Baylor College of Medicine

SAP Concur

Travel and Expense Manual

REV 10/29/2018

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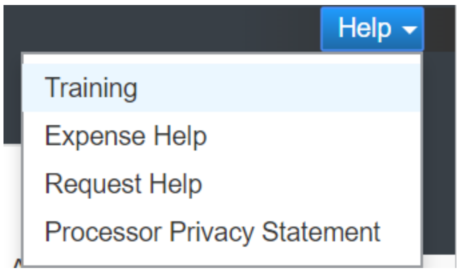
Welcome to SAP Concur

SAP Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all the tools you need to submit a travel request, book travel, create and submit travel requests and expense reports (for travel and non-travel expenses).

To access help, FAQs, and policies visit Mosaic Training and Expense at www.bcm.edu/mosaic, and then click **Travel and Expense**.

You can also access help within Concur, in the top right-hand corner, click **Help > Training**.

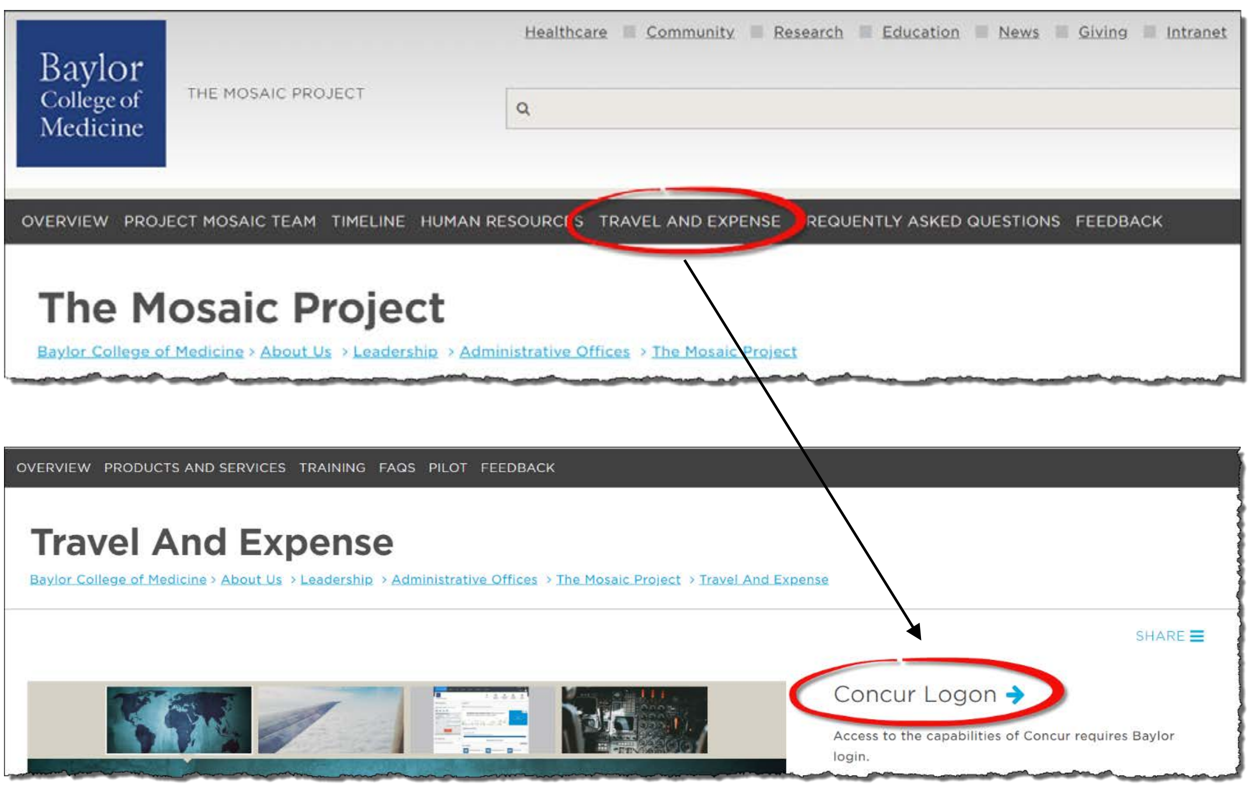


*Depending on which web browser you use, there will be some slight system differences and functionality. The preferred web browsers are **Internet Explorer** and **Chrome**.*

Login to www.bcm.edu/concur-solutions or click **Concur Logon** from the Travel and Expense website (www.bcm.edu/mosaic > **Travel and Expense**).

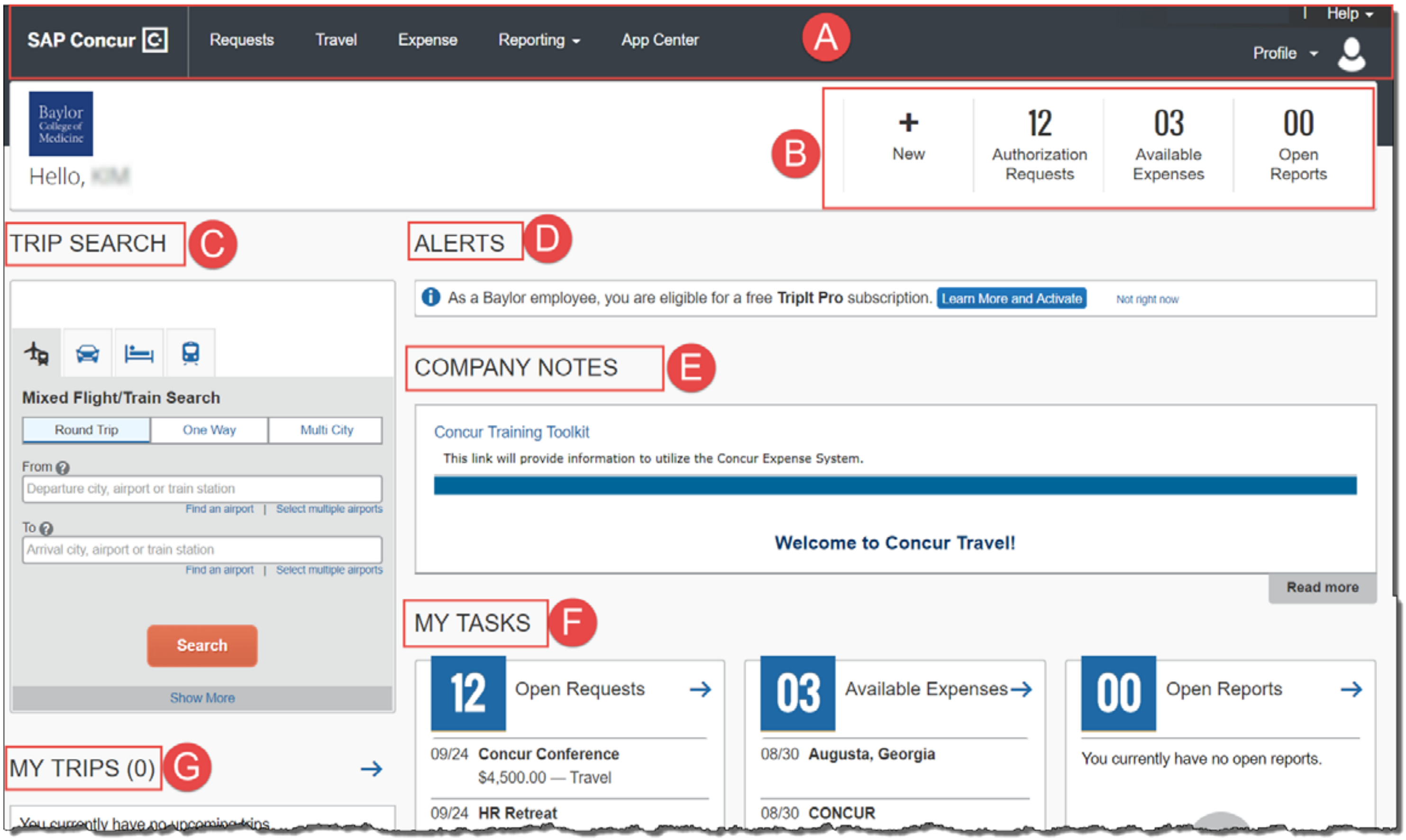
SAP Concur uses Single Sign-On (SSO), if prompted, log in with your BCM account.

Policies, FAQs and training are available on the **Travel and Expense** web page.



Exploring the SAP Concur Home Page

The SAP Concur home page contains the following sections.



Section	Description
A	**Menu Bar** • **SAP Concur logo** - To return to the SAP Concur home page from any other page • **Requests –** Submit/view travel request • **Travel –** Search and book travel arrangements • **Expense –** Create/view expense reports • **Approvals –** For approvers to approve requests and expense reports • **Reporting –** Access reporting • **App Center –** View mobile apps available • **Help** – Access training resources • **Profile** – Update profile settings or sign in as a delegate

<table>
<tr><td>B</td><td>Quick Task Bar
Start a new request and report
Open requests and reports
Manage available expenses</td></tr>
<tr><td>C</td><td>Trip Search
Flight: Use to book a flight. You can also book hotel and reserve a car at the same time.
Car, Hotel, Limo, or Rail: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (Flight tab).</td></tr>
<tr><td>D</td><td>Alerts - Displays informational alerts</td></tr>
<tr><td>E</td><td>Company Notes – Displays informational content</td></tr>
<tr><td>F</td><td>My Tasks – Lists open requests, available expenses, open reports, and approvals requiring attention</td></tr>
<tr><td>G</td><td>My Trips - Lists your upcoming trips</td></tr>
</table>

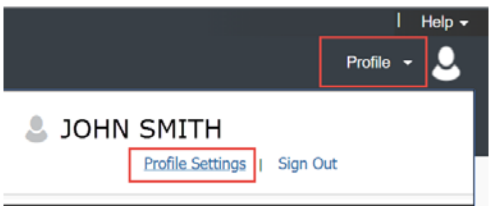
Updating Your Profile

You use the **Profile Options** page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information, etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information changes.

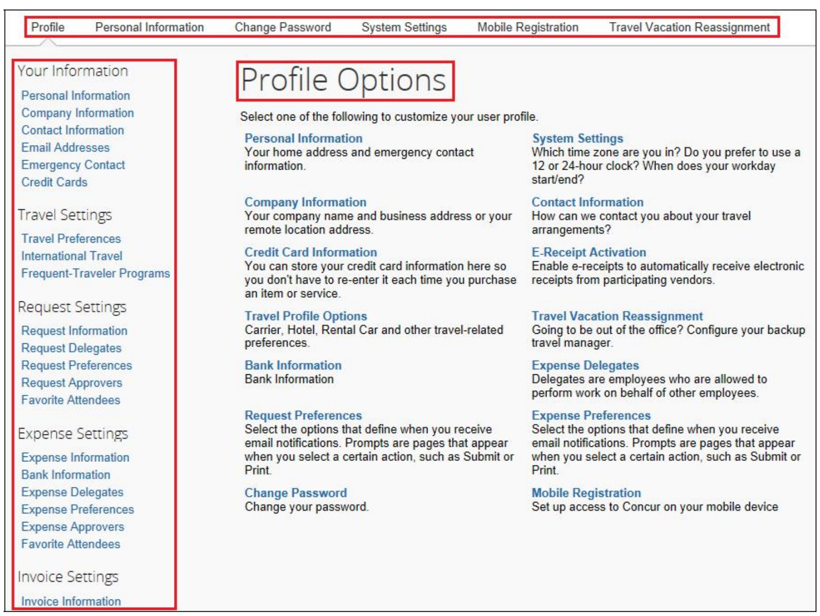
- **Your Information** – View/update personal information, verify name matches government issue ID, complete your email address verification, and add credit card information.
- **Travel Settings** - Enter travel preferences, add international travel information, Frequent-Traveler programs and add passport information. You can also add your travel assistants and arrangers (assist with booking travel).
- **Request Settings** – View your default request fund center information. Add or remove delegates, and view your permissions if assigned as a delegate for another employee (from the **Delegate For** tab). Update request email preferences, and add or remove attendees.
- **Expense Settings** - View your default expense fund center information. Add or remove delegates, and view your permissions if assigned as a delegate for another employee (from the **Delegate For** tab). Update expense email preferences, and add or remove attendees.
- **Other Settings** – Provides settings such as E-Receipts Activation and Concur Mobile Registration that you can set up a mobile PIN to sign in.

