# CONCUR REQUEST GUIDE

A comprehensive guide for users of
Arkansas State University's Concur Request System

Updated March 2020

# Contents


INTRODUCTION ..... 3

LOGGING INTO CONCUR ..... 3

MAIN MENU ..... 4

HOW TO START A SESSION AS A DELEGATE ..... 5

STARTING A REQUEST – REQUEST HEADER TAB ..... 7

- Request Trip Name ..... 7
- Request/Trip Start Date ..... 8
- Request/Trip End Date ..... 8
- Request/Trip Purpose ..... 8
- Destination City ..... 8
- Destination Country ..... 8
- Traveler Type ..... 8
- Trip Type ..... 8
- Additional Information and Comment Fields ..... 8
- Fund, Organization, and Program Code Fields ..... 8
- Cash Advance ..... 9

EXPENSES TAB ..... 9

- Individual Meals – Multiple Destinations ..... 10
- Individual Meals – Single Destination ..... 10
- Individual Meals – One Day Travel ..... 10
- Lodging ..... 10
- Airfare ..... 10
- Car Rental ..... 10
- Fuel ..... 10
- Ground Transportation ..... 10
- Parking ..... 10
- Mileage ..... 11
- Trip Optimizer ..... 11
- Group Meals ..... 11
- Internet/Online Fees ..... 12
- Currency Exchange Fees ..... 12

- Passports/Visa Fees ..... 12
- Registration Fees ..... 12
- Laundry-for students only ..... 12
- Miscellaneous ..... 12
- Professional Dues ..... 12

ALLOCATING AN EXPENSE ..... 13

ADDING ATTACHMENTS ..... 16

PRINTING YOUR DOCUMENT ..... 17

SUBMIT THE REQUEST ..... 17

Submitting as a Delegate ..... 17

Submitting as a Traveler with a Delegate ..... 18

Submitting Request as a Traveler (no Delegate) ..... 20

CASH ADVANCES ..... 20

HOW TO RECALL A REQUEST ..... 21

DELETING OR CANCELING THE REQUEST ..... 21

HOW TO CLOSE/INACTIVATE A REQUEST ..... 22

## INTRODUCTION

Welcome to the Concur Request System at Arkansas State University! We are excited to introduce this system to you, which is a result of the partnership between A-State and SAP Concur. Throughout this guide, you will find instructions to lead you through the entire Request process, from logging into the system to submitting your report.

Please direct any questions about the system to a travel representative or the e-mail address travel@astate.edu. We will work within our office and with others on campus to answer your questions as soon as possible.

## LOGGING INTO CONCUR

- Login to my.AState.edu
- Click on the Travel icon.
- Concur should automatically log you into the system.
- Alternatively, you can navigate to www.concursolutions.com and type in your e-mail address in the User Name field and your Concur password in the Password field.
    - If this is your first login, please contact Eric Jones (2005) or Traci Ellington (3261) for your initial password.
    - This password is not your A-State password and will not sync together.
    - We recommend that you change your Concur password at the same time you change your system password.
- If you cannot login, please contact our Security Administrators at cpi-security@astate.edu.

## MAIN MENU

The main menu in Concur allows the user to access travel request, expense reports, and approvals, as well as view available expenses and upload receipts. In this guide, we will focus on the request portions.

The toolbar across the top of the page consists of links to the different areas of Concur and your profile. Under "Help" you can access the Concur training information provided by SAP Concur.

Requests takes you do the Manage Requests page that defaults to all open requests within the last 90 Days. Change the view options to see older requests.

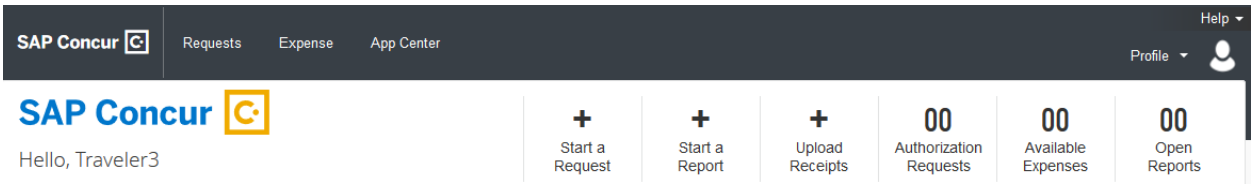
Expenses takes you to the Manage Expenses page that shows all in process expense reports, any available expenses, and uploaded receipt images. Click Report Library to see all open expenses reports within the last 90 Days. Change the view options to see older expenses reports.

Approvals (approvers only) takes you to the Approvals Home page that will show you a tab for each document type of approvals that can be done in Concur and the number of documents waiting on your approval.

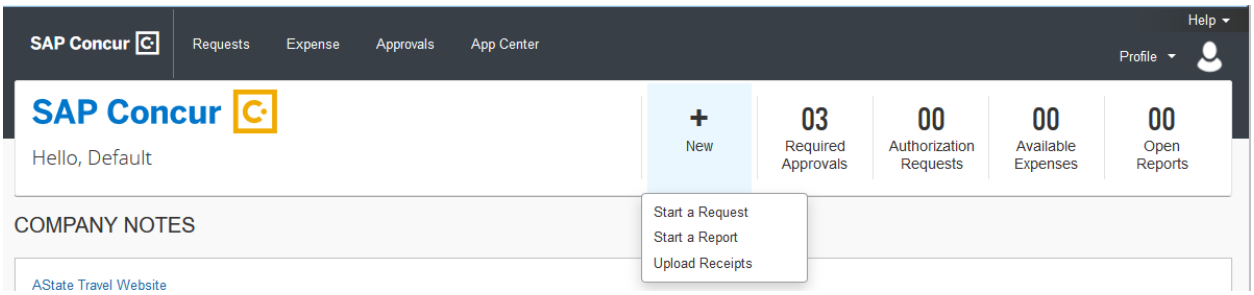
We currently do not use the App Center page. To return to the main menu click on the SAP Concur link in the top left corner.

The main menu is divided into 3 sections –

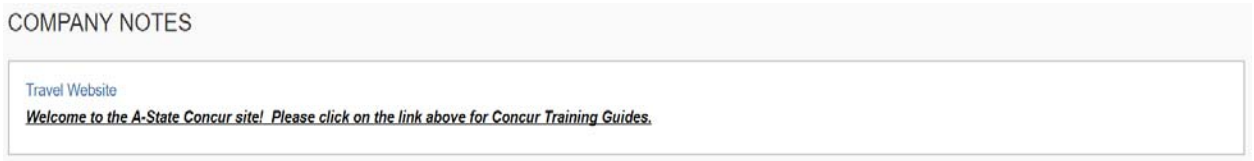
The top section gives you quick access to start a travel request, expense report, or upload receipts.



