



SAP CONCUR

TRAVEL EXPENSE MANAGEMENT SOLUTION

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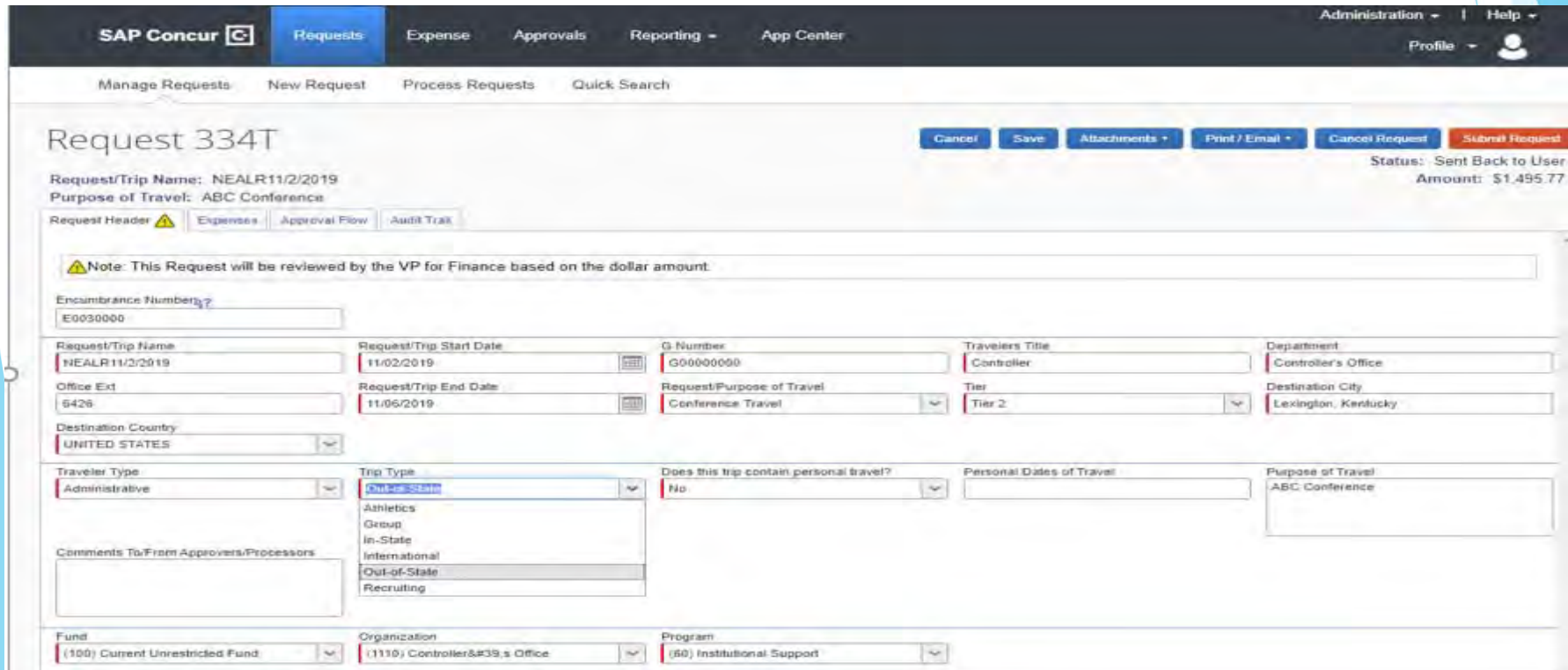
Gain Access to Concur

- ▶ Complete the SAP User Request Form
 - ▶ Go to GSUnet
 - ▶ Click Popular Links
 - ▶ Select Controller Office
 - ▶ Then click Travel Information on the left side of the screen
 - ▶ The form is listed under Concur Forms

Encumbrance Number

Prior to submitting your Travel Request you must:

1. Go into Banner and Encumber the funds needed to fund the travel
2. Obtain all applicable management approval for this Encumbrance.
3. Enter the Encumbrance Number on Concur Travel Request
4. Scan and attach documentation to the request showing that the encumbrance has been approved. **(THIS IS REQUIRED)**
5. Contact the Information Technology Center for Banner Encumbrance Training if needed.



The screenshot displays the SAP Concur 'Request 334T' form. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The right side shows 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar are links for 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The main form area is titled 'Request 334T' and includes buttons for 'Cancel', 'Save', 'Attachments', 'Print / Email', 'Cancel Request', and 'Submit Request'. The status is 'Sent Back to User' with an amount of '\$1,495.77'. The form fields are organized into sections: 'Request Header' (with a warning icon and tabs for 'Expenses', 'Approval Flow', and 'Audit Trail'), a note about review by the VP for Finance, 'Encumbrance Number' (E0030000), and a grid of fields for 'Request/Trip Name', 'Request/Trip Start Date', 'G Number', 'Travelers Title', 'Department', 'Office Ext', 'Request/Trip End Date', 'Request/Purpose of Travel', 'Tier', 'Destination City', 'Destination Country', 'Traveler Type', 'Trip Type', 'Does this trip contain personal travel?', 'Personal Dates of Travel', 'Purpose of Travel', 'Fund', 'Organization', and 'Program'. The 'Trip Type' dropdown is open, showing options like 'Out-of-State', 'Athletics', 'Group', 'In-State', 'International', 'Out-of-State', and 'Recruiting'. The 'Fund' field is set to '(100) Current Unrestricted Fund', 'Organization' to '(1110) Controller's Office', and 'Program' to '(60) Institutional Support'.

Request/Trip Name	Request/Trip Start Date	G Number	Travelers Title	Department
NEALR11/2/2019	11/02/2019	G00000000	Controller	Controller's Office

Office Ext	Request/Trip End Date	Request/Purpose of Travel	Tier	Destination City
6426	11/06/2019	Conference Travel	Tier 2	Lexington, Kentucky

Destination Country	Traveler Type	Trip Type	Does this trip contain personal travel?	Personal Dates of Travel	Purpose of Travel
UNITED STATES	Administrative	Out-of-State	No		ABC Conference

Fund	Organization	Program
(100) Current Unrestricted Fund	(1110) Controller's Office	(60) Institutional Support

Log in to SAP Concur

Go to: WWW.CONCURSOLUTIONS.COM

Select Log in at the top of the page

To Log in to SAP Concur:

- In the **Username** field, enter your username (this is your university email address).
- In the **Password** field, enter your password.
- Click **Sign In**.

NOTES:

- Log in to SAP Concur with your University email address.
- Your password is case sensitive.
- **First time users:** In the **Username** field, enter your username, then select **Forgot your password**. A link will be sent to your university email address so that you can set up your password.
- If you are not sure how to log in, check with the travel administrator for additional assistance.

SAP Concur

Sign In

User Name

Password

☐ Remember user name on this computer

Sign In

[Forgot your user name?](#)
[Forgot your password?](#)

Change language
English (US)

SAP SAP Concur

[Travel Policy](#)
[Service Status \(North America\)](#)

Last logged in: 02/09/2018 9:27 AM
© Copyright 2018 - SAP Concur - All Rights Reserved

Exploring the Sign In Page

Section	Description
Forgot your username?	<p>This section will let the system send your username in the email address that was set-up in your profile.</p> <p>Note:</p> <ul style="list-style-type: none">• If you do not see the email in your inbox, please check your spam or junk folder.• If you do not receive the email, please contact your company administrator.
Forgot your password?	<p>This section will let the system send the following in the email address that was set-up in your profile:</p> <ul style="list-style-type: none">• Your password hint (if you provided a password hint)- or -• Link to reset your password <p>Notes:</p> <ul style="list-style-type: none">• If you do not see the email in your inbox, please check your spam or junk folder.• If you do not receive the email, please contact your company administrator.
Change language	<p>This section allows you to change the language of your SAP Concur Account to your native language. [Example: Deutsch, Italiano, etc.]</p> <p>NOTE: SAP Concur is now available in 22 languages.</p>
Service Status	<p>This section provides you with an up-to-the-minute service availability and performance information. This will be helpful if you encounter a sudden system issue. [Example: Slow response, etc.].</p>

Exploring the Home Page

The home page contains the following sections.

