UTEP TRAVELER

Concur Traveler Training

Your guide to travel
and expense management.



Welcome Agenda

Traveler Training: delegates prepare; travelers submit in Concur

1

Why We're Moving to Concur

What campus told us and what Concur improves

2

Concur 101

Travel Request vs. Expense Report vs. Non-Travel

3

End-to-End Process

From request through reimbursement

4

Delegates & Travel Requests

Get notified when your request is ready; only you can submit

5

Track Requests & Book Travel

Check the request timeline, then book in Concur

6

Mobile App & Receipts

Capture and upload receipts with the Concur mobile app

7

Submit Your Expense Report

Use the email notice as your cue to submit in Concur

8

After Submission: Track Status

Follow the report timeline to see where your report stands

9

Resources & Next Steps

Find help, learn what happens next, and wrap up with thanks

Why We're Moving to Concur

Before configuring Concur, we asked campus users for feedback

What campus told us

- Returned reports were the number one complaint
- Receipt challenges — missing or hard-to-attach documentation
- Too many separate forms and manual processes
- Status tracking — "where is my document?"
- Mileage complexity and travel card delays
- Expense coding confusion and international travel challenges

How Concur answers it

Easier submissions

Alerts catch missing items before you submit, not after

Fewer separate forms

Entertainment details, mileage, and currency move into Concur

Streamlined approvals

Less redundant approval and faster travel reimbursement visibility

Connected travel tools

Booking, e-receipts, mobile, and delegate support in one place

What is not changing: UTEP travel policies, approval workflows, documentation requirements, and PeopleSoft payment processing.

Concur 101: Which Form Do I Need?

The answer depends on whether you are traveling

Travel Request

- Replaces the PeopleSoft Travel Authorization.
- Used to obtain approvals and provide estimated travel expenses.

Expense Report (Travel & Non-Travel)

- Replaces the PeopleSoft Expense Report. Used to submit actual expenses, attach receipts, and request reimbursement.
- Travel expenses require a fully approved Travel Request first; non-travel expenses are created directly, with no request needed.
- Travel and non-travel expenses may be submitted together when applicable.

Use this form when you need to...

If you need to...	Use this form
Request approval for upcoming travel or estimate travel expenses	Travel Request
Submit expenses after a trip, or submit a non-travel business expense	Expense Report

Remember: Travel Request = before travel. Expense Report = after travel. Travel expense reports require a fully approved Travel Request.

End-to-End Travel Process Overview

From request through reimbursement, in one system

1

Create Travel Request

Trip details, funding, estimated costs

2

Approvals

Supervisor, then funding source approver

3*

Book Travel

Air, hotel, and car booked in Concur

4

Travel Occurs

Capture receipts as you go

5

Expense Report

Actual costs, receipts, allocations

6

Reimbursement

Approved report flows to PeopleSoft

Estimates versus actuals

The Travel Request captures estimated costs so the trip can be approved in advance. The Expense Report captures the actual costs and the receipts that support them.

Approved does not mean paid

Approved reports flow to PeopleSoft automatically and then wait for the pay cycle, which still runs Monday, Wednesday, and Friday mornings. Ask for approval by close of business the day before a pay cycle day.

How to sign in to Concur

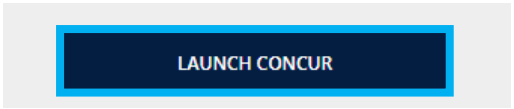
1. **Go to Concur**
   Visit **utep.edu/travel/concur** and select **Launch Concur**

2. **Sign in** with your UTEP Credentials

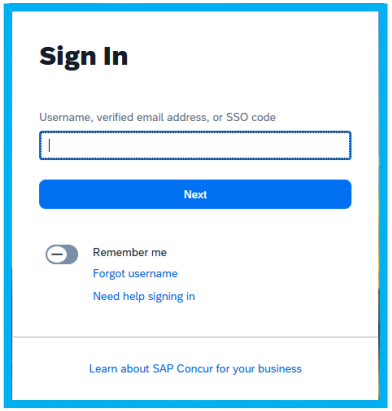
3. **View the Home Page**
   Once signed in, you'll be taken to the Concur Home Page, which serves as your main starting point