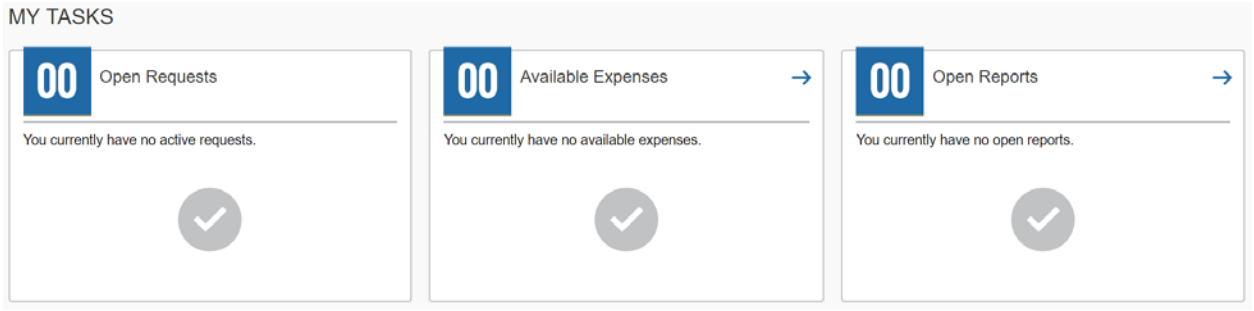
Or hovering over “New” to see the options:




The second section gives you a message from A-State’s Travel Office. This message can change, but there will be a link to the Travel Office website.



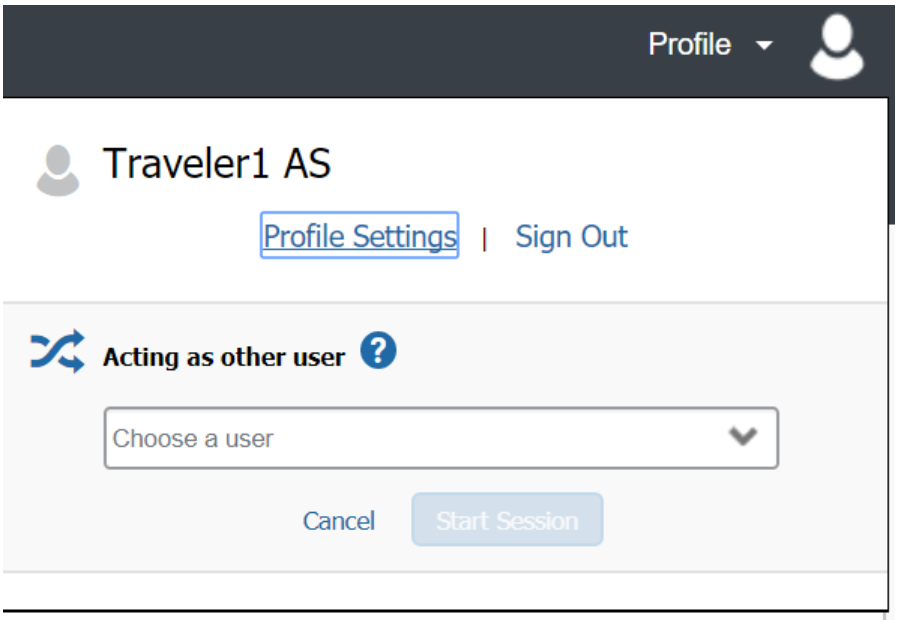

The third section shows you the open requests, available expenses, and open reports. For approvers, this section shows required approvals, available expenses, and open reports.




## HOW TO START A SESSION AS A DELEGATE

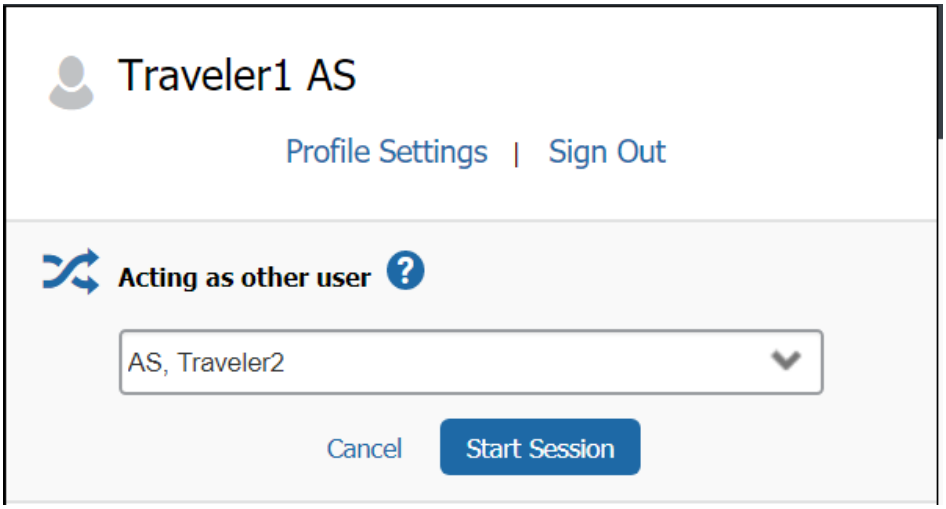
At the top of the main menu, click on the Profile drop down arrow:

Concur will bring up a space for you to use the drop down to search or type in the last name of the traveler:

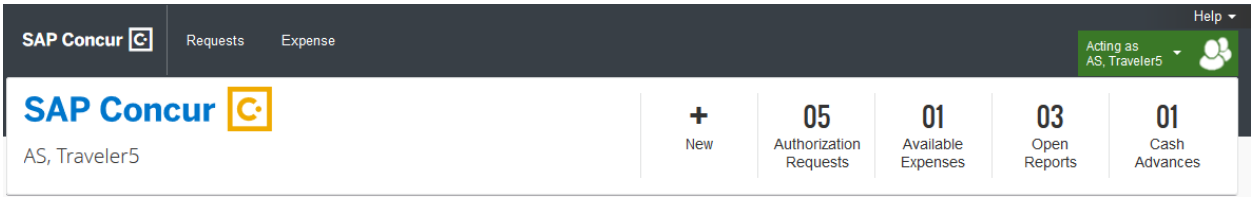



For delegates with multiple travelers, if a list does not appear start typing in the last name of the traveler.