To access your Profile page

1. Click **Profile > Profile Settings**.

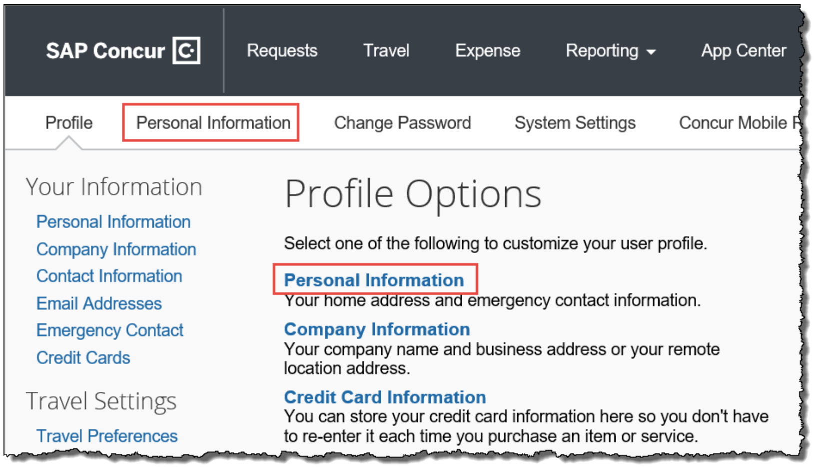


2. On the **Profile Options** page, review your information, and select the appropriate links to update your profile information. You can use the menus on the top of left to select a setting to update.

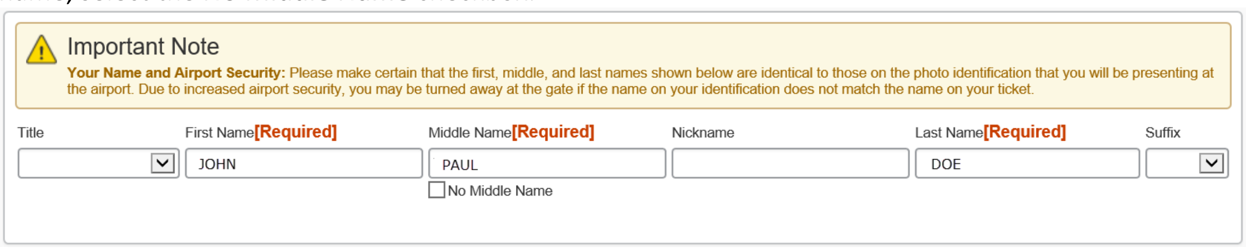


Verifying Personal Information

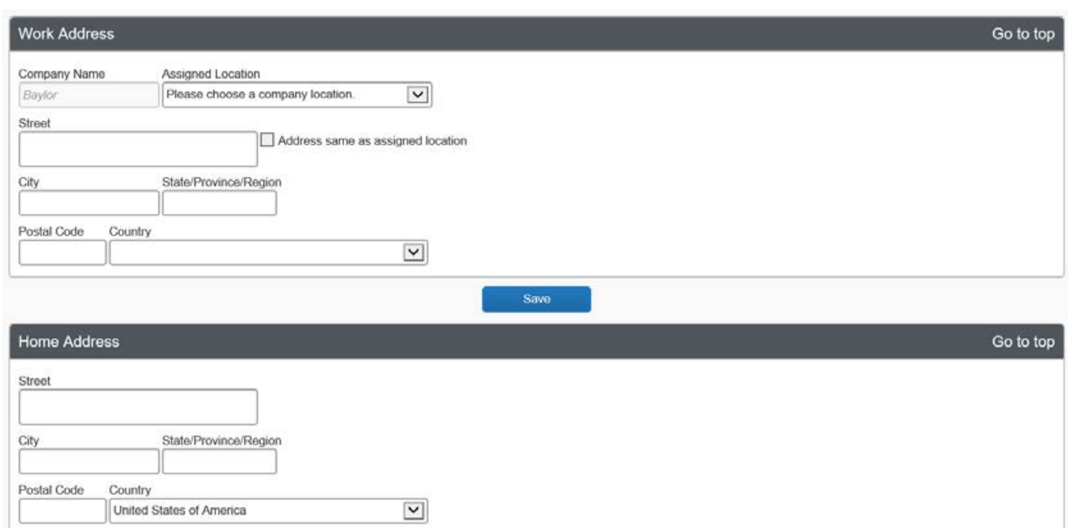
1. Click **Personal Information**.

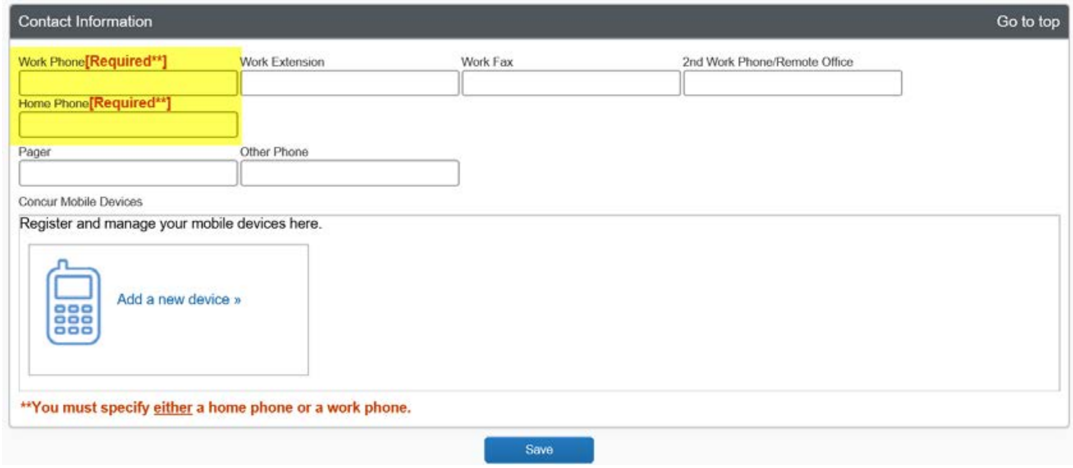


2. In the **My Profile** – **Personal Information** section, make sure that the first, middle, and last names shown are identical to those on the photo identification that you will be presenting at the airport. If you do not have a middle name, select the **No Middle Name** checkbox.



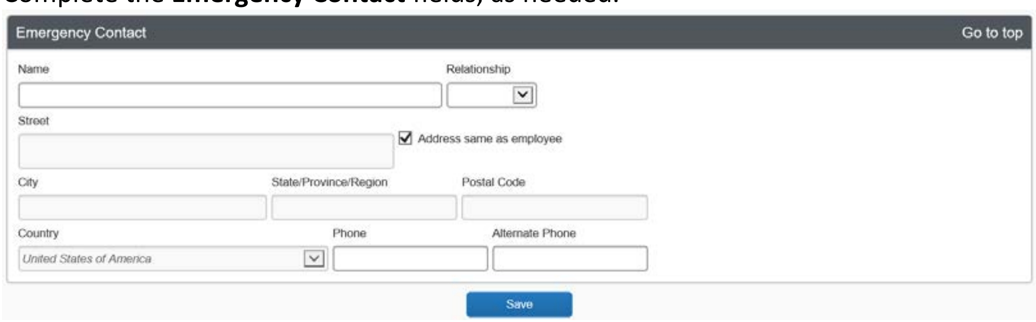
3. Scroll down and verify your **Work** and **Home Address**, and your **Contact Information** (required fields are labeled in red).





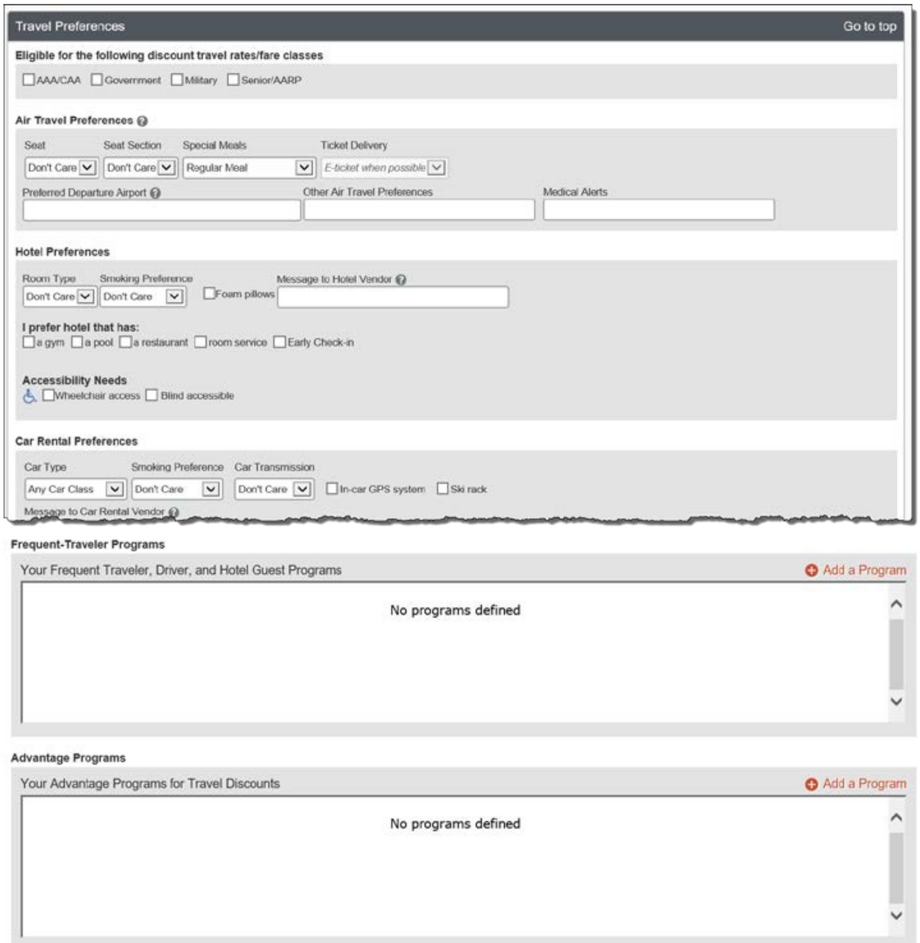
4. In the **Email Addresses** section, verify your email address to help manage receipts. Click **Add an email address** to add any additional email addresses that you will need to use.

5. Complete the **Emergency Contact** fields, as needed.

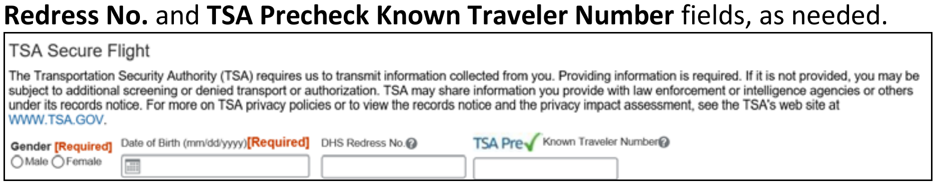


Updating Travel Preferences

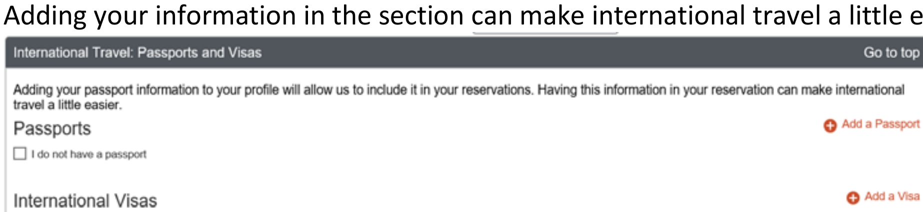
1. Scroll down to the **Travel Preferences** section. Select your discount travel rates/fare classes, and specify your **Air, Hotel**, and **Car Rental Preferences**. Under **Frequent-Traveler Program**, click **Add a Program** to add your frequent flyer programs.



