WELCOME TO CONCUR: THE BASICS

01/10/2019

Welcome to Concur!

The Concur system allows for the automation of the travel request and expense reporting process for campus business related travel. It is a self-initiated process, where the traveler is able to submit Travel Requests and Expense Reports electronically; including the entry of trip details, uploading of supporting documentation, and the routing of approvals to the appropriate campus Administrators. Some key advantages that the system offers include:

- Receipts can be emailed or scanned/uploaded to a user's available receipts area to be attached to your expense report.
- Added convenience through built-in automated features for CPP and CSU Travel Procedure compliance, mileage calculation, currency conversion, approval flow, etc.
- Email notifications and reminders of submissions and approvals at designated timed intervals.
- Intelligence reporting functions within the system will allow for the creation of detailed, actionable reports to analyze and audit the University's employee travel and expense data. This will allow for the measurement and tracking of metrics which will allow further refinement and improvements to be implemented on a go-forward basis for the University travel program.

The Authorization to Travel (1A), is now referred to as a Travel Request in Concur; while the Expense Claim is now referred to as an Expense Report.

Although Concur facilitates the electronic submission of the Expense Report, it is recommended for travelers to keep paper receipts until reimbursement for travel related expenses have been received.

Concur User Roles

There are three basic roles in Concur:

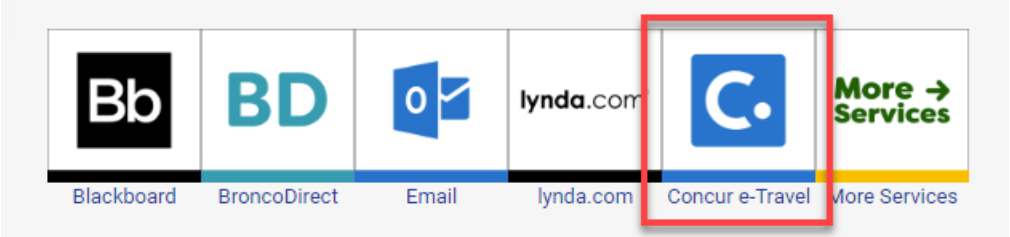
- The Traveler (Request/Expense User Role): The traveler is able to create his/her own Travel Requests and Expense Reports; including the upload of supporting documentation.
- The Travel Approver (Request/Expense Approver Role): The approver role is for Administrators that will be responsible for approving the Travel Request and Expense Report in alignment with the CSU Travel Procedures, Executive Orders and Technical Letters. This role is added to a user in addition to the Traveler role.
- The Delegate (Assigned by Traveler/Approver): The delegate may create and/or view Travel Requests and Expense Reports on behalf of the traveler. In addition, the delegate may review pending Travel Request and Expense Reports for an approver to ensure the Request or Report is in alignment with all policies and procedures. The person who creates the delegate relationship determines the rights and privileges of the delegate (create, view reports, receive emails, etc.). *(Note: This is not a recommended practice for CPP travel related activity. The traveler should initiate their own Travel Requests and Expense Reports; and obtain assistance, when needed, from designated department personnel who are trained to assist in the travel process.)*