4. **View Your Requests or Expense Reports**
   To see if there are any that need to be reviewed and submitted

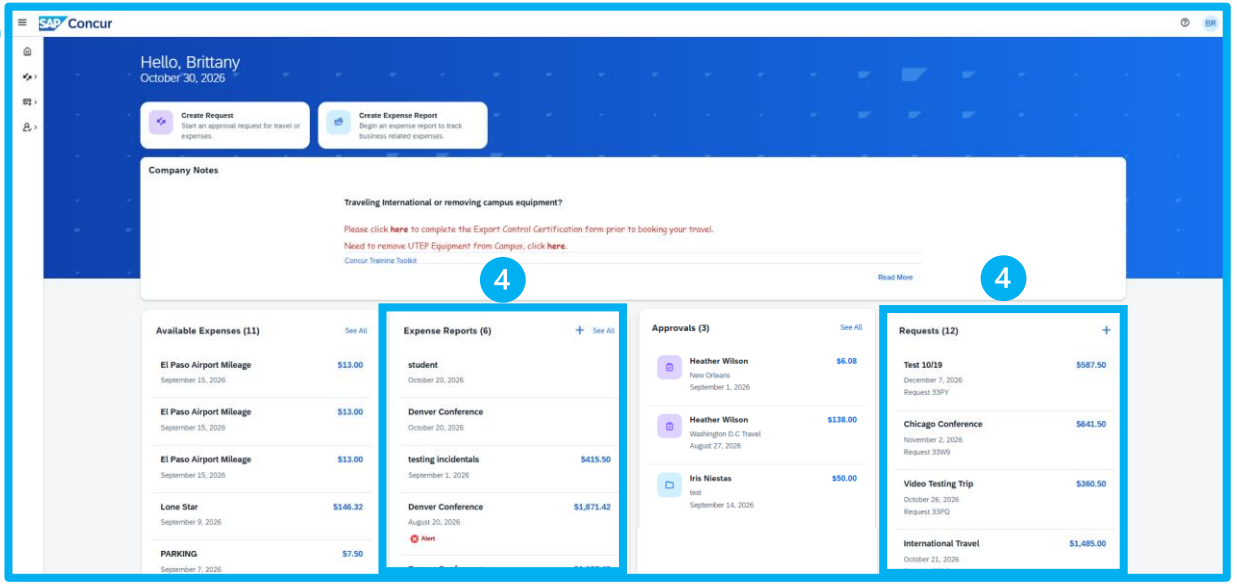
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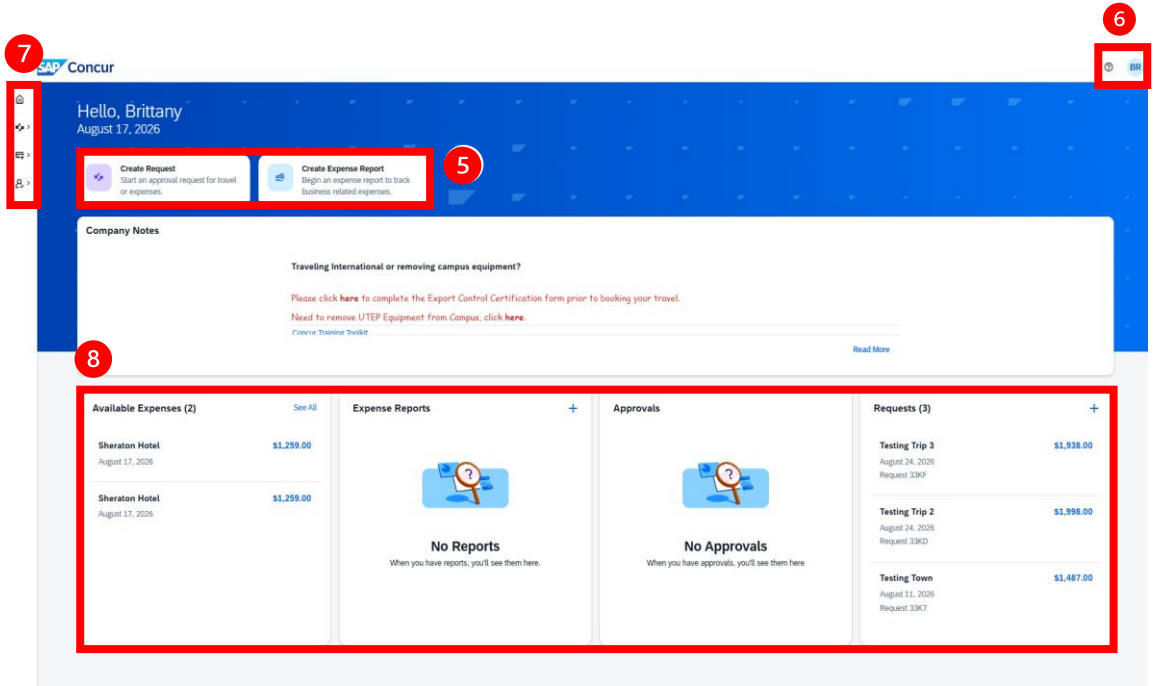
2



