# Concur Travel Frequently Asked Questions

## Contents

## General Concur Questions

1. **What is Concur?**
   Concur is SFA's new travel and expense software. This new software will streamline travel expense and request for SFA employees. Concur includes many advantages such as mobile access for on-the-go receipt uploading, built-in policy compliance, viewable approval routing, enhanced reporting, risk mitigation and auto-populated expense reports. Concur is the primary travel software for employees to seek reimbursement.

2. **I am new to Concur, what do I need to do first?**
   The first thing you need to do is to log in to Concur and review your profile.
   - Be sure to review the information already loaded into your profile you have the option to add more information to your profile if you prefer. All required information will be already added for you.
   - Next, verify your email address (in the Personal Information section of the profile).
   - Add any delegates/ proxy approvers you need or would like.
   - Review your default FOAP (under "request information")
   - Download the Concur App either from the profile section or the App Store or Google Play.

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3.  **How do I login to Concur?**
    Users should access Concur by logging into mySFA, then navigating to:

    Resources tab → Travel & P-Card heading → Concur link

    | RESOURCES | TRAVEL & P-CARD |
    |---|---|
    | | Concur |
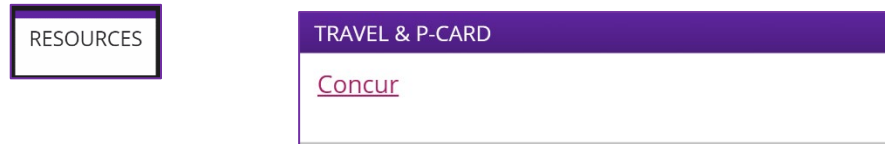
4.  **Can new employees get added to Concur?**
    Yes, new employees will be loaded into Concur once they are completely setup in Banner as an employee.

    > NOTE: If your department wants to utilize travel delegates to prepare travel for users, be sure new employees log in, review their profile, and add travel delegates.

5.  **I have a prospective employee coming to SFA for an interview- how do I prepare their travel?**
    Send a W9 and direct deposit form to traveloffice@sfasu.edu. We will then have the employee set up and create a profile in Concur for the prospective employee. We will provide the prospective employee with login information so they have the ability to submit their request/report.

6.  **Will my old trips be brought over into Concur?**
    No, old trips (including travel authorizations, travel reports, and advances) are not brought over from the old travel module (TEM).

7.  **What do I do if I am not getting emails?**
    Take the following actions:
    - Check your profile and make sure your email has been verified.
    - Review the "request preferences" and "expense preferences" to make sure the emails you want to receive are activated.
    - Check spam/junk folders in your email.

    If the above solutions fail, contact traveldesk@sfasu.edu .

8.  **Do I have to do my own travel requests and reports?**
    While it is encouraged that users (employees, faculty, staff) prepare and submit their own travel, it is not required that users prepare their own travel. However, all reports will have to be submitted by the actual traveler. Receipts and information could be given to an office delegate and they can prepare travel for you and notify you through Concur to login and submit.

    You can assign your delegate by going to Profile settings → Request delegates.

9. **How do I split expenses between two or more FOAPs?**
   Enter the expenses as normal. Then click on one of the expenses then click "allocate" on the bottom right hand side. A new window will appear with all the expenses on the left. Select the expenses you want to change the FOAP information for then click "allocate selected expenses".

   The right side of that window will display the FOAP. Click "new allocation" to add another FOAP. The amount and percentage can be adjusted to split it as desired.

10. **Can I allocate by dollar amount?**
    Yes. Enter in the expense and click on "Allocate" on the bottom right of the expense information. There, you can choose the expenses you want to allocate and choose "allocate selected expenses". There will be an option to allocate by percentage or amount.

11. **Can I set up multiple emails in my Concur Profile?**
    Yes. Log in and go to your profile. Review the "Personal Information" section and you will see an email area to verify your MySFA email and add alternative emails.

12. **How do I download the Concur App?**
    In the Profile section, there is an option under "other settings" that says "Concur Mobile Registration". Once selected then you may start the registration process. The app can also be downloaded from the Apple App Store or Google Play.

13. **Once a request/report is submitted, can it be recalled or sent back?**
    Yes, as long as it has not been fully approved by everyone in the Workflow, a report or request can always be recalled by the user or delegate. Simply open the report or request and click on the blue "recall" button on the top right.

1. **What do we need to attach when submitting requests?**
   All requests need a receipt attachment before it can be submitted. Appropriate attachments include itineraries, agendas, programs, or authorization to travel (such as an email with travel information).

