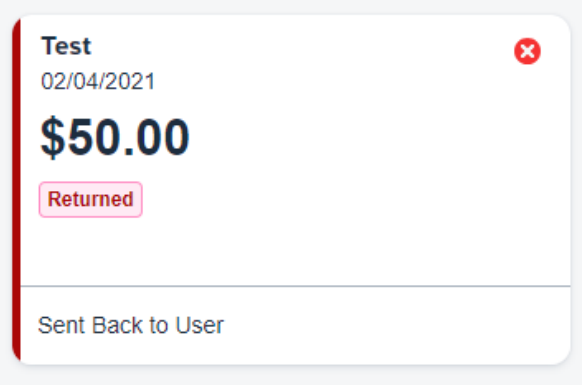
Correcting and Resubmitting an Expense Report

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.





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.