

NAVIGATING CONCUR:

After the Trip



Key Points

- ✓ THE ASSIGNED BUS OP SPECIALIST SHOULD BE ADDED TO THE APPROVAL FLOW AFTER THE DEFAULT APPROVER
- ✓ IF PERSONAL DAYS WERE ADDED TO YOUR TRIP, THIS APPROVED FORM & COST COMPARISONS ARE REQUIRED DOCUMENTATION TO VERIFY NO ADDITIONAL COST TO THE UNIVERSITY
- ✓ ANY EXPENSES BOOKED IN CONCUR MUST BE IMPORTED TO YOUR EXPENSE REPORT
- ✓ AN APPROVED INDIVIDUAL MEMBERSHIP FORM MUST BE ATTACHED WHEN REQUESTING REIMBURSEMENT FOR MEMBERSHIP
- ✓ THE AGENDA/ITINERARY OR MEMO NOTATING THE BUSINESS PURPOSE IS REQUIRED
- ✓ WHEN FUNDING IS NOT FROM YOUR HOME DEPT, MAKE SURE TO AD HOC THE APPROPRIATE APPROVERS
- ✓ EXPENSE REPORTS MUST BE SUBMITTED IN CONCUR WITHIN 3-10 DAYS AFTER COMPLETION OF TRIP
- ✓ IF THE EXPENSE REPORT IS SUBMITTED AFTER 60 DAYS, THE EXPENSES BECOME TAXABLE INCOME AND WILL BE REPORTED ON YOUR W-2 FORM
- ✓ EXPENSES PAID VIA OWL PAY, SUCH AS REGISTRATION, SHOULD NOT BE INCLUDED ON YOUR EXPENSE REPORT



KENNESAW STATE
UNIVERSITY

RCHSS TRAVEL

GETTING TO CONCUR

Upcoming Deadlines

- No current deadlines

Please Remember

New Mileage Rates, Effective January 1, 2021:

- Tier 1: .56 per mile
- Tier 2: .16 per mile

Airfare must be booked in Concur within 15-30 days prior to your trip!

Contact Information

- Ashlee Clark
- Janet McGovern
- Molly First

Please be sure to contact the correct person for your travel needs. Use the dropdown below to verify your CHSS Business Operations contact.

Assigned to Ashlee Clark



Assigned to Molly First



Assigned to Janet McGovern



Concur

- [Concur User Profile Activation or Update Form](#)
- [Best Practices for Travelers](#)
- [Travel FAQs](#)
- [Travel Request Checklist](#)
- [Expense Report Checklist](#)
- [Online Training/How-to Guides](#)
- [Navigating Concur \(Updated Jan. 2020\)](#)
- [Concur Direct Link](#)

Per Diem

- [GSA Domestic Per Diem Rates](#)
- [GSA Meals and Incidental Expenses \(M&IE\) Breakdown](#)
- [International Per Diem Rates](#)
- [International Per Diem Breakdown](#)
- [In-State Per Diem](#)
- [Navigating Concur: Per Diem](#)

Car Rental

- [Car Rental Cost Comparison Calculator](#)
- [Obtaining Car Rental Receipt](#)
- [Request to Reserve KSU Cars or Vans](#)

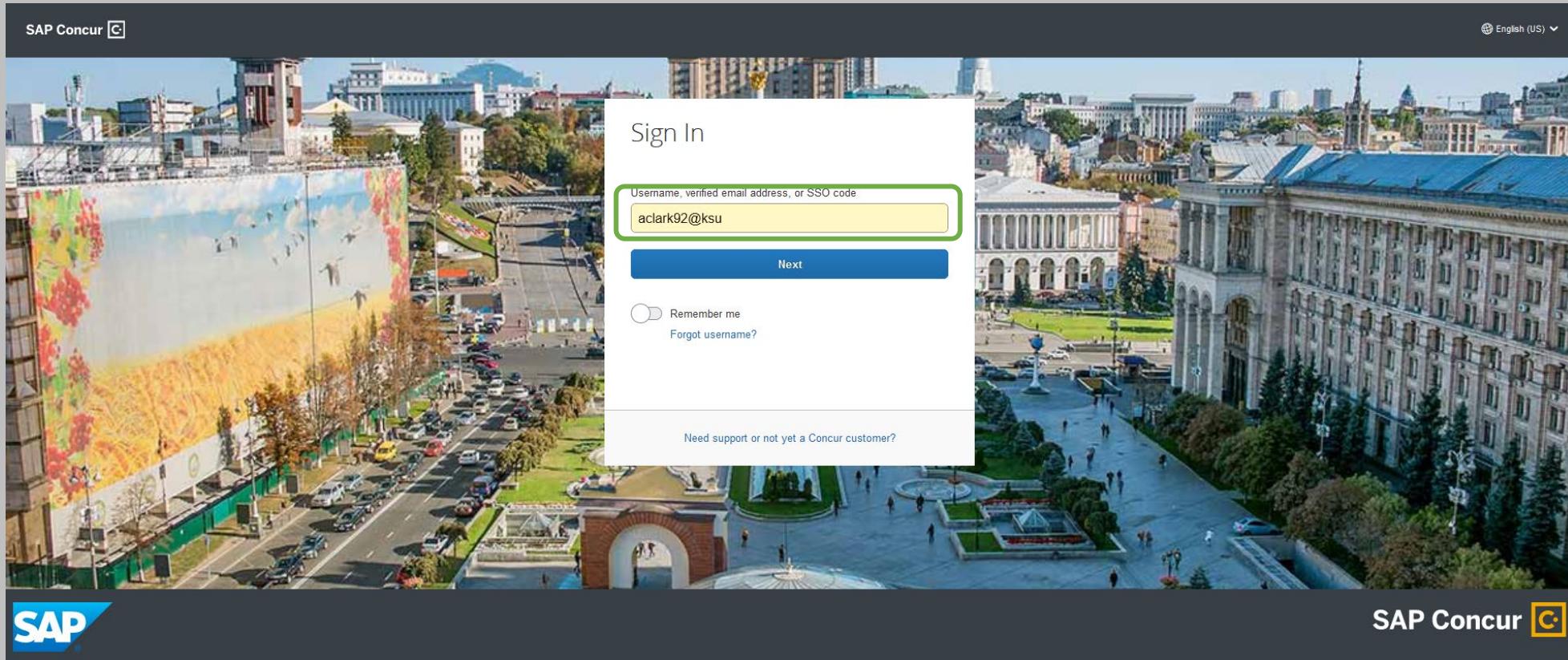
[RCHSS HOMEPAGE](#)

Travel Forms & Resources

- [RCHSS FY22 Travel Funding Request for Non-Tenure Track Faculty](#). Please submit by **September 30, 2021**, for best consideration. Click on the following link below to access the form in DocuSign: <https://bit.ly/2QDjNtv>
- [RCHSS Student Travel Request Form](#)
- [Travel Authorization Request: Adding Personal Time Form](#)
- [Individual Membership Form](#)
- [Additional Travel Forms & Resources](#)
- [Vendor/Supplier Forms](#)

<HTTPS://RADOW.KENNESAW.EDU/TRAVEL/>

HAVING ISSUES LOGGING INTO CONCUR?