2. **Do we need to attach receipts for each line?**
   Yes, you will need a receipt per line (per expense) rather than one large file attached to the report.

3. **How do I email receipts to my SAP Concur profile?**
   The sender's email address (cardholder or delegate) **MUST** be verified in their Concur profile prior to emailing receipt images and documents. Delegates can email receipt images and documents on behalf of the cardholder, but the delegate's email must be verified in their own profile.

   **To email receipts:**
   a) Initiate a new email using a **verified email address**
   b) Delegates: Add the cardholder's verified email address in the subject line
   c) Attach the file(s) (PNG, JPG, JPEG, PDF, HTML, TIF, OR TIFF)
   d) Send to receipts@concur.com
   e) Files will be store in **Available Receipts**

4. **Do emailed receipts have to be sent from my SFASU email address?**
   No, but it is highly preferred, receipts can be sent from any email account as long as that email address has been verified in your Concur profile. Concur uses the sent from address to link receipts to the appropriate cardholder account. You may add and verify multiple email addresses to your profile.

5. **If I do not have a Travel card and I book my own travel, how do I submit my receipts for reimbursement?**
   An expense report needs to be submitted with your receipts for proper reimbursement. You can either take pictures of the receipts with the Concur App, email them (after verification setup) to receipts@expenseit.com , or upload them directly into Concur. To upload them directly, go into Concur, click the "expense" tab at the top of the page, then the "upload Receipts" option at the bottom.

6. **How do you handle multiple attendees on one dinner receipt?**
   The names of the attendees can be noted a number of ways: by writing the names clearly on the receipt; listing their names in the comments within Concur; or the attendees can be added on the actual meal line below where the expense information is entered. Attendees can be added on the expense line for group and business meals. The favorite attendee tool could be utilized which saves a list of travelers that can be quickly

added to the meal line.

1. **Where is my Concur profile?**
   When you log into Concur through your mySFA, it is in the top right of the home page

2. **What information should I review when I get into my profile?**
   Profile Settings offers numerous ways to customize and configure your Concur experience. It is best to review all options there but the following should be reviewed upon the user's first login for accuracy:
   - Personal Information
     - Review Name, ID, Manager, and verify email address for accuracy
     - Enter any optional information such as contact information, additional email addresses, emergency contacts, travel preferences, international information, and credit cards
   - Request Settings (The configurations for travel requests)
     - Review default FOAP under "Request Information" to enter a default FOAP
     - Go to "Request Delegates" to add a delegate to act on your behalf
     - Review "Request Preferences" to review email notifications
   - Expense Settings (The configurations for expense reports)
     - Review default FOAP under "Expense Information" to enter a default FOAP
     - Go to "Expense Delegates" to add a delegate to act on your behalf
     - Review "Expense Preferences" to review email notifications.

3. **How do I change email notifications?**
   Once in your profile, you can change your email notifications by navigating to the left-hand side and clicking "request preferences" for the request-side notifications or to "expense preferences" for the travel expense report side of the notifications.

4. **Will my delegate receive my travel emails?**
   Not by default. If you would prefer your delegate to receive your emails, or you want to receive emails for someone you are a delegate for, go to "request delegates" on the left. There will be options to change the access to those being a delegate for you, and another tab to review the access granted to you. Click the box on the far right of those lines then click "save".

## Frequent Error Messages and Solutions

### Error: Receipt needed

In Concur Request, an attachment is required. If this error is received, attach an approved document such as Program Itinerary, Conference Agenda, Calendar, Email to travel, etc. Once the document is attached, the warning message will disappear until Submit is clicked again.

### Error: Attach request to report

Travel Reports require a travel request prior to submitting. To link or attach a request to a report, open the report and click "details" at the top and choose "Report header". At the bottom of the report header, click the "add" and then select the request to link to the report. Hit save on the header and try to resubmit.

### Error: Need a valid FOAP

All users have a default FOAP when their profiles were setup. Users or their delegates must change the default FOAP prior to creating a request or a report or they will need to change the FOAPs on the expense lines.

On the request, the user can do so by clicking an expense line, going to the bottom right-side of the page and click "allocate". In the new window, select the expenses that need a new FOAP, then change the FOAP on the right side.

On the report, the FOAP can be changed line-by-line, or select all expenses and click "edit" and change the FOAP there to change them all at once.

