



# Quick Access Guide

## What is Concur?

- Concur is a web-based tool that fully integrates travel reservations and expense reporting data into one application. Concur allows for the MSU employees to request approval for travel, book travel, and request reimbursement for out-of-pocket expenses incurred while traveling on behalf of MSU.

## Concur Modules

- Concur includes three modules – Request, Travel, and Expense
  - **Concur Request** is used to request approval for travel when attending a conference/meeting/workshop/etc., and when traveling out-of-state.
  - **Concur Travel** is used to reserve airfare, hotels, and rental cars through MSU's contracted travel agency, Travel Leaders.
  - **Concur Expense** is used to request reimbursement for out-of-pocket expenses incurred while traveling on behalf of MSU.

## Attaching Receipts

- There are multiple ways to attach receipts to an Expense Report in Concur:
  1. Scan and upload to Available Receipts – Scan and save the receipt to an easily accessible location on your computer. Concur supports .png, .jpg, .jpeg, .pdf, .html, .tif, or .tiff file formats with a 5 MB limit per file.
  2. Scan and email to [receipts@concur.com](mailto:receipts@concur.com).
  3. Take a picture using Expenselt – Use your smart phone or other device to take a picture and email to submit via the Concur mobile app.



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## Itemization

- If you need to split an expense line item that you have entered between multiple Expense types, you must use the **Itemize** feature.
  1. Select the expense line item you need to itemize from the Expenses list.
  2. Click the **Itemize** tab in the upper left-hand corner of the **Expense** section.
  3. Click **Create Itemization**. In the **Expense Type** field, , select the appropriate option from the dropdown list and complete all the required fields that populate.
  4. Adjust the expense amount.
  5. Click **Save Itemization**.
  6. Repeat the steps outlined above until the Remaining Amount equals \$0.00.
  7. Click **Save**.

## Allocation

- If you need to allocate to a FOAPAL (departmental account number) that is different from the FOAPAL listed in your Report Header, or you need to split a transaction between multiple FOAPALs, you will need to use the **Allocation** feature.
  1. Select the expense you want to allocate from the Expenses list.
  2. Click **Allocate** near the upper left-hand corner of the **Details** section.
  3. Choose either **Percentage** or **Amount**.
  4. Click **Add** and revise the Fund, Org, Program, Activity Code as need. You will need to physically click the option from the dropdown that will appear. Concur does not allow for hand keying FOAPALs. You must select the appropriate option from the list that appears.
  5. If you want to split the transaction between multiple FOAPALs, click **Save**.
  6. Repeat steps 4 and 5 for each new allocation you need to add.
  7. Click **Save**. The sum of the split expense lines must be equal to the total expense.

## Submitting Reports for Approval

- On the **Expense Report** page, click the **Submit Report** button. All exception flags must be cleared before the report can be submitted.
- To see who is approving your reports or to check the status of a report, open the **Expense Report**, click **Report Details**, then click **Report Timeline**.



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