USERNAME= NETID@KSU (DO NOT SPELL OUT KENNESAW OR ADD .EDU)

HOW TO CREATE AN EXPENSE REPORT

The screenshot shows the Concur Requests interface. At the top, there's a navigation bar with tabs for Requests (highlighted with a green box), Travel, Expense, Approvals, and App Center. Below the navigation is a search bar with options for Manage Requests, New Request, and Quick Search. The main area is titled "Approved Requests (2)". It contains a table with two rows of travel requests. The first row is for "Statesboro, GA, Feb. 19-21, 2014" with Request ID 4EA3 and Status Approved. The second row is for "Athens, GA, 2014-3/1/2014" with Request ID JWNQ and Status Approved. A green arrow points from the "Expense" link in the second row to the "Create New Report" button on the Expense homepage.

Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved	Remaining	Action
Statesboro, GA, Feb. 19-21, 2014 GAH Annual Conference	4EA3	Approved	02/19/2015 02/21/2015	09/11/2014 02/27/2014	\$439.00 \$465.20	\$439.00 \$466.00	\$28.00 \$274.74	Expense
Athens, GA, 2014-3/1/2014 Attend Georgia Association of Historians Conference	JWNQ	Approved		03/01/2014				

OPTION #1: (PREFERRED)

FROM THE CONCUR HOMEPAGE:

- SELECT: REQUESTS, VIEW, APPROVED REQUESTS
- CLICK: "EXPENSE" BESIDE THE APPROPRIATE TRAVEL REQUEST

*THIS OPTION PULLS YOUR APPROVED TRAVEL REQUEST INTO
YOUR EXPENSE REPORT FOR YOU

= OR =

OPTION #2:

FROM THE CONCUR HOMEPAGE:

- SELECT: EXPENSE, + CREATE NEW REPORT

The screenshot shows the Concur Expense interface. At the top, there's a navigation bar with tabs for Requests, Travel, Expense (highlighted with a green box), Approvals, and App Center. Below the navigation is a search bar with options for Manage Expenses and Cash Advances. The main area is titled "Active Reports". It features a red dashed box around a button labeled "+ Create New Report". Below this is a section titled "Available Expenses" which says "THERE ARE NO ACTIVE EXPENSE REPORTS. Click Create New Report to create a new report." To the right, there's a "Report Library" section. Further down are sections for "Available Receipts" and "Upload New Receipt", both enclosed in red dashed boxes.

EXPENSE REPORT HEADER

The screenshot shows the SAP Concur interface for creating a new expense report. The top navigation bar includes links for Requests, Travel, Expense (which is highlighted in blue), Approvals, and App Center. On the right, there are links for Help, Profile, and a user icon. Below the navigation, there are links for Manage Expenses and Cash Advances.

The main section is titled "Create a New Expense Report" and is labeled "Report Header". It contains the following fields:

- Report Date: 09/22/2021
- Report Name (Destination and Travel Dates): Seattle, WA 8/15-20/21
- Policy: University System Policy
- Trip Start Date: 08/15/2021
- Trip End Date: 08/20/2021
- Purpose of Trip: ABC Conference
- Trip Type: Domestic
- Report Key: (empty)
- Speed Chart: HSS-Radow/CollegeOfHumSoc

A "Comment" text area is present but empty.

A "Requests" tab is selected, showing a table with columns: Request Name, Request ID, Status (Cancelled), Request Total, Amount Approved, and Amount Remaining. There are "Add" and "Remove" buttons at the bottom of this section.

*** IF YOU CHOSE OPTION #2, CLICK "ADD" TO ATTACH YOUR TRAVEL REQUEST TO THE EXPENSE REPORT**

- REPORT NAME: USE THE “DESTINATION, TRAVEL DATES” FORMAT
- START DATE & END DATE: MUST BE THE SAME DATE RANGE AS THE REQUEST NAME
- PURPOSE OF TRIP: INDICATE THE NAME OF THE CONFERENCE/WORKSHOP/MEETING NAME YOU ARE ATTENDING
- TRIP TYPE: DOMESTIC OR INTERNATIONAL FOR RCHSS TRAVEL
- SPEED CHART NUMBER WILL DEFAULT TO HOME DEPT
- TO CHANGE THE SPEED CHART NUMBER, CLICK THE DOWN ARROW AND SELECT “CODE”
- IF PERSONAL TIME WAS ADDED TO YOUR TRIP, PLEASE NOTATE YOUR PERSONAL TRAVEL DAYS IN THE COMMENT BOX
- SELECT “NEXT” TO CONTINUE TO THE EXPENSE REPORT

Next >>

Cancel

HOW TO ADD PER DIEM

The screenshot shows the SAP Concur interface for managing travel expenses. At the top, there are fields for Policy (University System Policy), Trip Start Date (11/15/2021), Trip End Date (11/20/2021), Purpose of Trip (ABC Conference), and Trip Type (Domestic). Below these, a modal window titled "Travel Allowances" asks, "Will this report include meals per diem?" with "Yes" and "No" buttons. A green arrow points from the "Yes" button, which is highlighted with a green box, to the main expense entry screen. The main screen shows a "New Expense" dialog with fields for Date (11/15/2021) and Expense Type (selected to "Travel Allowances"). The "Travel Allowances" section is expanded, showing options like "New Itinerary", "Available Itineraries", "Expenses & Adjustments", and "Reimbursable Allowances Summary". The right side of the screen displays a list of recently used expense types, categorized into Communications, Other, Personal Car Mileage, Hotel, and Transportation. The "Travel Allowances" category is also listed here.

Policy: University System Policy

Trip Start Date: 11/15/2021

Trip End Date: 11/20/2021

Purpose of Trip: ABC Conference

Trip Type: Domestic

Travel Allowances

Will this report include meals per diem?

?