3



Concur Home Page Tour



5. Quick Action Buttons - Create & Submit
Create Travel Requests and Expense Reports for travel approval and reimbursement

6. Profile and Settings:
Access your profile, user settings, delegates, expense preferences, and system notifications

7. Navigation Menu:
Quick access to key Concur modules, including the Home page, Travel, Expense, Approvals

8. Expense & Request Management:
View and manage expenses, reports, approvals, and travel requests all in one place

Delegates

Delegates prepare. Travelers submit.

What delegates do

Prepare requests and reports, import expenses, and attach receipts in your Concur profile.

Who can use a delegate

Any employee—especially frequent travelers. You can assign more than one delegate.

You must submit

Your delegate emails you using Notify. Log in to Concur, review, and submit.

How delegates help

Prepare ahead
Start reports from e-receipts before you return.

Staff & faculty support
Let department staff handle the paperwork.

Backup coverage
Keep work moving when a delegate is away.

Student travel
Use a temporary profile and delegate for reimbursements.

Initial delegate access will match your PeopleSoft access.

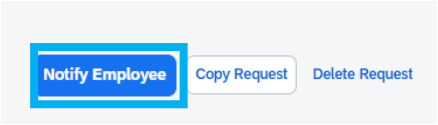
When a Delegate Creates Your Request or Report

1. Your Delegate Prepares the Request or Report
Your delegate can create and complete a Travel Request or Expense Report on your behalf. However, **they cannot submit it for you**. They click notify employee when they are done.

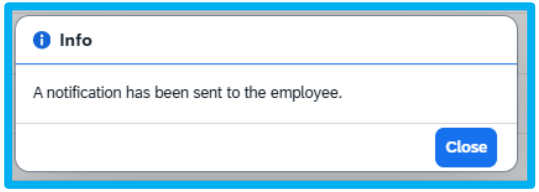
2. You'll Be Notified When It's Ready
Once your delegate has finished preparing the Request or Report, you'll receive an **email notification** letting you know it's ready for your review. The item will also appear in your Concur account.

3. Open and Review
Select the link in the email to open the Request or Report in Concur. Carefully review the information and make sure everything is accurate and complete.

