Concur Approval Training Class

Introduction, Changes, & Roles

Getting Started & Approval Demo

Using Mobile Devices with Concur
Introduction, Changes, & Roles

- Introduction
- Changes to Travel Process with Concur
- Changes to P-Card Process with Concur
- Travel-related Roles in Concur
- P-Card-related Roles in Concur
Why am I here?

Why Training is Important

• Every traveler and p-card holder must electronically “sign” their requests/reports by submitting them.

• Concur won’t allow you to submit requests/reports that violate certain policies.

• Knowing the system can make your work life easier, especially with regards to receipts and approving with a mobile device!

• Some policies have changed.
**Changes to Travel Process with Concur**

### Current System
- Submit paper travel request to Travel and Travel issues TR #
- After completing trip, submit travel expense claim to Travel along with documentation
- Travel expenses that are on a p-card are put on both the travel claim AND in the p-card monthly reconciliation packet

### Concur
- Create travel request in Concur; Request ID (aka TR#) generated upon save. Travel request must be approved by manager(s) in order for Request ID/TR# to be valid.
- After completing trip, submit travel expense report with attached receipts/documentation in Concur
- Travel expenses on traveler’s p-card are included in travel expense report
  - If p-card travel expenses prior to trip, submit travel expense report at end of month for those expenses
- Travel expenses on someone else’s p-card:
  - Traveler includes these expenses on their travel expense report
  - P-Card Holder also submits a travel expense report with just the charges on behalf of other travelers
Changes to P-Card Process with Concur

**Current Process**

- Submit P-Card Packet by 10\textsuperscript{th} of month with signed Approval of Procurement Card Transactions form, a signed US Bank Cardholder Activity report, receipts, and documentation.
- Packet includes all p-card transactions: travel and goods & services.

**Concur**

- Submit a P-Card Expense Report by 10\textsuperscript{th} of month with receipt attached to each expense item and documentation attached to report.
- Expense Report is electronically signed by p-card holder and their direct MPP.
- Expense Report is only considered “received” when approved by MPP.
- Transactions must be at least added to report by 10\textsuperscript{th} and submitted to Procurement by end of next billing cycle or card will be shut off.
- P-Card Expense Report is ONLY goods & services. Travel-related p-card expenses should be put on a Travel Expense Report.
Roles in Concur: Travel

**Traveler**
- Individual who is actually travelling
- Includes both one-time trips and blanket travel

**Delegate/Preparer**
- Individual who prepares travel request and/or travel expense claim on behalf of an individual
  - Can create requests/reports but cannot submit

**Approver**
- Individual who is authorized to approve a user’s travel request and/or travel expense claim
### Roles in Concur: P-Card

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P-Card Holder</td>
<td>Individual whose name is on the p-card</td>
</tr>
<tr>
<td></td>
<td>Or individual responsible for a department p-card</td>
</tr>
<tr>
<td>Delegate/Preparer</td>
<td>Individual who prepares p-card expense report on behalf of an individual</td>
</tr>
<tr>
<td></td>
<td>Can create reports but cannot submit</td>
</tr>
<tr>
<td>Approver</td>
<td>Individual who is authorized to approve a user’s p-card expense report</td>
</tr>
<tr>
<td></td>
<td>This is now your direct MPP</td>
</tr>
</tbody>
</table>
• Accessing Concur
• Filling out Concur profile
• Setting up Delegates
• Submitting travel requests and travel/p-card expense reports
• Approving travel requests
• Approving travel/p-card expense reports

http://finance.fullerton.edu/concur
• Concur Mobile app overview
• ExpenseIt Pro app overview
• Triplt Pro app overview
Concur Mobile App

What can I do with this app?

- book or view trips
- view expenses
- create & submit expense reports
- view status or submit existing travel requests
- take picture of receipts
- add mileage expense to a report
- approve expense reports

http://concur.com/mobile

Or App Center in Concur
Highly recommend setting up **Automatic export** expenses to Concur, as well as **Email** or **Push** notifications to stay aware of what’s happening with your expenses.
**TripIt Pro App**

- Easily find alternative flights.
- Get real-time flight alerts.
- Organize all travel plans in one place, accessible anytime, anywhere, on any device.
- Find better seats when they become available.

![TripIt Pro App Image]
Questions?

Concur Support
concur@fullerton.edu or 657-278-7777