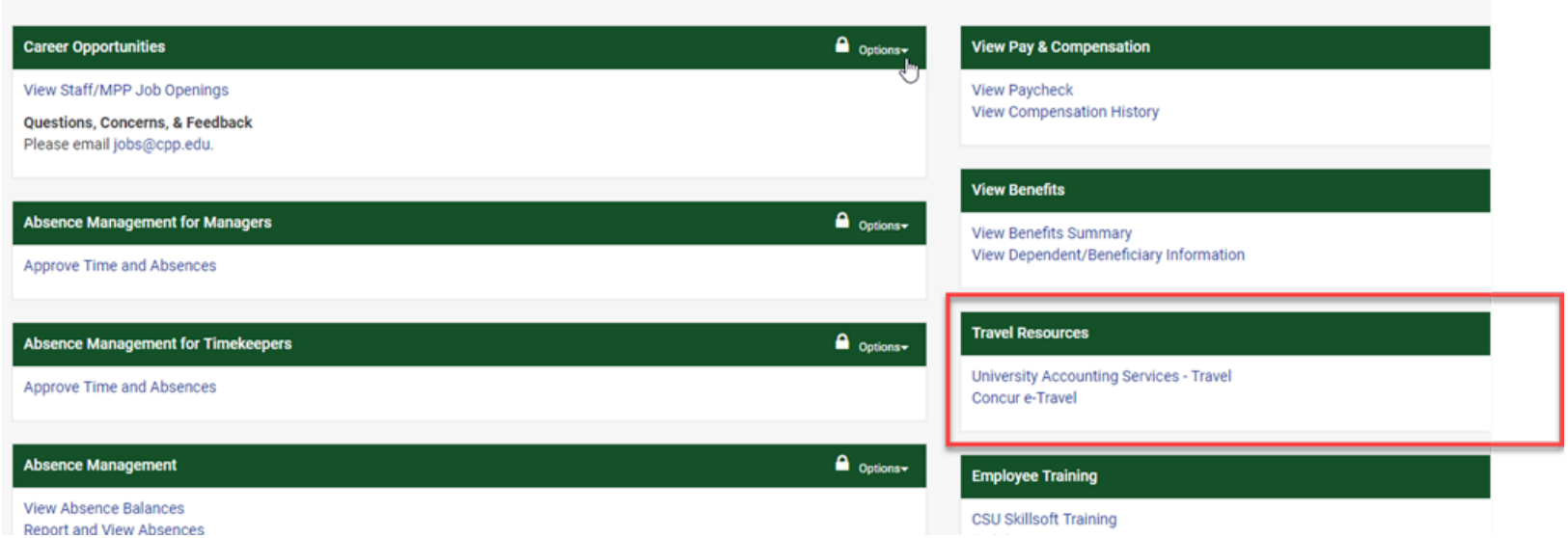
Signing In to Concur

Some helpful hints:

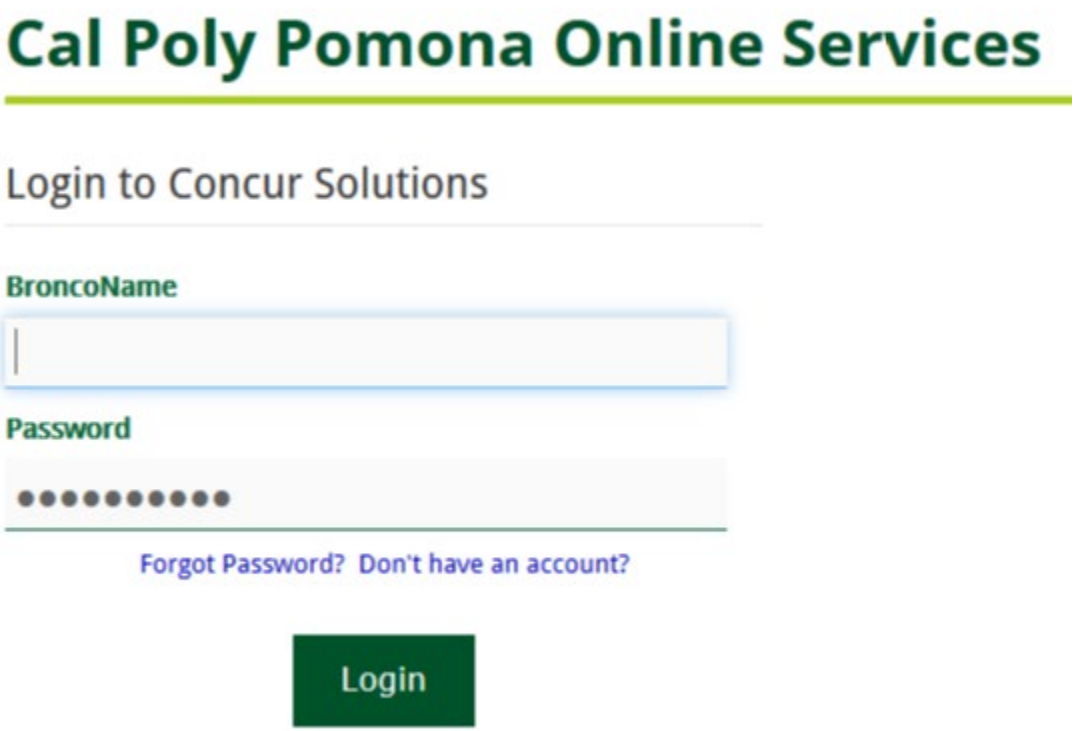
- Use the “cancel” button instead of the “back” button on your browser when navigating through Concur. By using the “back” button, it will cause you to be logged out of the system.
- Use your mouse to save instead of using the “enter” button.

