Concur Traveler & Delegate Training Class

Introduction, Process Changes, & Roles

Getting Started, Travel Request, & Travel Expense Report Demo

Using Mobile Devices with Concur
Introduction, Process Changes, & Roles

- Introduction
- Current Travel Workflow versus Concur Travel Workflow
- Changes to Travel Process with Concur
- Travel-related Roles in Concur
Why am I here?

**Why Training is Important**

- Every traveler must electronically “sign” their requests/reports by submitting them.
- Concur won’t allow you to submit requests/reports that violate certain policies.
- Your department/division may decide to change their processes and have *you* create and submit all travel requests/reports.
- Knowing the system can make your work life easier, especially with regards to receipts!
- Some policies have changed.
Current Travel Workflow versus Concur Travel Workflow

**Travel Process Today**

- Prepare Travel Request
- Signed by Approver
- Submit to Travel Ops
- Travel Audit and Assign TR#
- Books Travel
- Complete Travel
- Signed by Approver
- Submit to Travel Ops
- Travel Audit and Reimburse Traveler
- Receipts

**Future - Concur**

- Travel Request
- Concur Issues TR#
- Approver e-Signs
- Books Travel
- Expense Report
- Approver e-Signs
- Travel Audits & Reimburse Traveler
- Receipts
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
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
• Accessing Concur
• Filling out Concur profile
• Setting up Delegates
• Submitting a travel request
• Booking travel in Concur
• Submitting a travel expense report/claim
• Viewing status of your expense reports

http://finance.fullerton.edu/concur
Using Mobile Devices with 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
Take photos of receipts on the go
Receipts are reviewed and analyzed
Expenses are automatically generated
Simply assign expenses to an expense report

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

Organize all travel plans in one place, accessible anytime, anywhere, on any device.

Get real-time flight alerts.

Easily find alternative flights.

Find better seats when they become available.
Approvers in Concur Demonstration
Questions?

Concur Support
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