### Error: Need an itinerary row

When preparing an itinerary, Concur needs two lines: a departure date and return date. Users need to enter a departure city, date, and time as well as the destination, date, and time. Click save then enter in the return trip information. That means when the traveler left the destination city, date, and time as well as the return city, date, and time. Click save.

The end-result should show two lines on the left hand side. Continue navigating the screens until the user returns to the expense section.

If the user said "no" to the per diem question, needs to return to the itinerary, or needs to edit the itinerary information, they can always go to "details" at the very top then choose edit itinerary or new itinerary.

1. **What dates and locations should I use for a blanket travel request?**
   The date range should cover the duration of the blanket (example: if it is a Fall Semester blanket, it may have September 1st – December 31st). The locations can both be Nacogdoches. So, the departure and destination can both be Nacogdoches. The dates and locations can be further detailed in the request notes or in the expense report.

2. **How do I add or change the FOAP?**
   A user can review their FOAP information in their profile under "request information" and "report information". Once in the report or request, a user can change the FOAP by clicking on the expense line, then choosing "allocate". There the expenses can be selected and allocated by clicking "allocate selected expenses". The FOAP can then be changed on the right-hand side of that window.

3. **How do cash advances work in Concur?**
   Cash advances are requested in the header of the travel request. The request will be approved along with the advance through the workflow. Once it is completely approved, the cash advance will be issued the week prior to the start date of the trip.

4. **I need to make a change to a request but I already submitted it, how do I get it back?**
   As long as it has <u>not</u> been fully approved, a request can be recalled. Simply open the request in concur and click on the blue "recall" button on the top right.

5. **My trip is cancelled, how do I cancel it in Concur?**
   If a trip is no longer happening, open the request in concur and click the blue "Cancel Request" button on the top right. Add comments to the document for record keeping.

6. **Can blanket requests be made in Concur?**
   Yes. Blankets can be entered just like before. The word "blanket" will need to be in the title and the dates will have to cover the range of the travel assignment.

7. **How do I note personal days during a trip?**
   On the request header there is a fied that requires a yes/no answer for personal days followed by a space to indicate the personal days if any.

8. **How do I check the status of my Travel Request?**
   Once logged in, go to the Request section/tab. The status is displayed with the request. To see where it is in the approval process, open your request then go to the "approval workflow" tab to review where the document is within the Workflow.

9. **Do I need to create a Zero-Dollar travel request?**
   Yes, if there are no expenses associated with a planned trip a zero- dollar travel request must be submitted. Complete the Request Header just like normal and include "Zero

Dollar" in the title. For the Expense Line, add a line for Zero-Dollar Travel and enter $0 for the amount. You must still enter a FOAP.

An attachment is still required such as conference schedule, agenda or itinerary.

Once the trip is complete, verify that no expenses have incurred. If no expenses have incurred, "Close/Inactivate" the request by clicking on the request and clicking the close/inactivate icon . This will eliminate reminders that you have an open request that needs to convert to an expense report.

## Travel Booking

1. **What is CTP?**
   CTP means "Corporate Travel Planners" and are SFA's travel management company for booking travel. CTP can be utilized through the booking feature in Concur itself, or by contacting CTP.

2. **If I don't use Concur to book travel, do I have to use Corporate Travel Planners (CTP)?**
   While users do not need to use CTP, they are strongly recommended to do so. The services provided by CTP gives SFA and it's travelers irreplaceable service and peace of mind regarding travel by coordinating travel just the way they want it while complying with travel policy.

3. **What is a Travel Arranger?**
   A travel arranger is someone who can book on behalf of others.

4. **What is the difference between a Travel Delegate and a Travel Arranger?**
   A travel delegate is someone who can create and prepare travel reports and requests on behalf of the traveler.
   A travel arranger is someone who can book travel on behalf of the traveler.

5. **Can anyone be a Travel Arranger?**
   Yes, travelers can assign another SFA employee to be their travel arranger as long as their profile is complete.

6. **How do I add someone as my travel arranger?**
   Arrangers can be added by the traveler by navigating to their user profile, then clicking "Assistants/Arrangers" on the list to the left of the page. Once there click "Add an Assistant" and enter the desired individual in the search bar, indicate they can book travel and click save. Once the red icon next to "Can book travel?" changes to a green icon, the set up is done. An email will be sent to both the delegate and traveler confirming this.