To sign in to Concur, navigate to the CPP Portal and click on one of the two links for Concur.



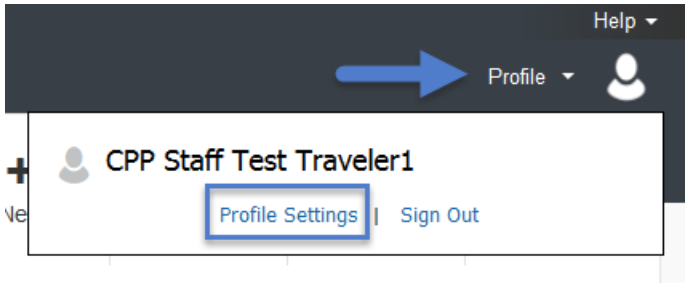


Cal Poly Pomona's Online Services Single Sign On screen will appear, where you will enter your BroncoName and Password to log into Concur.

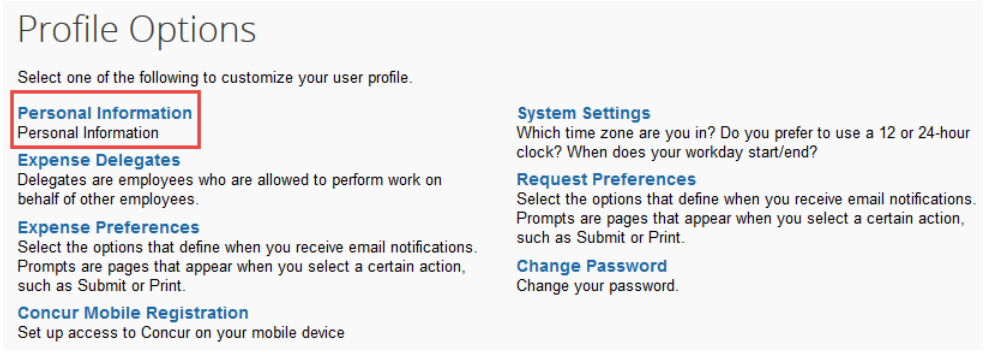


Updating Your Concur User Profile

The first time you sign in to Concur, click on “Profile” > “Profile Settings” to enter your personal information.