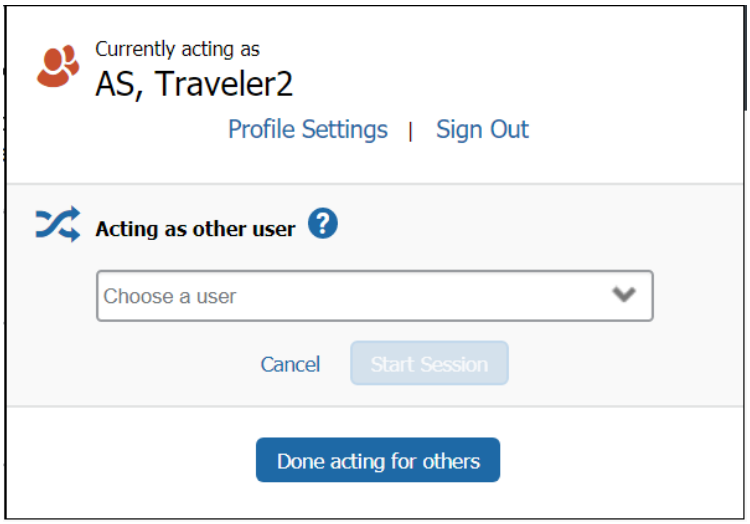
Choose the appropriate traveler, and click the “Start Session” button:




Your screen will now show that you are working as another person:



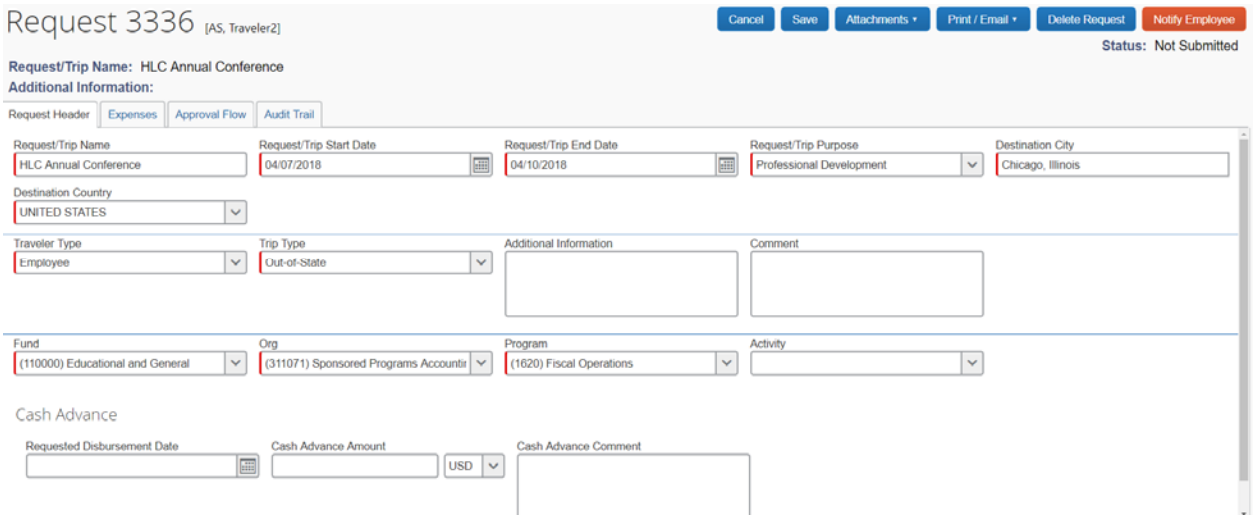
When you are ready to stop being a delegate for the traveler, click on the green button, and choose “Done acting for others”.




## STARTING A REQUEST – REQUEST HEADER TAB

After you login to Concur, click on “Start a Request” or hover over “New” and click on “Start a Request” from the list of options:

Request Header tab:




All fields with a red bar are required in order to submit the report.

- **Request Trip Name** – This should be a short description of your trip. For example, if you are going to the Higher Learning Commission Annual Conference, you could name it HLC Annual Conference.

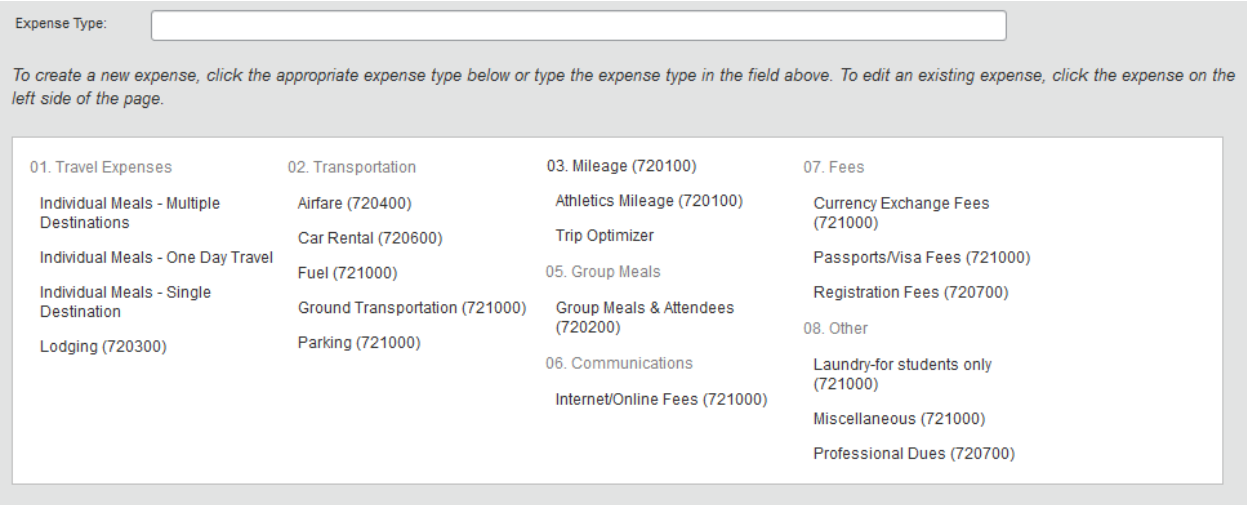
    - For Blankets, enter Blanket Request FYXX
- **Request/Trip Start Date** – The departure date.
    - For Blankets, enter 07/01/20XX
- **Request/Trip End Date** – The last day of your trip.
    - For Blankets, enter 06/30/20XX
- **Request/Trip Purpose** – Choose a trip purpose from the drop down menu.
    - For Blankets, choose Blanket Request
- **Destination City** – Start typing the name of the city where you are going. Concur will bring up a drop down for you to choose the correct location.
    - For Blankets, enter Jonesboro, Arkansas
- **Destination Country** – United States is the default selection, but choose another country if this is an international trip.
- **Traveler Type** – Choose the correct traveler type from the drop down, if it does not default in.
- **Trip Type** – Choose the location type of the trip (in-state, out-of-state, or international) **Please note that international should be chosen for any travel outside of the continental US.**
- **Additional Information and Comment Fields** –
    - **Grant funded travel** – All grant funded travel must include a short description of the trip that says why it is necessary for the award.
    - **All other travel** – Please use the Additional Information field to give a brief description of the business purpose of your trip.
- **Fund, Organization, and Program Code Fields** – Your default Fund, Organization, and Program codes will automatically show up in your Request Header, but you can change it if another fund will need to pay for your trip. Click on the drop down of each box to choose the appropriate number. You can search one of two ways:
    - Search by code – Start typing the first digit of the fund code, and Concur will bring up the list of numbers that match your search. Click on your Fund code. Click on the drop down arrow in the Organization Code & Program Code fields, and Concur will bring up the codes that are available to match up with the Fund code. Choose the code that matches your FOAP or start typing the code to narrow the search.