NOTE: To return to the home page from any other page, click the SAP Concur logo on the top left of the screen.

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none">Start a new report, request, cash advance, payment request, etc.;Open reports and requests;Manage available expenses; and,Upload Receipts.
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.

SAP Concur

RequestsTravelExpenseInvoiceApprovalsApp Center

Administration | Help

Profile

SAP Concur

Hello, William

+

New

29

Authorization Requests

00

Purchase Requests

38

Available Expenses

41

Open Reports

MY TASKS

00

Required Approvals

Great! You currently have no approvals.

38

Available Expenses

28.10

SpringHill Suites

USD 1,100.91

28.10

SpringHill Suites

USD 1,100.91

26.08

Avis

USD 654.83

26.08

Holiday Inn

USD 928.08

41

Open Reports

Hotel Reservation at ME...

KRW 555,278

test

test

Business Trip

BRL 711.96

Profile Information

To view your profile parameters:

- Click **Profile > Profile Settings**. The **Profile Options** page appears.
- Click the appropriate option from the left-side menu.
- Note: To see your **FOPAL** information. On The **Profile Options** page, select Expense Information.

SAP Concur

RequestsExpenseApprovalsReportingApp CenterAdministrationHelp

Profile

ProfilePersonal InformationChange PasswordSystem SettingsConcur Mobile Registration

Your Information

Personal InformationCompany InformationContact InformationEmail Addresses

Request Settings

Request InformationRequest DelegatesRequest PreferencesRequest ApproversFavorite AttendeesInternational Travel

Expense Settings

Expense InformationExpense DelegatesExpense PreferencesExpense ApproversFavorite Attendees

Other Settings

System SettingsConnected AppsConcur ConnectChange PasswordConcur Mobile Registration

Reporting Settings

Reporting BudgetNotification Settings

Profile Options

Select one of the following to customize your user profile.

Personal Information

Personal Information

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration

Set up access to Concur on your mobile device

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

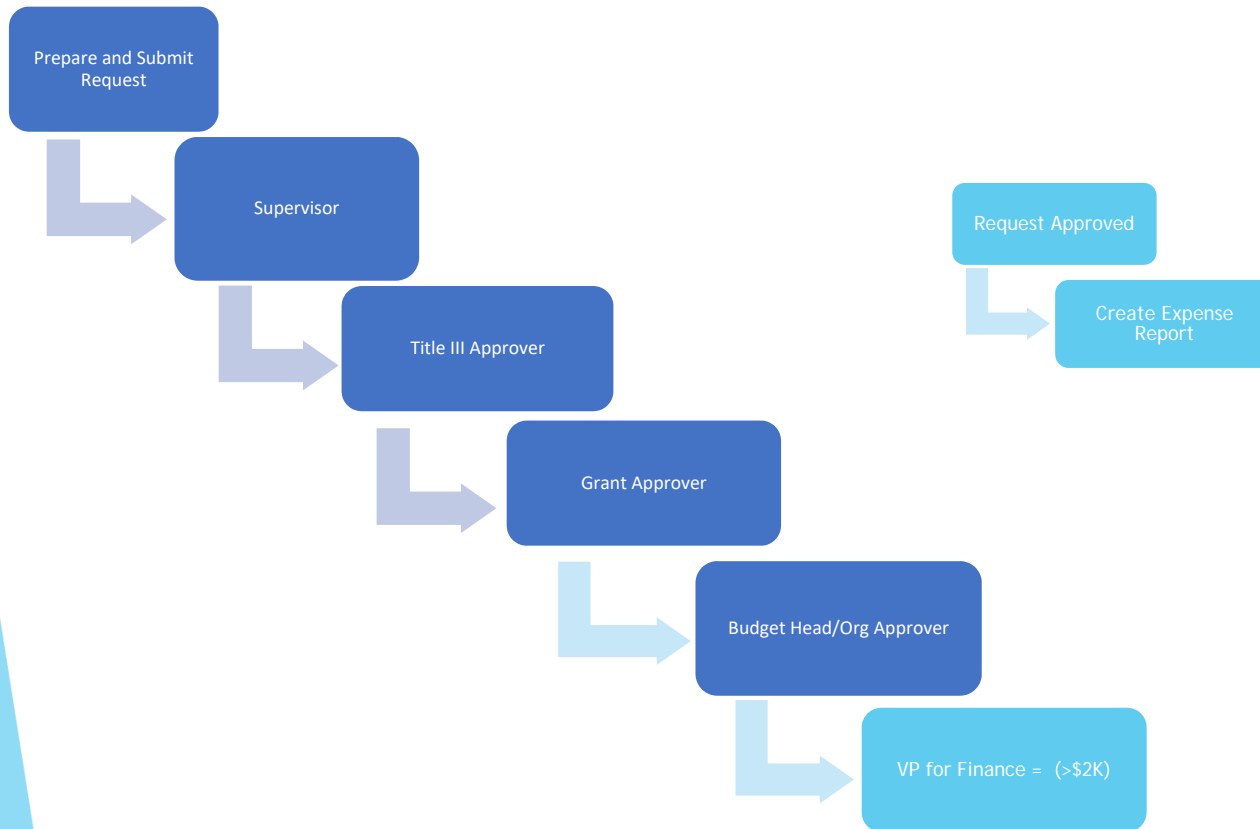
Change your password.