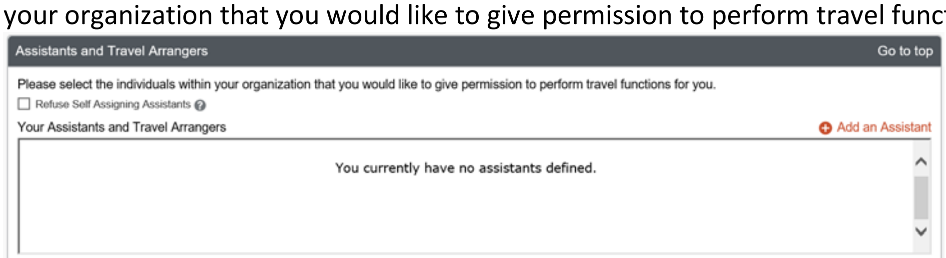
2. In the **TSA Secure Flight** section, verify the required **Gender** and **Date of Birth** fields. Complete the **DHS Redress No.** and **TSA Precheck Known Traveler Number** fields, as needed.



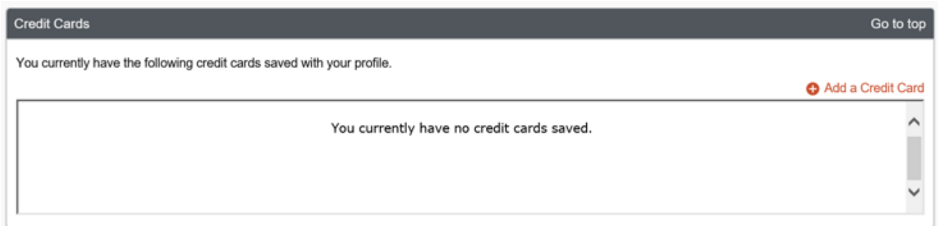
3. In the **International Travel Passports and Visas** section, add your passport or international visa information. Adding your information in the section can make international travel a little easier.



4. In the **Assistants** and **Travel Arrangers** section, click **Add an Assistant** to assign someone to book travel for you, or to assign them as your primary assistant for travel. You can search for and select the individual(s) within your organization that you would like to give permission to perform travel functions for you.



5. From the **Credit Cards** section, click **Add a Credit Card** to add or update your credit card information that you use to book travel and/or expenses.

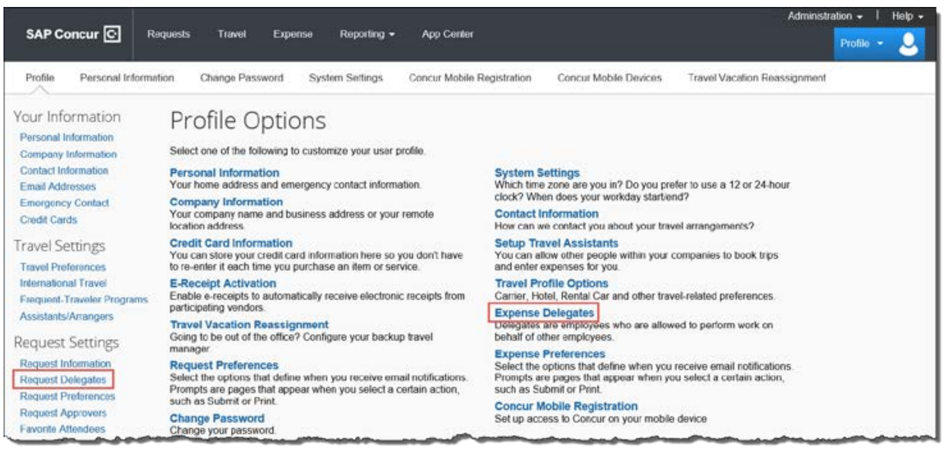


6. After you have completed your **Travel Profile** updates, click **Save** .

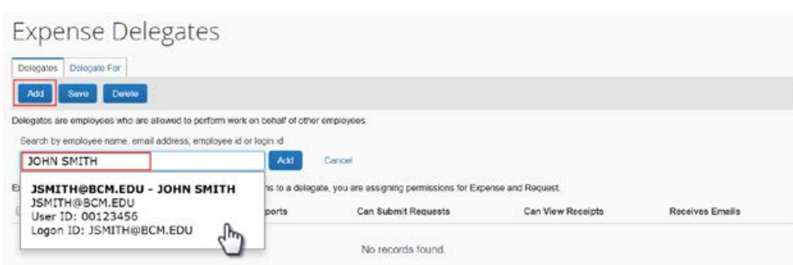
Adding Expense Delegates

Delegates are employees who you have assigned to work on your behalf for requests, expenses and/or approval. A delegate will share permissions for requests and expense reports. Delegates cannot submit the Missing Receipt Affidavit on behalf of the requestor.

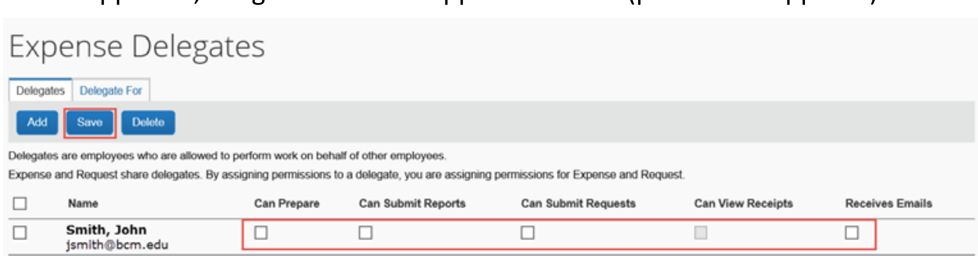
1. Click **Request Delegates** or **Expense Delegates**.



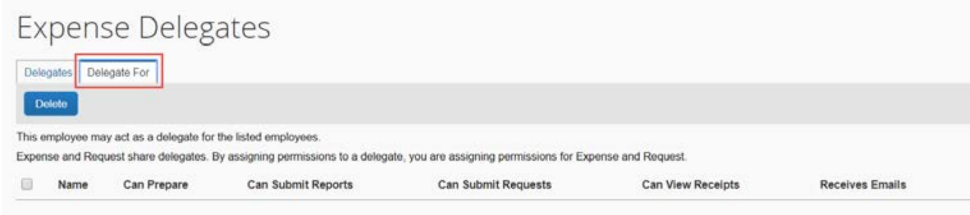
2. From the **Delegates** tab, click the **Add** button.
3. Search by employee name, email address, employee ID or login ID.
4. Select their name.



5. Specify which tasks you want the delegate to perform on your behalf, and then click the **Save** button. If you are an approver, assign the desired approver access (preview or approve).

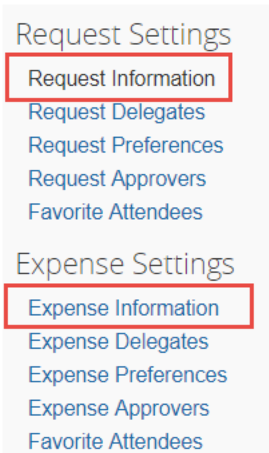


6. If you have been assigned as a delegate for someone, to view your permissions, click the **Delegate For** tab.



Viewing Your Fund Center Information

Your funds center will be populated in the **Request** screen, but the Expense report will need to be completed. You can view your funds center information from the **Request** screen or **Profile Setting** under **Request Information** or **Expense Information**. If you are unsure which funds center to use, contact your approver or add a comment to the approver.



Activating E-Receipts

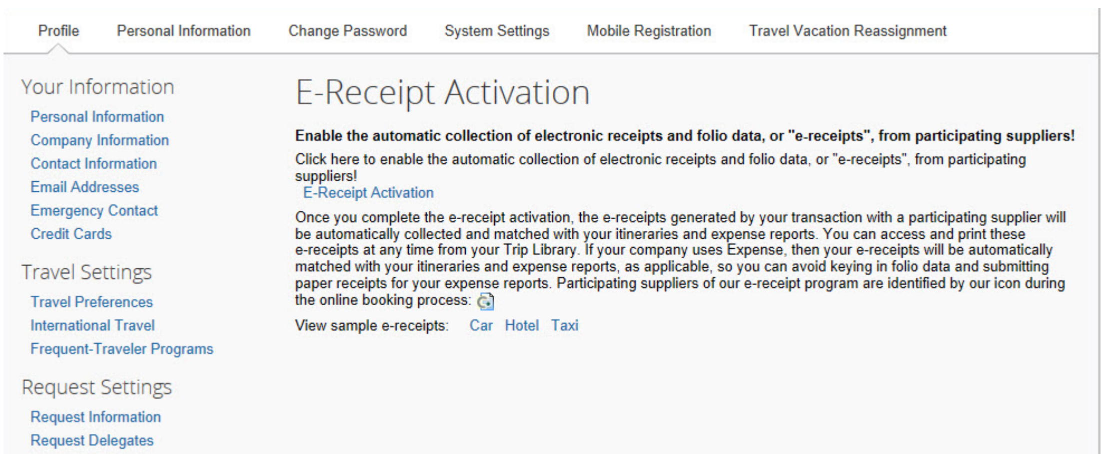
E-receipts are an electronic version of receipt data that can be sent directly to SAP Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

BCM is enabled to accept e-receipts from some vendors, and you must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data.

Enabling E-Receipts

To sign up for e-receipts

1. Either:
   - On the SAP Concur home page, click **Sign up here**. The **E-Receipt Activation** page appears.
     - or -
   - Click **Profile** > **Profile Settings** > **E-Receipts Activation** (in the **Other Settings** section of the left-side menu).
2. Click **E-Receipt Activation**. The **E-Receipt Activation and User Agreement** appears.
3. Click **I Accept**. The E-Receipts confirmation appears.
4. Once you have accepted the user agreement, all your corporate cards are opted-in. You can choose to opt-out a particular card in **Profile > Credit Cards**. Select the **Edit** icon for the card and uncheck the **Receive e-receipts for this card** check box.



Acting as a Delegate

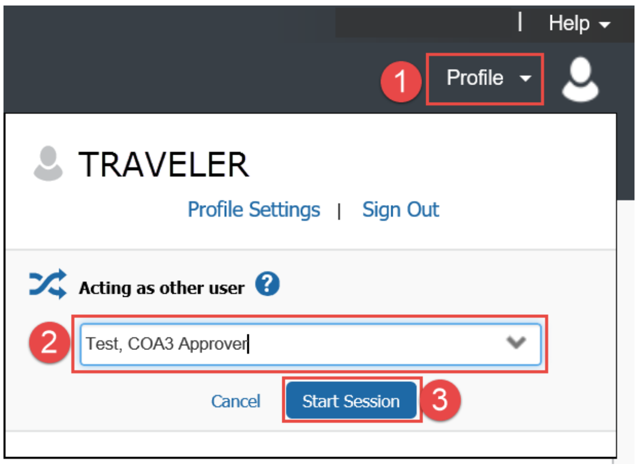
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

To work as a delegate

1. Click **Profile.**
2. From the **Acting as other user** menu, select the appropriate user's name.
3. Click **Start Session**.

   Note: The **Profile** menu now displays **Acting as** and shows the name you just selected.

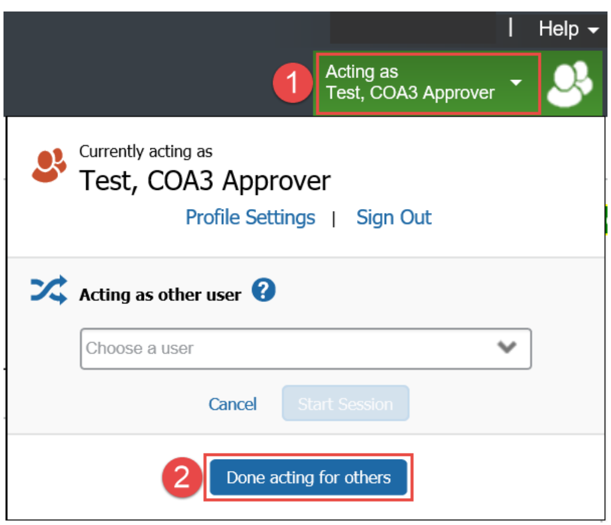
   You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.
4. To select a different user, follow the same steps but select a different name.