- Search by text – Select TEXT as the search by type. Start typing the first letter of the name of the code and Concur will bring up the name of all of the codes that start with the letter. Choose the right code. If you started with the fund code, click on the drop down arrow in the Organization Code & Program Code fields, and Concur will bring up the codes that are available to match up with the Fund code. Choose the code that matches your FOAP or start typing the name to narrow the search.
- If you started with the Organization Code, then click on the drop down arrow in the Fund Code & Program Code fields, and Concur will bring up the codes that are available to match up with the Organization code.

- **Cash Advance** – please see the Cash Advance instructions on page 21.

## EXPENSES TAB

The Expenses tab gives you the ability to list the expenses you anticipate you will incur on your trip. The request is an estimate, so exact amounts are not required. However, any expense report total that exceed a request total by 25% do require Vice Chancellor approval, so please include as much information as possible. Even if there are no expenses with a dollar value on the request (Blanket Requests or trips paid by another entity), please add the Miscellaneous expense type with a $0.00 amount to insure the proper approval flow.

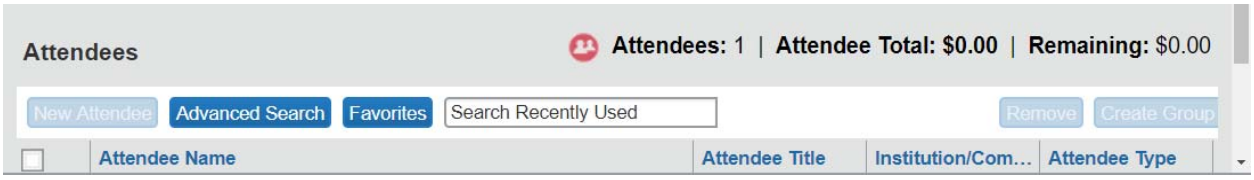


To start reporting expenses, click on the appropriate expense. The options include:

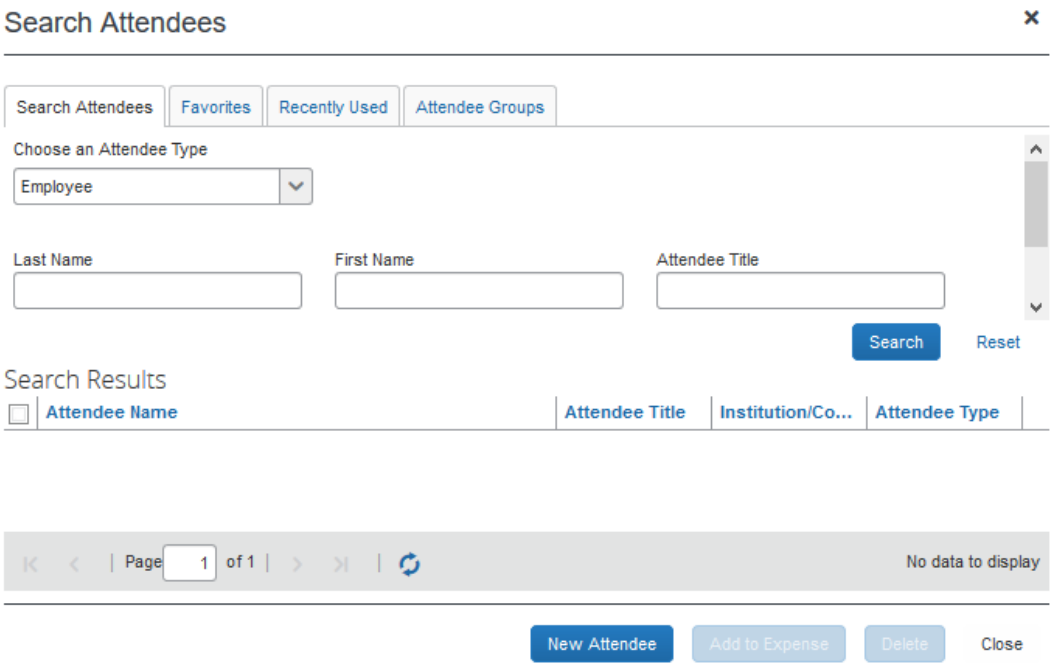
- **Individual Meals – Multiple Destinations** – This will allow you to report per diem amounts for more than one city. Type in the dates you will be in the city, the number of days you will be in the city, the number of days that include the first or last day of travel, and the city. Concur will automatically calculate the amount available to you for those days. Please remember the allowable amounts for the first and last day of travel is 75% of the per diem.
- **Individual Meals – Single Destination** – When travelling to only one location, use this to estimate your per diem by typing in the number of days you are staying in the city. This type should be used even if stopping along the way or a layover before reaching the final destination.
- **Individual Meals – One Day Travel** – If you will be gone for 10 hours or more but not overnight and are requesting reimbursement at 75% of per diem, please use this type. Attach the memo signed off by the appropriate Vice Chancellor. Number of days will always be 1.
- **Lodging** – Change the arrival and departure dates if they are different than the trip start and end dates. Type in the total amount of your estimated lodging expenses, and enter the appropriate information in the comment field as to why your lodging is over the $96 per night per diem amount. These reasons can include conference site, no hotel available at that rate, or high cost area. If it is under $96 per night, type in N/A.
- **Airfare** – Type in the date and the estimated amount of airfare. Remember any trips including airfare should have a Request report entered at least 14 days before the trip.
- **Car Rental** – Type in the date and the estimated amount of car rental.
- **Fuel** – Type in the date and the estimated amount of fuel. Fuel reimbursement is usually only allowed when paying out of pocket for fuel on a rental.
- **Ground Transportation** – Type in the date and the estimated amount of your public transportation, including taxis, shuttles, and ride shares.
- **Parking** – Type in the date and the estimated amount of parking charges you will incur on your trip.