7. **Are faculty/staff still allowed to book their own items without using this?**
It is highly recommended that faculty, staff, and their delegates utilize travel booking through Concur as it will ensure all benefits and features can be used and taken advantage of. Booking through CTP in Concur will also make sure that the Travel Agents at CTP can effectively assist the University with booking issues.

8. **If the flight is canceled just before the flight, how does the traveler contact the agency of record to get on a different flight?**
If a flight is cancelled or changed, make the change in the booking tool. If a flight is changed or cancelled right before the flight, contact CTP at 855-456-4474

9. **Where can I see more information about CTP?**
The easiest ways to see more information about CTP is in the company notes within Concur. Contact information is also listed there and on any itinerary sent to the traveler from CTP.

**Travel Expense Reports**

1. **How do I create an expense report?**
There are a few ways to create an expense report. Open your approved travel request and click the blue "Create Expense Report" button on the top right.

Alternatively, a user can go to "new" on the home page or to "expense" and then choose "create an expense report" but they will have to be sure to "link" the request to that travel report. Travel reports can always be created through the Concur app, as well.

2. **How do I attach a request to an expense report?**
Once the request is completely approved, a user can open that request and click the button on the top right that says "create and expense report" and that request will be attached already.

But if the report was created a different way, the user can open that report and go to the header (once opened, click "details" at the top of the report then "report header). At the bottom of the report header there will be a spot to select the approved request and add it to the report.

3. **How do I itemize?**
   Itemization is how users will break down the different costs associated with a lodging expense or airfare.
   To itemize lodging and break it down by lodging and lodging tax, the user will create a lodging expense line and enter all required information including the total cost of the bill.

   At the bottom of that section click "itemize" and Concur will bring up the "Nightly Lodging Expense" tab. From there the user can enter the nights they stayed, the lodging per night, and the lodging tax per night. If there are any other expenses included on the hotel bill that need to be entered separately (meals, fees, laundry, etc.) those can be entered below the nightly rates entered.

   To itemize for airfare, add the expense type Airfare like normal and enter the total amount of the ticket. Click "itemize" on the bottom right of the field. From there, Concur will ask for the expense type. Choose Airfare and enter the information and put in the total for the ticket then click save.

   Concur will ask for another expense type. This time choose "Airline fees" and enter the required information including the cost of the fees.

   In the end, the itemized lines should total the main expense line.

4. **How do I enter lodging expenses shared with another employee?**
   If a hotel room was shared with another employee, the hotel expense will be entered like normal then:
   - A comment must be entered noting who roomed together
   - And the "travel allowance" box will need to be unchecked.
   NOTE: Only uncheck that box if it is group lodging and the employees shared a room

5. **How do I add or change the FOAP?**
   In the report, the FOAP can be change per line. So, after the expense line is created, the fields for the Fund Org and Program will be editable. Select the desired FOAP and click save.

   Allocations to expenses can be made in a similar manner as requests. Select an expense, click "allocate" on the bottom right and allocate the selected expenses.

6. **I have many expense lines, do I have to change the FOAP for each line?**
   Yes, but there is an easier way to change each line without having to enter it in multiple times.
   - Select the very top check box to select all expenses.
   - Then choose "edit" on the right".
   - Finally, in the new window that appears, click the box for "Fund" and enter in a FOAP there and the FOAP will be added for each expense line.

7. **I have many expense lines, do I really have to add a receipt for each line?**
   Yes, except expenses where per diem will be claimed.

8. **How do I handle personal/not reimbursable expenses?**
   If there are personal, non-travel, or otherwise non-reimbursable expenses they should be left off the travel report.

   If the personal charge is on a T-Card charge, that charge will have to be included to match it but the charge, or the portion of the charge should be marked as "Non Reimbursable/Personal Expense" and it will be deducted from the traveler's reimbursement.

9. **What documentation do I need for mileage? Can I just use the mileage calculator?**
   The mileage calculator can be used to calculate mileage but the vehicle cost comparison chart will still need to be attached as well.

10. **How do I check the status of my Expense Report?**
    The status of an expense report can be reviewed at anytime by going to the "Expense" tab at the very top of Concurs homepage and finding your report there or by clicking on "Report Library" to review a list-view of your past reports.

    Reports can be reviewed and monitored from anywhere with the Concur App.

11. **What if I have group/team travel with multiple rooms per night?**
Concur will always want check-in and check-out dates as well as the cost of lodging and lodging tax per night. For group lodging, this leave the user with a slightly different process.

First, for group lodging, please uncheck the "travel allowance" box. This box calculates travel per diem and is not necessary for group lodging.