To return to your own tasks

1. Click the user's name.
2. Then click **Done acting for others**.

   Note: The **Profile** menu now appears.



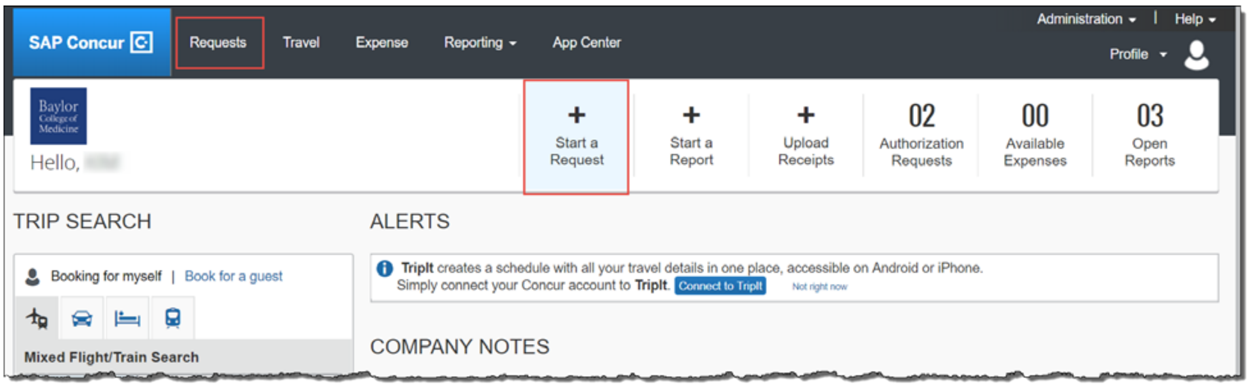
Submitting a Travel Request

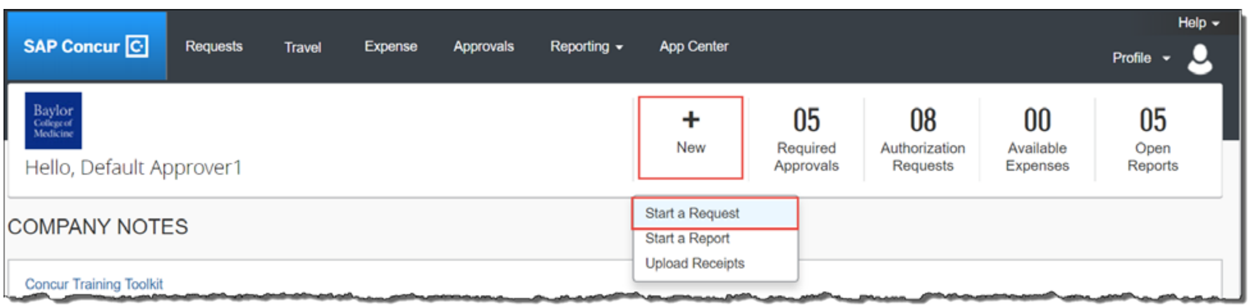
Prior to your business trip, submit a travel request for approval. An approved travel request is required for an expense report.

Note: Your profile settings should be completely set up prior to submitting a request and booking travel.

Submitting a Travel Request

1. To create a new request, click one of the following options:
    - Click **Requests > New Request**
    - **Start a Request**
    - **New > Start a Request** (if approver)

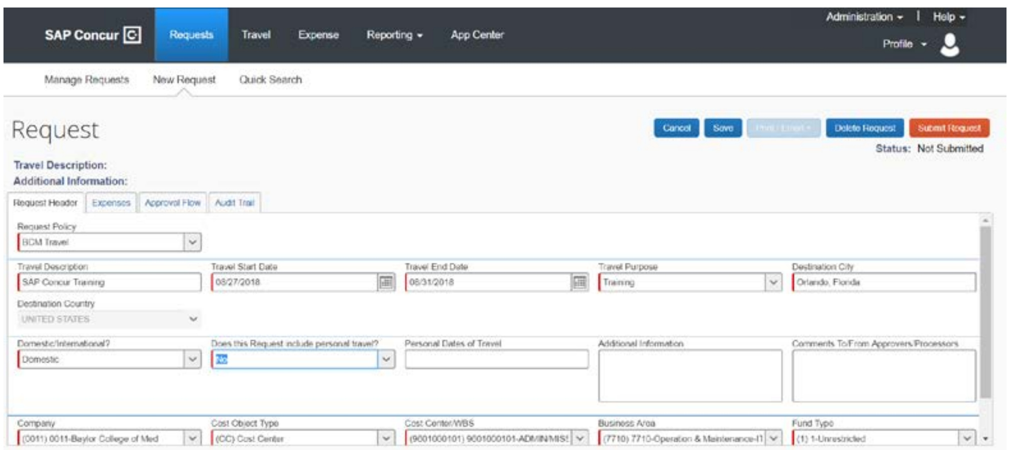




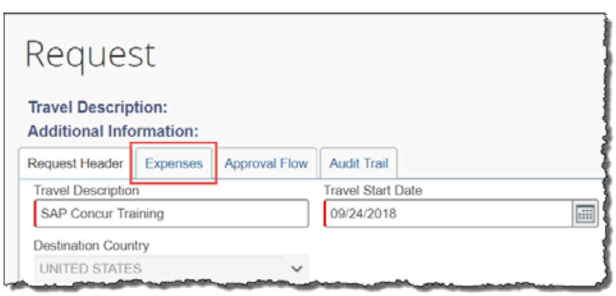
2. In the Request Header, complete all required fields (red bar):
    - Request Policy
        - BCM Travel – *Traveler is BCM employee*
        - Guest Travel – *Travel is a non-BCM employee, examples: guest speaker, honorarium. An [AP Vendor ID](#) will be required when submitting the expense report. It is not required when submitting a request.*
    - Travel Description - *name for trip request*
    - Travel Start Date
    - Travel End Date
    - Travel Purpose
    - Destination City
    - Domestic/International?

- Does this Request include personal travel?
- Company – *defaults to employee record information but can be updated*
- Cost Object Type – *defaults to employee record information but can be updated*
- Cost Center/WBS – *defaults to employee record information but can be updated*
- Business Area – *defaults to employee record information but can be updated*
- Fund Type –*Typically, it will be the **1- Unrestricted***
- Internal Order

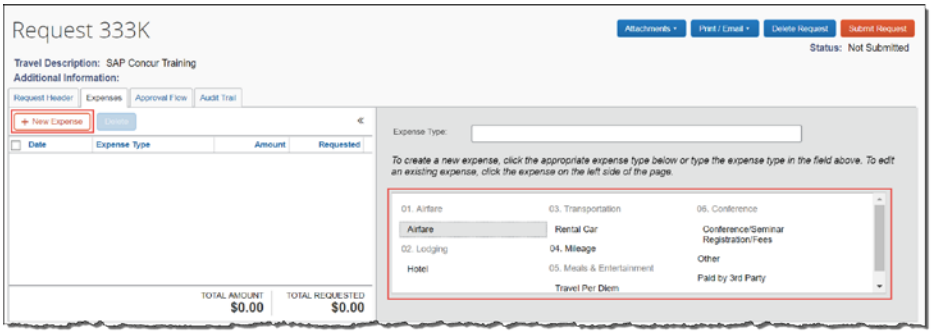
3. In the Request Header, completion of the non-required fields is helpful:
    - Personal Dates of Travel
    - Additional Information
    - Comments To/From Approvers/Processors – include notes related to the reason for the trip, etc., especially if exceptions are involved.



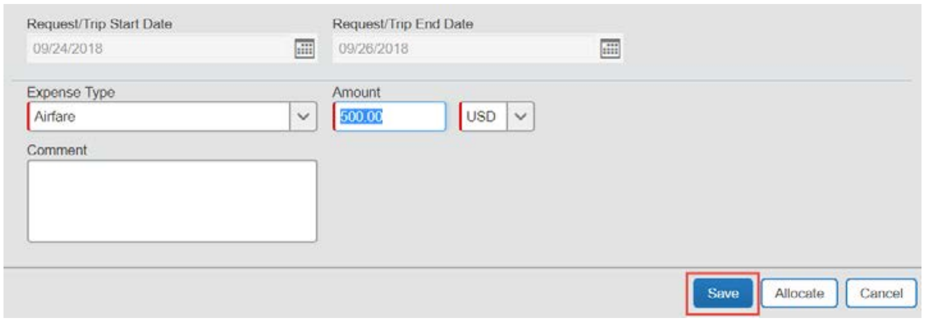
4. To complete the Request for Travel, the estimated costs for the trip must be included. This is done within the **Expenses** tab. Click on the **Expenses** tab.



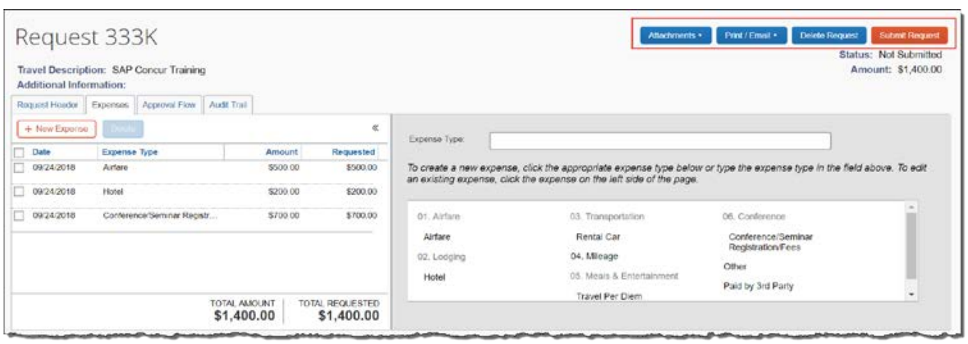
5. Enter the estimated amount for each Expense type. Click on each expense type you will incur during the requested trip. You can either click on the **+ New Expense** button or click the actual Expense type on the right-hand side.



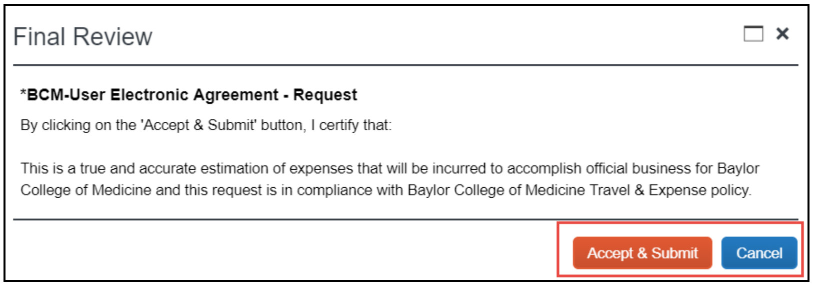
6. Click **Save** as you create each expense type amount.