RACHEL D NEAL

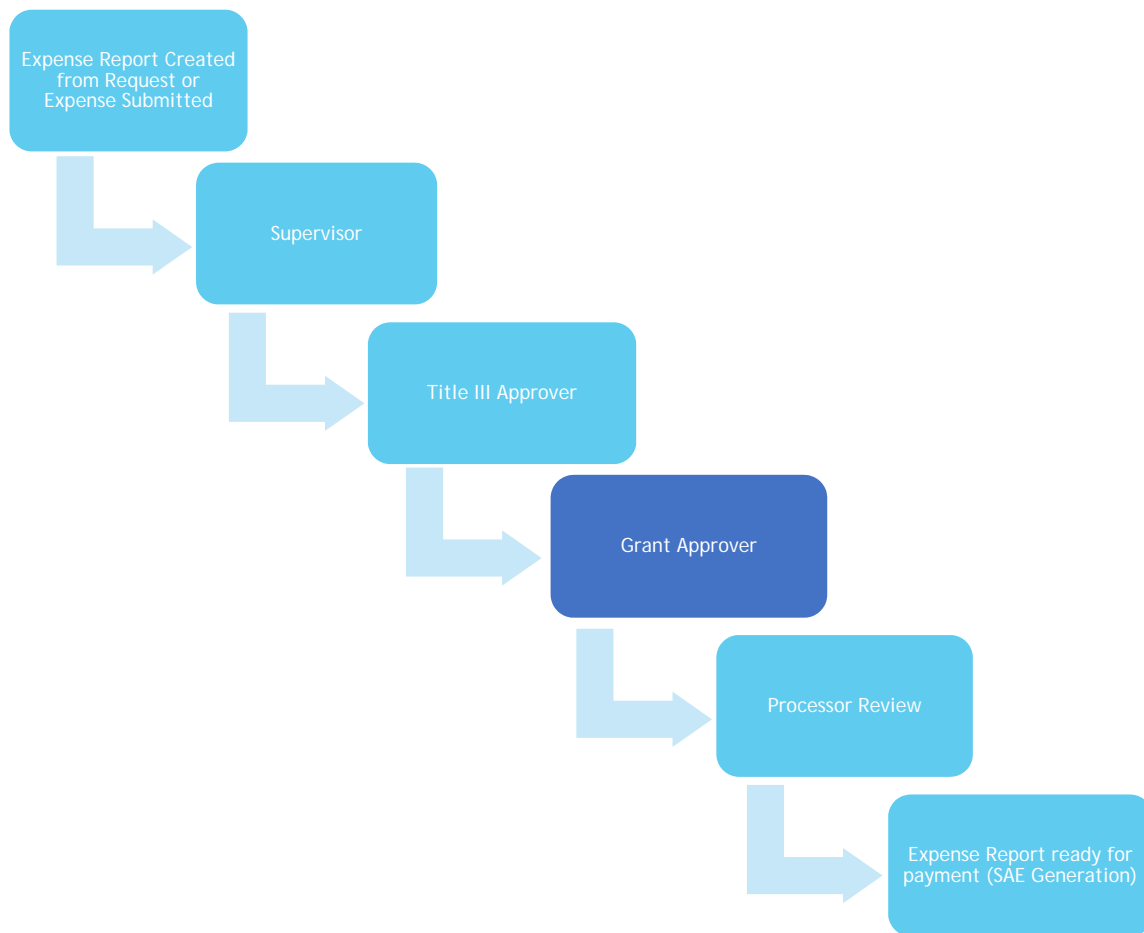
Profile SettingsSign Out

Grambling State University - Workflow:

Request:



Expense:



Add a Delegate

- To add a Request or Expense *delegate* to your profile:
- Click **Profile > Profile Settings**. The **Profile Options** page appears.
 - Click the appropriate option from the left-side menu. (Request and/or Expense Delegate).
 - Select Add, Enter the delegate’s name in the box, then select a delegate from the list of employees in the system.
 - Assign the permission, then SAVE.

Profile Personal Information Change Password System Settings Concur Mobile |

Your Information
Personal Information
Company Information
Contact Information
Email Addresses

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees
International Travel

Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees

Other Settings

Request Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
--------------------------	------	-------------	--------------------	---------------------	-------------------	-----------------	-------------	-----------------------	--------------------------	--------------------------

Delegates

If you are acting as an Expense *delegate* for another employee (*delegator*):

- Any changes you make on this page affect only the delegator and do not change your personal information.
- You cannot access all profile options for your delegator, such as bank information.

To access the profile information:

- Click **Profile > Profile Settings**. The **Profile Options** page appears.
- Click the appropriate option from the left-side menu.

The screenshot shows the SAP Concur user interface. At the top, there's a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. On the right of the navigation bar are 'Administration' and 'Help' dropdowns, and a 'Profile' button with a user icon. Below the navigation bar, the 'Profile' tab is selected, showing a sub-menu with 'Personal Information', 'Change Password', 'System Settings', and 'Mobile'. The main content area is titled 'Profile Options' and features a left-hand menu with categories: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), and 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees). The main content area lists several options: 'Personal Information' (Your home address and emergency contact information), 'Company Information' (Your company name and business address or your remote location address), 'Credit Card Information' (You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service), 'E-Receipt Activation' (Enable e-receipts to automatically receive electronic receipts from participating vendors), 'Travel Vacation Reassignment' (Going to be out of the office? Configure your backup travel manager), 'Request Preferences' (Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print), 'Change Password' (Change your password), 'Acting as other user' (with a search bar and a 'Cancel' button), 'Setup Travel Assistants' (You can allow other people within your companies to book trips and enter expenses for you), 'Travel Profile Options' (Carrier, Hotel, Rental Car and other travel-related preferences), 'Expense Delegates' (Delegates are employees who are allowed to perform work on behalf of other employees), 'Expense Preferences' (Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print), and 'Mobile Registration' (Set up access to Concur on your mobile device).

Processing Travel as a Delegate

- Click **Profile**
- Under **Acting as other user** enter the user's name that you are performing duties for, or select the name from the drop-down list.
- Then Hit **Start Session**
- To end the Session under Profile, select **End Session**.

1)

SAP Concur | Requests | Expense | Reporting | App Center | Administration | Help | Profile

GRAMBLING STATE UNIVERSITY
Hello, JACQUELINE

+ Start a Request + Start a Report + Upload Receipt

JACQUELINE A. WHITAKER
Profile Settings | Sign Out

Acting as other user ?
[Empty dropdown menu]
Cancel

COMPANY NOTES
Fund, Org or Program Code Problems
Please contact the Concur System Admin at xxx-xxxx or via email to report any issues relating to with locating your fund, organization

2)

SAP Concur | Requests | Expense | Reporting | App Center | Administration | Help | Profile

GRAMBLING STATE UNIVERSITY
Hello, JACQUELINE

+ Start a Request + Start a Report + Upload Receipt

JACQUELINE A. WHITAKER
Profile Settings | Sign Out

Acting as other user ?
NEAL RACHEL D
Cancel Start Session

COMPANY NOTES
Fund, Org or Program Code Problems
Please contact the Concur System Admin at xxx-xxxx or via email to report any issues relating to with locating your fund, organization

3)

