Concur Travel & Expense

OVERVIEW & NAVIGATION
Concur Overview & Navigation

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What is Concur?

- Concur is a comprehensive web based tool that integrates travel request and expense reporting with a complete travel booking solution for higher education business travel.
- Concur also offers the Concur Mobile App to manage your travel expenses, and approvals on your mobile device and/or tablet.
- Concur can be used for Employee In-State, Out-of-State, and International Travel.
Benefits of Concur....

- Seamless & transparent travel and expense user experience
- Quicker employee reimbursement
- Easier receipt capture and documentation by upload/scan to Expense Report
- Email notifications and reminders of submissions and approvals at designated timed intervals
- No out-of-pocket expense for airfare when booking through Concur Travel
- Convenience through built-in automated features for CSU travel policy compliance, mileage calculation, currency conversion, etc.
- Better reporting of all transaction types
Concur Overview

Concur streamlines for a fully automated electronic workflow process of...

- Travel reimbursements via EFT or mail
- US Bank travel ghost card transactions (airfare)
- Domestic & International travel approvals
Concur has 3 Modules:

1. **Request (Travel Request)** – Formerly known as a Request for Authorization to travel is required to obtain preapproval of your travel prior to making any travel reservations.

2. **Travel (Concur Travel)** – Concur Travel should be used to book airfare and make rental car and hotel reservations through the University’s travel management company (TMC), Christopherson Business Travel (CBT).

3. **Expense (Expense Report)** - Formerly known as Travel Claim is required to request reimbursement for out-of-pocket expenses, and to reconcile any university paid transactions.

- CSU policies are integrated within all 3 modules to make for easier reporting, approving, and processing.
The Travel Process

Step 1: Complete Travel Request. Once approved...

Step 2: Book Travel (via Concur Travel or outside Concur)

Step 3: Complete and submit Travel Expense Report after trip return.
Approval Workflow

- All Travel Requests and Expense Reports will go through an automated workflow process.
- The “Reports To” Approver is your direct report provided by HR.
- The Budget Approver has been designated by your Department Admin and is based on Dept. ID/Fund combination.
- Depending on Travel Type and Travel Destination, additional approvals may be required for Travel Request.
- In addition to required approvals, approvers can add additional approvers to the workflow to any particular Travel Request and/or Expense Report.
Concur Approval Workflows

Travel Request = In-State/Out-of-State

1. Travel Request Submitted
2. “Reports To” Approver
3. Budget Approver
4. Travel Request Approved

Travel Request = International

1. Travel Request Submitted with Foreign Travel Insurance Form attached
2. “Report to” Approver
3. Budget Approver
4. Exception Approver (Provost)
5. Travel Request Approved

Expense Report = In-State/Out-of-State/International

1. Expense Report Submitted
2. “Report to” Approver
3. Budget Approver
4. AP Travel Processor
5. Expense Report Approved
6. CFS

Purple → Automatic routing
Eligible SF State employee accounts are setup to use Concur now!

- **Accessing Concur...**
  - Login with your SF State Credentials via Single Sign-on:
    - [http://fiscaff.sfsu.edu](http://fiscaff.sfsu.edu)
      - Services > Travel Services
      - Quick Links > Travel Service Center > Concur Login

- After first initial login to Concur, employees should review and complete their User Profile. Setting up your profile is important so that all the information in Concur is current and accurate for booking travel and getting the most out of the Concur Travel & Expense System. Saving your Profile once is required to book travel in Concur.
Accessing Concur

Once you click on the Concur Link, it will take you to the CSU Campus Login page to enter your SF State Credentials.
Navigating Concur Homepage

<table>
<thead>
<tr>
<th>Concur Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Task Bar</td>
<td>Provides direct access to Travel Requests, Available Expenses, Open Reports (Expense Reports), and other Concur features. Click on + New &gt; Start a Request to start a New Travel Request.</td>
</tr>
<tr>
<td>Alerts</td>
<td>Displays informational alerts about Travel features.</td>
</tr>
<tr>
<td>My Tasks</td>
<td>Displays a dashboard for your Open Requests, Available Expenses (US Bank Ghost Card Transactions – Airfare), Open Reports (Expense Reports) and Pending Approvals.</td>
</tr>
<tr>
<td>Trip Search</td>
<td>Use this Trip Search for obtain estimates for travel. Do not book travel here and instead book from your approved Request under Requests.</td>
</tr>
<tr>
<td>My Trips</td>
<td>This section lists your upcoming trips.</td>
</tr>
<tr>
<td>Company Notes</td>
<td>Important information provided by CSU campuses and valuable Concur information as well as Christopherson Business Travel contact information.</td>
</tr>
</tbody>
</table>
Need More Information?

- For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at: https://fiscaff.sfsu/travel.com