7. Click **Submit Request** once all expenses have been entered and are ready to submit. You can also select one of the following:
   - **Attachments -** if you have attachments to include
   - **Print/Email –** print/email a copy of request
   - **Delete Request** – delete request if you no longer need it



8. A **Final Review** window will appear. Click **Accept & Submit** or **Cancel**.

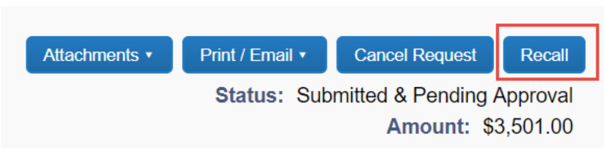


9. If there are no errors, then the request will be submitted with the **Pending Approval** status.

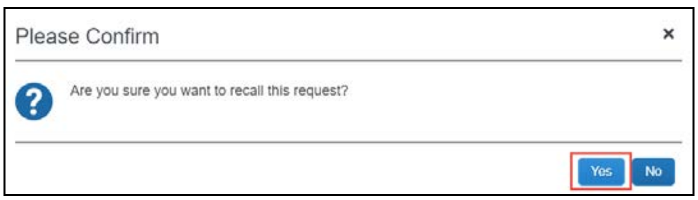
Recall a Request

You can recall a request to make changes if it has not been approved. To recall a request:

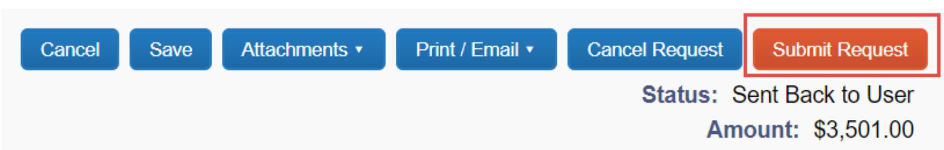
1. Click **Requests > Manage Requests >** select the **Request Name**.
2. Click **Recall.**



3. Click **Yes** to confirm.

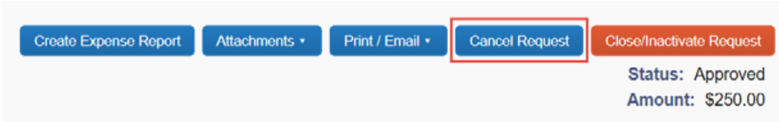


4. Make the necessary changes, and then **Submit Request**.

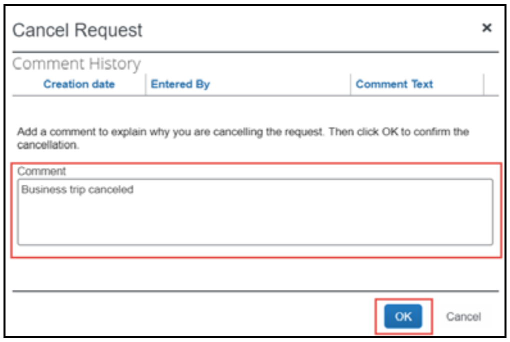


Cancel a Request

1. To cancel a request, click **Cancel Request**.



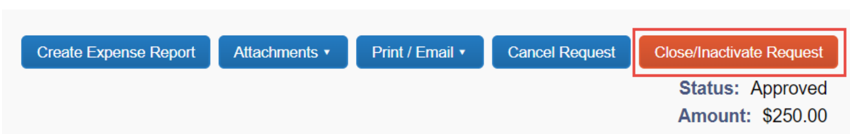
2. Enter a **Comment** and then click **OK**.



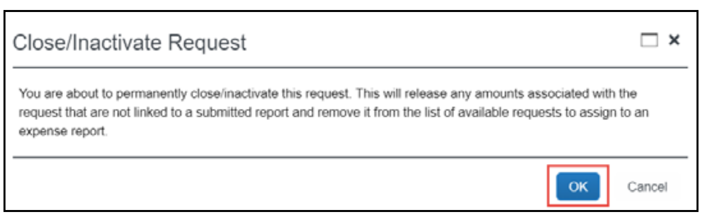
Close/Inactivate Request

To close a request after all expenses related to the request have been submitted and to be removed from the **Managed Requests** screen:

1. Click **Close/Inactivate Request**. When you close a request, it cannot be used for an expense report.

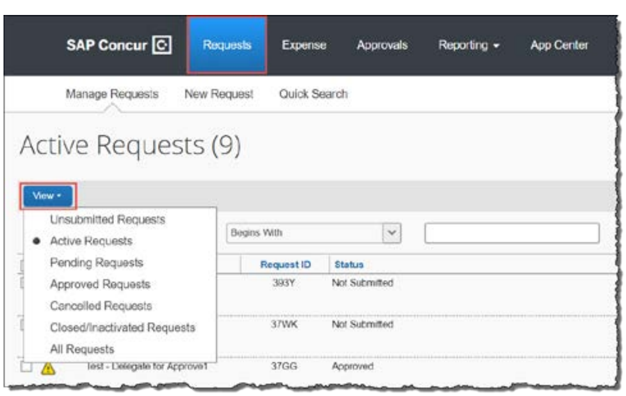


2. Click **OK** to confirm.



Viewing Requests

To view all your requests, click **Requests.** Use the **View** button to filter and display the type of Requests you want to see.



Using SAP Concur Travel

You can book airfare, hotel and car rental from our dedicated travel agency FROSCH. From the SAP Concur home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations *without* a flight, use the **Hotel** and **Car** **Search** tabs, respectively.

Important: An approved Request ID is required to complete the booking reservation.

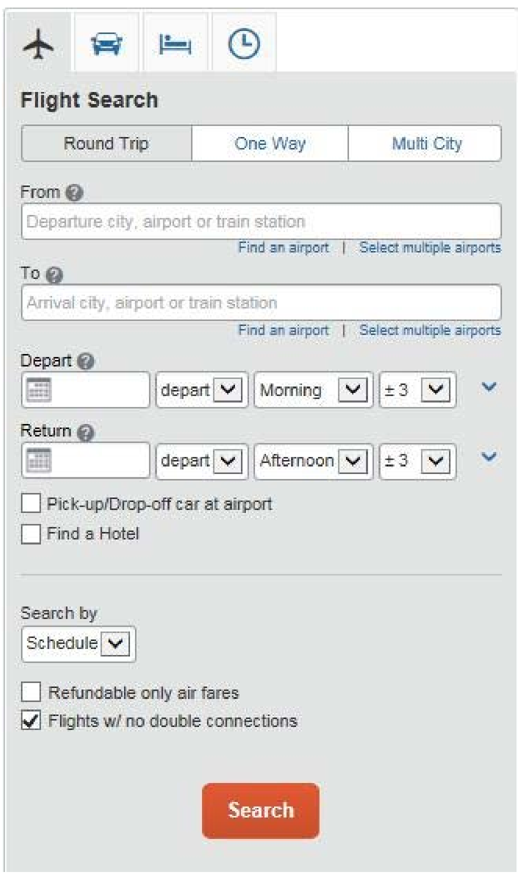
Flight Reservations

You can access the Flight tab (or Air / Rail) on the left side of the SAP Concur home page.

To search for a flight

1. On the SAP Concur home page, on the **Flight** tab, select one of the following options:
   - Round Trip
   - One Way
   - Multi City

   If you have a car, hotel, limo or rail to book without airfare, use the corresponding tabs.



2. In the **From** and **To** fields, enter the cities for your travel.

   Note: When you type in a city, airport name, or code, Travel will automatically search for a match.
3. Click in the **Depart** and **Return** date fields, and then select the appropriate dates from the calendar.

4. Select **depart** or **arrive**, the time of day you want to fly, and time range from the dropdown arrows.

   Note: Travel will automatically search before and after the time you select.

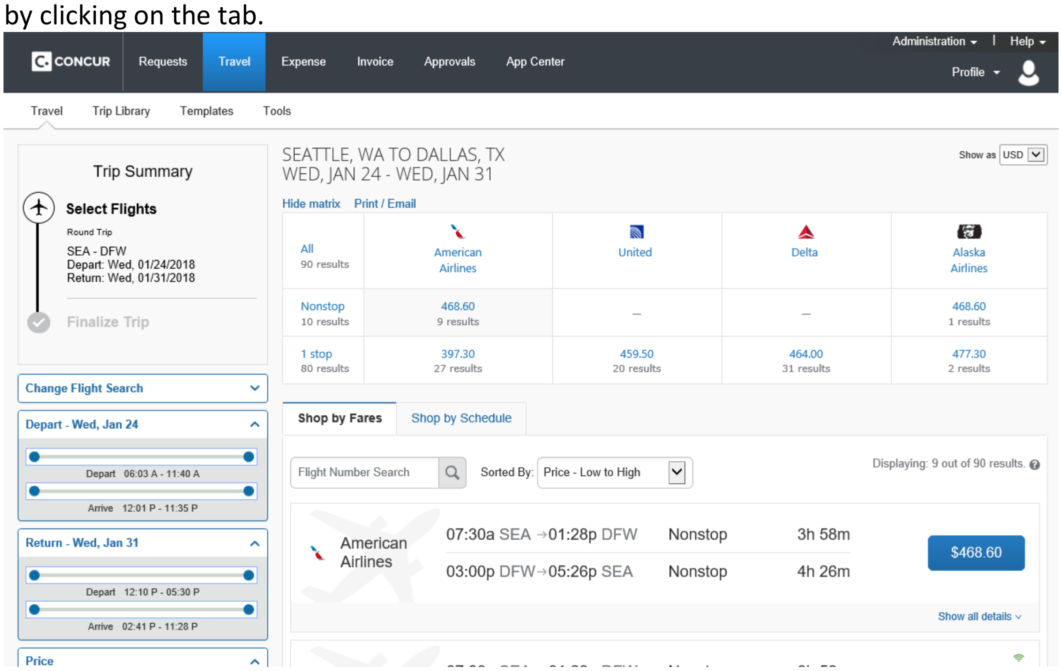
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.

   Note: You can automatically reserve a car, which allows you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.

6. If you need a hotel, select the **Find a Hotel** check box. You can choose to search for the hotel by the number of miles you specify from the following:
   - Airport
   - Address
   - Company Location
   - Reference Point / Zip Code (a city or neighborhood)
7. Select **Schedule** or **Price** from the **Search by** dropdown arrow.
8. To search only fully refundable fares, select the **Refundable only air fares** check box.
9. If you do not want a flight with a double connection, select the **Flights w/ no double connections** check box.
10. Click **Search.**

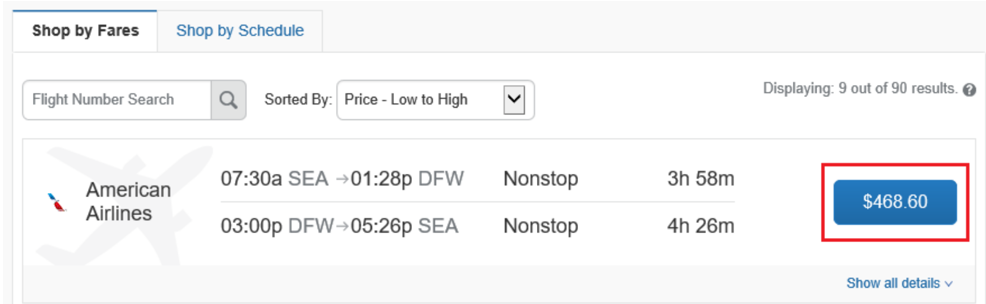
To make the reservation

1. Review the search results and select the most appropriate option for your flight.
2. To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the left. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

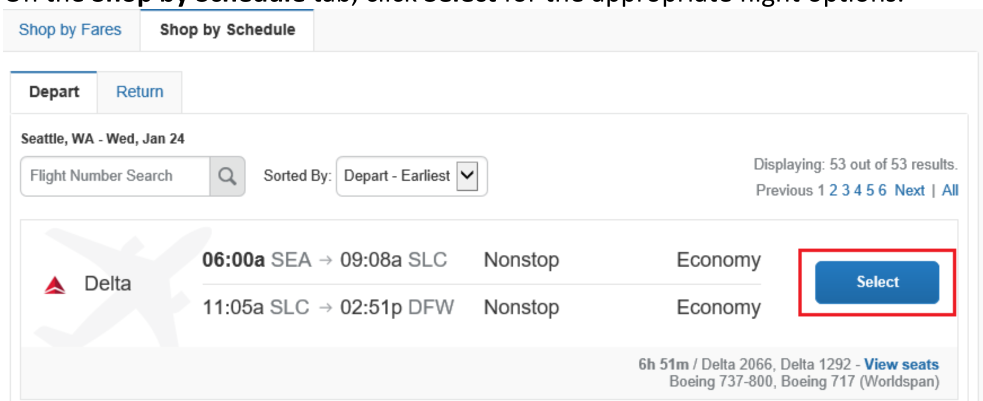


- If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
- If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active

3. To select your flight, do one of the following:
   - On the **Shop by Fares** tab, select the cost button for the appropriate flight options.