SAP Concur | Requests | Expense | Approvals | Help | Acting as NEAL RACHEL D

GRAMBLING STATE UNIVERSITY
NEAL RACHEL D

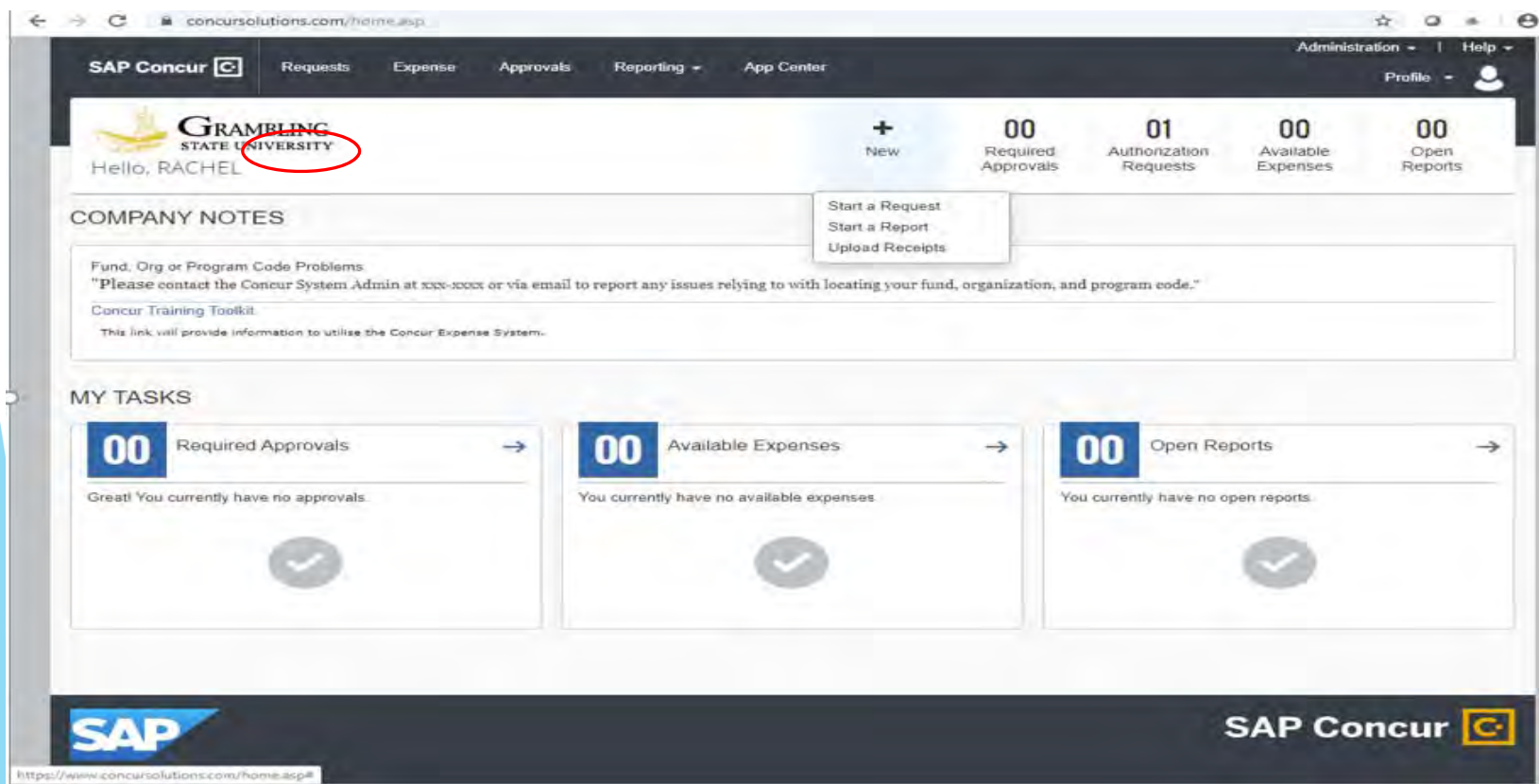
New 00 Required Approvals 05 Authorization Requests 00 Available Expenses 02 Open Reports 00 Cash Advances

COMPANY NOTES

Creating a New Request

To create a request:

- 1. Select from the following:
 - On the home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Request**.
- or -
 - Click the **Request Tab**, then click **New Request** (on the sub-menu).



Request Header

Complete all required fields (marked with red bars) and the customized optional fields, as needed.

- **NOTE:** The format for the **Request/Trip Name** for all request is your last name, first name initial, and the start date of the travel.

Example: NEALR11/2/2019

Request/Trip Name: NEALR11/2/2019

Purpose of Travel: ABC Conference

Request Header

Expenses

Approval Flow

Audit Trail

Note: This Request will be reviewed by the VP for Finance based on the dollar amount.

Encumbrance Number

E0030000

Request/Trip Name

NEALR11/2/2019

Request/Trip Start Date

11/02/2019

G Number

G00000000

Travelers Title

Controller

Department

Controller's Office

Office Ext

6426

Request/Trip End Date

11/06/2019

Request/Purpose of Travel

Conference Travel

Tier

Tier 2

Destination City

Lexington, Kentucky

Destination Country

UNITED STATES

Traveler Type

Administrative

Trip Type

Out-of-State

Does this trip contain personal travel?

No

Personal Dates of Travel

Purpose of Travel

ABC Conference

Comments To/From Approvers/Processors

Fund

(100) Current Unrestricted Fund

Organization

(1110) Controller's Office

Program

(60) Institutional Support

Request Header

- Traveler Type

This is split into 6 categories:

- Administrative – selected by University Staff when travel does not include students
- Athletic Staff – selected by University Athletic staff when travel does not include students
- Athletic Team – selected by University Athletic staff when travel does include students for competition
- Faculty – selected by University Faculty when travel does not include students
- Group – selected by University Faculty or Staff when travel does include students
- Students – selected for Student only travel

The screenshot displays the SAP Concur 'Request 334T' form. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Requests' tab is active. The form header shows 'Request/Trip Name: NEALR11/2/2019' and 'Purpose of Travel: ABC Conference'. A status bar indicates 'Status: Sent Back to User' and 'Amount: \$1,495.77'. The 'Request Header' tab is selected, showing a warning note: 'Note: This Request will be reviewed by the VP for Finance based on the dollar amount.' The form fields are organized into sections: 'Encumbrance Number' (E0030000), 'Request/Trip Name' (NEALR11/2/2019), 'Request/Trip Start Date' (11/02/2019), 'G Number' (G00000000), 'Travelers Title' (Controller), 'Department' (Controller's Office), 'Office Ext' (6426), 'Request/Trip End Date' (11/06/2019), 'Request/Purpose of Travel' (Conference Travel), 'Tier' (Tier 2), 'Destination City' (Lexington, Kentucky), 'Destination Country' (UNITED STATES), 'Traveler Type' (Administrative), 'Trip Type' (Out-of-State), 'Does this trip contain personal travel?' (No), 'Personal Dates of Travel' (empty), 'Purpose of Travel' (ABC Conference), 'Fund' ((100) Current Unrestricted Fund), 'Organization' ((1110) Controller's Office), and 'Program' ((60) Institutional Support).

Field	Value
Encumbrance Number	E0030000
Request/Trip Name	NEALR11/2/2019
Request/Trip Start Date	11/02/2019
G Number	G00000000
Travelers Title	Controller
Department	Controller's Office
Office Ext	6426
Request/Trip End Date	11/06/2019
Request/Purpose of Travel	Conference Travel
Tier	Tier 2
Destination City	Lexington, Kentucky
Destination Country	UNITED STATES
Traveler Type	Administrative
Trip Type	Out-of-State
Does this trip contain personal travel?	No
Personal Dates of Travel	
Purpose of Travel	ABC Conference
Fund	(100) Current Unrestricted Fund
Organization	(1110) Controller's Office
Program	(60) Institutional Support

Request Header

- Trip Type

This is split into 6 categories:

- Athletics –
- Group –
- In-State –
- International –
- Out of State –
- Recruiting –

The screenshot shows the SAP Concur Request Header form for Request 334T. The form is titled "Request 334T" and includes a status bar at the top right indicating "Status: Sent Back to User" and "Amount: \$1,495.77". The form is divided into several sections: "Request Header", "Expenses", "Approval Flow", and "Audit Trail". The "Request Header" section contains fields for "Request/Trip Name" (NEALR11/2/2019), "Purpose of Travel" (ABC Conference), "Request/Trip Start Date" (11/02/2019), "Request/Trip End Date" (11/06/2019), "G Number" (G00000000), "Travelers Title" (Controller), "Department" (Controller's Office), "Office Ext" (6426), "Request/Purpose of Travel" (Conference Travel), "Tier" (Tier 2), "Destination City" (Lexington, Kentucky), "Destination Country" (UNITED STATES), "Traveler Type" (Administrative), "Trip Type" (Out-of-State), "Does this trip contain personal travel?" (No), "Personal Dates of Travel", "Purpose of Travel" (ABC Conference), "Fund" ((100) Current Unrestricted Fund), "Organization" ((1110) Controller's Office), and "Program" ((60) Institutional Support). A note at the top left states: "Note: This Request will be reviewed by the VP for Finance based on the dollar amount." The "Trip Type" dropdown menu is open, showing options: Athletics, Group, In-State, International, Out-of-State, and Recruiting. The "Out-of-State" option is selected.

Request 334T

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

Status: Sent Back to User
Amount: \$1,495.77

Request Header Expenses Approval Flow Audit Trail

Note: This Request will be reviewed by the VP for Finance based on the dollar amount.