- **Mileage** – Type in the date and the estimated distance of your trip. Attach the proof of mileage.
- **Trip Optimizer** – Type in the date and amount from the trip optimizer spreadsheet. Attach the trip optimizer and proof of mileage.
- **Group Meals** – If you are planning on paying for several people as part of your trip, please use this expense type. Type in the appropriate date, and the estimated amount of the meal. Please include the number of attendees and the amount requested per attendee in the comment section.

  Alternatively, add the name of the attendees, if available. In order to add names, click on the "Advanced Search" button:




Then choose an Attendee Type by clicking on the drop down in the field and clicking on one of the options, which include student, guest, or employee. Type in the information requested (first and last Name, affiliation for guests, or title for employees), and then click the "New Attendee" button.



Click on “Save” if you are done adding attendees or “Save and Add Another” if you want to add more attendees. Concur will add the attendee to the list and bring you back to the expense page once you are done adding attendees.

- **Internet/Online Fees** – Type in the date and the estimated amount of internet/online fees you will incur on your trip.
- **Currency Exchange Fees** – If you are taking an international trip, include the date and the estimated amount of the fees.
- **Passports/Visa Fees** – This may or may not be an allowable expense for your trip. Please check with your supervisor (and Sponsored Programs Accounting if the trip is grant funded) before you include it in your Request document. If it is allowable, type in estimated amount of the passport/visa fees you will incur on your trip.
- **Registration Fees** – Type in the estimated amount of registration fees you will incur on your trip. Does your registration fees include organizational dues? If so, please include that component in the professional dues expense unless there is no way to separate the registration from dues. Then enter the full amount and attach the memo signed off by the appropriate Vice Chancellor approving the purchase.
- **Laundry-for students only** – If you plan to pay for necessary laundry fees for students (team uniforms, etc.), please type in the date and estimated amount of laundry fees you will incur on your trip.
- **Miscellaneous** – If an expense is not included in the list, please type in the date, a description of the expense, and the estimated amount you will incur during your trip.
- **Professional Dues** – If your registration fees includes professional/organizational dues, please type in the date and the estimated amount here and attach the memo signed off by the appropriate Vice Chancellor approving the purchase.

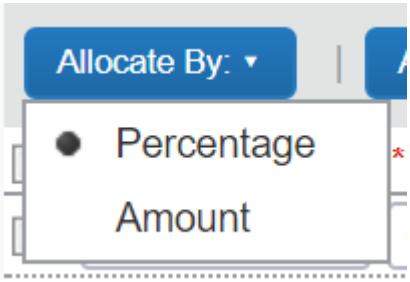
After you type in the appropriate information in each expense type, click the “Save” button, and continue to add expenses until you have added all of your estimated expenses. Once you are done adding expenses, you can add any attachments, print the document, and/or submit the document.

## ALLOCATING AN EXPENSE

There are some trips that might need to be charged to more than one FOAP. In order to record them, you will need to allocate your expenses.

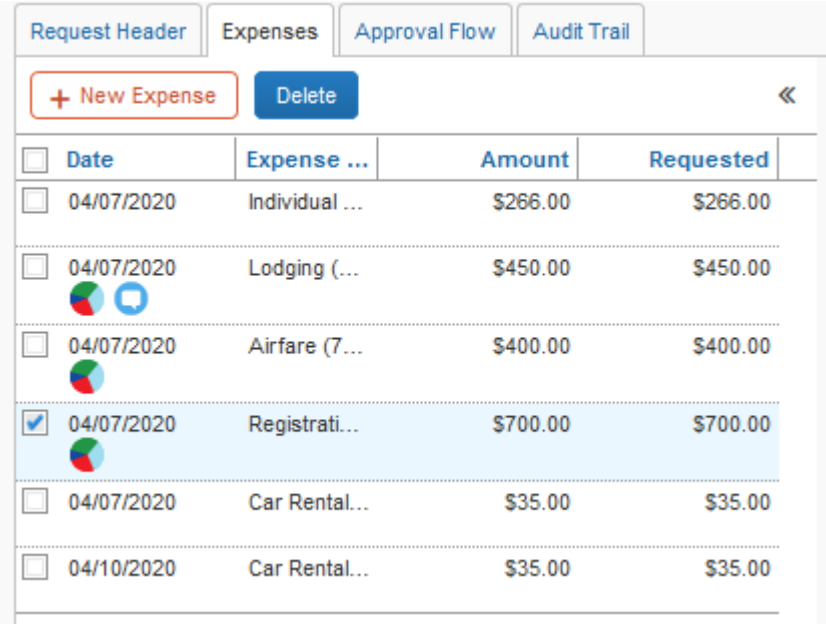
- Click on any expense you would like to allocate
- Click on the "Allocate" button in the lower right corner
- The pop-up window gives you the opportunity to choose one or more expenses you would like to allocate. In this example, we will allocate three of the expenses in the document by checking the boxes next to the name of the expense, and then clicking the "Allocate Selected Expenses" button:

- Choose whether you would like to allocate by percentage or amount by clicking on the “Allocate By:” drop down button:

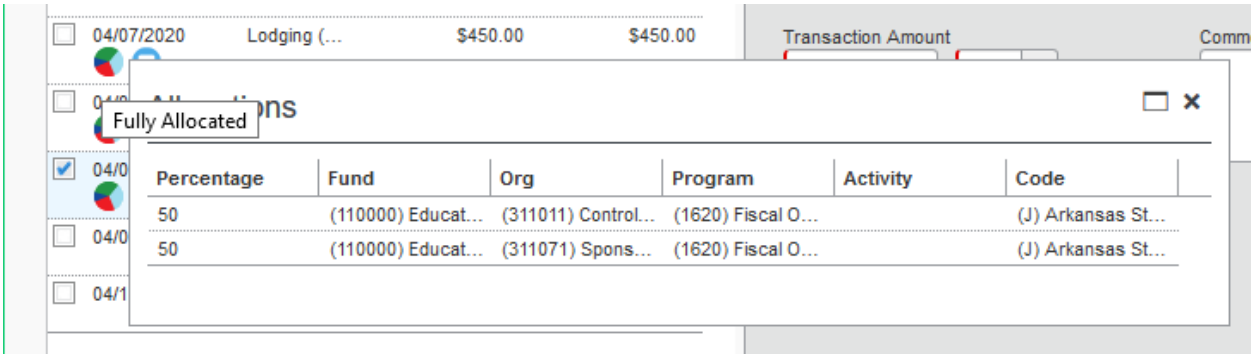



- To allocate by percentage:
  - Type in the percentage amount for the first default FOAP, and then tab over to the next field. Concur will automatically add another line for the next FOAP. If you are not using the default FOAP that was in the Header tab, you can select another FOAP using the same search function that was described in the Header section.
  - Tab through to the next line, and add a new percentage and FOAP.
  - Concur will keep adding lines until you allocate 100% of the expense.
    - Concur will keep track of the total for you at the top right of the screen.
  - Click the “Save” button to retain your changes and return to your document.
- To allocate by dollar amount:
  - Type in the dollar amount for the first default FOAP, and then tab over to the next field. Concur will automatically add another line for the next FOAP. If you are not using the default FOAP that was in the Header tab, you can select another FOAP using the same search function that was described in the Header section.
  - Tab through to the next line, and add a new dollar amount and FOAP.
  - Concur will keep adding lines until you allocate 100% of the expense.
    - Concur will keep track of the total for you at the top right of the screen.
  - Click the “Save” button to retain your changes and return to your document.

- In order to see which expenses have been allocated, look for the allocation icon, which looks like a pie chart:

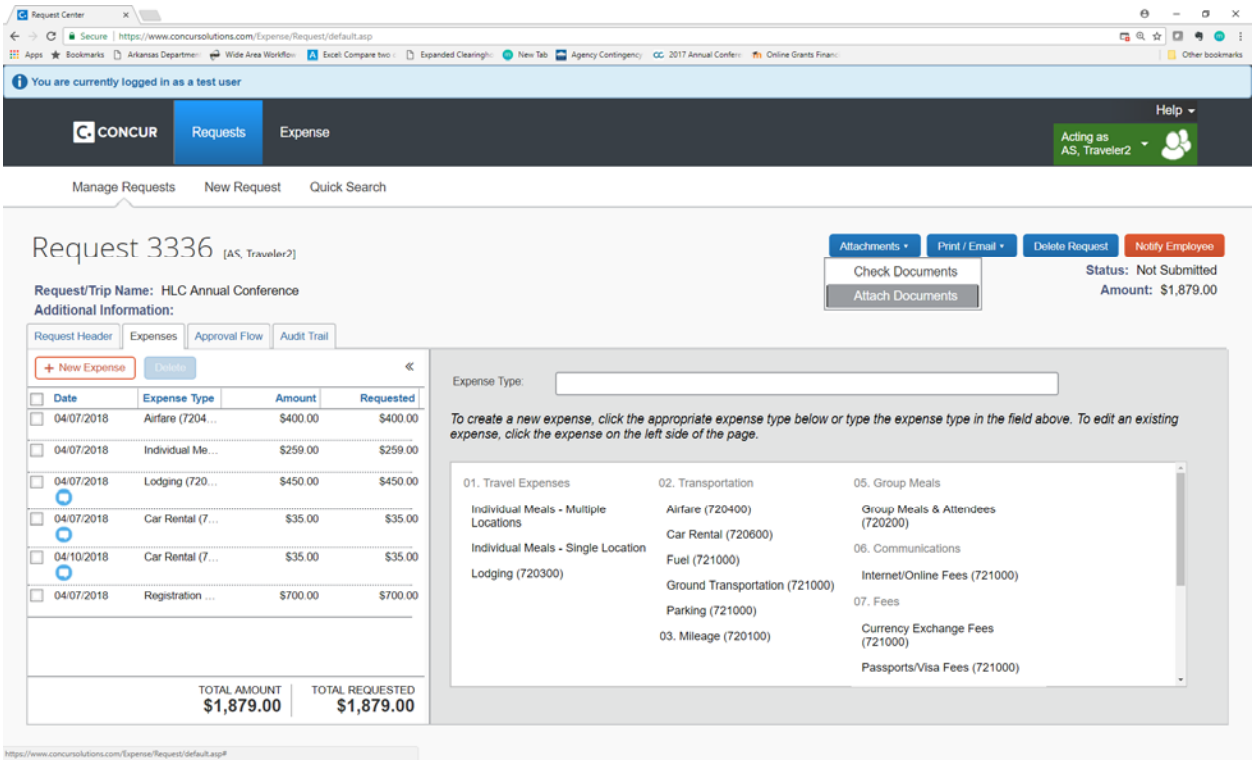



- When you hover over the icon, Concur will bring up the allocation for your review:



## ADDING ATTACHMENTS

If you have documents you would like to attach to your Request, click on the "Attachments" button, then "Attach Documents".




To select and upload your document:

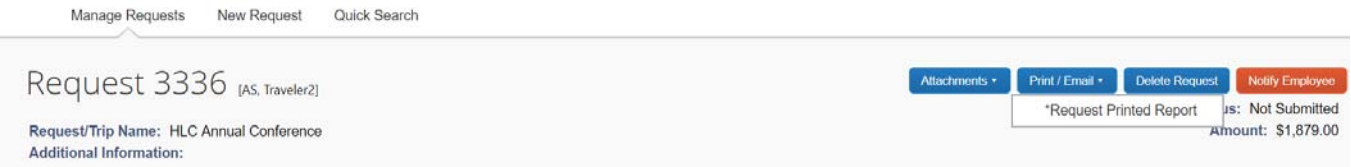
- Click on the "Browse" button.
- Choose a document that is on your computer.
- Click the "Open" button.
- Click on the "Upload" button.
- The document will show up on the list with the word "Attached" to the side.
- You can attach up to 10 documents at a time.
    - Multiple files are combined into one document.
- Click on the "Close" button once you are done.