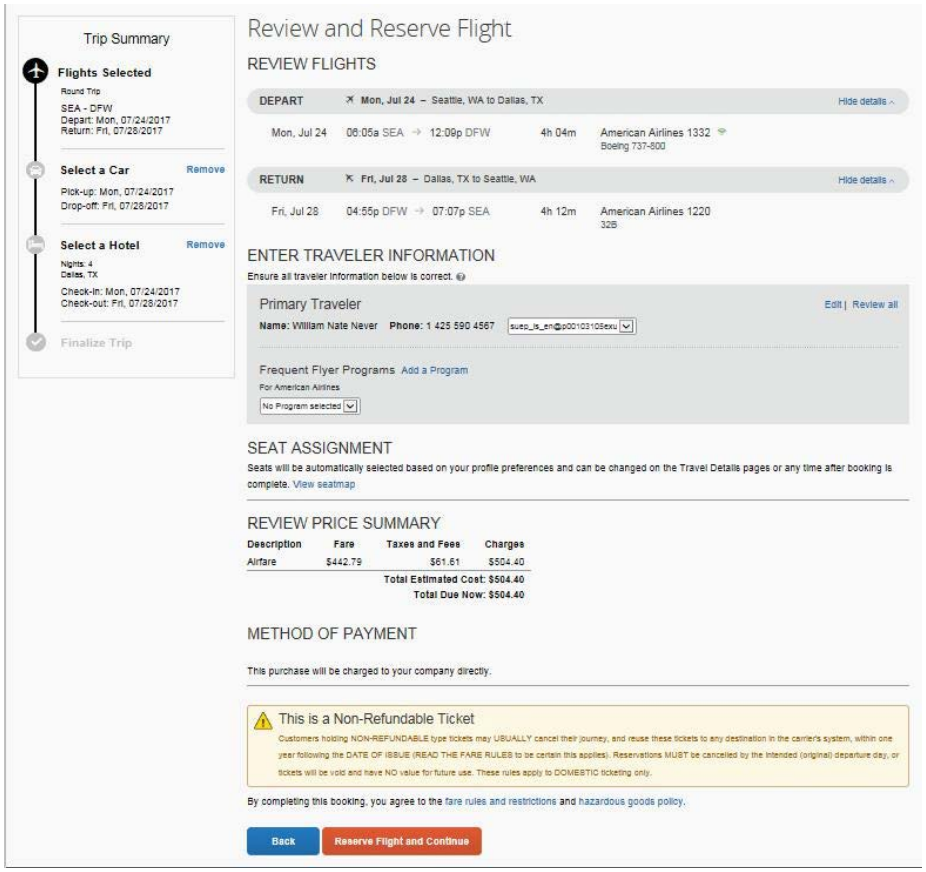


- On the **Shop by Schedule** tab, click **Select** for the appropriate flight options.



4. Click the appropriate link to show all the flight details.
5. Review the flight details for your trip.

   Note: Depending on your airfare provider, you can click the **View seats** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**.
6. Click the fare amount button to select these flights.
7. Add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.



8. Click **Reserve Flight and Continue**.

Car Reservations

If you requested a car on the **Flight** tab (or **Air / Rail**) **Search**, the rental car search results appear.

To select a rental car

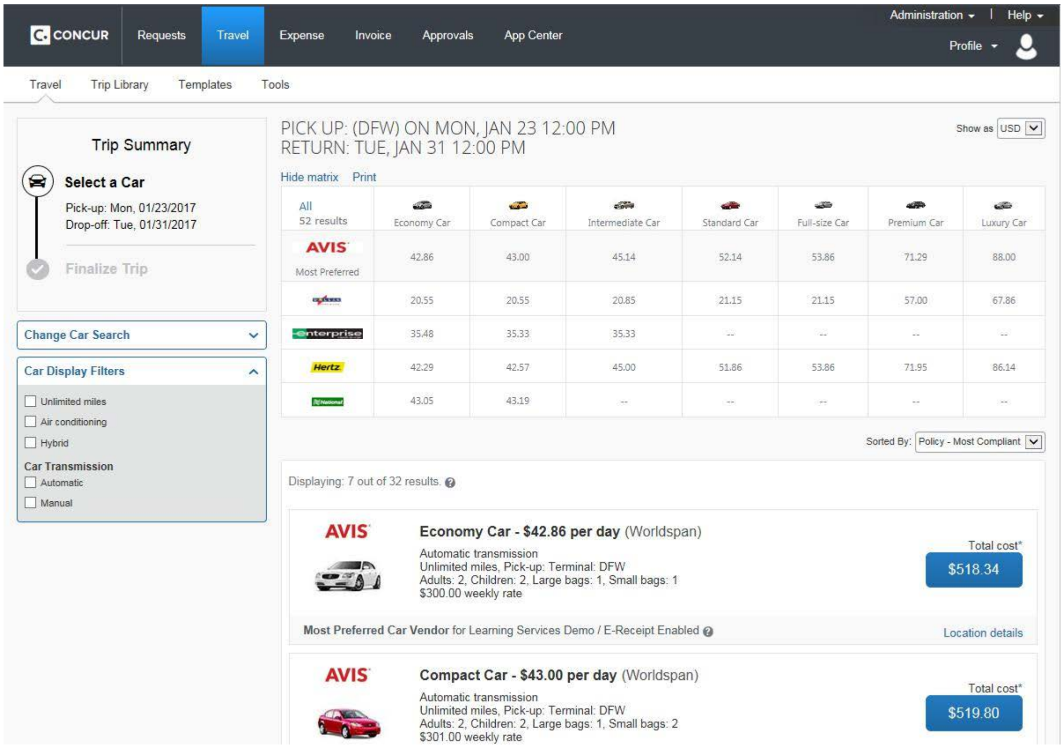
- If you selected **Pick Up/Drop off car at airport** on the **Flight** tab, you will see the results for the car search.
- If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

  – Or –

- Click the **Car** tab on the left side of the SAP Concur home page, and then select your Pick-up and Drop-off dates and time, and then click **Search**.

1. Click the **Total cost** button next to the appropriate rental car.

   Note: You can sort the car results to help find your selection.



2. Review your car rental details, and then click **Reserve Car and Continue**.
3. Review your travel details, and then click **Next**.

Hotel Reservations

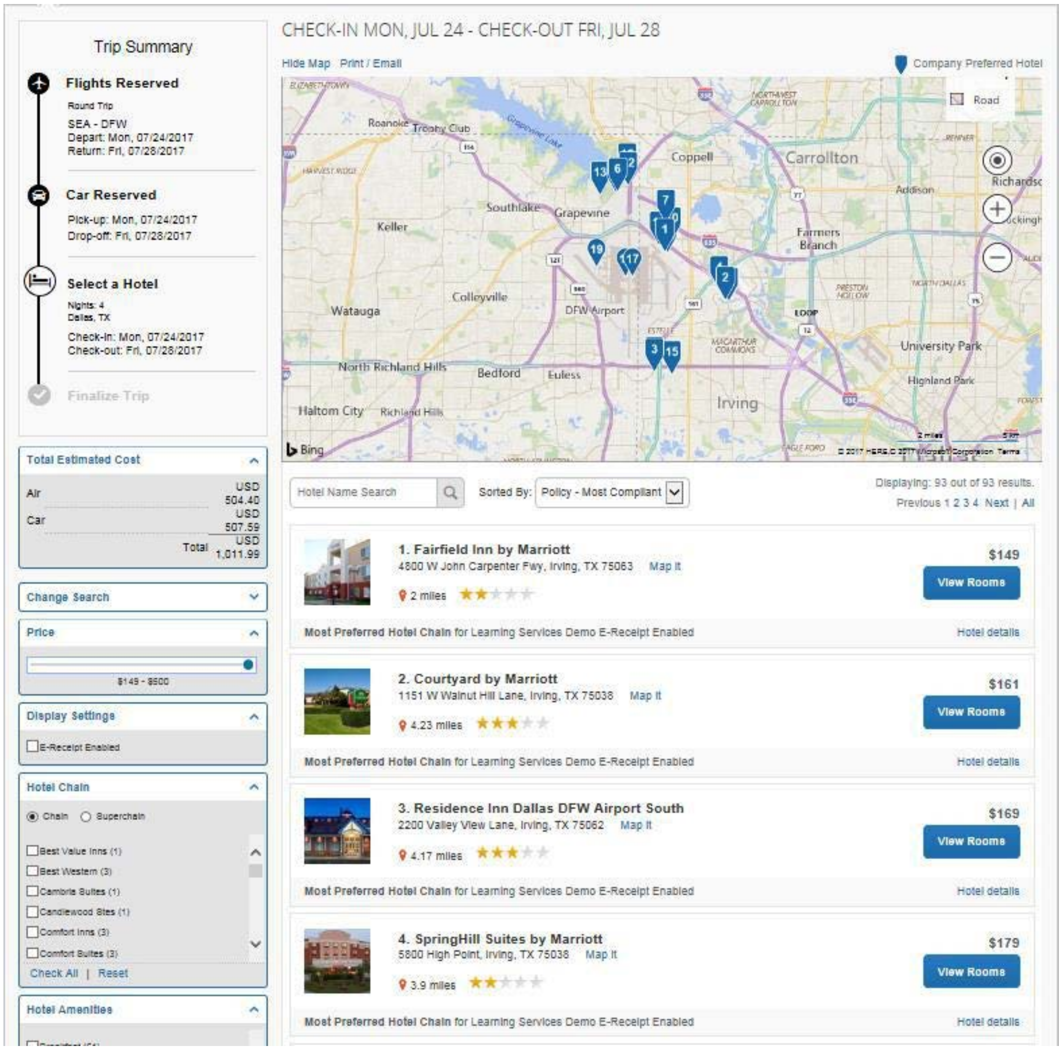
Note: Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.

To select a hotel

- If you requested a hotel on the **Flight** tab (or **Air / Rail**) **Search**, the hotel search results appear.

  – Or –

- Click the **Hotel** tab on the left side of the SAP Concur home page, and then select your **Check-in** and **Check-out** dates and time, and then click **Search**.



1. Use the filter options to narrow your search by **Hotel Chain** or **Amenities**.
2. Click **View Rooms** to view room rates.
3. When you are ready to reserve your hotel room, click the rate button next to the desired room type.
4. Review the information on the **Review and Reserve Hotel** page, select the check box to agree**,** and then click **Reserve Hotel and Continue**.

Completing the Reservation

You can add or make changes to the car or hotel as well as change the dates of the flight before you complete your reservation.

To complete the reservation

1. Review the **Travel Details**, and then click **Next**.

   Note: You may be able to add parking, taxi, Wi-Fi, or dining at this time.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name, Trip Description** and **Request ID** fields.

   The trip name and description data are for your record keeping. The **Request ID** is available from the Request screen. You can choose to send a copy of the confirmation to additional recipients.
3. Click **Next**.

   You will see the name, itinerary, and ticketing deadline, along with the total estimated cost

4. Click **Confirm Booking** to finalize your trip.
5. On the **Pre-populating Your Expense Report** page, you can add transportation and parking expenses, and then click **Finish**.

Cancelling or Changing a Reservation

To change an airline, car rental, or hotel reservation

1. At the top of the SAP Concur home page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

   Notes:
   - Flight changes are available for e-tickets that include a single carrier.
   - If the trip is already ticketed but has not occurred, you can change the time and/or date of the flight. Your change options will be with the same airline and routing.
   - Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.