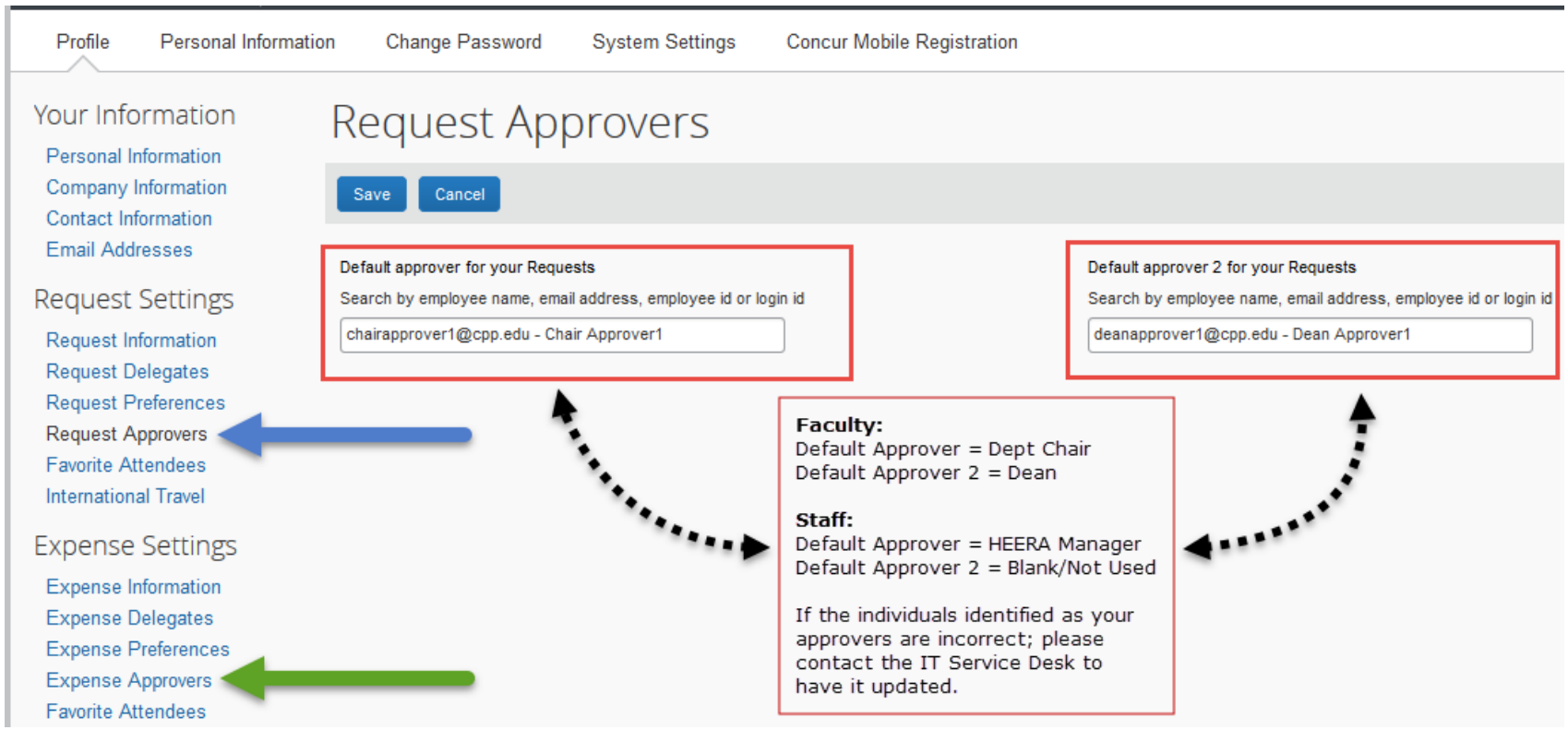
It is recommended that at least the following fields be updated under the Profile Options – “Personal Information”:



- Work Address
  - Please use the University’s mailing address: 3801 W. Temple Ave., Pomona, CA, 91768
- Contact Information
  - Work Phone [Required]
  - Home Phone [Required]
- Email Addresses
  - Verify your email in your profile. This will allow you to receive system generated notification emails; as well as be able to email your receipts to receipts@concur.com. The receipts will be stored in your available receipts until you attach them to an Expense Report.