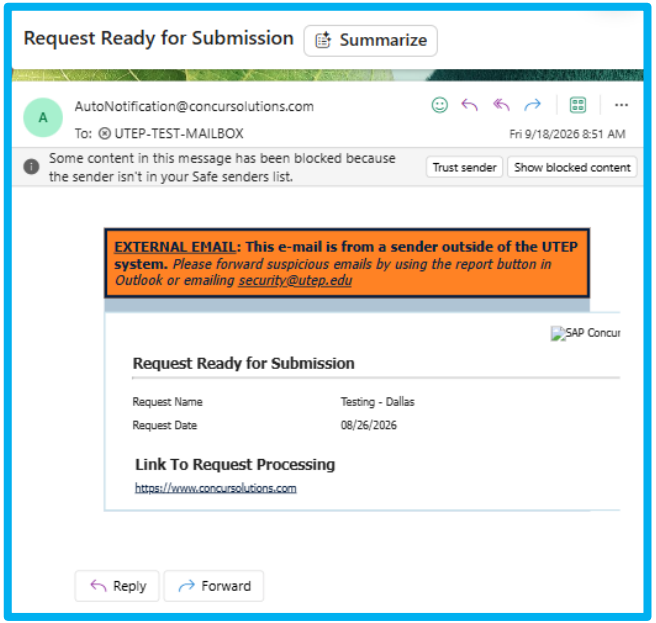
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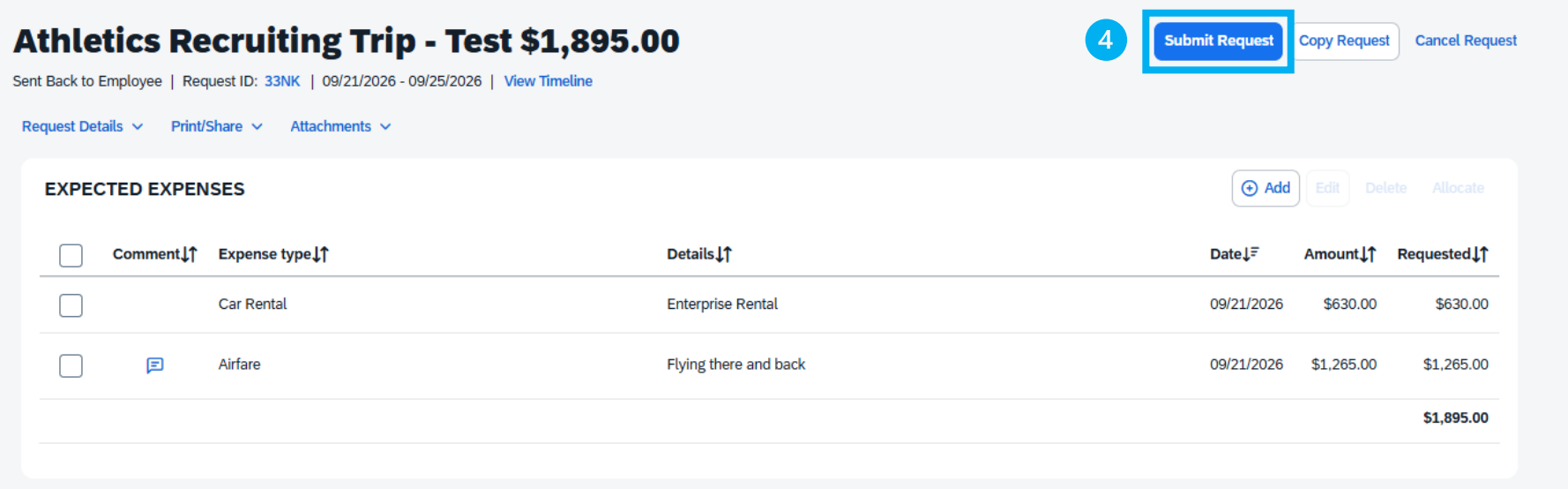