Encumbrance Number E0030000

Request/Trip Name NEALR11/2/2019	Request/Trip Start Date 11/02/2019	G Number G00000000	Travelers Title Controller	Department Controller's Office
Office Ext 6426	Request/Trip End Date 11/06/2019	Request/Purpose of Travel Conference Travel	Tier Tier 2	Destination City Lexington, Kentucky
Destination Country UNITED STATES	Traveler Type Administrative	Trip Type Out-of-State	Does this trip contain personal travel? No	Personal Dates of Travel
Comments To/From Approvers/Processors		Purpose of Travel ABC Conference		
Fund (100) Current Unrestricted Fund	Organization (1110) Controller's Office	Program (60) Institutional Support		

Adding Transactions to a Travel Request

- Once you have completed the request Header tab, proceed to the expense tab to add expense items to your travel request.
- Select add **New Expense**.
- Choose from the list of expenses on the right and continue to add expenses until you have added all the applicable expenses for your upcoming travel.

SAP Concur

RequestsExpenseApprovalsReportingApp Center

AdministrationHelp

Profile

Manage RequestsNew RequestProcess RequestsQuick Search

Request 334V

AttachmentsPrint / EmailDelete RequestSubmit Request

Status: Not Submitted

Request/Trip Name:
Purpose of Travel:

Request HeaderExpensesApproval FlowAudit Trail

+ New Expense

Date	Expense Type	Amount	Requested
------	--------------	--------	-----------

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses

02. Transportation

03. Meals

04. Other

Hotel

Airfare

Breakfast

Other Allowables

Hotel Tax

Airline Fees

Dinner

Registration/Fees

Laundry Services

Car Rental

Group Meals

Tips/Gratuities

Car Rental Fuel

Lunch

Mileage

Charter Bus

Other Ground Transportation

TOTAL AMOUNT
\$0.00

TOTAL REQUESTED
\$0.00

Adding Expenses to the Travel Request

- Once you choose from the list of expenses on the right,
- Complete all required fields (marked with red bars) and the customized optional fields, as needed.
- Attach supporting documents as needed to support request.
- Then **Save**.
- **Note:** If applicable, indicate whether the transaction is paid by individual travel card or travel office by selecting the appropriate checkbox.
- If supporting documentation is required, the system will not allow you to submit your request for approval until support has been attached.

REQUIRED SUPPORTING DOCUMENTS (Attach ALL documents in Concur)

- **Hotel-** Hotel confirmation, credit card authorization form if paid by the travel office
- **Airfare-Quotes**
- **Car Rental-Hertz or Enterprise Booking Form**
- **Registration-Agenda**
- **Recruiting-Schedule**
- **Mileage-Google Maps, Map Quest, etc.**
- **Cash Advance-Meal per diem list**

Hotel Expense Type

If the hotel is paid by the travel office, then attach the credit card authorization form to the request.
If the form is filled out electronically, then attach the link in the comment section under the hotel expense
For in state hotels, provide them with a hotel tax exemption form before or upon arrival.

The screenshot displays the SAP Concur interface for Request 334T. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The right side shows 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, there are links for 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'.

The main section is titled 'Request 334T'. It includes a 'Request/Trip Name: NEALR11/2/2019' and 'Purpose of Travel: ABC Conference'. The status is 'Sent Back to User' with an amount of '\$1,495.77'. There are buttons for 'Attachments', 'Print / Email', 'Cancel Request', and 'Submit Request'.

The 'Request Header' section has tabs for 'Request Header', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below this is a '+ New Expense' button and a 'Delete' button.

The 'Expenses' tab shows a table of expenses:

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	11/05/2019	Hotel	\$336.60	\$336.60
<input type="checkbox"/>	11/02/2019	Airfare	\$334.17	\$334.17
<input type="checkbox"/>	11/03/2019	Registration/Fees	\$450.00	\$450.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/06/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$50.00	\$50.00
<input type="checkbox"/>	11/02/2019	Breakfast	\$65.00	\$65.00
<input type="checkbox"/>	11/02/2019	Lunch	\$90.00	\$90.00
<input type="checkbox"/>	11/02/2019	Dinner	\$120.00	\$120.00


At the bottom of the table, it shows 'TOTAL AMOUNT \$1,495.77' and 'TOTAL REQUESTED \$1,495.77'.

The right side of the form contains fields for 'Expense Type' (Hotel), 'Vendor' (Marriott Hotels), 'Hotel City' (Lexington, Kentucky), 'Check in Date' (11/05/2019), 'Check Out Date' (11/06/2019), and 'Transaction Amount' (\$336.60 USD). There is also a 'Comment' field and two checkboxes: 'Paid with Travel Card (See tool tip)' and 'Paid by Travel Office (See tool tip)'. At the bottom right, there are 'Save', 'Allocate', and 'Cancel' buttons.

Meal Expense Type

If paid out of pocket for students or received a cash advance for meals, then a meal per diem list is required. Refer to the travel pocket guide on the travel page to determine the meal allowance

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

Request Header  Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#)

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	11/05/2019	Hotel	\$336.60	\$336.60
<input type="checkbox"/>	11/02/2019	Airfare	\$334.17	\$334.17
<input type="checkbox"/>	11/03/2019	Registration/Fees	\$450.00	\$450.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/06/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$50.00	\$50.00

Expense Type: Breakfast Transaction Date: 11/02/2019

Meal Allowance: 13 Number of Days: 5

Transaction Amount: \$5.00 USD

Comment: Description:

Airfare Expense Type

The Travel Office cannot approve the airfare request until your travel request has made it to the Travel Office queue.

To book a flight you must first create a profile

<https://legacy.cbtravel.com/business/profile/stateofla/>

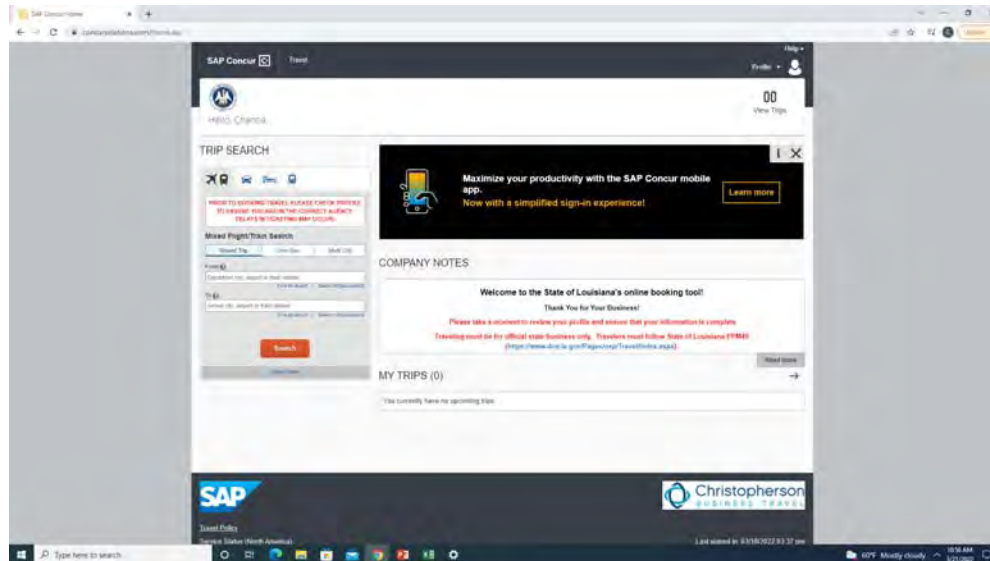
Once you create a profile, log in

<https://app.cbtravel.com/authentication/?url=%2F>

Go to book travel

Book/Manage online trips

Then it will take you to Concur (Look below to see how your screen should look)



- ▶ The Travel Office pays for ALL airfare.
- ▶ For the method of payment please select the CBA card that is already on file ending in 1111.
- ▶ Attach the list of flight options to your travel request.