Yes

No

SAP Concur Requests Travel Expense Approvals App Center Help Profile

Seattle, WA 11/15-20/21

+ New Expense Import Expenses Details Receipts Print / Email

Expenses Date * Expense Type

Adding New Expense

Report Header Totals Audit Trail Approval Flow Comments Cash Advances Available Assigned Allocations Travel Allowances New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

New Expense

Expense Type

Recently Used Expense Types

Other Ground Personal Car Mileage Hotel Taxi

All Expense Types

Communications Other ...Other ...Other Meals ...Transportation

Cellular Phone Agenda Office Supplies Student Meals (list attached) Parking

Internet/Data Charges Copy Charges Student Meals (with Attendee) Personal Car Mileage

Local Phone For Travel Agent (In-State Travel) Registration Transportation

Long Distance For Travel Agent (Internal Travel) Subscriptions Airfare

Other Communication For Travel Agent (Out of State Travel) Laundry Baggage Fees

Individual Meals Laundry Membership Fees Employee Group Meal

Single Day Meal Per Diem Miscellaneous Meals (Exception w/receipt)

Lodging Hotel

Other Meals

B&B IT Supplies & Materials

Other Ground

Tolls

VisaPass

...Transportation

Voice/Data Wireless

IF YOU WERE UNABLE TO SELECT "YES":
- GO TO: DETAILS, NEW ITINERARY

PER DIEM: IMPORT ITINERARY

The screenshot shows the Concur Expense interface. On the left, a main window titled "Create a New Expense Report" is open, showing fields for Report Date (07/15/2015), Report Name (Charleston, SC 5/15-21/15), and Policy (HSS-Communications (02010)). A green arrow points from the text "IF YOUR TRIP INCLUDED AIRFARE BOOKED IN CONCUR, YOU HAVE THE OPTION TO 'IMPORT ITINERARY'" to the "Import Itinerary" button in the "Travel Allowsances For Report: Charleston, SC 5/15-21/15" dialog box. This dialog box also contains tabs for "Edit itinerary", "Available itineraries", and "Expenses & Adjustments". The "Import itinerary" tab is selected, showing a table of stops between Kennesaw, Georgia and Charleston, South Carolina. On the right, another "Travel Allowsances For Report" dialog box for San Francisco 8/5/15-8/9/15 is shown, with a green arrow pointing to the "Import" button in its "Select trips and charges to use to create this itinerary" dialog.

IF YOUR TRIP INCLUDED AIRFARE BOOKED IN CONCUR, YOU HAVE THE OPTION TO
"IMPORT ITINERARY"

Travel Allowsances For Report: Charleston, SC 5/15-21/15

Itinerary Info

Itinerary Name: Charleston, SC 5/15-21/15

Add Stop Delete Stop Import itinerary

Departure City	Arrival City	Arrival Rate Location
Kennesaw, Georgia	Charleston, South Carolina	CHARLESTON COUNTY, US...
Charleston, South Carolina	Kennesaw, Georgia	COBB COUNTY, US-GA, US

New Itinerary Stop

Depart from (city): Kennesaw, Georgia

Date:

Time:

Arrive in (city):

Date:

Time:

Save

Go to Single Day Itineraries Next >> Cancel

Travel Allowsances For Report: San Francisco 8/5/15-8/9/15

Itinerary Info

Itinerary Name: San Francisco 8/5/15-8/9/15

Add Stop Delete Stop Import Itinerary

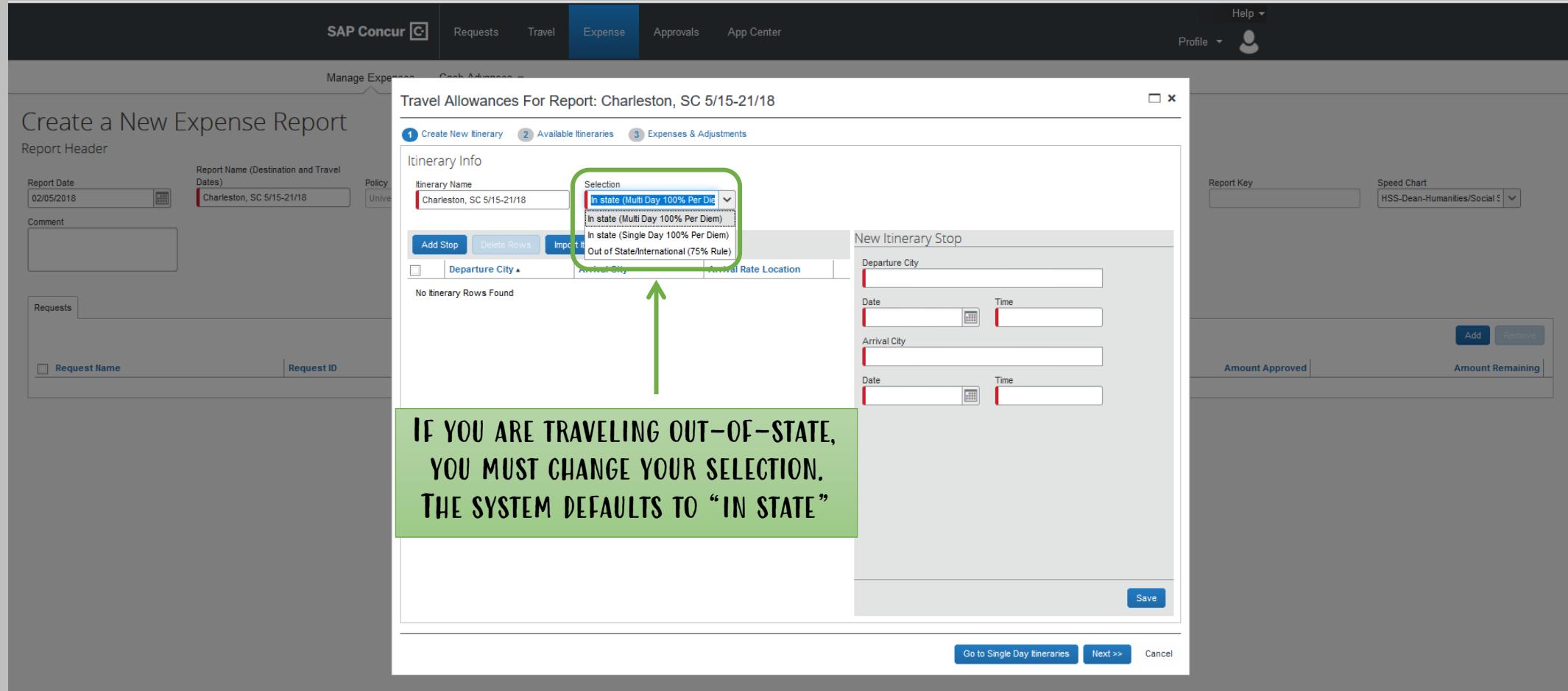
No Itinerary Rows Found

Select trips and charges to use to create this itinerary

Description	Start Date	End Date
San Francisco 8/5/15-8/9/15 (254PWN)	08/05/2015 09:55	08/10/2015 12:55