## PRINTING YOUR DOCUMENT

There is no requirement to print your Request document, but you can if you would like to keep a copy.

To print a copy of the Request:

- Click on the “Print/Email” button
- Click on *Request Printed Report

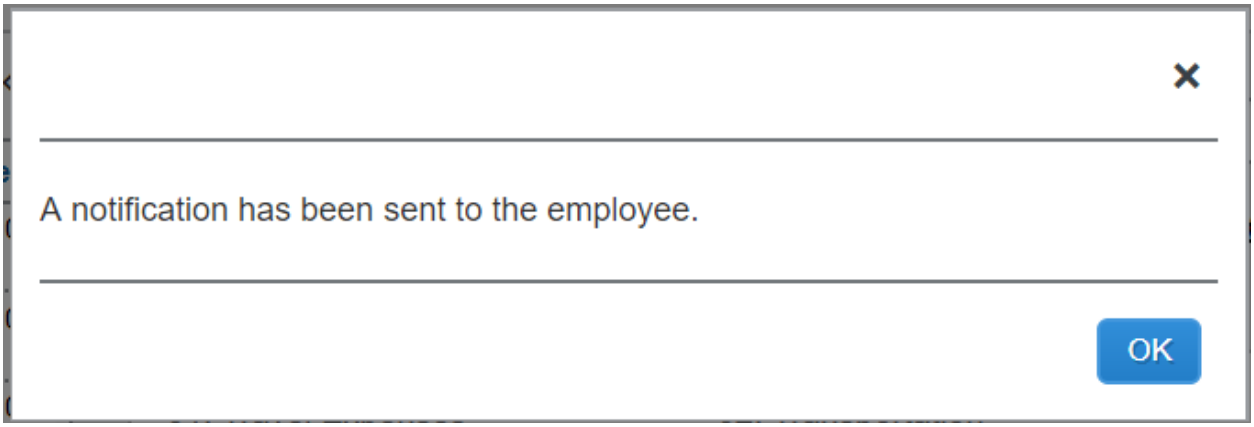



- Concur brings up a printable document that includes the information from the Request Header and Expenses tabs.
- Choose the “PDF” button if you would like to save a copy to your computer.
- Choose the “Email” button and enter the recipient(s) email to send the information to one or more individuals.
- Choose the “Print” button if you would like to print the information.

## SUBMIT THE REQUEST

### Submitting as a Delegate

- Click on the “Notify Employee” button.
- You will receive this message:

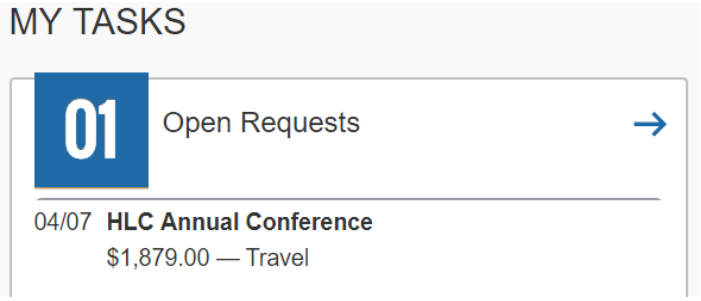



- Click “OK”

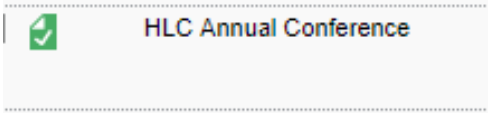
- Concur will take you back to the “Active Requests” list, which will show you the Request Name, Request ID, Status, Request Dates, Submission Date (after the traveler submits the document), and the total dollar amount of the document.
- Concur will send an e-mail to the traveler, and a green checkbox will appear on the traveler’s request list to let them know that the document is ready to submit.

**Submitting as a Traveler with a Delegate**

- You will receive an e-mail when your document is ready to submit.
- On the main menu, Concur will put documents awaiting your submission in the Open Requests section:

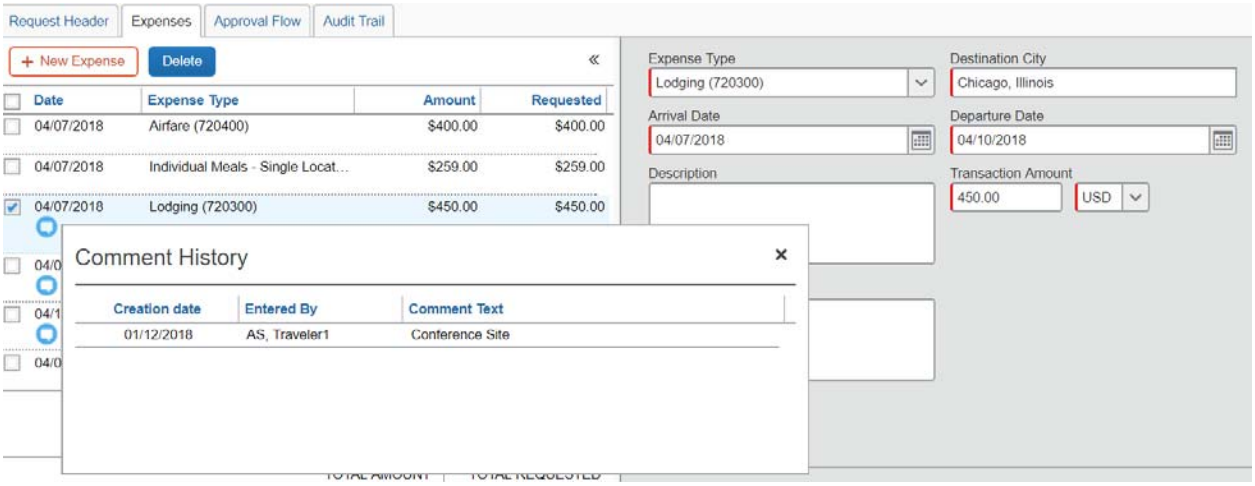



- Find the request with the green checkbox.

