CONCUR

Quick Access Guide

What is Concur?

- Concur is a web-based tool that fully integrates travel reservations and expense reporting data into one application. Concur allows for the MSU employees to request approval for travel, book travel, and request reimbursement for out-of-pocket expenses incurred while traveling on behalf of MSU.

Concur Modules

- Concur includes three modules – Request, Travel, and Expense
  - Concur Request is used to request approval for travel when attending a conference or meeting, and when traveling out-of-state.
  - Concur Travel is used to reserve airfare, hotels, and rental cars through MSU's contracted travel agency, Travel Leaders.
  - Concur Expense is used to request reimbursement for out-of-pocket expenses incurred while traveling on behalf of MSU.

Attaching Receipts

- There are several ways to attach receipts to an Expense Report in Concur:
  1. Scan and upload to Available Receipts – Scan and save the receipt to an easily accessible location on your computer. Concur supports .png, .jpg, .jpeg, .pdf, .html, .tif, or .tiff file formats with a 5 MB limit per file.
  2. Scan and email to receipts@concur.com.
  3. Take a picture using ExpenseIt – Use your smart phone or other device to take a picture and email to submit via the Concur mobile app.

Itemization

- If you need to split an expense line item that you have entered between multiple Expense types, you must use the **Itemize** feature.
  1. Select the expense line item you need to itemize from the Expenses list on the left.
  2. Click **Itemize** in the lower right-hand corner of the **Expense Details** section.
  3. A new tab will open titled **New Itemization**. From the dropdown list, select the appropriate Expense Type and complete all of the required fields that populate.
  4. Adjust the expense amount.

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5. Click **Save**.
6. Repeat the steps outlined above until the Remaining Amount equals $0.00.
7. Click **Save**.

Allocation

- If you need to allocate to a FOAPAL (departmental account number) that is different from the default listed in your profile, or you need to split a transaction between multiple FOAPALs, you will need to use the Allocation feature.
    1. Select the expense you want to allocate from the Expenses list on the left.
    2. Click **Allocate** near the lower right-hand corner of the **Expense Details** section.
    3. From the Allocate By dropdown menu, choose either **Percentage** or **Amount**.
    4. Click the field under Fund, Org, or Program (or all three if all need to be changed) and a dropdown will appear with other available options. Concur does not allow for hand-keying FOAPALs. You must select the appropriate option from the list that appears.
    5. If you want to split the transaction between multiple FOAPALs, click **Add New Allocation**.
    6. Repeat steps 4 and 5 for each new allocation you need to add.
    7. Click **Save**. The sum of the split expense lines must be equal to the total expense.
    8. In the confirmation message box, click **OK**.
    9. In the Allocate Report window, click **Done**.

Submitting Reports for Approval

- On the **Expense Report** page, click the **Submit Report** button. All exception flags must be cleared before the report can be submitted.
- To see who is approving your reports or to check the status of a report, open the **Expense Report**, click **Details**, then click **Approval Flow**.