Import Cancel

PER DIEM: CREATING ITINERARY



* IF YOU DO NOT HAVE AIRFARE ASSOCIATED WITH YOUR TRIP, YOU WILL MANUALLY ENTER YOUR ITINERARY STOPS

PER DIEM: CREATING ITINERARY

The screenshot shows the Concur Expense application interface. On the left, the main screen displays a 'Create a New Expense Report' form with fields for 'Report Date' (07/15/2015), 'Report Name (Destination and Travel Dates)' (Charleston, SC 5/15-21/15), and 'Comment'. Below these are sections for 'Requests' and 'Request Name / Request ID'. A green arrow points from the 'Report Date' field to the 'Itinerary Name' field in the open dialog. The dialog title is 'Travel Allowances For Report [Charleston, SC 5/15-21/15]'. It contains tabs for 'Edit Itinerary', 'Available Itineraries', and 'Expenses & Adjustments'. The 'Itinerary Info' tab is selected, showing the 'Itinerary Name' (Charleston, SC 5/15-21/15) and a table of stops. The table has columns for 'Departure City', 'Arrival City', and 'Arrival Rate Location'. It lists two stops: Kennesaw, Georgia (05/15/2015 08:00 AM) and Charleston, South Carolina (05/15/2015 01:00 PM). Another row shows a stop from Charleston, South Carolina (05/21/2015 12:00 PM) to Kennesaw, Georgia (05/21/2015 05:00 PM). To the right of the table is a 'New Itinerary Stop' form with fields for 'Depart from (city)', 'Date', 'Time', 'Arrive in (city)', 'Date', and 'Time', along with 'Add' and 'Remove' buttons for stops. At the bottom of the dialog are buttons for 'Go to Single Day Itineraries', 'Next >', and 'Cancel'.

- THERE MUST BE AT LEAST 2 ITINERARY STOPS
 - ONE FOR THE FIRST DAY OF YOUR TRIP
 - ONE FOR YOUR LAST DAY OF YOUR TRIP
- IF YOU TRAVELED TO MORE THAN ONE CITY (OVERNIGHT), PLEASE ADD THOSE LINES
- MAKE SURE THE DATES WITHIN THE ITINERARY MATCH YOUR REPORT HEADER 'S START & END DATES

PER DIEM: EXPENSES & ADJUSTMENTS

Create a New Expense Report

Report Header

Report Date: 09/22/2021

Report Name (Destination and Travel Dates): Seattle, WA 8/15-20/21

Comment:

Requests

Request Name | Request ID

Travel Allowances For Report: Seattle, WA 8/15-20/21

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/> Exclude All <input type="checkbox"/>	08/15/2021 Orlando, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$45.75
<input type="checkbox"/>	08/16/2021 Orlando, Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$45.00
<input type="checkbox"/>	08/17/2021 Orlando, Florida	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$44.00
<input checked="" type="checkbox"/>	08/18/2021 Orlando, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
<input type="checkbox"/>	08/19/2021 Orlando, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$33.00
<input type="checkbox"/>	08/20/2021 Orlando, Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$45.75

<< Previous Create Expenses Cancel

- CHECK THE BOXES FOR MEALS THAT WERE PROVIDED TO YOU BY THE AIRLINE, HOTEL, OR CONFERENCE / MEETING*
- SELECT “EXCLUDE ALL” FOR ANY PERSONAL DAYS ADDED
- THEN SELECT “CREATE EXPENSES”

* MAKE SURE TO ADD THE CONFERENCE / MEETING SCHEDULE THAT INDICATES EACH DAY’S ACTIVITIES TO SHOW IF ANY MEALS WERE PROVIDED TO YOU

PER DIEM: ADDED TO EXPENSE REPORT

Orlando, FL 9/15-20/21 Delete Report Submit Report

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses Move ▾ Delete Copy View ▾ Available Receipts

Date	Expense Type	Amount	Requested
09/20/2021	Fixed Meals Orlando, Florida	\$45.75	\$45.75
09/19/2021	Fixed Meals Orlando, Florida	\$61.00	\$61.00
09/18/2021	Fixed Meals Orlando, Florida	\$61.00	\$61.00
09/17/2021	Fixed Meals Orlando, Florida	\$61.00	\$61.00
09/16/2021	Fixed Meals Orlando, Florida	\$61.00	\$61.00
09/15/2021	Fixed Meals Orlando, Florida	\$45.75	\$45.75

Adding New Expense

New Expense Move ▾ Delete Copy View ▾ Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

Other Ground	Personal Car Mileage	Hotel	Taxi

All Expense Types

Communications	Other	...Other	...Other Meals	...Transportation
Cellular Phone	Agenda	Office Supplies	Student Meals (list attached)	Parking
Internet/Data Charges	Copy Charges	Postage	Student Meals (with Attendee)	Personal Car Mileage
Local Phone	For Travel Agent (In-State Travel)	Registration	Transportation	Rental Car Fuel
Long Distance	For Travel Agent (International Travel)	Subscriptions	Airfare	Rental Cars Only
Other Communication	For Travel Agent (Out of State Travel)	Tours	Baggage Fees	Shuttle Service
Individual Meals	Laundry	Other Meals	Bus	Taxi
Single Day Meal Per Diem	Membership Fees	Employee Group Meal	IT Supplies & Materials	Tolls
Lodging	Miscellaneous	Meals (Exception w/receipt)	Other Ground	VisaPass
Hotel				...Transportation
				Voice/Data Wireless

TOTAL AMOUNT **\$335.50** **TOTAL REQUESTED** **\$335.50**

PER DIEM: HOW TO EDIT OR DELETE YOUR ITINERARY

TO EDIT YOUR ITINERARY:

- SELECT: "DETAILS", "AVAILABLE ITINERARIES"
- HIGHLIGHT YOUR ITINERARY, THEN SELECT "EDIT"

Travel Allowances For Report: Orlando, FL 9/15-20/21

Assigned Itineraries				
Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Atlanta, Georgia	09/15/2021 09:00 AM	Orlando, Florida	09/15/2021 12:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	09/20/2021 09:00 AM	Atlanta, Georgia	09/20/2021 12:00 PM	FULTON COUNTY, US-GA, US

Itinerary: Seattle, WA 8/15-20/21

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Atlanta, Georgia	09/15/2021 09:00 AM	Orlando, Florida	09/15/2021 12:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	09/20/2021 09:00 AM	Atlanta, Georgia	09/20/2021 12:00 PM	FULTON COUNTY, US-GA, US

Available Itineraries

Current Itineraries	Delete	Assign		
Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

Done

Orlando, FL 9/15-20/21

+ New Expense Import Expenses Details ▾ Receipts ▾ Print / Email ▾

Expenses Date ▾ Expense Type

Adding New Expense

Date	Description
09/20/2021	Fixed Meals Orlando, Florida
09/19/2021	Fixed Meals Orlando, Florida
09/18/2021	Fixed Meals Orlando, Florida
09/17/2021	Fixed Meals Orlando, Florida
09/16/2021	Fixed Meals Orlando, Florida
09/15/2021	Fixed Meals Orlando, Florida

Report Report Header
Totals
Audit Trail
Approval Flow
Comments

Cash Advances Available
Assigned

Allocations Allocations

Travel Allowances New Itinerary
Available Itineraries
Expenses & Adjustments
Reimbursable Allowances Summary

