

CONCUR TRAVEL USER GUIDE

Caddo Parish Public Schools

Contents

Introduction	2
Logging Into Concur	3
Create Your Travel Profile	3
Acting as a Delegate	9
Creating a Travel Request	111
Completing Request Header Information	12
Estimate Expenses Using Concur Travel	12
Completing the Segments Section	16
Completing the Expenses Section	17
Allocating Expenses to Multiple Accounts	19
Uploading Required Documents	20
Submitting for Approval	222
Completing the Booking Process	233
Creating Travel Expense Report	244
Adding Expenses to a Report	25
Itemizing Expenses	27
Adding Attendees to Business Meals	27
Exceptions	27
Attaching Receipts to an Expense Report	27

Introduction

Effective **November 9, 2020**, the paper-based current process for approving travel requests and travel expense reimbursements has been replaced with SAP Concur Travel.

No more tracking down supervisors to approve and sign a paper travel request. Concur brings the entire process and all the data together in one place, so you can see and manage your travel request efficiently.

The accounts payable process is streamlined by automating the process from reimbursement request to payment.

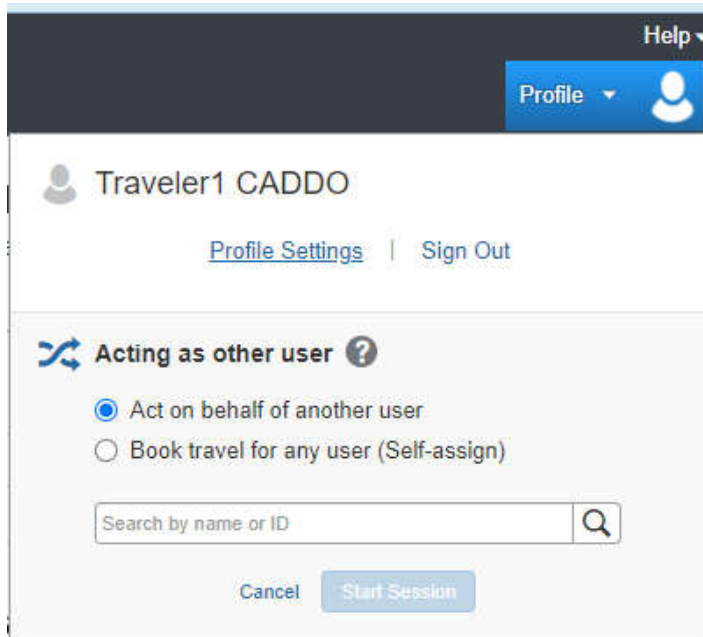
The Concur mobile app allows users to scan receipts of expenses while traveling, and attach them to expense reports for easy reimbursement.

Logging Into Concur

- Navigate to Concur site, www.concursolutions.com and type in your Caddo e-mail address in the User Name field and your Concur password in the Password field.
- You will be assigned a temporary password. You will be required to change your password when you login to Concur for the first time. Passwords must be changed every 90 days. Passwords must be a minimum of 7 characters long but no more than 60 characters and contain at least one uppercase and one lowercase letter and one number. You will not be able to reuse any of your last 4 passwords.
- If you cannot login, please contact our Security Administrators Kristi Willis at 603-6263 or Marchelle Cavanaugh at 603-6353

Create Your Travel Profile

In the upper right hand corner, click **Profile**, and then click **Profile Settings**. **IMPORTANT NOTE: You must complete the required fields of the Profile before you can book a trip.**



The screenshot shows the user profile settings interface. At the top right, there is a 'Help' dropdown and a 'Profile' dropdown menu with a user icon. Below this, the user's name 'Traveler1 CADD0' is displayed next to a profile icon. Underneath the name are two links: 'Profile Settings' and 'Sign Out'. A section titled 'Acting as other user' with a question mark icon contains two radio button options: 'Act on behalf of another user' (which is selected) and 'Book travel for any user (Self-assign)'. Below these options is a search input field labeled 'Search by name or ID' with a search icon. At the bottom of this section are 'Cancel' and 'Start Session' buttons.

This brings you to the Profile page. There are several sections of the Profile page, and various links to access them.

The screenshot shows the SAP Concur interface. At the top, there is a dark navigation bar with 'SAP Concur' logo and links for 'Requests', 'Travel' (highlighted in blue), 'Expense', and 'App Center'. Below this is a secondary navigation bar with links for 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile'. The main content area is titled 'Profile Options' and contains two columns. The left column, 'Your Information', lists links for 'Personal Information', 'Company Information', 'Contact Information', 'Email Addresses', 'Emergency Contact', and 'Credit Cards'. The right column, 'Profile Options', contains the text 'Select one of the following to customize your user profile.' followed by two options: 'Personal Information' (with a description: 'Your home address and emergency contact information.') and 'Company Information' (with a description: 'Your company name and business address or your remote location address.'). Blue arrows point from the 'Personal Information' link in the left column to the 'Personal Information' option in the right column, and from the 'Profile' link in the top navigation bar to the 'Profile' link in the secondary navigation bar.

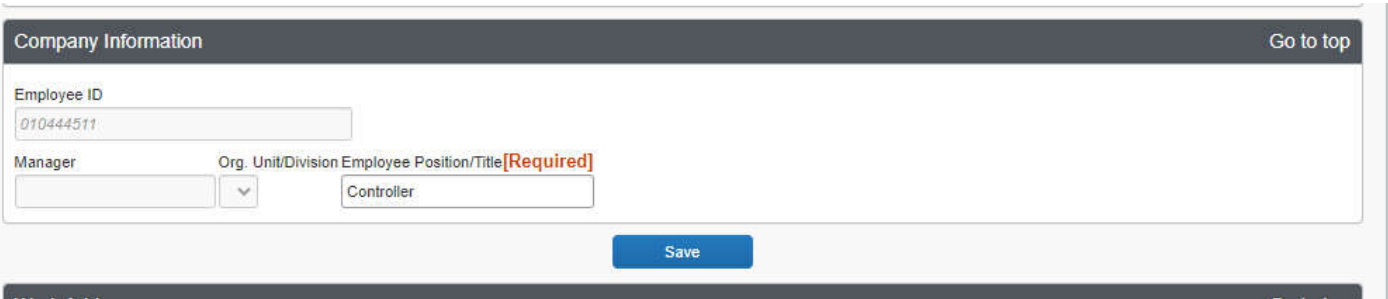
Begin by clicking **Personal Information**.

Your name should already appear in the fields. Review this information carefully. Your name must appear **EXACTLY** how it shows on your photo identification. This is how your name will appear on your airline ticket. Any errors may result in your being turned away by airport security.

This information must be updated before booking travel.

The screenshot shows the 'My Profile - Personal Information' page. At the top, there is a 'Jump To:' dropdown menu set to 'Personal Information' and a 'Choose' button. Below this is a paragraph of text explaining that Concur Travel will display available unused tickets and that users should review their information carefully. To the right of this text is a 'Change Picture' link and a silhouette icon. Below the text is a note: 'Fields marked [Required] and [Required**] (validated and required) must be completed to save your profile.' The main form area contains an 'Important Note' box with a warning icon and text: 'Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.' Below the note is a form with the following fields: 'Title' (dropdown menu), 'First Name [Required]' (text input with 'Traveler1'), 'Middle Name [Required]' (text input with a 'No Middle Name' checkbox below it), 'Nickname' (text input), 'Last Name [Required]' (text input with 'CADD'), and 'Suffix' (dropdown menu).

The next section is your **Company Information** and should also already be pre-populated with your employee ID. If you notice an error, contact Finance. Enter your Position/Title.



The screenshot shows a form titled "Company Information" with a "Go to top" link in the upper right corner. The form contains the following fields: "Employee ID" with the value "010444511"; "Manager" with an empty text box; "Org. Unit/Division" with a dropdown arrow; and "Employee Position/Title" with the value "Controller" and a red "[Required]" label. A blue "Save" button is located at the bottom center of the form.