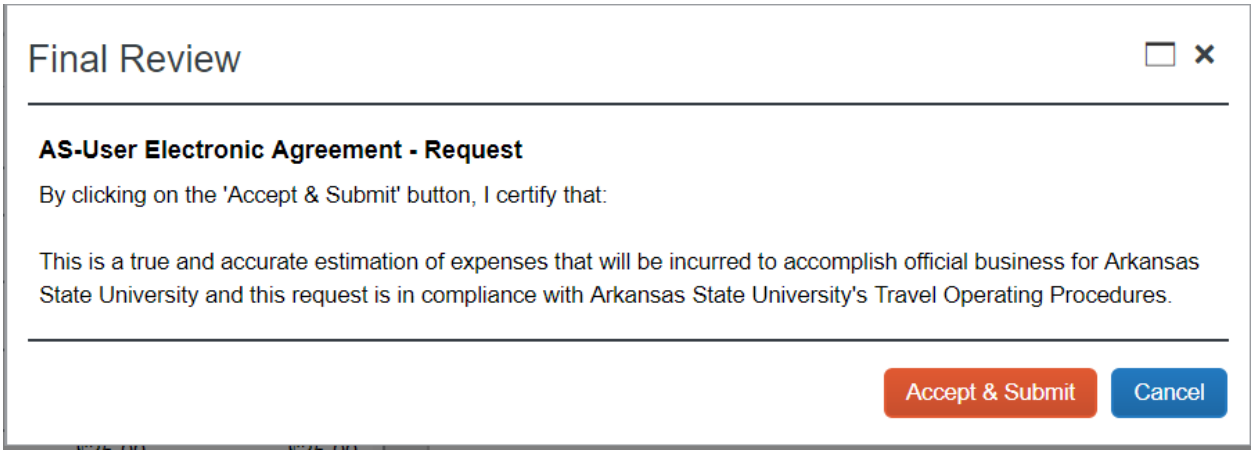



- Click on the request title.
- Review the request, including the header and expenses.
- For Cash Advances the **traveler** must type “I agree” in the Cash Advance Comments field before submitting the Travel Request. The traveler is agreeing to the following responsibilities: “Upon receipt of the advance, I will ensure the funds are in a secure location at all times. I will repay any unused advance back to the University in full within 15 working days after completion of the trip.”
- If any field on the header or in the expenses are incorrect, you can change the information. If you are changing a field in a specific expense, click on the “Save” button once you are done making the change.

- You can see any comments your delegate has entered by hovering your cursor over any of the blue circle comment icons:




- Once you have reviewed the request and agree it is correct, click the "Submit Request" button.
- You will receive the following message:




- Click the "Accept & Submit" button if you agree with the statement.
- Click "Cancel" if you do not and make appropriate changes.
- Once you submit for approval, Concur will take you to the Active Requests page, which will show you the Request Name, Request ID, Status, Request Dates, Submission Date, and the total dollar amount of the document. The Status column will show you where the document is in the approval flow.

**Submitting Request as a Traveler (no Delegate)**

- Once you are done entering in the expenses, click the "Submit Request" button.
- You will receive the "Final Review" message.
- Click the "Accept & Submit" button if you agree with the statement.
- Click "Cancel" if you do not and make appropriate changes.
- Once you submit for approval, Concur will take you to the Active Requests page, which will show you the Request Name, Request ID, Status, Request Dates, Submission Date, and the total dollar amount of the document. The Status column will show you where the document is in the approval flow.

## CASH ADVANCES

In order to submit for a cash advance in the Request Header Tab:

- Type in the Disbursement Date, which is the date the University will write the advance check.
    - Disbursement Dates must be between 1-14 days before the start date of your trip.
- Type in the Cash Advance Amount you are requesting. Keep these limits in mind:
    - Advances must be $100.00 or more.
    - For domestic trips that do not include a student group, you can request up to 50% of the meals and approved miscellaneous expenses (no airfare or registration) that will not be direct billed to the University or paid with a T-Card or Department Card.
    - When applying for an advance for student group or team travel, only a full-time faculty member or staff member can request up to 90% of anticipated expenses (less airfare and registration) that are not to be direct billed to the University or paid by a T-Card or Department Card.
    - For international trips, you can request up to 75% of the anticipated expenses (no airfare or registration) that will not be direct billed to the University or paid with a T-Card or Department Card.
- The **traveler** must type "I agree" in the Cash Advance Comments field before submitting the Travel Request. The traveler is agreeing to the

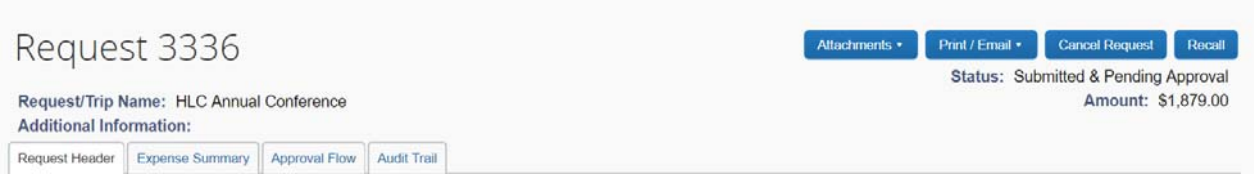
following responsibilities: “Upon receipt of the advance, I will ensure the funds are in a secure location at all times. I will repay any unused advance back to the University in full within 15 working days after completion of the trip.”

- Complete the Expenses tab and submit the request.

## HOW TO RECALL A REQUEST

At any time in the approval process, the traveler (*not the delegate*) can recall the request to make a change.

- Once you login to Concur, look at the “Open Requests” box under “My Tasks”.
- Click on the request you would like to recall.
- Click on the “Recall” button in the top right corner of the screen.




- Click the “Yes” button when the confirmation pop-up appears.
- You will receive a confirmation message the report has been recalled and you can now make appropriate changes and resubmit.
- The recalled report will have to go through the entire approval process again.

## DELETING OR CANCELING THE REQUEST

Requests that have not been submitted can be deleted:

- Choose the document you would like to delete from your list of Active Requests.
- Click on the “Delete Request” button.
- Concur asks you the question, “Are you sure you want to delete this request?” Click on the “Yes” button.

Requests that have been submitted can be canceled:

- Choose the document you would like to cancel from your list of Active Requests.
- Click the “Cancel Request” button from the top right of the screen.
- Add a comment to say why you are canceling the request and click the “OK” button.

## HOW TO CLOSE/INACTIVATE A REQUEST

Close a Request after the trip is taken when there will be no reimbursements or T-Card transactions to reconcile on an Expense Report. *Closing the request will keep the traveler and delegate from receiving an email when an Expense Report isn’t done in a timely manner.*

- Once you login to Concur, look at the “Open Requests” box under “My Tasks”.
- Click on the document you would like to close.
- Click the “Close/Inactivate Request” button in the top right corner of the screen.

- Click the “OK” button when the confirmation pop-up appears.