- ## TO DELETE YOUR ITINERARY:
- SELECT: "DETAILS", "AVAILABLE ITINERARIES"
 - HIGHLIGHT YOUR ITINERARY, THEN SELECT "UNASSIGN", "DELETE"

Travel Allowances For Report: Orlando, FL 9/15-20/21

Assigned Itineraries				
Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Atlanta, Georgia	09/15/2021 09:00 AM	Orlando, Florida	09/15/2021 12:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	09/20/2021 09:00 AM	Atlanta, Georgia	09/20/2021 12:00 PM	FULTON COUNTY, US-GA, US

No Assigned Itineraries Found

Available Itineraries

Current Itineraries	Delete	Assign		
Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Seattle, WA 8/15-20/21				
Atlanta, Georgia	09/15/2021 09:00 AM	Orlando, Florida	09/15/2021 12:00 PM	ORANGE COUNTY, US-FL, US
Orlando, Florida	09/20/2021 09:00 AM	Atlanta, Georgia	09/20/2021 12:00 PM	FULTON COUNTY, US-GA, US

Done

IMPORTING EXPENSES

ALL EXPENSES BOOKED IN CONCUR MUST BE IMPORTED: AIRFARE, RENTAL CAR, & HOTEL

- ALL TRAVEL AGENT FEES ASSOCIATED WITH THE TRIP MUST ALSO BE IMPORTED TO THE EXPENSE REPORT

The screenshot shows the Concur interface with the 'Expense' tab selected. Below it, a report for 'San Francisco 8/5/15-8/10/15' is displayed. In the top navigation bar, the 'Import Expenses' button is highlighted with a green box. A green arrow points from this button to the 'Move' button in the 'Available Expenses' modal window. The modal lists various expense items with checkboxes and dropdown menus for selection and modification.

TO IMPORT EXPENSES, SELECT "IMPORT EXPENSE"

- SELECT ALL APPROPRIATE EXPENSES OF YOUR TRIP
- THEN SELECT "MOVE", "TO CURRENT REPORT"

*FOR HOTEL & RENTAL CAR, MAKE SURE TO CHANGE THE AMOUNT TO MATCH THE FINAL ITEMIZED BILL

- THE IMPORTED AMOUNT IS THE ESTIMATED AMOUNT WHEN YOU ORIGINALLY BOOKED
- CAR RENTAL INSURANCE & PRE-PAID OR REFUELING OPTIONS THROUGH THE RENTAL CAR AGENCY ARE NOT ALLOWABLE
- GAS STATION RECEIPTS ARE ALLOWABLE FOR RENTAL CAR, AND SHOULD BE ADDED SEPARATELY TO YOUR EXPENSE REPORT
 - RENTAL CAR MUST BE RETURNED WITH THE SAME AMOUNT OF FUEL IT HAD WHEN IT WAS PICKED UP

The screenshot shows the 'San Francisco 8/5/15-8/10/15' report. The 'Import Expenses' button is visible in the top navigation. The 'Exceptions' section shows two entries with error messages: 'Missing required field: Traveler Type.' and 'Itemizations are required for this entry.' The main 'Expenses' table lists several items, with the flight from Atlanta and the hotel stay in San Francisco highlighted with green boxes. The table includes columns for Date, Expense, Amount, and Requested.

Date	Expense	Amount	Requested
05/28/2015	Airfare DELTA Air Lines Inc., Atlanta, Ge	\$420.39	\$420.39
06/05/2015	Fixed Meals San Francisco, California	\$49.50	\$49.50
06/06/2015	Fixed Meals San Francisco, California	\$66.00	\$66.00
06/07/2015	Fixed Meals San Francisco, California	\$66.00	\$66.00
06/08/2015	Fixed Meals San Francisco, California	\$66.00	\$66.00
06/09/2015	Fixed Meals San Francisco, California	\$66.00	\$66.00
06/10/2015	Fixed Meals San Francisco, California	\$49.50	\$49.50
05/28/2015	For Travel Agent (In-State Tra Travel, Inc., Duluth, Minnesota	\$4.27	\$4.27
06/09/2015	Hotel Marriott Hotels, San Francisco, C	\$0.00	\$0.00

TOTAL AMOUNT \$787.66 TOTAL REQUESTED \$787.66

IMPORTED EXPENSES:

HOTEL: ITEMIZING

Left Side: Hotel Itemizing Process

Right Side: Hotel Itemizing Result

Bottom Left: Summary of Steps

- WHEN ADDING A HOTEL EXPENSE, OR AFTER IMPORTING HOTEL TO YOUR REPORT, YOU MUST FILL OUT THE EXPENSE SEGMENT'S DETAILS
- THEN SELECT "ITEMIZE"
- NEXT, YOU MUST ITEMIZE YOUR NIGHTLY LODGING EXPENSES
- A DETAILED RECEIPT INDICATING THE TRAVELER'S NAME & METHOD OF PAYMENT IS REQUIRED

SETTING UP YOUR PERSONAL CAR REGISTRATION

Profile Personal Information Change Password System Settings Mobile Registration

Help Profile

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Personal Car **(highlighted)**
- Favorite Attendees

Other Settings

- System Settings
- Connected Apps
- Concur Connect
- Change Password
- Privacy Statement
- Mobile Registration

Personal Car Registration

This page displays all the personal cars that have been registered. Click New to register another car.
Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID: Personal Car Tier 1 Vehicle Type: Personal Car Tier 1

Preferred Car

Save Cancel

Vehicle ID	Vehicle Type	Active
<input type="checkbox"/> Personal Car Tier 1	Personal Car Tier 1	Yes
<input type="checkbox"/> Personal Car Tier 2	Personal Car Tier 2	Yes

MILEAGE RATES:
TIER 1: .56 PER MILE
TIER 2: .16 PER MILE

GO TO: "PROFILE", "PERSONAL CAR". THEN CLICK "NEW":

- TYPE "PERSONAL CAR TIER 1" IN THE "VEHICLE ID" SEGMENT
- UNDER "VEHICLE TYPE" SELECT: "PERSONAL CAR TIER 1" & "PREFERRED CAR", SAVE
- CLICK "NEW" AGAIN:
- TYPE "PERSONAL CAR TIER 2" IN THE "VEHICLE ID" SEGMENT
- UNDER "VEHICLE TYPE" SELECT: "PERSONAL CAR TIER 2", SAVE

NEW EXPENSE: PERSONAL CAR MILEAGE

Charleston, SC 5/15-21/15

New Expense **Import Expenses** **Receipts** **Print / Email**

Exceptions

Expense	Date	Amount	Exception
Fixed Meals	05/15/2015	\$38.25	⚠ The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions.
Fixed Meals	05/16/2015	\$51.00	⚠ The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions.
Fixed Meals	05/17/2015	\$51.00	⚠ The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions.