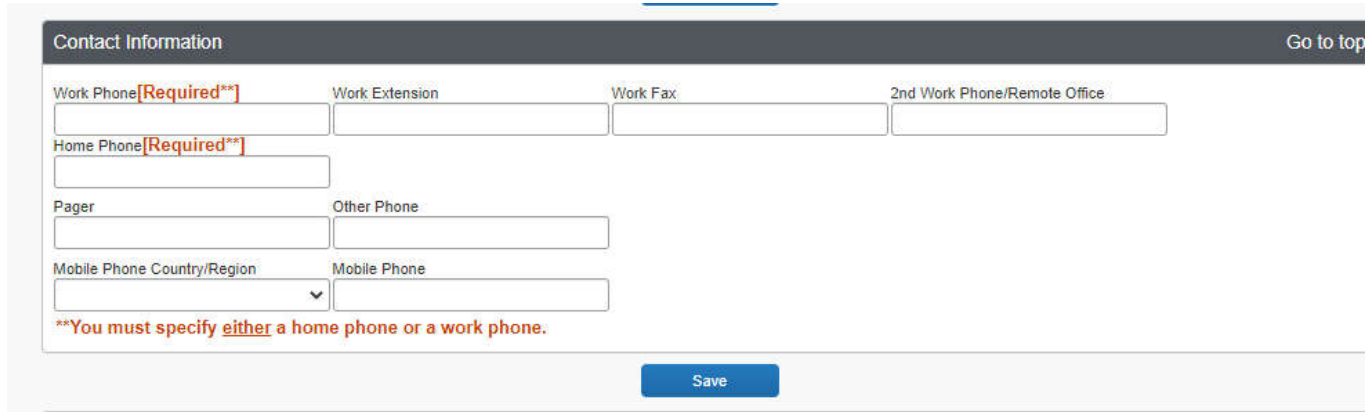
You may notice there are **Save** buttons at the bottom of each section. You may save each section as you move along.

You may enter your **Home Address**, however, this is not a required field.



The screenshot shows a form titled "Home Address" with a "Go to top" link in the upper right corner. The form contains the following fields: "Street" with an empty text box; "City" with an empty text box; "State/Province/Region" with an empty text box; "Postal Code" with an empty text box; and "Country" with a dropdown arrow.

The next section contains two required fields: **Work Phone** and **Home Phone**. You can substitute your mobile phone number for your home phone.



The screenshot shows a form titled "Contact Information" with a "Go to top" link in the upper right corner. The form contains the following fields: "Work Phone" with a red "[Required**]" label and an empty text box; "Work Extension" with an empty text box; "Work Fax" with an empty text box; "2nd Work Phone/Remote Office" with an empty text box; "Home Phone" with a red "[Required**]" label and an empty text box; "Pager" with an empty text box; "Other Phone" with an empty text box; "Mobile Phone Country/Region" with a dropdown arrow; and "Mobile Phone" with an empty text box. A red note at the bottom states: "**You must specify either a home phone or a work phone." A blue "Save" button is located at the bottom center of the form.

Next, you will need to verify your email address. First, check to see that the pre-populated email address is correct. Then, click on the **Verify** link.

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

+ Add an email address

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	kgwillis@caddoschools.org	Not Verified	Verify	Yes	

A verification code will be sent to your email. Copy and paste the code into the verification field and click **OK**.

Verification Email Sent

An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.

OK

Email Addresses Go to top

Please add at least one email address.

- ▶ [How do I add an email address?](#)
- ▶ [Travel Arrangers / Delegates](#)
- ▶ [Why should I verify my email address?](#)
- ▶ [How do I verify my email address?](#)

+ Add an email address

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	kgwillis@caddoschools.org	Check email for code	Resend Cancel	Yes	

Enter Code

OK

Email Verification Status

Your email address has been verified. You may now send receipts to Concur by emailing receipts@concur.com. You may now send trips to Concur by emailing plans@concur.com.

OK

Complete the fields in the **Emergency Contact** section. While this is not required, the information will be used in the event of an emergency, and so it is encouraged.

Emergency Contact Go to top

Name Relationship

Street Address same as employee

City State/Province/Region Postal Code

Country Phone Alternate Phone

United States of America

Frequent Traveler Program Information

This section allows you to retain your frequent traveler benefits. You can also add any reward programs.

Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs + Add a Program

No programs defined

To enter information for any frequent traveler programs you may have, click on the “Add a Program” link. You may enter up to five travel programs at a time. Follow the directions and click “Save”. If you have more than five rewards program numbers, you may click the “Add a program” link again to add additional numbers.

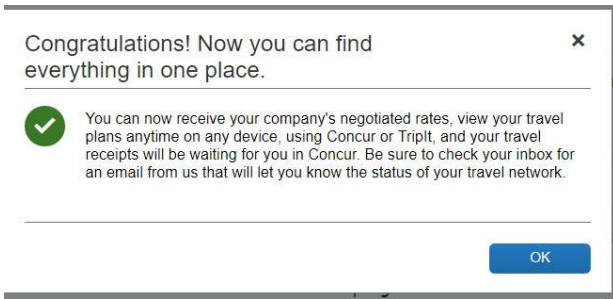
Add Travel Programs

i Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc.).

1	 Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
	<input type="text" value="Select a carrier"/>	<input type="text"/>	<input checked="" type="checkbox"/>
2	 Air/Rail Carrier	Frequent Traveler / Driver/ Guest Number	Search this vendor
	<input type="text" value="Select a carrier"/>	<input type="text"/>	<input checked="" type="checkbox"/>

To create a travel network and allow Concur to share information with travel partners, such as *Triplt*, read the terms and conditions provided at the link and click “I Agree”. You can un-enroll at any time.



TSA Secure Flight Information

TSA requires entry of gender and date of birth. You can also enter a Redress Number or your TSA PreCheck Known Traveler Number if you have one. Click on the Quick Help icon for additional information about these options.

TSA Secure Flight

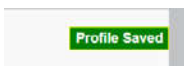
The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at WWW.TSA.GOV.

Gender **[Required]** Male Female Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No.  Known Traveler Number

Credit Card Information

This section allows you to enter your personal credit card information. Flights and rental car are all billed to the district, however your card may be needed to reserve any hotel rooms. Once entered, the card information will remain encrypted. To enter your credit card information, click the **+ Add a Credit Card** link and follow the instructions. Click **Save** to save the information and return to the profile page.

Once your entire profile has been completed, click any of the **Save** buttons visible. If any errors occur, a pop up message will inform you of any corrections that are needed. Correct the errors and click **Save** again. Once the profile has been saved a message will appear on the upper right hand portion of the screen.



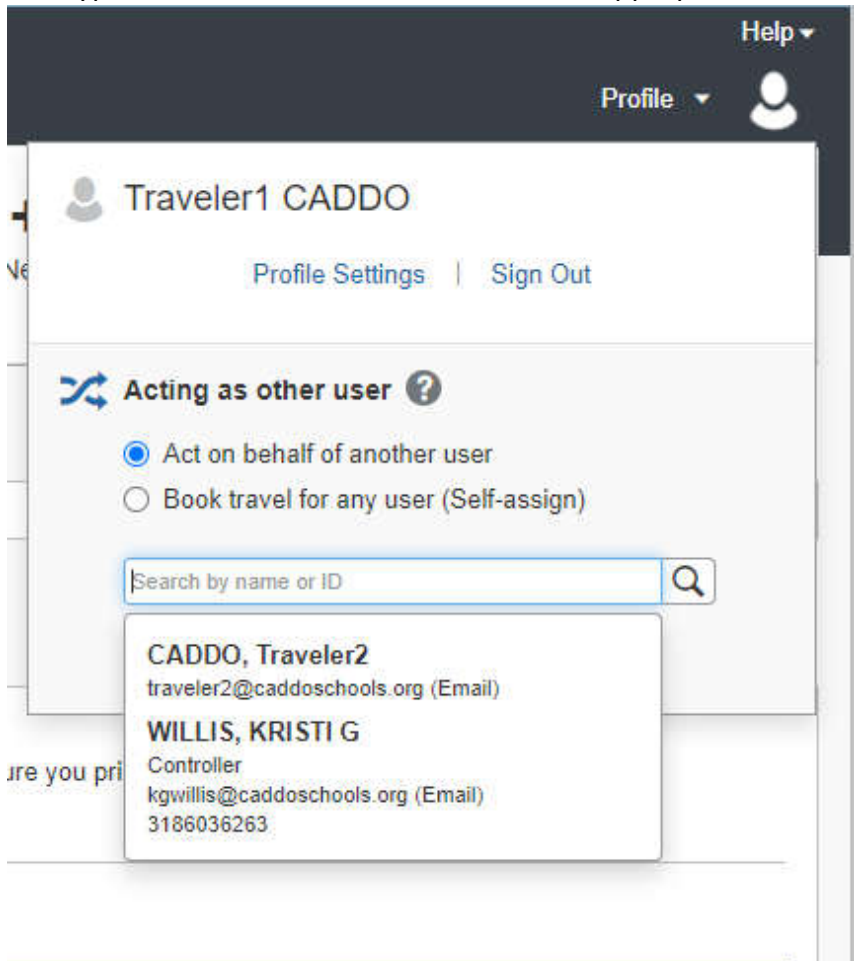
Click the **SAP Concur** link at the top of the toolbar to return to the homepage.
If you have questions about completing the Concur Profile, please Finance.