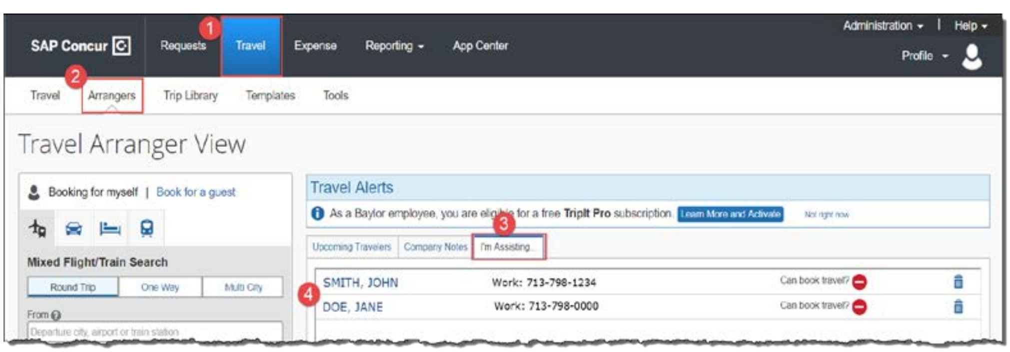
3. To change a trip, in the **Action** column, click **Change Trip**.
4. On the **Itinerary** page, select the portion of the trip you want to change.
5. To cancel your entire trip, in the **Action** column, click **Cancel Trip**, and then click **OK**.

   Note: When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips

Acting as a Travel Assistant or Arranger

A travel assistant/arranger are employees who can book travel on behalf of other employees. **NOTE**: The traveler must assign you as their travel assistant/arranger from their Profile Settings before you can assist with travel arrangements (flight, hotel, car rental…).

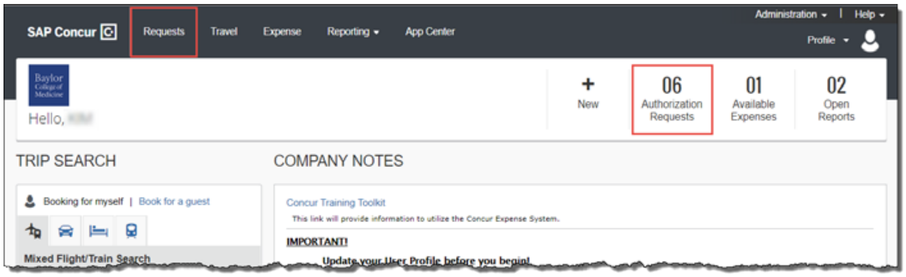
1. Click **Travel**.
2. Click **Arrangers**.
3. Click **I'm Assisting…** tab.
4. Select **traveler's name**.



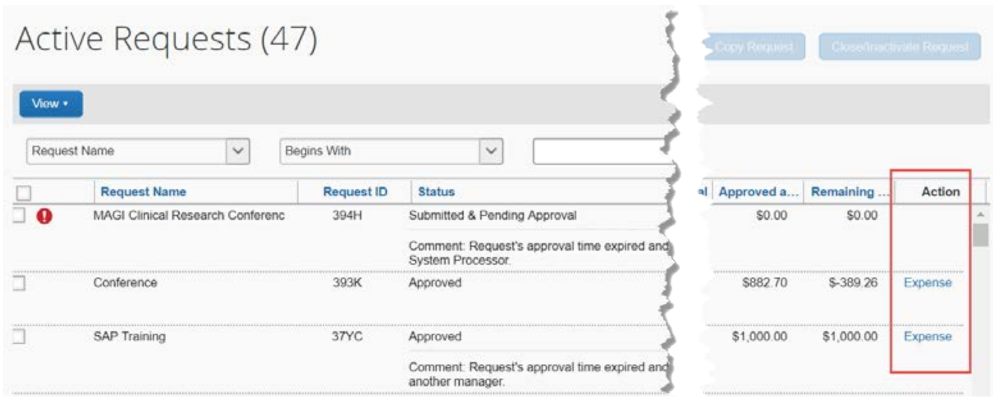
Creating a Travel Expense Report

A travel expense report requires an approved request. All expenses related to the trip should be added to one report. To create a travel expense report:

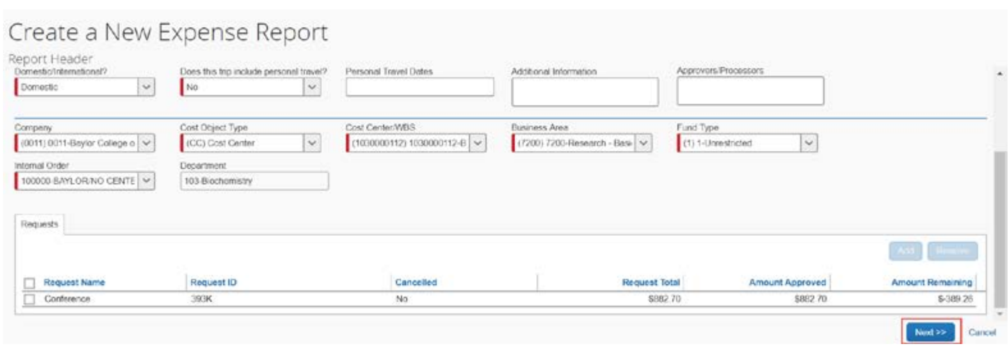
1. From the home page, click **Requests** or **Authorization Requests.**



2. From the **Action** column, select the appropriate **Expense** hyperlink.



3. If needed, make any updates and then click **Next** (bottom of screen).

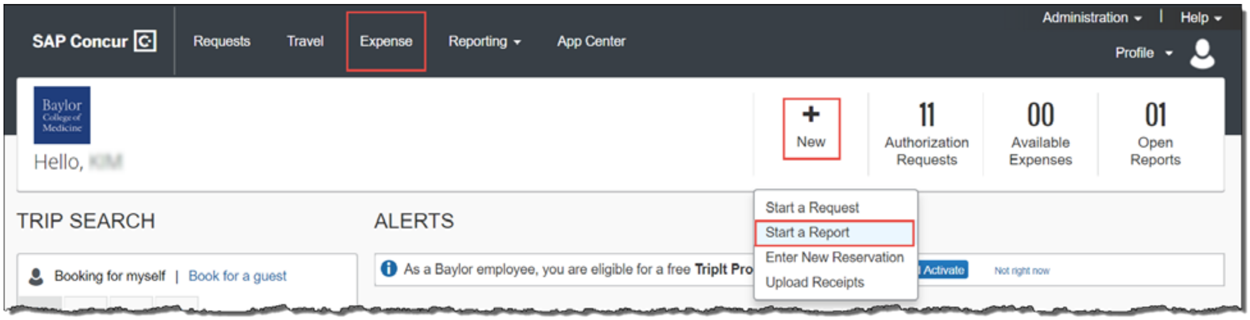


➢ Refer to **Adding Expenses To a Report** to learn how to enter expenses for reimbursement and/or reconciliation (for P-Card or corporate card).

Creating a Non-Travel Expense Report

To create a non-travel expense report

1. To create a new expense report, click one of the following options:
   - **Expense > Create a New Report**
   - **+ New > Start a Report**



2. In the Report Header, complete all required fields (red bar):
   - Report Type – *Choose BCM Expense Report for employees, Guest Expense Report for non-BCM staff (guest speakers, honorariums), or PCard Report*
     - *For Guest Expense Reports, an [AP Vendor ID] will be required when submitting the expense report. It is not required when submitting a travel request.*
   - Report Name
   - Report/Trip Purpose
   - Report Start Date – *start date of transaction/receipt*
   - Report End Date – *end date of transaction/receipt*
   - Domestic/International?
   - Does this trip include personal travel?
   - Personal Travel Dates *(optional, should be completed if there was personal travel)*
   - Additional Information *(optional)*
   - Comments To/From Approvers/Processors *(optional but required if report requires COO approval)*
   - Company
   - Cost Object Type
   - Cost Center/WBS
   - Business Area
   - Fund Type
   - Internal Order

To view your default funds center information, click Profile > Profile Settings > Request or Expense Information or contact your approver.

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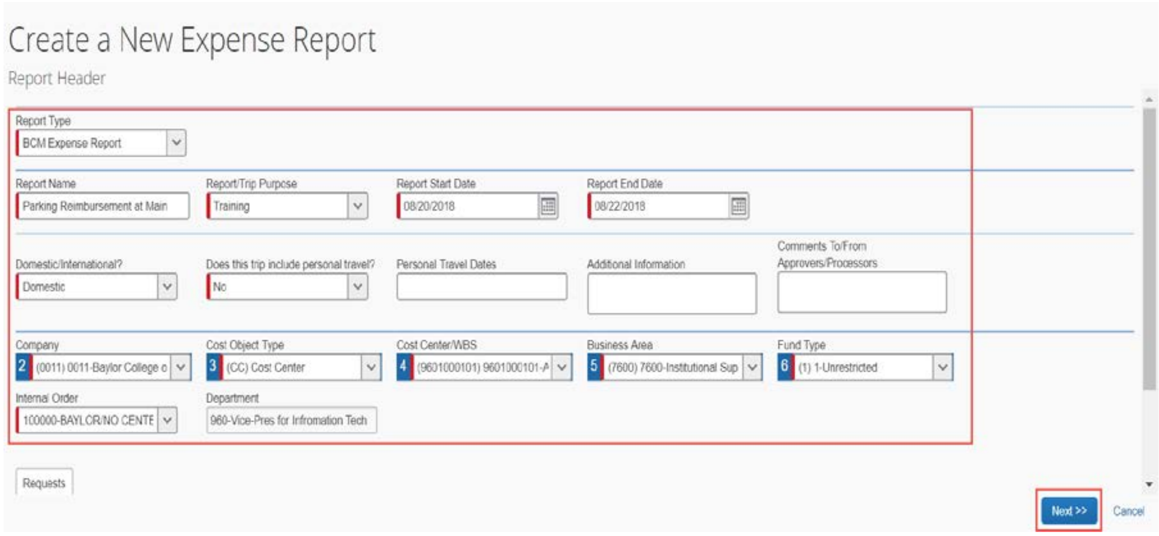
3. Click the **Next** button at the bottom of the screen.

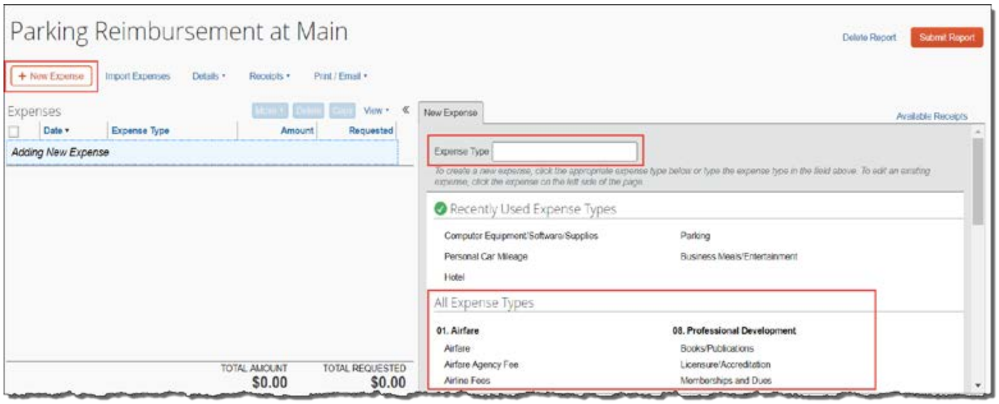


➢ Refer to **Adding Expenses to a Report** to learn how to enter expenses for reimbursement and/or reconciliation (for P-Card or corporate card).

Adding Expenses to a Report

To add expenses to a report:

1. Click on each expense type you incurred. You can either click the **+ New Expense** button, use the **Expense Type search** field or click the actual **Expense type name** on the *right*-hand side of the screen.