SAP Concur | Requests | Expense | Approvals | Reporting | App. Center

Manage Requests | New Request | Process Requests | Quick Search

Request 334T

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

Request Header | Expenses | Approval Flow | Audit Trail

[+ New Expense](#) | [Delete](#)

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	11/05/2019	Hotel	\$336.60	\$336.60
<input checked="" type="checkbox"/>	11/02/2019	Airfare	\$334.17	\$334.17
<input type="checkbox"/>	11/03/2019	Registration/Fees	\$450.00	\$450.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/06/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/>	11/02/2019	Other Allowables	\$50.00	\$50.00
<input type="checkbox"/>	11/02/2019	Breakfast	\$65.00	\$65.00
<input type="checkbox"/>	11/02/2019	Lunch	\$90.00	\$90.00
<input type="checkbox"/>	11/02/2019	Dinner	\$120.00	\$120.00

Expense Type:

Vendor:

Business Travel Start Date:

Amount:

Comment:

Registration Fee Expense Type:

If paid by the Travel Office, then attach the website link and your login information in the comment section.
Please specify which course you are registering for if there are more than one option.

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

Request Header Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#)

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 11/05/2019	Hotel	\$336.60	\$336.60
<input type="checkbox"/> 11/02/2019	Airfare	\$334.17	\$334.17
<input checked="" type="checkbox"/> 11/03/2019	Registration/Fees	\$450.00	\$450.00
<input type="checkbox"/> 11/02/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/> 11/06/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/> 11/02/2019	Other Allowables	\$50.00	\$50.00
<input type="checkbox"/> 11/02/2019	Breakfast	\$65.00	\$65.00

Expense Type: Registration/Fees Transaction Date: 11/03/2019

Transaction Amount: 450.00 USD

Description: Early Bird Registration

Comment:

If payment made by Travel Office, attach website link.

Other Allowable Expense Type:

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

Request Header Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#)

Date	Expense Type	Amount	Requested
<input type="checkbox"/> 11/05/2019	Hotel	\$336.60	\$336.60
<input type="checkbox"/> 11/02/2019	Airfare	\$334.17	\$334.17
<input type="checkbox"/> 11/03/2019	Registration/Fees	\$450.00	\$450.00
<input checked="" type="checkbox"/> 11/02/2019	Other Allowables	\$25.00	\$25.00
<input type="checkbox"/> 11/06/2019	Other Allowables	\$25.00	\$25.00

Expense Type: Other Allowables Type of Other Allowable: Baggage

Business Travel Start Date: 11/02/2019 Amount: 25.00 USD

Comment:

Car Rental Expense Type:

Attach Enterprise or Hertz car rental booking form to the travel request.

If you are requesting a larger size vehicle and there are less than 4 passengers, then a justification letter is required.

Please provide the address on the booking form for all reservations that are made outside of Ruston.

If you have a travel card, then you can pay for the car rental and gas with your travel card for out of state rentals ONLY.

Non cardholders, for out state rentals, the Travel Office will pay for the rental and you will get reimbursed for gas.

(receipts are required)

This screenshot shows a web form for entering a car rental expense. The form is divided into two main columns. The left column contains fields for: Expense Type (set to 'Car Rental'), Pick-up City (Monroe, Louisiana), Drop-off Time (05:00), Pick-up Date (11/02/2019), Drop-off Date (11/08/2019), Type of Rental (In-State Rental), Traveler Cell #, Enterprise Rental Location (Monroe), and Address. The right column contains fields for: Vendor (Enterprise), Pick-up Time (06:00), Drop-off City (MONROE), Early Pick-up Note, Transaction Amount (35.00 USD), Work Email (near@gram.edu), Number of Passengers (1), Type of Vehicle Requested (Standard Size), and Justification. At the bottom right, there are three buttons: 'Save', 'Allocate', and 'Cancel'.

Car Fuel Expense Type: For in state car rental, once your travel request is approved, the Travel Office will send you an email to pick up your gas card.

This screenshot shows a web form for entering a car fuel expense. The form has a few fields: Expense Type (set to 'Car Rental Fuel'), Transaction Date, Type of Rental Fuel, Transaction Amount (0.00 USD), Description, and Comment. At the bottom right, there are three buttons: 'Save', 'Allocate', and 'Cancel'.

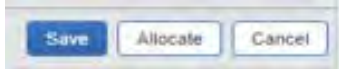
MILEAGE

- ▶ You can only be reimbursed up to 99 miles per trip
- ▶ Provide documentation showing the miles to and from your destinations (ex. Map Quest)

Allocating Expenses

The Allocations feature allows you to allocate expenses to multiple accounts, which will be charged for those expenses. You can allocate a single expense or multiple expenses.

- With the report open, to create or edit a *single* expense, click **Allocate** at the bottom of the **Expense** tab.



- To allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then:
(1)Click **Allocate the selected expenses** on the right side of the page.

- or -

(1)Click **Details > Allocations**.

The **Allocations for Request** window appears. The total expense amount, the amount allocated, and the amount remaining appear in the **Allocations** section.

Allocations for Request : NEALR11/2/2019

Request List

Allocate Selected Expenses Clear Selections Summary

<input type="checkbox"/>	Date ▼	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	11/05/2019	Other Allowables		\$25.00
<input checked="" type="checkbox"/>	11/05/2019	Hotel		\$336.60
<input checked="" type="checkbox"/>	11/03/2019	Registration/F...		\$450.00
<input checked="" type="checkbox"/>	11/02/2019	Airfare		\$334.17
<input checked="" type="checkbox"/>	11/02/2019	Other Allowables		\$25.00
<input checked="" type="checkbox"/>	11/02/2019	Other Allowables		\$50.00
<input checked="" type="checkbox"/>	11/02/2019	Breakfast		\$65.00
<input checked="" type="checkbox"/>	11/02/2019	Lunch		\$90.00
<input checked="" type="checkbox"/>	11/02/2019	Dinner		\$120.00

Allocations

Total:\$25.00 Allocated:\$25.00(100%) Remaining:\$0.00(0%)

Allocate By: ▼ Add New Allocation Delete Selected Allocations Favorites ▼

<input type="checkbox"/>	Percentage	Fund	Organization	Program	Code
<input type="checkbox"/>	50	(100) Current ...	(1110) Control...	(60) Institution...	(100) Current U...
<input type="checkbox"/>	50	(201) Housing	(1317) Tiger Vil...	(90) Auxiliary E...	(201) Housing-(...

Save Cancel

- From the **Allocate By** dropdown list, select **Percentage** or **Amount**.

Select from the Account lists the appropriate account and allocated expenses accordingly.

NOTE:

- 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.

- Click **Save**.

- For the confirmation message, click **OK**.

Approval Flow of Travel Request

- This document indicates the levels of approval for travel requests

Request 334T Save Workflow Attachments • Print

Request/Trip Name: NEALR11/2/2019
Purpose of Travel: ABC Conference

[Request Header](#) [Expenses](#) [Approval Flow](#) [Audit Trail](#)

Supervisor Approval:
FAUCETTE, SHERIAH N.