Acting as a Delegate

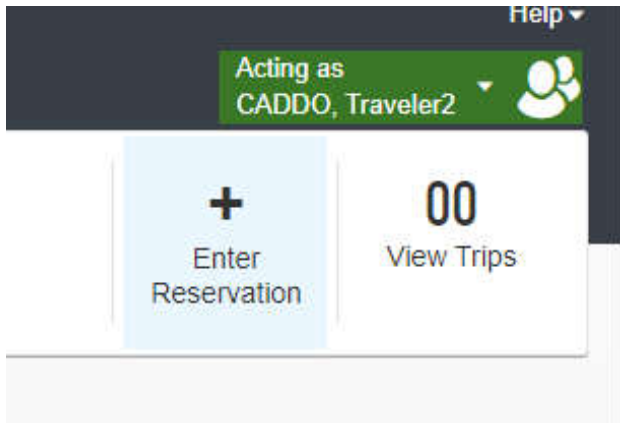
To begin acting as someone's delegate, first you must login to Concur using your own login credentials. If you have been assigned to work as a delegate, Finance will define which tasks you can complete, such as preparing reports.

To work as a delegate...

1. Click **Profile** in the upper right-hand corner of the screen
2. Click **Acting as other user**
3. Type the user's last name, and select the appropriate user's name from the options that appear



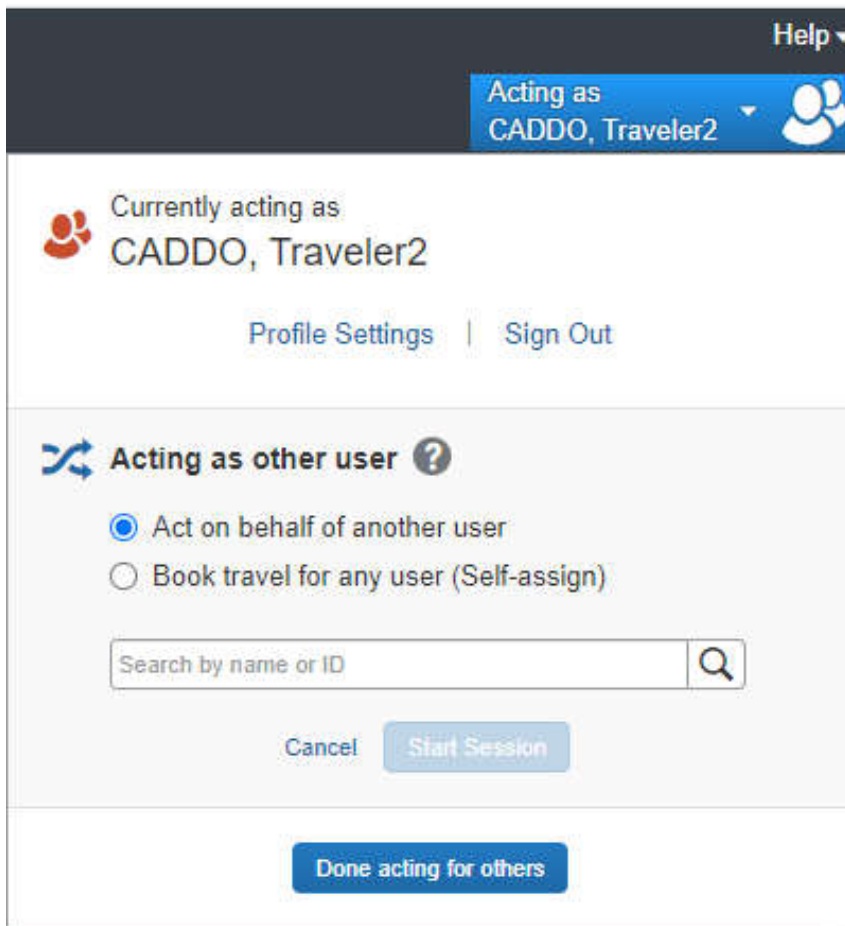
4. Click **Start Session**



NOTE: The **Profile** menu now displays **Acting as**, and shows the name you just selected.

You are now officially working on behalf of that person. Complete the normal processes of creating reports, attaching documentation, etc.

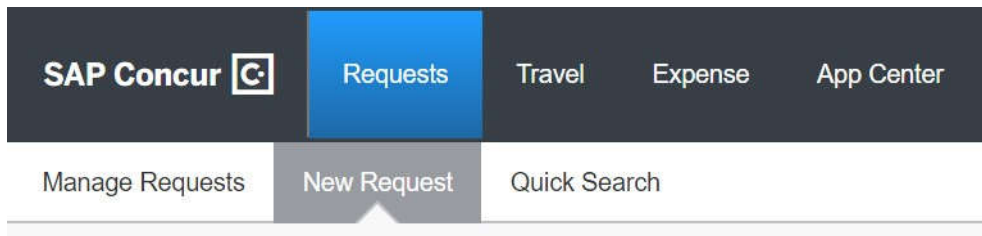
5. To select a different user, follow the same steps but select a different name
6. To return to your own tasks, click **Acting as**, and then click **Done acting for others**



Creating a Travel Request

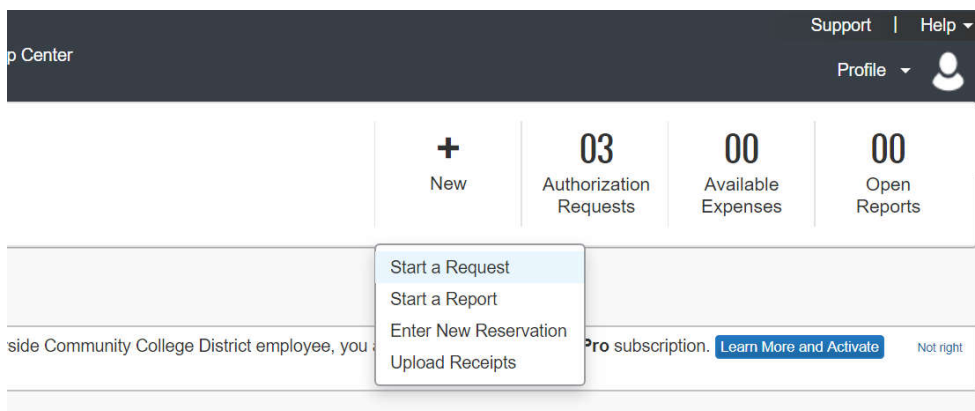
To create a new Travel Request:

Click **Requests**, then **New Request** at the top left hand side of the screen:

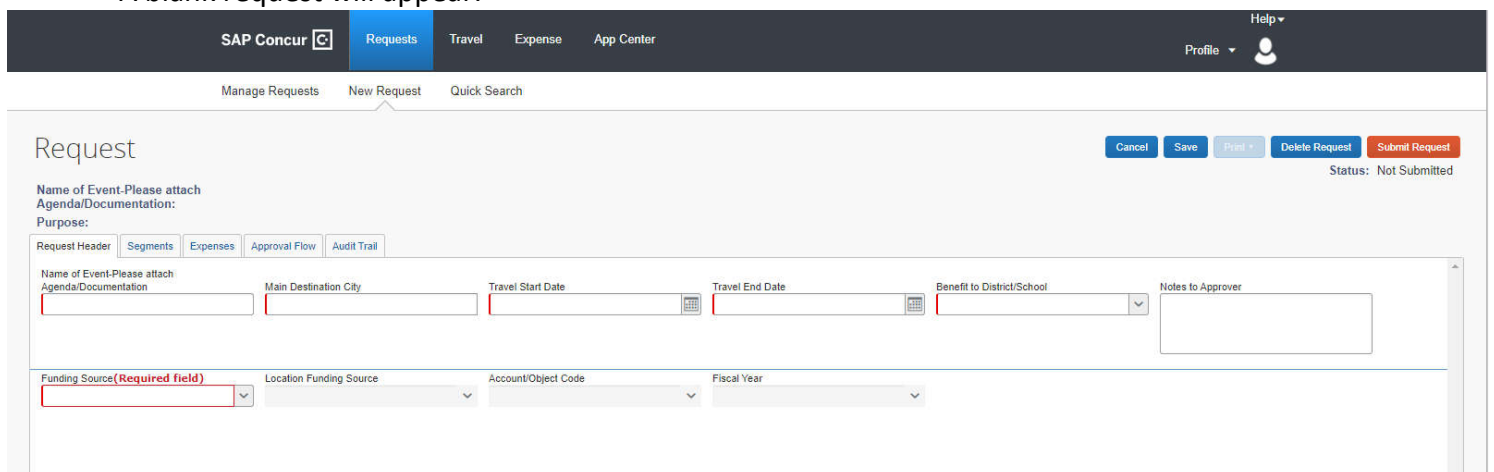


OR

Click **+ New**, then select **Start a Request**:



A blank request will appear:

A screenshot of a blank SAP Concur Request form. The form is titled 'Request' and has a status of 'Not Submitted'. It includes a 'Request Header' section with tabs for 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The form fields include: 'Name of Event-Please attach Agenda/Documentation', 'Main Destination City', 'Travel Start Date', 'Travel End Date', 'Benefit to District/School', 'Notes to Approver', 'Funding Source (Required field)', 'Location Funding Source', 'Account/Object Code', and 'Fiscal Year'. There are buttons for 'Cancel', 'Save', 'Print', 'Delete Request', and 'Submit Request'.

Completing Request Header Information

When completing the **Request Header** section, fields with a red line on the left side are required:

Name of Event-Please attach Agenda/Documentation	Main Destination City
<input type="text"/>	<input type="text"/>

1. **Name of Event** – Enter the complete conference name. Be sure to spell out the entire conference name if space allows.
2. **Main Destination City** – Enter the city where the conference is taking place.
3. **Travel Start/End Date** – Please indicate the days you will be traveling based on conference agenda or flyer. These dates should include any additional travel days that may be required. Only include business trip start and end dates.
4. **Benefit to the District** – Select from the drop-down menu the best description of the purpose for your trip.
5. **Account Coding** – Select from the drop-down menus the correct components of the budget funding your trip. NOTE: Be sure to use the account coding provided by the department funding your trip.

Funding Source(Required field)	Location Funding Source	Account/Object Code	Fiscal Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Click **Save** before continuing to the next tab (**Segments**).

Estimating Expenses Using Concur Travel

Prior to completing the segments portion of the travel request, you will need to obtain estimated costs of the portions of the travel that will be booked within Concur. To do this, you will need to visit the travel store.

To begin, click on the **Travel** tab. This will take you to the travel “store”.



Estimating Air Travel Expenses

On the left-hand side of the screen, you can begin your search for airfares by completing the fields provided.

Complete the fields and click **Search**.

Travel Arrangers Trip Library Templates

Is your driver's license REAL ID compliant? A new form of identification will be required for air travel within the U.S. starting October 2020. [Click here for more information on REAL ID.](#)

Mixed Flight/Train Search

Round Trip One Way Multi City

From [Find an airport](#) | [Select multiple airports](#)

To [Find an airport](#) | [Select multiple airports](#)

Depart depart ▼ ▼

Return depart ▼ ▼

Pick-up/Drop-off car at airport

The search results will display and can be modified to narrow/change your results.

Return - Fri, Feb 19

Price

Display Settings

Airport Filters

Shop by Fares Shop by Schedule

Flight Number Search Sorted By: Stops

Displaying: 250 out of 251 results. Previous | Page: 1 of 25 | Next | All

Carrier	Flight	Route	Stops	Duration	Basic Economy	Main Cabin
Delta	07:15 AM SHV → 10:02 AM ATL	Nonstop	1h 47m	\$396.20	\$466.20	
Delta	09:50 AM ATL → 10:50 AM SHV	Nonstop	2h 00m			
¹ DL 5243 / DL 5413 operated by ENDEAVOR AIR DBA DELTA CONNECTION						
United	07:15 AM SHV → 12:39 PM ATL	1 IAH	4h 24m	\$402.48	\$475.20	
United	07:45 AM ATL → 11:12 AM SHV	1 IAH	4h 27m			
¹ UA 5654 / UA 4651 operated by SKYWEST DBA UNITED EXPRESS, UA 3612 / UA 3470 operated by REPUBLIC AIRWAYS DBA UNITED EXPRESS						
United	07:15 AM SHV → 12:39 PM ATL	1 IAH	4h 24m	\$402.48	\$475.20	
United	09:30 AM ATL → 03:27 PM SHV	1 IAH	6h 57m			
¹ UA 5654 / UA 5598 operated by SKYWEST DBA UNITED EXPRESS, UA 3612 operated by REPUBLIC AIRWAYS DBA UNITED EXPRESS, UA 6379 operated by						

Select the fare which best meets your departure/arrival time needs. The next screen will display the flight numbers and flight summary for the trip.

Trip Summary

Flights Selected

Round Trip
SHV - ATL
Depart: Mon, 02/15/2021
Return: Fri, 02/19/2021

Finalize Trip

Review and Reserve Flight

REVIEW FLIGHTS

DEPART ✕ Mon, Feb 15 – Shreveport, LA to Atlanta, GA Hide details >

Mon, Feb 15 07:15a SHV → 10:02a ATL 1h 47m Delta 5243 Canadair Regional Jet 900
Operated by ENDEAVOR AIR DBA DELTA CONNECTION

RETURN ✕ Fri, Feb 19 – Atlanta, GA to Shreveport, LA Hide details >

Fri, Feb 19 09:50a ATL → 10:50a SHV 2h 00m Delta 5413 Canadair Regional Jet 900
Operated by ENDEAVOR AIR DBA DELTA CONNECTION

ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct.

Primary Traveler Edit | Review all

Name: KRISTI GALLION WILLIS Phone: 3186036263

Frequent Flyer Programs [Add a Program](#)

For Delta

SELECT SEATS

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

Flight	Seat
DL 5243 Basic Economy (E)	Select a seat
DL 5413 Basic Economy (E)	select a seat

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$376.00	\$20.20	\$396.20
Total Estimated Cost:		\$396.20	
Total Due Now:		\$396.20	

Use this price summary as your estimated cost for completing the segment portion of the travel request.

DO NOT click on Reserve Flight and Continue! Travel requests must be fully approved prior to booking. Simply click on “travel” to return to the travel store to continue estimating other expenses such as hotel or ground transportation.

METHOD OF PAYMENT

This purchase will be charged to your company directly.