Travel Request and Expense Approvers

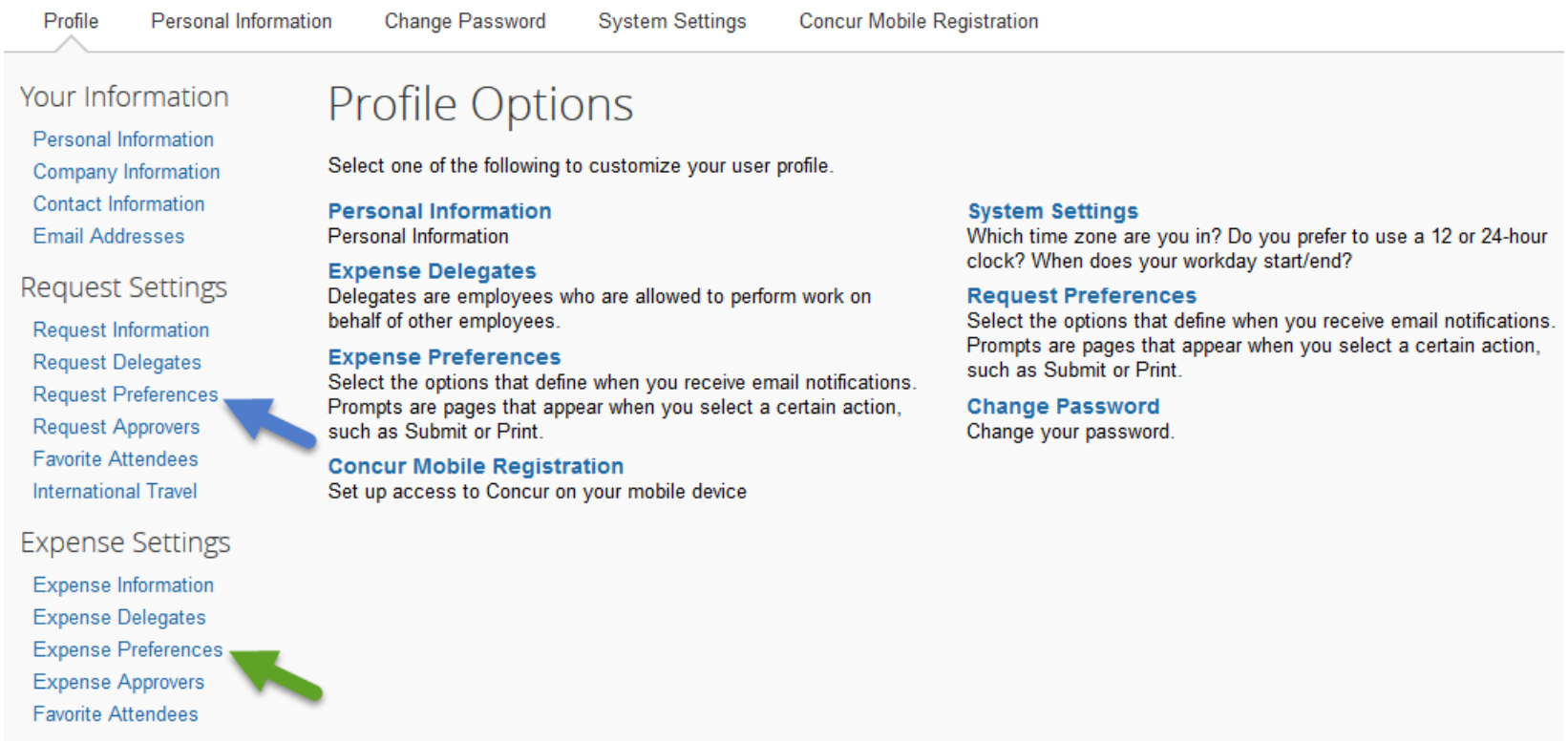
To review the request and expense approvers assigned to your profile, click on “Profile” > “Profile Settings” > “Request Approvers” OR “Expense Approvers”. The personnel identified as the default approver and default approver 2 for your requests, should also be your approvers for your expenses.



Email Notifications

Concur sends a variety of emails including email reminders, system emails, and workflow email notifications. Users are not able to turn on/off system generated email reminders or specific workflow email notifications. However, the user can make changes to email notifications for Request and Expense within their own profile under each modules preferences screen.

On the "Profile Options" screen, click on "Request Preferences" or Expense Preferences" to set your email notification settings. **It is recommended to have all email notifications turned on for Request and Expense.**



From the "Request Preferences" page, make the desired choices for email notifications as follows:

Send email when…	Description
The status of a request changes	An email is sent to an employee when the status of a submitted request has changed. The only exception is when an approver sends the request back to the employee for resubmission. When this happens, a status email is not sent, but a different "Send Back to Employee" email is sent.
A request is submitted for approval	An email is sent to a request approver when a request is made by one of the employees in the approver's group.