Title III Approver:
HILL, HERCULES, BEVERLY
(this step may be skipped)

Grant Office Approval:
WASHINGTON, MOROLINE J.
(this step may be skipped)

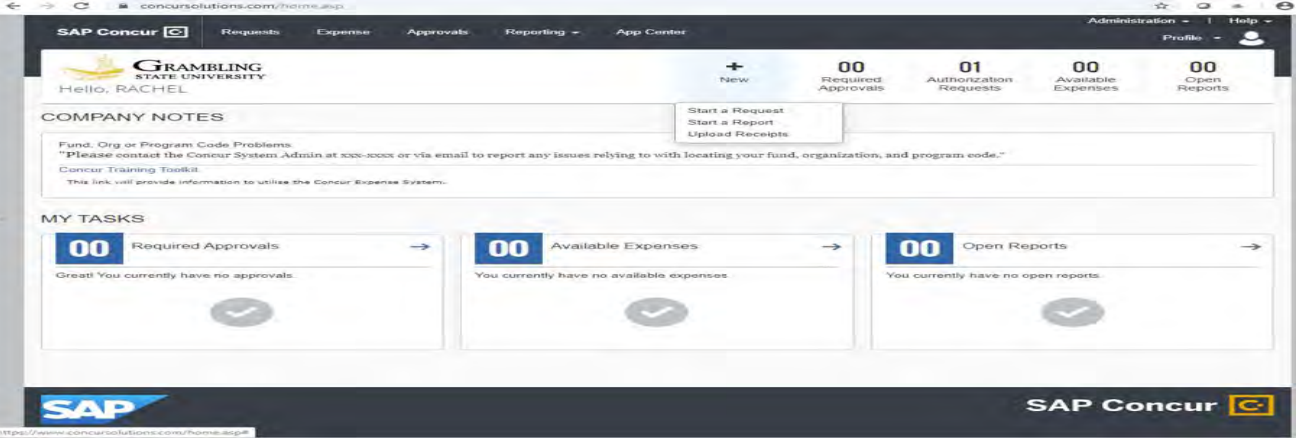
Budget Head:

VP of Finance Approval:
LEMBELLE, MARTIN
(this step may be skipped)

Creating a New Expense Report

To create a report:

1. Select from the following:
 - On the home page, in the **My Tasks** section, click **Open Reports**
 - Under **Active Request**, select the request you are ready to submit an expense report for. Under **Action** on the far right of the screen click **Expense**.



1. Complete all required fields (marked with red bars) and the customized optional fields customized, as needed.
2. Click **Next**. Available **Cash Advances** are displayed in a popup window (assign advances or click **Next**). Depending on your company's configuration, you might see a **Travel Allowances** popup window, click **Yes** or **No** to include travel allowance expenses.
3. At this point, you will either:
 - Add company card transactions to your expense report. -or-
 - Add an out-of-pocket expense to your expense report.

Create a New Expense Report

Report Header

Report/Trip Name

Rachel D Neal

G Number

G00000000

Travelers Title

Controller

Department

Controller's Office

Office Ext

Report/Trip Start Date

11/02/2019

Trip Departure Time (First Day)

06:00

Trip Arrival Time (First Day)

12:00

Report/Trip End Date

11/06/2019

Trip Departure Time (Last Day)

09:00

Trip Arrival Time (Last Day)

16:00

Report/Purpose of Travel

Conference Travel

Tier

Tier 1

Traveler Type

Administrative

Trip Type

Out-of-State

Does this trip include personal travel?

No

Additional Information

Comments To/From Approvers/Processors

Fund

1 (100) Current Unrestricted Ft

Organization

2 (1110) Controller's Office

Program

3 (60) Institutional Support

Military time

Requests

Add

Remove

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
--------------------------	--------------	------------	-----------	---------------	-----------------	------------------

Next >>

Cancel

Adding Expenses to the Expense Report

- Choose from the list of expenses
- Complete all required fields (marked with red bars) and the customized optional fields, as needed
- Attach supporting documents as needed to support request
- **Save**
- **NOTE:** If applicable, indicate whether the transaction is paid for by the traveler's card, travel office, voyager or out of pocket by selecting the appropriate checkbox
- If supporting documentation is required, the system will not allow you to submit your request for approval until supporting documentation has been attached.

Hotel Expense Type:

Expenses

Date	Expense Type	Amount	Requested
09/18/2019	Other Allowables	\$25.00	\$25.00
09/14/2019	Hotel Marriott Hotels, Lexington, Kentucky	\$692.94	\$692.94
09/14/2019	Airfare Delta Air Lines, Lexington, Kentucky	\$334.17	\$334.17
09/14/2019	Registration/Fees sacubo, Lexington, Kentucky	\$450.00	\$450.00
09/14/2019	Other Allowables	\$25.00	\$25.00
09/14/2019	Breakfast Lexington, Kentucky	\$12.00	\$12.00
09/14/2019	Lunch Lexington, Kentucky	\$17.00	\$17.00
09/14/2019	Dinner Lexington, Kentucky	\$30.00	\$30.00

TOTAL AMOUNT
\$1,586.11

TOTAL REQUESTED
\$1,586.11

Expense

Receipt Image

Available Receipts

Total Amount: \$692.94 | Itemized: \$692.94 | Remaining: \$0.00

Previous Comment
Entered By RACHEL NEAL: From 9/14/2019 to 9/17/2019

Expense Type
Hotel

Tiers
Tier 2

Transaction Date
09/14/2019

Report/Purpose of Travel
Conference Travel

Vendor
Marriott Hotels

City of Purchase
Lexington, Kentucky

Payment Type
University Paid - CBA

Amount
692.94

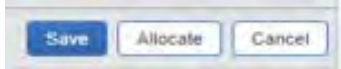
USD

Attach Receipt

Allocating Expenses

The Allocations feature allows you to allocate expenses to multiple accounts, which will be charged for those expenses. You can allocate a single expense or multiple expenses.

- With the report open, to create or edit a *single* expense, click **Allocate** at the bottom of the **Expense** tab.



- To allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then:
(1)Click **Allocate the selected expenses** on the right side of the page.

- or -

(1)Click **Details > Allocations**.

The **Allocations for Request** window appears. The total expense amount, the amount allocated, and the amount remaining appear in the **Allocations** section.

Allocations for Request : NEALR11/2/2019

Request List

Allocate Selected Expenses Clear Selections Summary

<input type="checkbox"/>	Date ▼	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	11/06/2019	Other Allowables		\$25.00
<input checked="" type="checkbox"/>	11/05/2019	Hotel		\$336.60
<input checked="" type="checkbox"/>	11/03/2019	Registration/F...		\$450.00
<input checked="" type="checkbox"/>	11/02/2019	Airfare		\$334.17
<input checked="" type="checkbox"/>	11/02/2019	Other Allowables		\$25.00
<input checked="" type="checkbox"/>	11/02/2019	Other Allowables		\$50.00
<input checked="" type="checkbox"/>	11/02/2019	Breakfast		\$65.00
<input checked="" type="checkbox"/>	11/02/2019	Lunch		\$90.00
<input checked="" type="checkbox"/>	11/02/2019	Dinner		\$120.00

Allocations

Total:\$25.00 Allocated:\$25.00(100%) Remaining:\$0.00(0%)

Allocate By: ▼ Add New Allocation Delete Selected Allocations Favorites ▼

<input type="checkbox"/>	Percentage	Fund	Organization	Program	Code
<input type="checkbox"/>	50	(100) Current ...	(1110) Control...	(60) Institution...	(100) Current U...
<input type="checkbox"/>	50	(201) Housing	(1317) Tiger Vil...	(90) Auxiliary E...	(201) Housing-(...