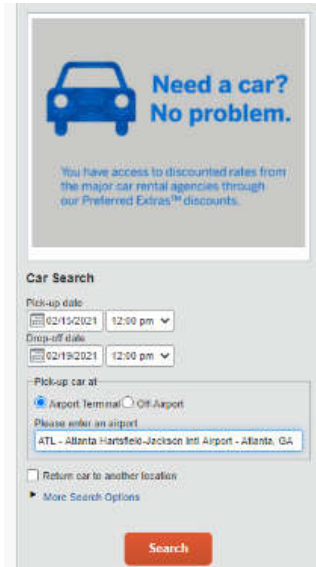
This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

Back
Reserve Flight and Continue

Estimating Car Rental Expenses



The image shows a car rental search interface. At the top, there is a blue car icon and the text "Need a car? No problem." Below this, a smaller text says "You have access to discounted rates from the major car rental agencies through our Preferred Extras™ discounts." The main search area is titled "Car Search" and includes fields for "Pick-up date" (02/15/2021, 12:00 pm) and "Drop-off date" (02/19/2021, 12:00 pm). There are radio buttons for "Pick-up car at" with "Airport Terminal" selected and "Off-Airport" unselected. Below this, there is a text input field for "Please enter an airport" with "ATL - Atlanta Hartsfield-Jackson Intl Airport - Atlanta, GA" entered. There is also a checkbox for "Return car to another location" which is unchecked, and a link for "More Search Options". A red "Search" button is at the bottom.

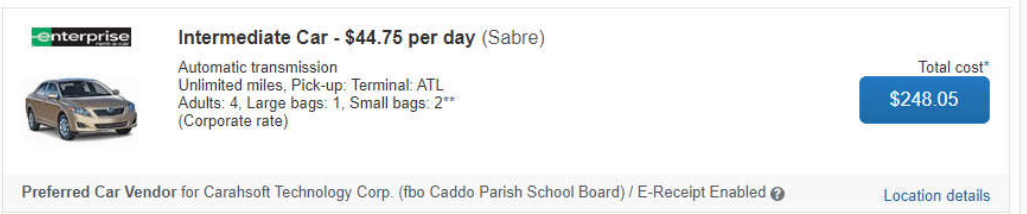
To obtain an estimate of car rental expenses, click on the car icon and complete the required fields.

Then click **Search**. The search results will be displayed.

NOTE: It is important to note that Caddo holds an agreement with Enterprise/National Car Rentals. You will only be allowed to book a car rental with a different rental company when Enterprise/National is not available.

Intermediate car options will be displayed. Utilize the estimated cost when completing the segment tab of your travel request. Again, **DO NOT** reserve the car. Click “travel” to return to the travel store and continue estimating your trip.

Displaying: 5 out of 68 results. ?



The image shows a search result for an Enterprise car rental. It features the Enterprise logo, a photo of a silver sedan, and the text "Intermediate Car - \$44.75 per day (Sabre)". Below this, it lists "Automatic transmission", "Unlimited miles, Pick-up: Terminal: ATL", and "Adults: 4. Large bags: 1, Small bags: 2** (Corporate rate)". A blue button displays the "Total cost*" as "\$248.05". At the bottom, it says "Preferred Car Vendor for Carahsoft Technology Corp. (fbo Caddo Parish School Board) / E-Receipt Enabled ?" and a link for "Location details".

Follow the same steps to estimate the hotel expenses if applicable. In some instances, the conference you are attending may offer a group or block rate on. In this case, it is not necessary to search for a cost estimate for lodging. The group or block rate must be included on the hotel segment of your request.

Completing the Segments Section

Use the estimates obtained through Concur Travel to create the segments. To create a segment, click on the desired icon. The appropriate segment fields appear. Please complete the fields – including the approximate requested amount of the segment – and click **Save**.

After saving one segment, click another segment icon to add additional information.

Airfare

The screenshot shows the 'Add Segment' form for an Air Ticket. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs, there are four icons representing different travel modes: Airplane, Train, Car, and Hotel. The 'Air Ticket' icon is selected. The form is titled 'Air Ticket' and has an 'Amount' field set to 'USD'. There are three radio buttons for 'Round Trip', 'One Way', and 'Multi-Segment', with 'Round Trip' selected. The form is divided into 'Outbound' and 'Return' sections. The 'Outbound' section has fields for 'From', 'To', 'Date', and 'Depart at'. The 'Return' section has fields for 'Date' and 'Depart at'. Both sections have a 'Comment' field.

Hotel

The screenshot shows the 'Add Segment' form for a Hotel Reservation. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs, there are four icons representing different travel modes: Airplane, Train, Car, and Hotel. The 'Hotel' icon is selected. The form is titled 'Hotel Reservation' and has an 'Amount' field set to 'USD'. There are two sections: 'Check-In' and 'Check-Out'. The 'Check-In' section has fields for 'City', 'Date' (01/11/2021), and 'At'. The 'Check-Out' section has fields for 'Date' (01/15/2021) and 'At'. There is a 'Detail' field between the 'Check-In' and 'Check-Out' sections. At the bottom, there is a 'Comment' field.

Car Rental

The screenshot shows the 'Add Segment' interface for a 'Car Rental' request. At the top, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Below the tabs, there are icons for different expense types: Airplane, Train, Car, and Hotel. The 'Car Rental' segment is selected, and the amount is set to USD. The form includes fields for 'Pick-up' and 'Drop-off' locations, dates, and details. A 'Comment' field is also present at the bottom.

Once you have completed the fields, click **Save**, and follow these same steps to complete any remaining segments that apply to the request.

Completing the Expenses Section

Use this next section to add seminar registration/course fees.

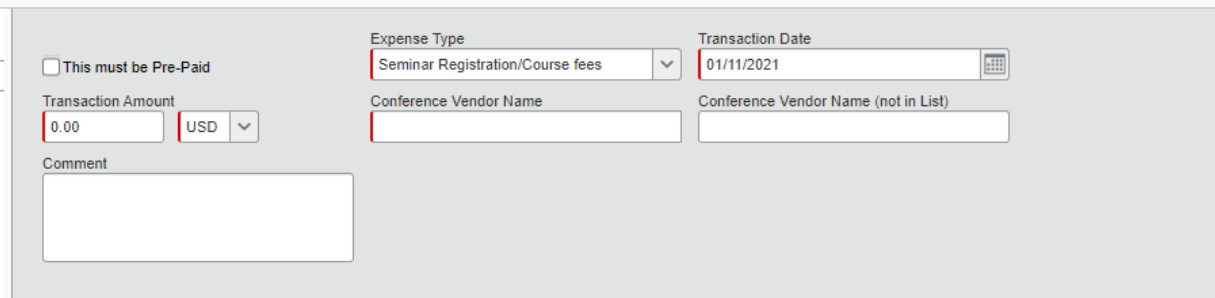
Begin by clicking on the **Expenses** tab of the request:

The screenshot shows the 'Expenses' tab for 'Request 334C'. The request title is 'Request 334C'. Below the title, there is a section for 'Name of Event-Please attach Agenda/Documentation: LA Assoc of School Bus Offcls' and 'Purpose:'. The 'Expenses' tab is selected, and there are buttons for '+ New Expense' and 'Delete'. Below the buttons, there is a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'.

Select Seminar Registration/Course Fees

The screenshot shows the 'Expense Type' selection screen. There is a text input field for 'Expense Type:'. Below the field, there is a list of expense types, including '03. Other' and 'Seminar Registration/Course fees'. A note below the list reads: '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.'