Expenses

Date	Expense	Amount	Requested
05/21/2015	Fixed Meals Charleston, South Carolina	\$38.25	\$38.25
05/20/2015	Fixed Meals Charleston, South Carolina	\$51.00	\$51.00
05/19/2015	Fixed Meals Charleston, South Carolina	\$51.00	\$51.00
05/18/2015	Fixed Meals Charleston, South Carolina	\$51.00	\$51.00
05/17/2015	Fixed Meals Charleston, South Carolina	\$51.00	\$51.00
05/16/2015	Fixed Meals Charleston, South Carolina	\$51.00	\$51.00
05/15/2015	Fixed Meals Charleston, South Carolina	\$38.25	\$38.25

Total Amount: \$331.50 Total Requested: \$331.50

New Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

- Personal Car Mileage
- Hotel
- Taxi

All Expense Types

Communications	...Other	...Other	Transportation	...Transportation
Cellular Phone	For Travel Agent (In-State Travel)	Registration	Airfare	Rental Cars Only
Internet/Data Charges	For Travel Agent (International Travel)	Subscriptions	Baggage Fees	Shuttle Service
Local Phone	For Travel Agent (Out of State Travel)	Tours	Bus	Taxi
Long Distance		Laundry	IT Supplies & Materials	Tolls
Other Communication		Membership Fees	Other Ground	VisaPass
Lodging		Miscellaneous	Parking	Voice/Data Wireless
Hotel		Employee Group Meal	Personal Car Mileage	
Other		Meals (Exception w/receipt)	Rental Car Fuel	
		Student Meals (1st attached)		
		Student Meals (w/ Attendee)		

New Expense

View Reimbursement Rates

Expense Type	Transaction Date	Purpose of the Trip	Traveler Type	From Location	To Location
Personal Car Mileage	05/15/2015	ABC Conference	Employee		

Vehicle ID: Personal Car Tier 1 **Number of Passengers:** 0 **Distance to Date:** 0

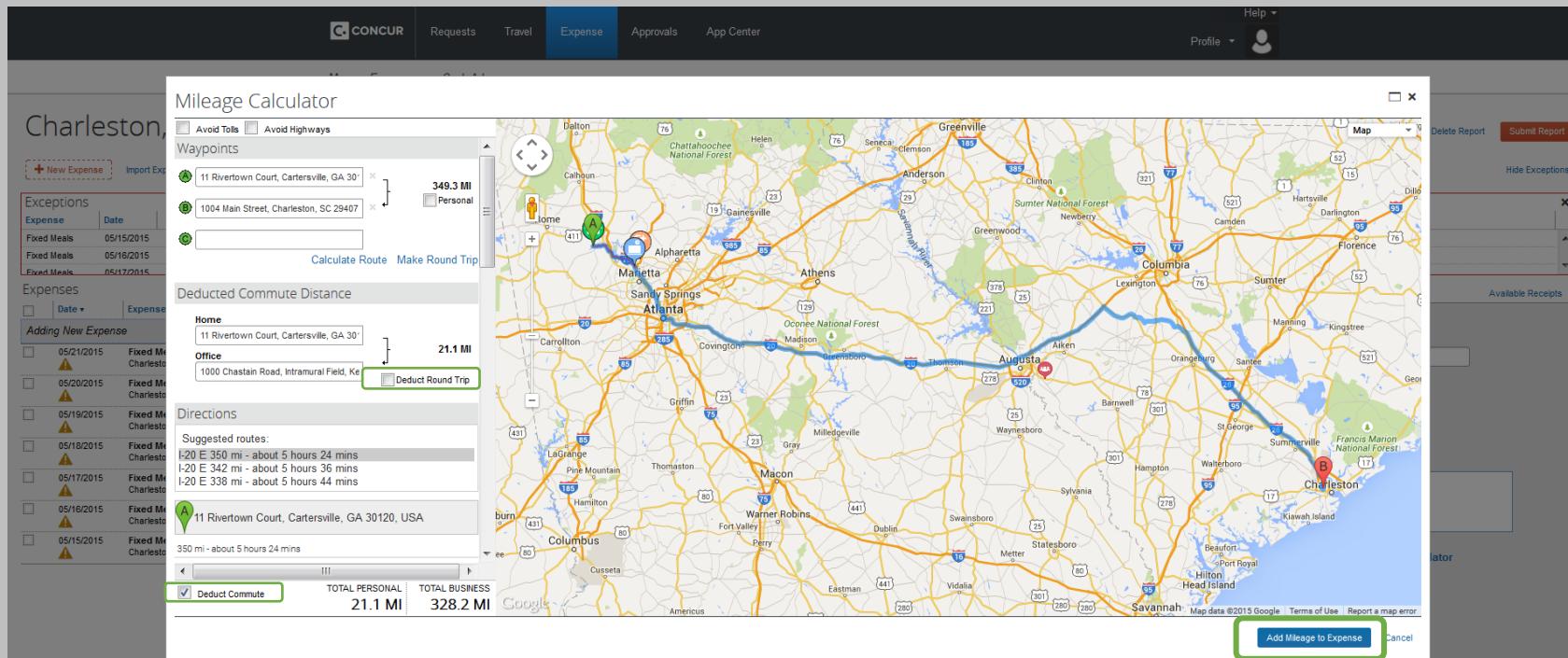
Mileage Calculator

Select the "PERSONAL CAR MILEAGE" EXPENSE SEGMENT:

- THE "TRANSACTION DATE" IS THE FIRST DAY OF TRAVEL
- PURPOSE OF TRIP MUST MATCH WHAT WAS NOTATED ON THE REPORT HEADER
- THE "TRAVELER TYPE" IS "EMPLOYEE"
- LEAVE THE "FROM / TO LOCATION" FIELDS BLANK
- SELECT YOUR "VEHICLE ID": TIER 1 OR TIER 2
- CLICK THE "MILEAGE CALCULATOR" LINK

Save **Attach Receipt** **Cancel**

NEW EXPENSE: PERSONAL CAR MILEAGE



- IF YOU ARE DEDUCTING YOUR COMMUTE, PLEASE MAKE SURE TO THE “DEDUCT COMMUTE BOX”
- IF YOU ARE LEAVING FROM HOME & RETURNING HOME, PLEASE MAKE SURE TO “DEDUCT ROUND TRIP”
 - YOU DO NOT HAVE TO DEDUCT YOUR COMMUTE ON WEEKEND DAYS OR HOLIDAYS
- ONCE YOU HAVE ENTERED YOUR “WAYPOINTS”, MAKE SURE TO SELECT “ADD MILEAGE TO EXPENSE”
- MAKE SURE TO “SAVE” YOUR EXPENSE TYPE TO THE EXPENSE REPORT BEFORE ADDING ANOTHER EXPENSE

Do I need to deduct my normal drive to work?

If you are traveling on a normal workday (Monday – Friday), yes.