Next, enter in all pertinent information for the expense and then click "itemize" at the bottom. Concur will bring up the nightly itemization page. From there enter the check in and check out dates and enter the cost per night for lodging and cost per night for tax.

If the nightly rate differed, you may need to enter it on a night-by-night basis. To do so, enter in the first night as usual and click save when done. Click that expense line to open up the hotel information again and click "add itemization" to enter in the next night at the different rate.

## Travel Card

1. **Where can I see the Travel Card Charges?**
If you are an Individual Travel Card Cardholder or Department Travel Card Custodian, you will see your card charges in your Concur queue. You can click on "Available Expenses" to view your charges.

2. **Is there a deadline for resolving T-Card charges?**
T-Card charges must be matched, resolved, or settled no later than 15 days after the trip has been completed. If Travel card charges are crossing fiscal years please email traveldesk@sfasu.edu

3. **How often are T-Card charges loaded into Concur?**
T-Card charges are loaded into Concur nightly from Citi, however transactions may take a few days to post to Citi.

4. **What should I do if there is fraud on my card?**
Notify the travel office or CitiBank immediately.

The charge will need to be noted, disputed, and then assigned to a travel request/report. When the credit arrives, that can be assigned to the same report to wipe out the charge.

5. **What should I do if the charge is wrong?**
Take every effort to resolved the issue with the vendor. The vast majority of the time it can be resolved with them and a credit will be received.

If the vendor cannot be contacted, then the charge can be disputed - contact the travel office or CitiBank to do this.

6. **I've heard I can't use someone else's Travel Card anymore; do I need to get one?**
Users do not need a Travel Card (T-Card) to travel. T-cards are only a convenience for frequent travelers and those who have to buy expenses items such as airfare and hotel. A travel card must be used for the cardholders travel expenses only.
Contact your department or the travel office for guidance.

7. **How do I receive a Travel Card?**
Complete a T-card application form (located on the Travel webpage) and email it to traveldesk@sfasu.edu

## Delegates

1. **How do I add delegates?**
Only users can add their own delegates. Delegates cannot add themselves as someone's delegate.

Travelers need to log into Concur and go to Profile then Profile Settings. On the left-hand side, there is an option for "request delegates" and "expense delegates". Go to either one of those options to add a delegate and grant access.

Access ranges but include access to prepare requests/ reports, view receipts, submit requests/ reports, and (if applicable) approve for. Click all that apply to give access.

NOTE: Delegates can prepare for users, but the State requires that travelers submit their own reports.

2. **How do I remove delegates?**
Both the user and the delegate can remove delegate access through profile settings by going to "request delegates" or "expense delegates", selecting the delegate to remove, then clicking "delete".

3. **How can delegates receive emails for travel users?**
When assigning delegates, there is an option to turn on emails for the delegate.

4. **Can delegates approve for others?**
   Yes, as long as the delegate has an approver role in Concur.  The approver role is assigned to supervisors as listed in the Hierarchy Maintenance table, and financial managers for ORGs listed in Banner.

5. **Can delegates prepare and submit for the user?**
   Delegates can prepare reports for users but they cannot submit for users. There will be an option to notify the traveler for them to review and submit the report once it's completed.

6. **Can a delegate use the app to prepare a user's travel?**
   No, a delegate can only act on behalf of another user through the desktop SAP Concur site.


**Approvers**

1. **Where do I go to approve a report pending my approval?**
   Approvers will receive an email from Concur with a link to the request or report when it is ready to approve. Otherwise, the approver can log into Concur and go to either the "approvals" tab at the very top or the approvals section under "my tasks" towards the bottom of the home page.

2. **I am an approver delegate, how do I get email notifications when the primary approver has something to approve?**
   The Primary Approver must grant their Approver Delegate access to email notifications. Access is granted in Profile Settings, under the Expense Delegates Tab, by checking the box "Receives Approval Emails" for the Approver Delegate.

3. **How do I view approval history?**
   When the report is opened, select the Approval Flow tab to review who has approved it and who still needs to approve it

4. **Where can I review the status of my report?**
   With Concur opened, go to the very top tabs and click on "Expense." There you will see all active reports and their status.

5. **Can I add another approver for travel requests and reports?**
   Once Travel Requests are in workflow, a user can click on the "Approve & Forward" button and enter an additional workflow approver.

   After the user approves the Request, it will be sent immediately to the additional approver.  After the additional approver approves, the Request will be sent to the next workflow approver.