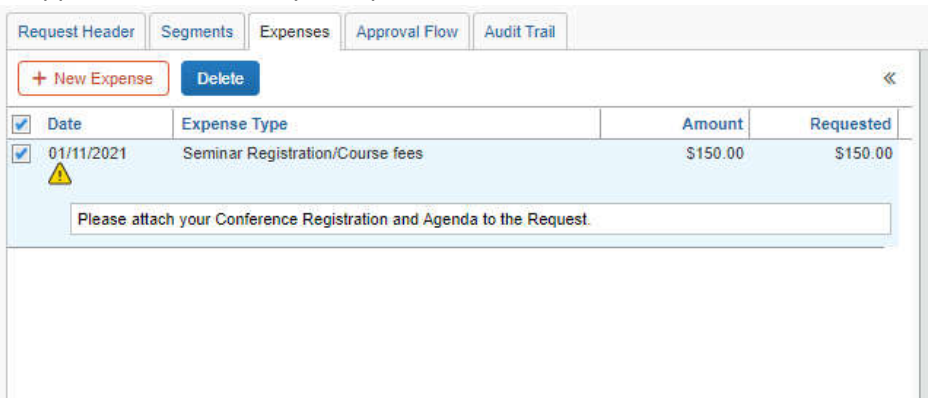
Complete all required fields. If Seminar Registration/Course Fees should be pre-paid (paid by the District before your trip), check the “This must be Pre-Paid” box. If the Conference Name is not available in the Conference Vendor Name drop-down menu, select “Other” and enter the name of the vendor in the Conference Vendor Name (not in list) field.



The screenshot shows an expense form with the following fields and values:

- This must be Pre-Paid
- Expense Type: Seminar Registration/Course fees
- Transaction Date: 01/11/2021
- Transaction Amount: 0.00 USD
- Conference Vendor Name: (empty)
- Conference Vendor Name (not in List): (empty)
- Comment: (empty text box)

If you have selected to have your Seminar Registration/Course fees pre-paid, you will notice an alert icon appear in the summary of expenses on the left side of the screen:



The screenshot shows the 'Expenses' tab of a request. The table below contains one entry with a warning icon in the left margin.

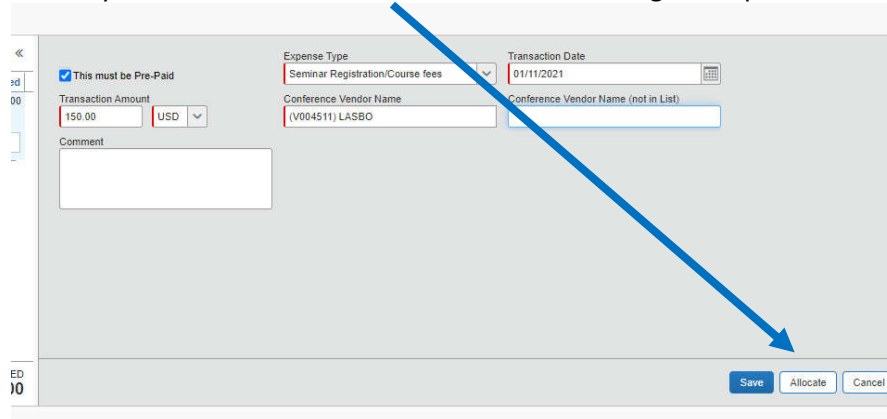
<input checked="" type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	01/11/2021	Seminar Registration/Course fees	\$150.00	\$150.00

Please attach your Conference Registration and Agenda to the Request.

The conference agenda and registration form must be attached to your request.

Allocating Expenses to Multiple Accounts


You may have noticed the allocate button when saving the expenses:



The screenshot shows an expense entry form. At the bottom right, there are three buttons: 'Save', 'Allocate', and 'Cancel'. A blue arrow points from the top center of the form down to the 'Allocate' button.

If only one account code will be charged, you do not have to specifically allocate the funds. The system will use the account coding on the request “header” tab to charge the expenses. If you need to allocate all or a portion of the expenses to more than one budget line, click on “allocate” to open up the dialog box.

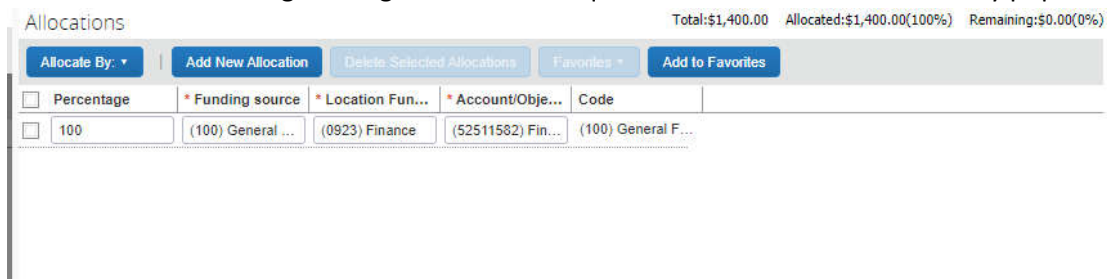
Select the checkboxes to the left of each expense you would like to allocate. You may select one, all, or some of the expenses.



The screenshot shows the 'Request List' dialog box for 'LA Assoc of School Bus Offcls'. It contains a table with the following data:

Date	Expense Type	Group	Amount
<input type="checkbox"/> 01/11/2021	Seminar Regis...		\$150.00
<input checked="" type="checkbox"/> 01/11/2021	Airfare		\$400.00
<input checked="" type="checkbox"/> 01/11/2021	Hotel		\$1,000.00

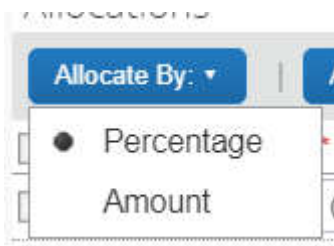
Click on the “Allocate Selected Expenses” button. The following appears on the right-hand side of the screen. Notice the budget string added in the request “header” tab is automatically populated.



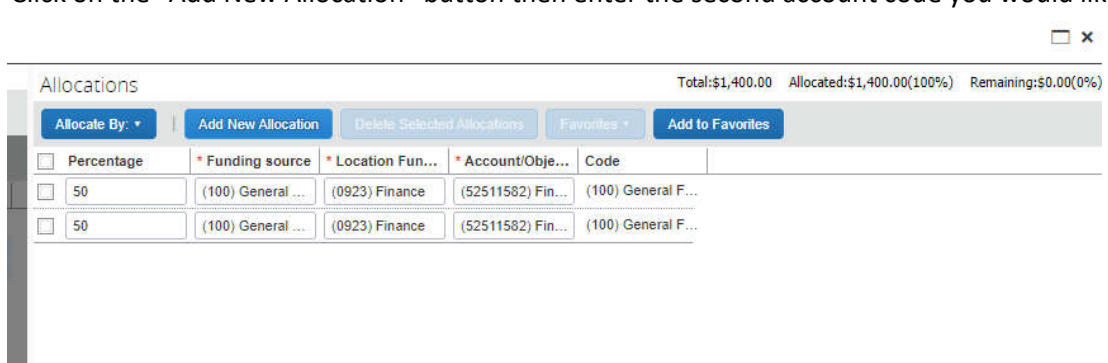
The screenshot shows the 'Allocations' dialog box. At the top right, it displays: Total:\$1,400.00 Allocated:\$1,400.00(100%) Remaining:\$0.00(0%). Below this are several buttons: 'Allocate By: ▾', 'Add New Allocation', 'Delete Selected Allocations', 'Favorites ▾', and 'Add to Favorites'. At the bottom, there is a table with the following data:

Percentage	* Funding source	* Location Fun...	* Account/Obje...	Code
<input type="checkbox"/> 100	(100) General ...	(0923) Finance	(52511582) Fin...	(100) General F...

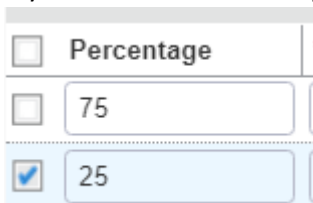
There are two ways to allocate the budget: Percentage or Amount. In this example, we will allocate by percentage.



Click on the “Add New Allocation” button then enter the second account code you would like to charge.