3



Submit the Request or Report

4. Submit the Request or Report
Once everything looks correct, select **Submit Request** or **Submit Report**.

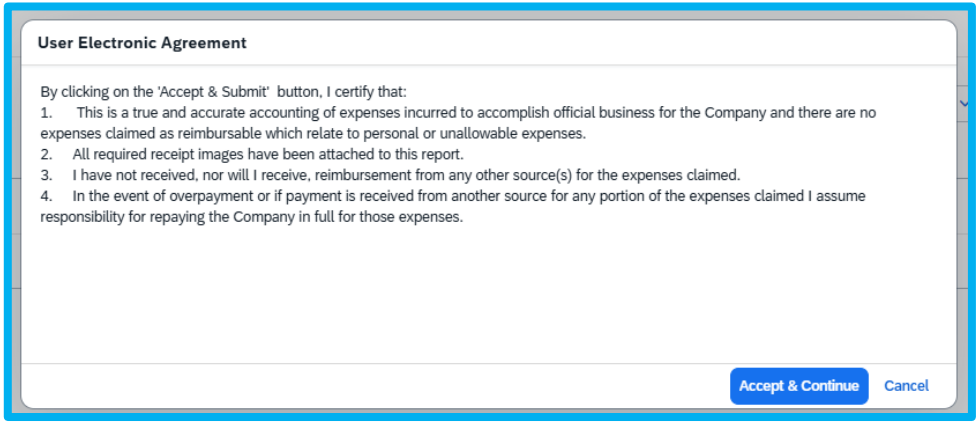


Accept the User Electronic Agreement

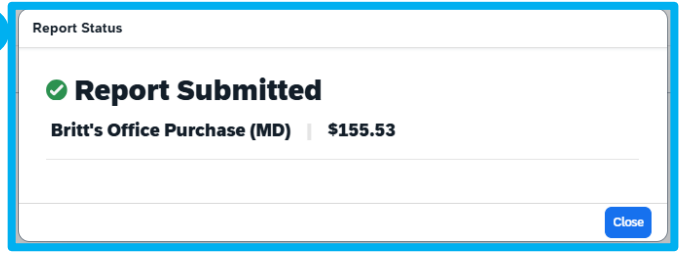
5. Accept the User Electronic Agreement
The **User Electronic Agreement** will appear. Review the agreement, then select **Accept & Continue**.

6. Submission Complete
Your Request or Expense Report is now successfully submitted and will **move through the appropriate approval process**.

5



6



How to Book in Concur

Need Additional Booking Assistance?

- Visit the Concur Training Resources for detailed guides and video tutorials on booking flights, hotels, and rental cars.
- Training materials are available anytime and provide step-by-step instructions for managing travel reservations in Concur.



- Prefer personalized booking assistance? **Anthony Travel remains available** to help travelers book and manage their reservations.