2. Complete the required information for each expense, denoted by the red bar. The required fields may vary depending on the expense type selected. If you

   The options once you complete the required fields include:

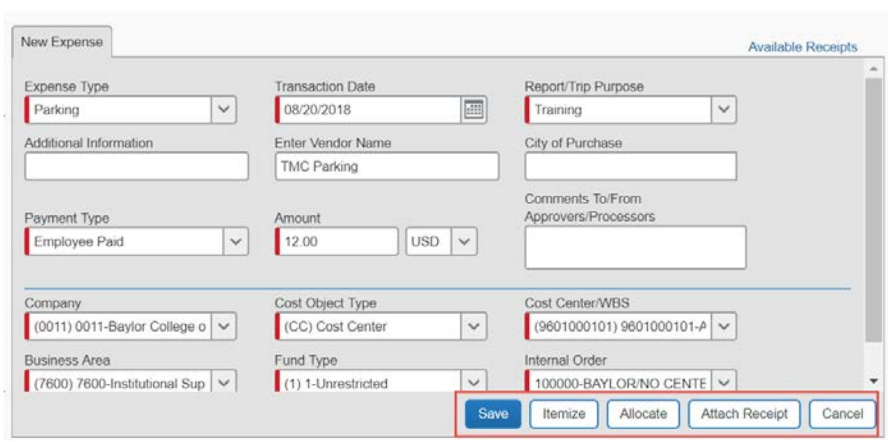
   a. **Save** – will save this expense in the current report (will see the expense on the left side of the screen)

   b. **Itemize –** itemize expenses to account for receipts that include both business and personal expenses or to ensure that each of your expenses is accounted for correctly

   c. **Allocate** – allows you to allocate expenses to different projects or departments by percentage or dollar amount.

   d. **Attach Receipt** – receipts are required for expenses. A receipt can be included at this point or once you save the expense. Select a receipt from your receipt store if they are loaded into Concur or browse your file directories to attach a copy of the receipt.

   e. **Cancel** – cancels the expense entry



3. Once all expenses are entered, ensure all required receipts have been attached by reviewing the *left*-hand side of the screen under the **Expenses** area.

If the required receipt icon  displays, a receipt is required and has not been attached. Select the **Attach Receipts** button from the bottom *right*-hand side of the screen or select the **Attach Receipt Images** from the **Receipts** drop-down.

Itemizing Expenses

1. Click on the expense that you want to **Itemize** by selecting the expense on the left side of the report or select from the Expense Types.
2. Complete the Expense detail information.
3. Click **Itemize** at the bottom right of the screen.
4. Fill in the required information and click **Save Itemizations**.
5. All itemizations will appear on the left side of the expense report.
6. To edit an Itemization, click the Itemization on the left side of the screen and make changes on the right side of the screen.
7. To delete an Itemization, click the Itemization on the left side of the screen and click the Delete button at the top of the expense report.

Allocating Expenses

1. To allocate expenses, on the Manage Expenses page, click Details, and then click Allocations or the Allocate button.
2. Or, you can Allocate expenses as you create a new expense. The Allocate button will be seen at the bottom of the right-hand screen. If completing while completing a New Expense, complete the required fields, then click **Allocate**.
3. In the **Allocations for Report** window, use the check boxes to select individual expenses, or select the first check box to select all the expenses.
4. Click **Add New Allocation**. The total expense amount, the amount allocated, and the amount remaining appear in the Allocations section. You can adjust the amounts and percentages. The total amount must be 100 percent allocated, otherwise an audit rule is flagged, and you will not be able to submit the report.
5. Select from the lists or type the appropriate information in the fields, and then click **Save**.
6. Click **Done** to return to your expense report. The fully allocated icon appears with each allocated expense in the expense list. The partially allocated icon appears if there is a remaining amount.

Entering Personal Car Mileage

1. With the expense report open, on the **New Expenses** tab, select **Mileage**.
2. Goggle **Mileage Calculator** window automatically displays. Enter **Waypoints** – Actual starting point and Destination.
3. Click **Calculate Route**.
4. If applicable, click **Make Round Trip**.
5. Click **Add Mileage to Expense**.

Adding Attendees to Business Meals

1. With the expense report open, on the **New Expenses** tab, select **Business Meals/Entertainment**.

2. Click **Advanced Search** to search for attendees by type**.** Check the appropriate box for each attendee to add.
3. Click **Add to Expense**.
4. Check appropriate attendees.
5. Click **Save**.

Converting Currency

To account for an expense incurred in another currency:

1. With the report open, click **New Expense**, and then enter the appropriate information in the required and optional fields.
2. Enter the **Amount** of the expense. Select the appropriate currency in the drop down. If the currency is other than USD, the conversion rate will automatically populate based on the Transaction Date.
3. The Concur system calculates the amount in US dollars.

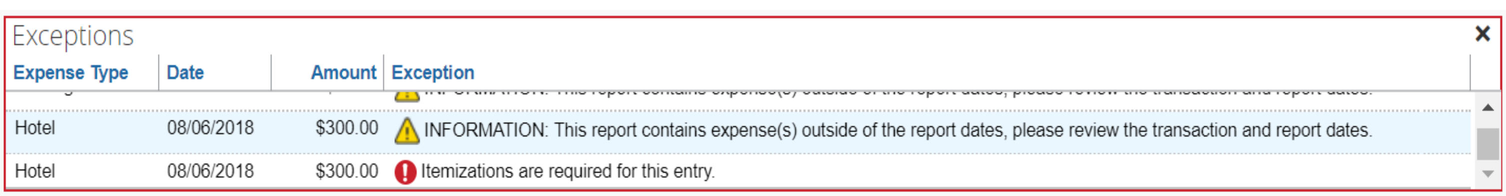
Missing Receipt Affidavit

If you do not have a receipt, you can complete the Missing Receipts Affidavits **except** for the following expense: airfare, hotels, car rentals, and conference registrations. In addition, an Expense Delegate cannot submit the Missing Receipt Affidavit on behalf of the requestor.

1. From your expense report, click Receipts > Missing Receipt Affidavit or Attach Receipt > Missing Receipt Affidavit.
2. Select the expense for which you are missing a required receipt.
3. Review the attestation then click Accept & Create.

Exceptions

Before submitting the expense report, ensure there are no exceptions. Exceptions will be displayed above all the Expenses listed. The Expense Type will be listed with the Date, Amount, and Exception reason. Review the reason and make corrections as needed. If exceptions exist, include reasons for the exceptions in the comments section. Those exceptions with a **Yellow** icon are warnings. You should correct the exception if possible. Yellow warnings will still allow a report to be submitted. An exception with a **Red** icon is hard stops and you will not be able to submit your report until this exception has been corrected.


Exceptions

Expense Type	Date	Amount	Exception
Hotel	08/06/2018	$300.00	INFORMATION: This report contains expense(s) outside of the report dates, please review the transaction and report dates.
Hotel	08/06/2018	$300.00	Itemizations are required for this entry.

Attaching Receipts to an Expense Report

Travelers are expected to keep receipts and documentation of business-related travel and non-travel expenses. Receipts are required for:

- For all expenses charged to sponsored agreements, regardless of dollar amount.
- For all expenses $25 or greater charged to all other funding sources
- For all entertainment meals or engagements, regardless of dollar amount or funding source
- For travel expenses of airfare, hotel, car rental, and registration fees

Uploading receipts using Available Receipts

Available Receipts work with the SAP Concur Imaging Service to provide receipt images that the user can either email or upload images to, and then use to attach images at the line item expense entry level (only). Images in supported format are uploaded using an SAP Concur-verified email address provided by the user during signup, and these images are then available to that user (only) for the purpose of attaching to report expense entries.

To attach a receipt image to an expense entry using Available Receipts

1. Select an entry to open it in **Details** view.
2. Click **Attach Receipt Image**.
3. Select the receipt image you want to attach, and then click **Attach.**
4. The receipt image is attached to the expense entry and displays on the right side of the screen.

   Note: You can **Detach** or **Append** the image from the receipt pane.

Concur Mobile App:

- Within the app, use the camera icon to take a picture of your receipt.
- An expense will be created from the receipt, and the expense details and receipt image will display under Available Expenses.

Scanned Images:

- Scan your receipts and save the file(s) to your computer.
- Click on the line item that requires a receipt, then click **Attach Receipt** on the right side of the screen.
- Click **Browse** to locate the file on your computer, then **Attach** and Close.

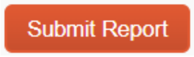
Email:

Your email address must be verified in your Concur Profile Settings.

- Email your receipt images as attachments to receipts@expenseit.com. The receipts will be added to your **Available Expenses**.
- From your expense report, click **Import Expense** > **Available Expenses**.

Submitting an Expense Report

To submit your expense report

1. Click **Submit Report** 

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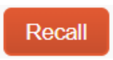
2. A Final Review window will appear. Click **Accept & Submit** or **Cancel**.
3. A window will display showing that the Report has been successfully submitted. Click **Close**.

   If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact concursupport@bcm.edu.

Recalling a Report

You can recall and update a report if it has not been approved. Recalled reports can be modified and resubmitted.

1. Submitted reports display on the Expenses home page, under **Active Reports**.
2. Click the **Expense Report name** to open the report.
3. Click **Recall** 

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4. Click **Yes** to confirm if you want to recall the report.

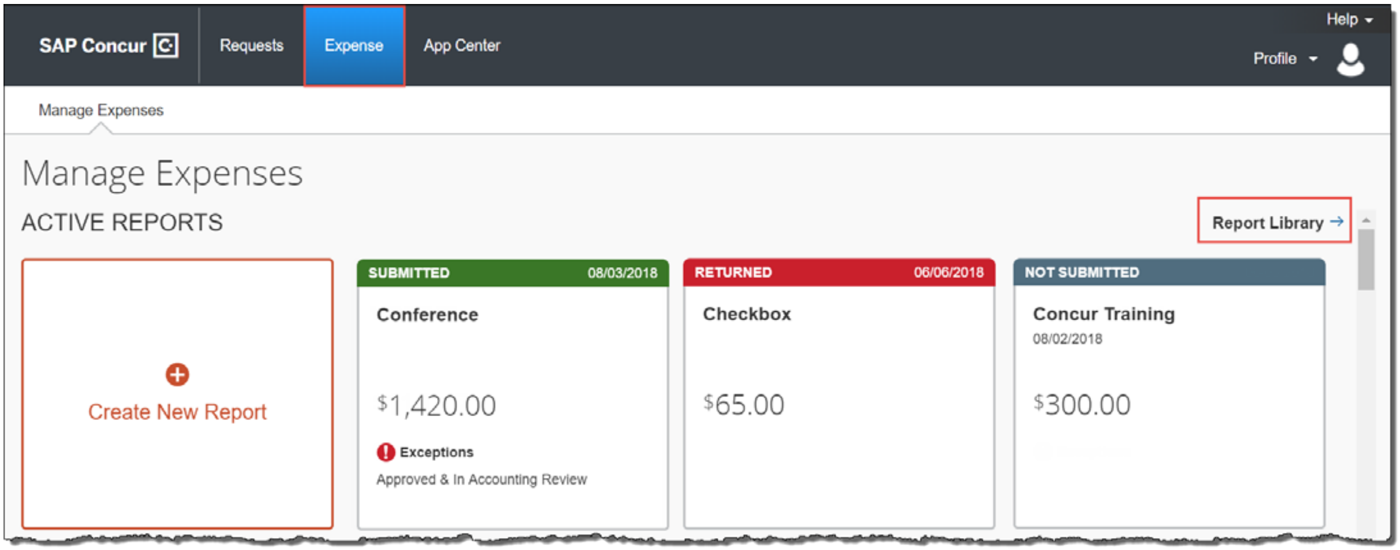
Returned Expense Report

Approvers cannot modify reports but can return them to the requestor for corrections. You will receive an email notification if the report has been returned and requires updates.

1. Returned Reports display on the **Expenses** home page, under **Active Reports**.
2. Click the **Expense Report** name to open the report.
3. Make the requested changes.
4. Click **Submit Report**.

Viewing Expense Reports

To view all your expense reports, click **Expense**. Use the **Report Library** option to view reports in a list view.



Support Contacts

BCM Concur Support

Email: concursupport@bcm.edu

Card Holder Services (P-Card/Corporate Travel Card)

Email: cardadmin@bcm.edu

FROSCH Travel Assistance

Booking is available online via Concur or over the phone:

Direct to FROSCH: (888) 575-6522

Email: bcmtravel@frosch.com

Hours: 7 a.m. - 8 p.m. CT (Monday-Friday)

After Hours Support: (888) 575-6522, Access Code: SabreWY79