If you would like to modify the percentages, simply click in the field and change as needed:



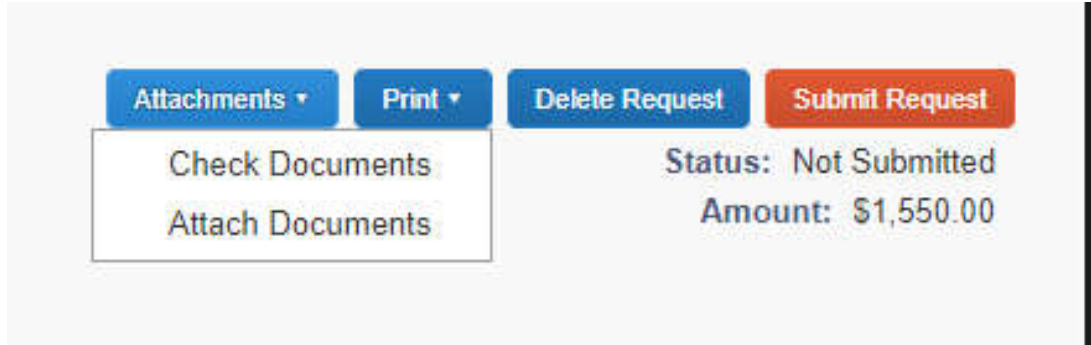
Remember to Save the allocations. If you are done entering expenses and allocating budget, you are ready to upload the required documents.

Uploading Required Documents

Before submitting the request for approval, there are required documents that need to be uploaded. The request will not move forward without these documents.

- Conference flyer or agenda
- Registration form

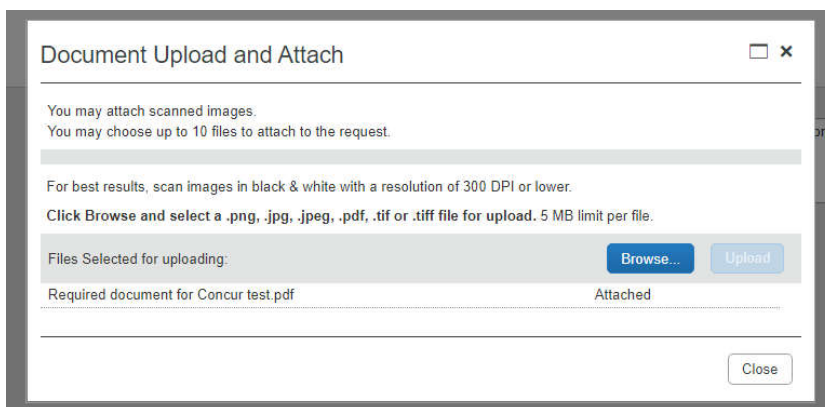
To upload required documents, click on the **Attachments** button and select **Attach Documents**:



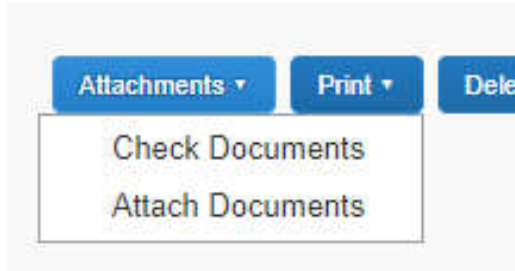
Click on the **Browse** button and attached the documents you need to upload one at a time.



Click on **Upload**. The document name will appear with a note of **Attached** if successful. Once all required documents have been uploaded, click on **close**.



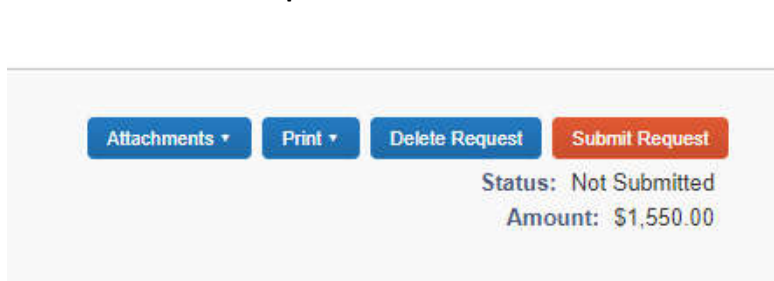
If you would like to verify the documents have been successfully uploaded, click the **Attachments** button again and select **Check Documents** from the drop-down menu. A pop-up window will appear (be sure to enable pop-ups in your web browser).



Submitting for Approval

Once you have uploaded all of the required documents, you are ready to submit the request for approval. The system automatically routes travel requests to immediate supervisors then budget approvers as determined by the account coding used on the travel request.

Click on the **Submit Request** button.



Now, your request will appear under your “Active Requests” with the automatically assigned travel number and status shown.

Active Requests (4)
[Clear Request](#)
[Copy Request](#)
[Clone/Track my Request](#)

[View](#)

Request Name Begins With

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input type="checkbox"/>	Event Request for Case Review	333Q	Not Submitted	02/23/2021		\$50.00
<input type="checkbox"/>	⚠ LASBO	354D	Submitted & Pending Approval - CADDQ Approver	02/27/2021	11/25/2020	\$150.00
<input type="checkbox"/>	Test of Event Request 2020 10 22	333U	Not Submitted	01/11/2021		\$600.00
<input type="checkbox"/>	Test of Copy Downs	333M	Not Submitted	10/28/2020		\$50.00
				10/30/2020		
				10/12/2020		
				10/16/2020		

Completing the Booking Process

Once the travel request has been fully approved, you will receive an email notification from AutoNotifications@concur solutions.com indicating your request has been approved. You are now ready to book your airfare, hotel, or car rental as appropriate. Follow the steps below.

Login to Concur.

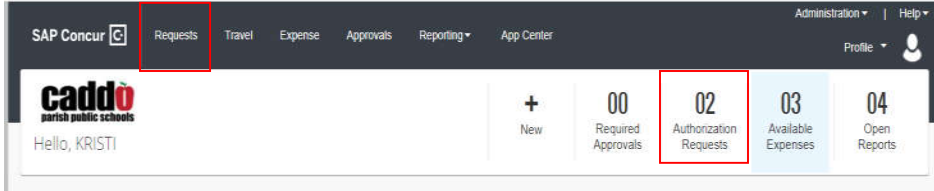
Click on the “Travel” link on the banner and book your trip using the same steps followed to gather trip estimates.

NOTE: When a hotel group or block rate is available, you must complete your hotel reservation by contacting the hotel directly. You will not be able to book a hotel with a group or block rate using Concur Travel. If you book a hotel at a higher rate when a group or block rate is available, you will be reimbursed at the lesser rate.

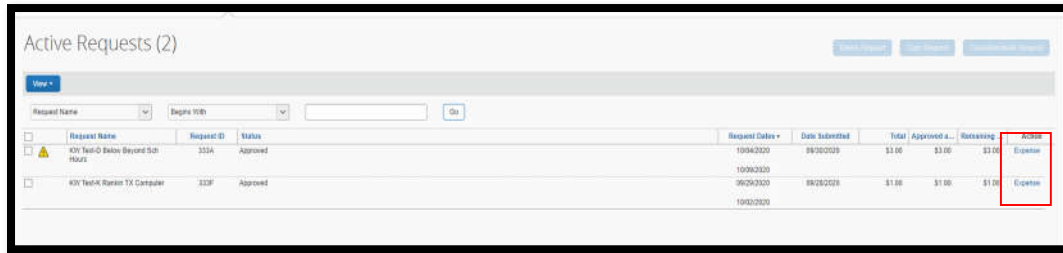
Creating Travel Expense Report

A travel expense report requires an approved request. All expenses related to the trip should be added to one report. To create a travel expense report:

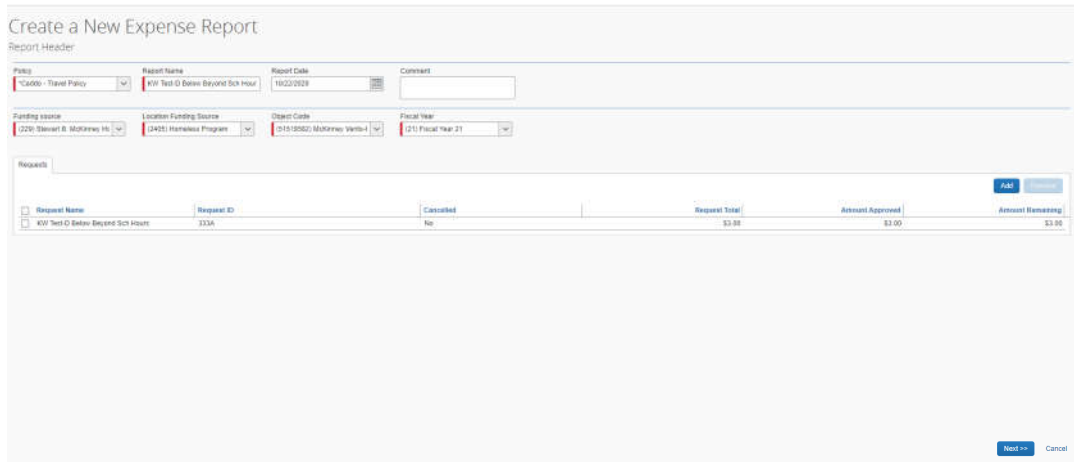
1. From the home page, click Requests or Authorization Requests.