Concur will complete this for you in the mileage calculator. Check the box in the bottom left to deduct one-way commute miles, or the box located next to your home address to deduct round trip mileage.

REF: <https://fiscalservices.kennesaw.edu/travel/faqs/peach-state.php>

NEW EXPENSE: GROUND TRANSPORTATION

New Expense		Available Receipts			
Expense Type	Other Ground	Transaction Date	08/12/2021	Traveler Type	Employee
Payment Type	Out of Pocket	Amount	25.00	USD	<input type="checkbox"/> Personal Expense (do not reimburse)
Purpose of Trip	ABC Conference	Vendor Name	Curb Taxi	City	Orlando, Florida
Comment	Taxi from airport to conference hotel.				

WHEN REQUESTING REIMBURSEMENT FOR GROUND TRANSPORTATION, A COMMENT INDICATING WHERE YOU ARE TRAVELING TO / FROM IS REQUIRED.
THIS IS TO SHOW THE BUSINESS PURPOSE OF THE EXPENSE.

		08/09/2019	Taxi	Curb taxi	Attend ASA Co...	New York, New...	Out of Pocket	\$61.42	\$61.42
		08/12/2019	Taxi	Curb taxi	Attend ASA Co...	New York, New...	Out of Pocket	\$61.42	\$61.42

THE SPEECH BUBBLE ICON INDICATES THAT A COMMENT HAS BEEN ADDED TO AN EXPENSE TYPE.

ATTACHING A CONFERENCE AGENDA

Recently Used Expense Types

Other Ground Personal Car Mileage Hotel Taxi

All Expense Types

Communications

Cellular Phone
Internet/Data Charges
Local Phone
Long Distance
Other Communication

Other

Agenda
Copy Charges

...Other

Office Supplies
Postage
Registration
Subscriptions
Tours

Other Meals

Employee Group Meal
Meals (Exception w/receipt)

...Other Meals

Student Meals (list attached)
Student Meals (with Attendee)

Transportation

Airfare
Baggage Fees
Bus
IT Supplies & Materials
Other Ground

...Transportation

Parking
Personal Car Mileage
Rental Car Fuel
Rental Cars Only
Shuttle Service
Taxi
Tolls
VisaPass

...Transportation

Voice/Data Wireless

THERE ARE TWO WAYS TO ADD A CONFERENCE AGENDA TO YOUR EXPENSE REPORT:

1. GO TO: "RECEIPTS", "ATTACH RECEIPT IMAGES"
2. GO TO: "NEW EXPENSE", "AGENDA"

OR

The screenshot shows the Concur interface for managing expenses. At the top, there's a navigation bar with 'concur' and links for 'Manage Expenses' and 'Cash Adv...'. Below the navigation, the text 'Charleston, SC 5/15-21/15' is displayed. The main area shows a table titled 'Exceptions' with columns for 'Expense', 'Date', 'Amount', and 'Exception'. There are several entries for 'Fixed Meals' with dates ranging from 05/15/2015 to 05/17/2015 and amounts between \$38.25 and \$51.00. To the right of the table, there are buttons for 'Receipts Required', 'Check Receipts', and 'Attach Receipt Images'. A green arrow points from the 'Agenda' link in the 'Recently Used Expense Types' list to the 'Attach Receipt Images' button.

Expense	Date	Amount	Exception
Fixed Meals	05/15/2015	\$38.25	⚠️ The Transaction Date is Greater than 30 days old. Please be more specific with your dates.
Fixed Meals	05/16/2015	\$51.00	⚠️ The Transaction Date is Greater than 30 days old. Please be more specific with your dates.
Fixed Meals	05/17/2015	\$51.00	⚠️ The Transaction Date is Greater than 30 days old. Please be more specific with your dates.

TOTAL AMOUNT **\$331.50** TOTAL REQUESTED **\$331.50**

<https://www.concursolutions.com/Expense/Client/default.asp#>

* IF THERE WAS NOT A FORMAL CONFERENCE SCHEDULE / WORKSHOP ITINERARY / MEETING PROGRAM, A MEMO INDICATING THE BUSINESS PURPOSE FOR EACH DAY IS REQUIRED

MISSING RECEIPT OPTIONS


KENNESAW STATE
UNIVERSITY
OFFICE OF FISCAL SERVICES

**Kennesaw State University
Lost Receipt/Invoice Affidavit**

Purchaser Name (please print): _____

Department (please print): _____

Payment Method (check one): Cash Check Credit Card KSU Purchasing Card

I certify that I made the purchase shown below for official business but do not have a receipt because (check all that apply):

Vendor did not provide a detailed receipt
 I have requested an invoice, but the vendor has not provided it
 I had a receipt but cannot locate it
 I have a receipt, but it is not readable, and this document is provided in order to describe the items purchased
 Order was placed via telephone, fax, or internet and vendor has not supplied an invoice

All information must be typed, completed on-line, or printed in ink. All information is required. Use one affidavit per lost receipt.

Vendor Name	
City	
Date of Purchase	
Detail Description of Items Purchased (each line limited to 60 characters – attach additional sheet if necessary)	Item Amount
Total Purchase Amount	

Tax paid: No Yes

This document will be used in lieu of an invoice or receipt for this transaction. I certify that all items listed above (and on the attached, if applicable) were purchased and received for Kennesaw State University business. I also understand that excessive use of this form instead of submitting actual receipts or invoices may result in loss of reimbursement for payments from personal resources, suspension or cancellation of P-Card for Purchasing Card payments, and/or disciplinary action.

Purchaser Signature: _____ Date: _____

Supervisory Signature: _____ Date: _____

- OR -

Receipts ▾ Print / Email ▾

- Receipts Required
- Check Receipts
- Attach Receipt Images
- View Available Receipts
- Missing Receipt Affidavit**

Missing Receipt Affidavit

Adequate documentation must be submitted to substantiate reimbursable University expenses of \$25.00 or more in accordance with IRS and state regulations. Original receipts must be submitted when available and are considered acceptable support for Kennesaw State University expenses. When the original receipt has been lost or is otherwise not available from the vendor, an affidavit must be submitted before expenses will be considered for reimbursement. The missing receipt affidavit must have the following information in the comment section of the expense entry: description, quantity purchased, unit price and why a receipt was not available.

To create an affidavit, choose from the Expense(s) below that require a Receipt

<input type="checkbox"/>	Expense Type	Date ▾	Amount
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This Affidavit will be used in lieu of an invoice or receipt for this transaction. I certify that all items indicated were purchased and received for Kennesaw State University business. I also understand that excessive use of this Affidavit instead of submitting actual receipts or invoices may result in loss of reimbursement for payments from personal resources and/or disciplinary action.