Save Cancel

- From the **Allocate By** dropdown list, select **Percentage** or **Amount**.

Select from the Account lists the appropriate account and allocated expenses accordingly.

NOTE:

- 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.

- Click **Save**.

- For the confirmation message, click **OK**.

Itemizing Expenses

Use the Itemize feature to account for receipts that include both business and personal expenses or to ensure that each of your expenses is accounted for correctly.

To itemize an expense:

- Create the expense as usual, and then click **Itemize** (instead of **Save**).
- The expense appears on the left side of the page, along with the message *Adding New Itemization*.
- The name of the **New Expense** tab changes to **New Itemization**.
- On the **New Itemization** tab, select the expense type that applies to the first itemization. The page refreshes, displaying the required and optional fields for the selected expense type.
- Complete the fields as directed.
- Click **Save**.
- The newly-created itemization appears on the left side of the page, below the expense.
- The total amount, the itemized amount, and the remaining amount appear on the right side of the page.
- For each additional itemization, on the **Itemization** tab, select the appropriate expense type and complete the appropriate fields. **NOTE:** You can also copy itemizations to save time with similar entries.

Once you have itemized the **Total Amount** of the charge, the **Itemization** tab is replaced by the **New Expense** tab.



Seattle Trip

Delete Report

Submit Report

+ New Expense

+ Quick Expenses

Import Expenses

Details

Receipts

Print / Email

Expenses

Expense

Amount

Requested

2014-10-29

Office Supplies
Office Warehouse, Seattle, Washir

\$68.23

\$68.23

Adding New Itemization

New Itemization

Available Receipts

Total Amount: \$68.23 | Itemized: \$0.00 | Remaining: \$68.23

Expense Type

Business Promotions

Misc. Promotional Expense

Trade Shows

Communications

Cellular Phone

Local Phone

Long Distance

Online Fees

Pager

Company Car Expense

Company Car Maintenance

Company Car Oil

Company Car Wash

Entertainment

Alcohol

TOTAL AMOUNT

TOTAL REQUESTED

\$68.23

\$68.23

Save

Cancel

Printing and Submitting an Expense Report

To preview and print the expense report

- On the expense report page, click **Print / Email**, and select one of the options from the drop-down list.

- Available options include:

- GSU Detailed Report with Summary Data**: Prints a report that includes all report-level information as well as a summary of the report.

- GSU Travel Card Log Sheet – w/Row Entries**: Prints your travel activity for the month that lists all the purchases to be reconciled with your bank statements.

- Review the details, and then click **PDF/Email/Print**.

The screenshot displays the SAP Concur expense report interface. At the top, there is a navigation bar with a red-bordered button labeled '+ New Expense' and three menu items: 'Details', 'Receipts', and 'Print / Email'. Below this, the main content area is titled 'Expenses' and features a table with columns for 'Date' and 'Expense Type'. A blue-bordered box labeled 'Adding New Expense' is visible on the left. A dropdown menu is open from the 'Print / Email' button, showing two options: '*GSU-Detailed Report with Summary Data' and '*GSU-Travel Card Log Sheet - w/Row Entries'. In the foreground, a 'Final Review' window is displayed, showing the 'Expense Report' details for 'Report Name : Seattle Trip' and 'Employee Name : Peterson, Sue'. The window has a title bar with 'Show Expenses' (checked) and 'Show Itemizations' (unchecked), and buttons for 'PDF', 'Email', 'Print', and 'Close'.

To submit your expense report

- On the expense report page, click **Submit Report**. The **Final Review** window appears.

- Review the information for accuracy. You can **Print**, **Attach Receipt Images**, or **View Receipts**.

- Click **Accept & Submit**.

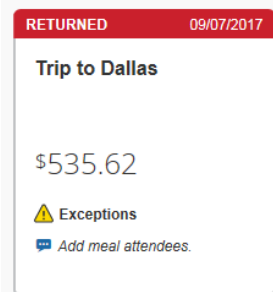
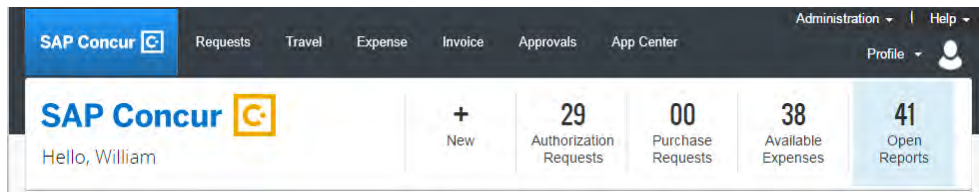
If you cannot successfully submit the report, a message appears describing the report error or exception. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

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:

- 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. The approver's comment appears below the amount.

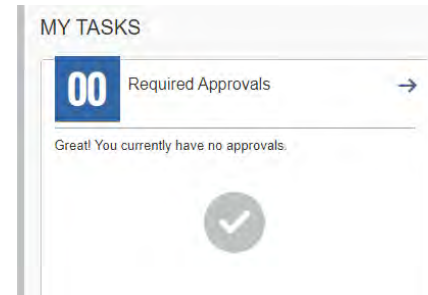
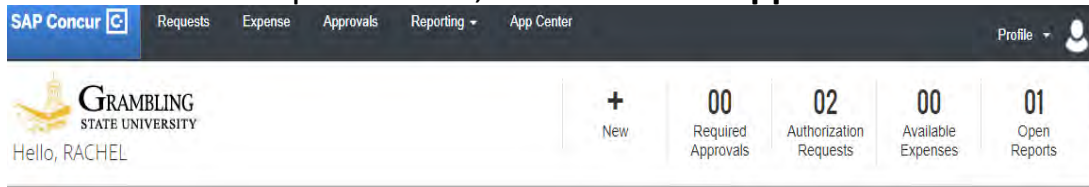


- Click the report tile to open the report.
- Make the requested changes.
- Click **Submit Report**.

Reviewing and Approving an Expense Report

To approve a report "as is":

1. On the home page, on the Quick Task Bar, place your mouse pointer over **Required Approvals**, and then select the report you want to open.
- or -
2. On the home page, in the **Required Approvals** section of **My Tasks**, click **Requests or Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
3. Review the report details, and then click **Approve**.



Sending Back an Expense Report

To return the entire request or expense report to the employee for correction:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Request or 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**.

To practice creating, submitting, & approving travel documents, you can use the test environments listed below:

Last ▲ / First	Employee Group Configuration	Email	Employee ID	Login ID
Test, COA1 Approver	Test-Grambling State University	coa1@gram.edu	coa1	coa1@gram.edu
Test, COA2 Approver	Test-Grambling State University	coa2@gram.edu	coa2	coa2@gram.edu
Test, Admin	Test-Grambling State University	admin@gram.edu	admin	admin@gram.edu
Test, Processor	Test-Grambling State University	processor@gram.edu	processor	processor@gram.edu
Test, ITAdmin	Test-Grambling State University	itadmin@gram.edu	itadmin	itadmin@gram.edu
Test, Traveler1	Test-Grambling State University	traveler1@gram.edu	traveler1	traveler1@gram.edu
Test, Traveler2	Test-Grambling State University	traveler2@gram.edu	traveler2	traveler2@gram.edu
Test, ApproverTwo	Test-Grambling State University	approver2@gram.edu	approver2	approver2@gram.edu
Test, Grant	Test-Grambling State University	grantapprover@gram.edu	grantapprover	grantapprover@gram.edu
Test, Finance	Test-Grambling State University	finapprover@gram.edu	finapprover	finapprover@gram.edu