

Submitting as a Traveler with a Delegate

How to Login to Concur the first time:

1. Open your favorite web browser (Internet Explorer, Firefox, or Chrome).
2. Go to www.concursolutions.com.
3. Your e-mail is your login.
4. Please e-mail cpi-security@astate.edu or call Traci Ellington (ext. 3261), Eric Jones (ext. 2005), or Nikki Turner (ext. 2788) for your initial password.
5. You will be asked to change your password – type the initial password into the first field, then your chosen password in the next two fields. In the last field, type a hint that will help you remember your password if you forget it.
6. After the first login, you will just need your e-mail address and your new password to login to Concur.

How to Submit Requests in the Web Browser:

1. In the lower left corner of your screen, you will see a box that says “Open Requests”.
2. Click on the document you want to submit. If you have several documents, click on the link “Authorization Requests”, then chose the document that you would like to submit.
3. Concur will open the document.
 - a. The first tab is the Request Header, which gives you the trip name, the dates of travel, the trip purpose, the destination, and funding source, and any advance information.
 - b. The second tab is the Expenses tab, which gives you a breakdown of all of the expenses.
 - i. You could see several icons on this screen
 1. A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
 2. A blue circle icon means that there is a comment. Click on the icon to bring up the comment for you to read.
 3. A pie chart icon means that the expense has been allocated between two or more FOAP’s. Click on the icon to see how the expense is being charged.
 - c. If you need to see any attachments, click on the “Attachments” icon, and then click on “View Documents in a new window”. If you have pop-up blocker set up in your browser, you will have to allow pop-ups by www.concursolutions.com.
 - d. If you are ready to submit, click “Submit Request”.
 - e. If you do not approve of the document, you can make any appropriate changes to the header or the expenses before you submit the document. If you are changing a field in a specific expense, click on the “Save” button once you are done making the change.
4. Concur will bring you back to the list of documents pending your submission. Choose the next document and repeat step 3 until all documents are submitted. The Status column will show you where the document is in the approval queue.
5. Once you have completed all of the documents, log out of Concur by clicking on the arrow next to “Profile” in the upper right corner, then click on “Sign Out”.

How to Submit Expense Reports in the Web Browser:

1. In the lower right corner of your screen, you will see a box that says "Open Reports".
2. Click on the document you want to submit. If you do not see the document in the list, click on the "Open Reports" arrow to see the full list.
3. Concur will open the document.
 - a. Concur will automatically open the Expenses tab, which gives you a breakdown of all of the expenses.
 - i. You could see several icons on this screen
 1. A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
 2. A blue circle icon means that there is a comment. Click on the icon to bring up the comment for you to read.
 3. A pie chart icon means that the expense has been allocated between two or more FOAP's. Click on the icon to see how the expense is being charged.
 4. A blue icon with a piece of paper in the center means that there is a receipt image(s) attached. Hover over the icon to see the receipt image(s).
 - b. If you need to see the header information or itinerary information, click on "Details", then "Report Header" or "Available Itinerary".
 - c. If you are ready to submit, click "Submit Report".
 - d. If you do not approve of the document, you can make any appropriate changes to the header or the expenses before you submit the document. If you are changing a field in a specific expense, click on the "Save" button once you are done making the change.
4. Concur will bring you back to the list of documents pending your submission. Choose the next document and repeat step 3 until all documents are submitted. The Status column will show you where the document is in the approval queue.
5. Once you have completed all of the documents, log out of Concur by clicking on the arrow next to "Profile" in the upper right corner, then click on "Sign Out".