Quick overview of Concur

Prior to Travel/Event: Submit a Request (Pre-Authorization for travel or entertainment)

- **How to Create and Submit a Request** Video (1:56 min)
  - Refer to the Understanding the Header Row video **Understanding a Concur Header** Video (1:19 min). Here are examples of fields you will need to fill out. Same as the paper form.
    - Event/Trip Name (e.g., conference, training, fieldwork)
    - Report Type (Dropdown options)
    - Request/Trip purpose & Business purpose
    - Request/Trip start and Request/Trip end dates
    - Destination City/Country
    - Host Name (For entertainment or employee morale events)
  - **Expected Expense Screen**: We recommend adding in anticipated expenses such as lodging, meals, or registration. This step will save you time when you return from your trip.
- **How to Request a Cash Advance** Video (0.33 min)
- **How to Apply a Cash Advance** Video (0.54 min)
  - It’s recommended for travelers to apply for a Travel & Entertainment Card.

Returning from Travel: Create an Expense Report (Travel, Entertainment, or Business)

- **How to Create an Expense Report from an Approved Request** Video (1:33 min)
  - FAU (Full Accounting Unit)- This is the account you will spend money from (e.g., start-up, retention, grant). Make sure to enter the correct four-letter department code.
  - Selecting the correct Funding Sub.
    - For Travel- Select sub-5
    - For most other reimbursements- Select sub-3
- **How to Create an Expense Report on Concur Mobile** (No video)
- **How to Itemize an Expense on Concur Mobile** (No video)
- **Uploading Receipts** Video (1:15 min)
- **Uploading Receipts on Concur Mobile** Video (1:19 min)
  - Pro Tip: Upload your receipts into Concur before starting your expense report.
  - Follow your department’s protocol on submitting meal receipts.

Business Expense: (e.g., memberships, miscellaneous expenses)

- **How to create a Business Expense Report**
  - The Business Expense cannot create as a pre-authorization request.
  - Business Expense Reimbursements should always be a last resort, and your Department should direct everyone to use **Gateway** or use your Department **Flexcard** for these kinds of purchases.

Delegates (Please follow your internal department protocol on using delegates)

- **Delegate Overview** Video (1.34 min)
- **How to Add a Delegate** (No video)
  - If you do not see the employee you want to add as a delegate, please contact your department manager.