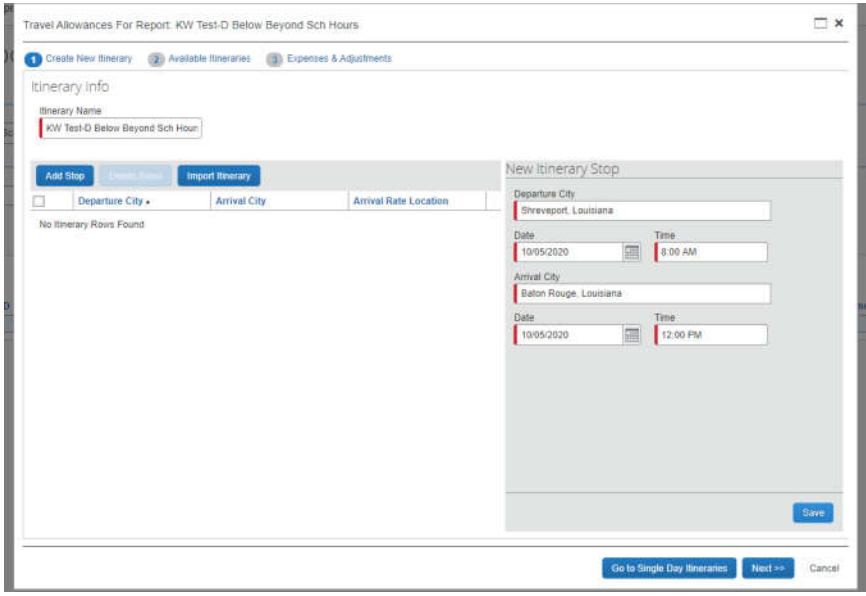
2. From the Action column, select the appropriate Expense hyperlink



3. If needed, make any updates and then click Next (bottom of screen).



4. Enter your trip itinerary for your departure date and return date.

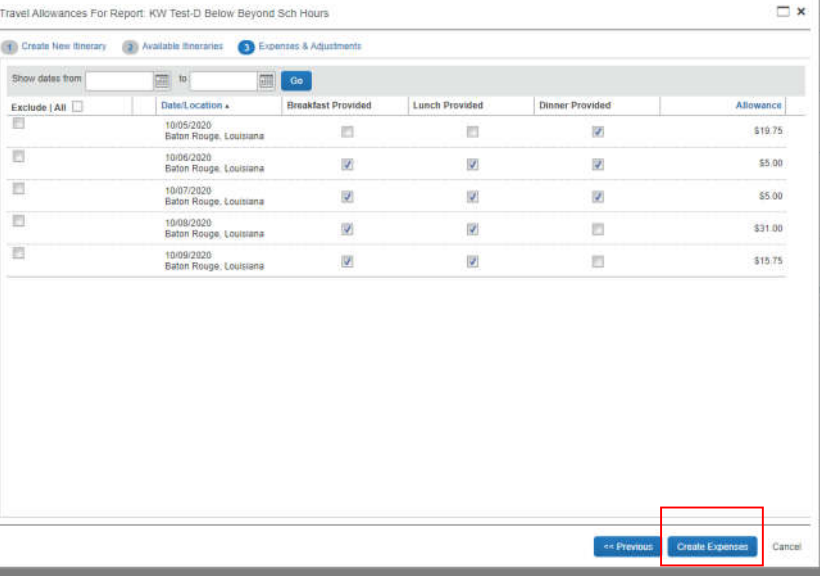


5. Click Next.

Adding Expenses to a Report

To add expenses to a report:


1. Meals – Check the box for any meals provided for by the conference. Then click “Create Expenses.”



2. Click on each expense type you incurred from the list provided on the right-hand side of the screen.

3. Complete the required information for each expense. The required fields are denoted with a red line on the left. Once required fields are completed:
 - a. Click **Save** to save this expense to the current report (you will see the expense on the left side of the screen)
 - b. **Attach Receipts** to the expense. Receipts are required for all expenses. Select a receipt from your receipt store if they are loaded into Concur or browse your file directories to attach a copy of a receipt.

4. Once all expenses are entered, ensure all required receipts have been attached by reviewing the left-hand side of the screen under the **Expenses** area.

If the required receipt icon  displays, a receipt is required and has not been attached. Select the Attach Receipts button from the bottom right-hand side of the screen or select the Attach Receipt Images from the Receipts dropdown.

Itemizing Expenses

1. Click on the expense to be itemized by selecting the expense on the left side of the report. (Hotels require itemization.)
2. Complete the expense detail information.
3. Click **Itemize** at the bottom of the right screen.
4. Fill in the required information and click **Save Itemizations**.
5. All itemizations will appear on the left side of the expense report.
6. To edit an itemization, click the itemization on the left side of the screen and make changes on the right side of the screen.
7. To delete an itemization, click the itemization on the left side of the screen and click the Delete button at the top of the expense report.

Adding Attendees to Business Meals (only allowable on Superintendent Chiefs expense reports)

1. With the expense report open, on the **New Expenses** tab, select **Business Meals (Attendees)**.
2. Click **Advanced Search** to search for attendees by type. Check the box for each attendee to add.
3. Click **Add to Expense**.
4. Check appropriate attendees.
5. Click **Save**.

Exceptions

Before submitting the expense report, ensure there are no exceptions. Exceptions will be displayed above all expenses listed. The Expense Type will be listed with the Date, Amount and Exception reason. Review the reason and make corrections as needed. An exception with a **Red** icon is a hard stop and you will not be able to submit your report until this exception has been corrected.

Exceptions			
Expense Type	Date	Amount	Exception
Hotel	10/09/2020	\$400.00	❗ Itemizations are required for this entry.

Attaching Receipts to an Expense Report

Travelers are expected to keep receipts and documentation of all travel.

Uploading receipts using Available Receipts

Available Receipts work with the SAP Concur Imaging Service to provide receipt images that the user can either email or upload images to, and then use to attach images at the line item expense entry level (only). Images in supported format are uploaded using an SAP Concur-verified email address provided by the user under **Profile Settings**. These image are then available to that user for the purpose of attaching to report expenses.

To attach a receipt image to an expense entry using Available Receipts

1. Select an entry to open it in **Details** view.
2. Click **Attach Receipt Image**.
3. Select the receipt image you want to attach, and then click **Attach**.

4. The receipt image is attached to the expense entry and displays on the right side of the screen.

Note: You can **Detach** a receipt image if needed.

Concur Mobile App

- Within the app, use the camera icon to take a picture of your receipt.
- An expense will be created from the receipt, and the expense details and receipt image will display under Available Expenses.

Scanned Images

- Scan your receipts and save the file(s) to your computer.
- Click on the line item that requires a receipt, then click **Attach Receipt** on the right side of the screen.
- Click **Browse** to locate the file on your computer, then **Attach** and Close.