Accept & Create Cancel

IF YOU ARE MISSING A RECEIPT, YOU CAN EITHER FILL OUT THE [LOST RECEIPT / INVOICE AFFIDAVIT FORM](#) OR FILL OUT THE "MISSING RECEIPT AFFIDAVIT" WITHIN CONCUR
- THE MISSING RECEIPT FORM MUST BE FULLY APPROVED BEFORE IT IS UPLOADED TO CONCUR

ALLOCATING THE EXPENSE REPORT

The screenshot displays two Concur Expense reports side-by-side. The left report shows a list of expenses for a trip to Charleston, SC, with a green arrow pointing to the 'Allocations' link in the sidebar. The right report shows the 'Allocations for Report: Charleston, SC 5/15-21/15' screen, where the 'Allocate Selected Expenses' button is highlighted with a green box.

Left Report (Expense List):

- Report Header: Charleston, SC 5/15-21/15
- Exceptions: Fixed Meals (multiple entries for dates 05/15/2015, 05/16/2015, 05/17/2015)
- Expenses: Fixed Meals (multiple entries for dates 05/15/2015, 05/16/2015, 05/17/2015)
- Total Amount: \$331.50

Right Report (Allocations):

- Report Header: Charleston, SC 5/15-21/15
- Allocation Details: Total \$331.50, Allocated \$331.50 (100%), Remaining \$0.00 (0%)
- Allocation Buttons: Allocate Selected Expenses (highlighted), Add New Allocation, Clear Selections, Summary
- Allocation Table Headers: Percentage, Business Unit, Speed Chart, Code
- Allocation Table Data: One entry for Kennesaw State HSS-Community USG43000-02010
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/15/2015, Fixed Meals, Hotel, \$38.25)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/16/2015, Fixed Meals, Hotel, \$51.00)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/17/2015, Fixed Meals, Hotel, \$51.00)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/18/2015, Fixed Meals, Hotel, \$51.00)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/19/2015, Fixed Meals, Hotel, \$51.00)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/20/2015, Fixed Meals, Hotel, \$51.00)
- Allocation Table Details: Date, Expense, Group, Amount (e.g., 05/21/2015, Fixed Meals, Hotel, \$38.25)

WHEN FUNDING IS NOT FROM YOUR HOME DEPT OR IS SPLIT BETWEEN MULTIPLE DEPTS, THE ALLOCATION MUST BE ADJUSTED
- SELECT: "ADD NEW ALLOCATION" TO SPLIT ALLOCATE

ALLOCATING THE EXPENSE REPORT

The screenshot shows the Concur Expense Report Allocation interface. At the top, there are tabs for Requests, Travel, Expense (selected), Approvals, and App Center. A green box highlights the 'Expense' tab.

The main area displays the 'Allocations for Report: Charleston, SC 5/15-21/15'. It includes an 'Expense List' table and an 'Allocations' table.

Allocating by Amount: A green arrow points from the text 'ALLOCATING BY AMOUNT IS THE BEST OPTION' to the 'Allocations' table. The table shows allocations for Kennesaw State HSS-Community USG43000-02010. One row is selected with a checkbox and the value '50'.

Date	Expense	Group	Amount
05/15/2015	Fixed Meals		\$38.25
05/16/2015	Fixed Meals		\$51.00
05/17/2015	Fixed Meals		\$51.00
05/18/2015	Fixed Meals		\$51.00
05/19/2015	Fixed Meals		\$51.00
05/20/2015	Fixed Meals		\$51.00
05/21/2015	Fixed Meals		\$38.25

Allocating by Speed Chart: A green arrow points from the text 'TO SEARCH FOR THE SPEED CHART NUMBER, SELECT "CODE"' to the 'Allocations' table. The table shows allocations for Kennesaw State HSS-Community USG43000-02010. One row is selected with a checkbox and the value '\$165.75'. The dropdown menu 'Type to search by:' is open, with 'Code' selected.

Amount	Business Unit	Speed Chart	Code
\$165.75	Kennesaw Stat...	HSS-Communi...	USG43000-02010
\$165.75	Kennesaw Stat...	HSS-Communi...	USG43000-02010

At the bottom, there are 'Save' and 'Cancel' buttons.

APPROVAL FLOW: ADDING AN APPROVER

The screenshot shows the Concur interface with the following elements:

- Header:** CONCUR logo, Requests, Travel, Expense (highlighted in blue), Approvals, App Center, Help, Profile.
- Left Panel:** Manage Expenses, Cash Advances dropdown. It displays a list of expenses for "Charleston, SC 5/15-21/15". A green arrow points from the "Adding New Expense" section to the "Approval Flow" button in the sidebar.
- Right Panel:** Approval Flow for Report: Seattle, WA 11/15-20/21. It shows two sections:
 - Manager Approval:** Cole, Pamela B.
 - Back Office Approval:** BUSINESS OPERATIONS SPECIALIST ADDED HERE
- Bottom:** Buttons for Submit Report, Save Workflow, and Cancel.

*** WHEN FUNDING IS NOT FROM YOUR HOME DEPT OR IS SPLIT BETWEEN MULTIPLE DEPTS, ADD THE APPROPRIATE APPROVER TO THE APPROVAL FLOW**

YOU MUST RE-ADD ANY AD HOC APPROVERS TO THE APPROVAL FLOW IF THE EXPENSE REPORT IS SENT BACK TO YOU

SUBMIT REPORT

The image shows the SAP Concur Expense application interface. On the left, a modal window titled "Approval Flow for Report: Seattle, WA 11/15-20/21" displays approval steps. It lists "Manager Approval" assigned to "Cole, Pamela B." and "Back Office Approval" assigned to "BUSINESS OPERATIONS SPECIALIST ADDED HERE". Below these fields are two green plus signs and a green minus sign, indicating the ability to add or remove approvers. A large green "OR" symbol is positioned between the approval flow window and the main report page. The main report page on the right shows a list of expenses with columns for "Description", "Amount", "Category", and "Status". A red "Submit Report" button is highlighted with a green border in the top right corner of the main page. Other buttons visible include "Delete Report", "Available Receipts", and "Help". The SAP Concur logo is at the top left, and a user profile menu is at the top right.

* WHEN FUNDING IS NOT FROM YOUR HOME DEPT OR IS SPLIT BETWEEN MULTIPLE DEPTS, ADD THE APPROPRIATE APPROVER TO THE APPROVAL FLOW

YOU MUST RE-ADD ANY AD HOC APPROVERS TO THE APPROVAL FLOW IF THE EXPENSE REPORT IS SENT BACK TO YOU

Submit Report Save Workflow Cancel

Help ▾
Profile ▾

Delete Report Submit Report

Available Receipts

OR

THERE ARE TWO WAYS TO SUBMIT AN EXPENSE REPORT:

1. AT THE TOP RIGHT OF THE REPORT, SELECT: "SUBMIT REPORT"
2. WITHIN THE APPROVAL FLOW WINDOW, SELECT "SUBMIT REPORT"



THANK YOU.
& Welcome Back