Prompt…	Description
For an approver when a request is submitted	When you submit a request, you are prompted to select a request approver. If you have a default approver, that person's name appears automatically but you can select another approver if desired. *(**Recommended** to select this prompt for CPP, as all approvers are built into the approval workflow for Travel Requests.)*

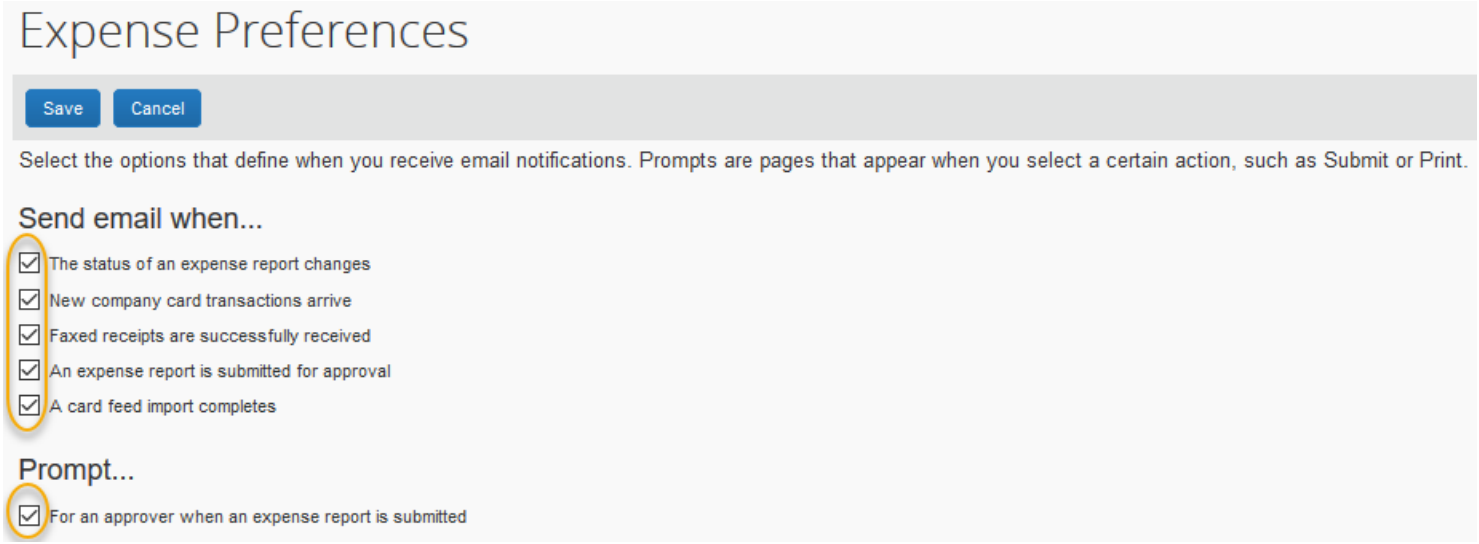
To turn the notification(s) off, uncheck the respective notification box ***(not recommended)***. Notifications can be turned back on by re-checking the box(es).

From the "Expense Preferences" page, make the desired choices for email notifications as follows:

Send email when…	Description
The status of an expense report changes	An email is sent when the status changes, such as from *Issued* to *Approved.*
New company card transactions arrive	An email is sent to an employee when new company card transactions are imported.
Faxed receipts are successfully received	An email is sent to an employee when new faxed receipts have been received by Concur's imaging service.
An expense report is submitted for approval	An authorized approver is sent an email when an employee submits an expense report for the approver to approve.
A card feed import completes	An email is sent to the Company Card admin that informs them the company card job has completed. *(Only applicable to Admin level users.)*

Prompt…	Description
For an approver when an expense report is submitted	When you submit an expense report, you are prompted to select an approver. If you have a default approver, that person's name appears automatically but you can select another approver if desired. *(**Recommended** to select this prompt for CPP, as all approvers are built into the approval workflow for Expense Reports.)*

To turn the notification(s) off, uncheck the respective notification box ***(not recommended)***. Notifications can be turned back on by re-checking the box(es).



Campus Contact Information

If you have questions regarding the Travel Procedures or how to use Concur, please contact:

Travel@cpp.edu

A staff member from University Accounting Services/Accounts Payable will contact you to address your question.

If you have technical questions regarding the Concur system, or your default approvers need to be updated, please contact:

Cal Poly Pomona IT Service Desk
itservicedesk@cpp.edu -or- (909) 869-6776
Submit a Request IT or Fix It ticket using the IT Service Portal at https://cpp.service-now.com/ehelp