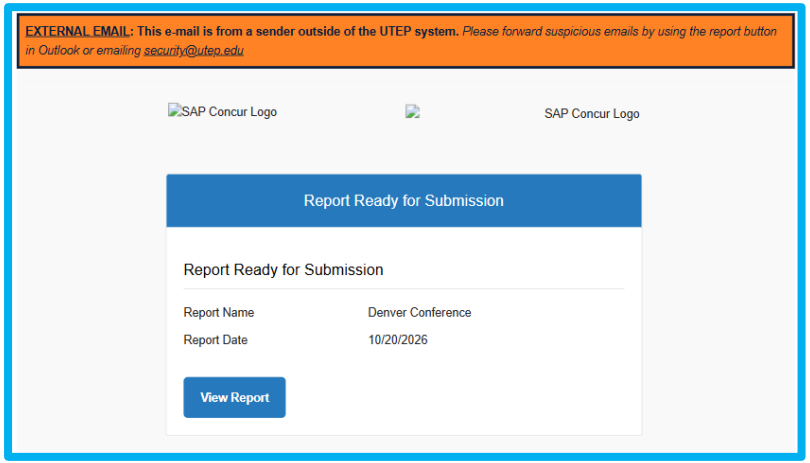
Expense Reports

When Your Delegate Prepares Your Expense Report

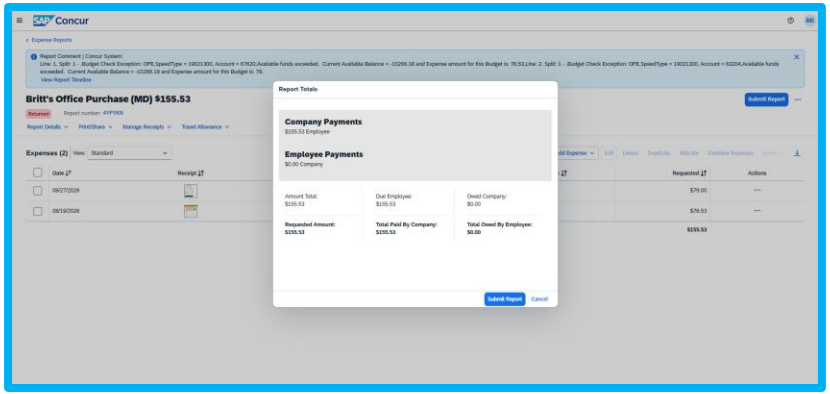
1. **You'll Receive a Notification**
   Once your delegate has finished preparing your Expense Report, you'll receive an **email notification** letting you know it's ready for review.

2. **Review the Expense Report**
   Select the link in the email to open the report. **Review all expenses and information carefully** to make sure everything is accurate and complete.

1



2



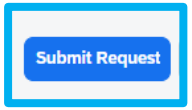
When Your Delegate Prepares Your Expense Report

3. **Submit the Report**
   Once everything looks correct, select **Submit Report**.

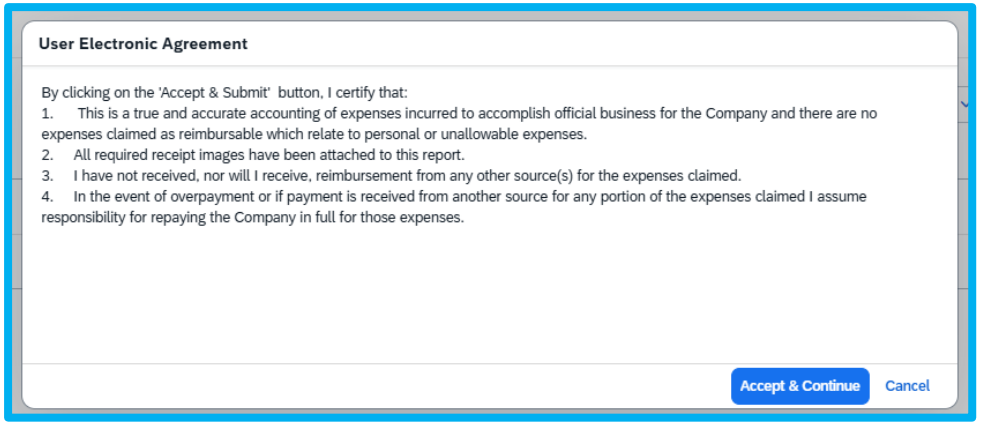
4. **Review the User Electronic Agreement**
   The **User Electronic Agreement** will appear. Review the agreement and select **Accept & Continue**.

5. **Report Submitted**
   Your Expense Report is now submitted and will **move through the approval process**.

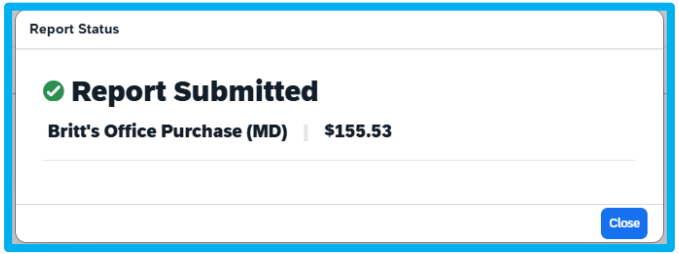
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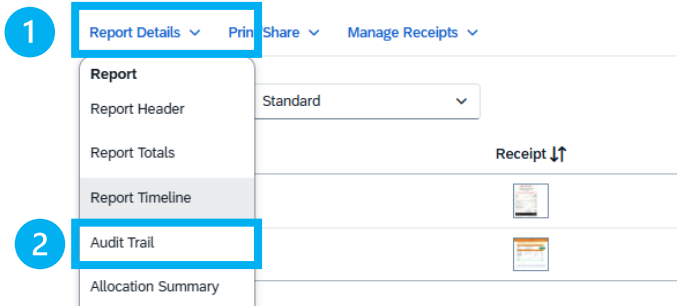


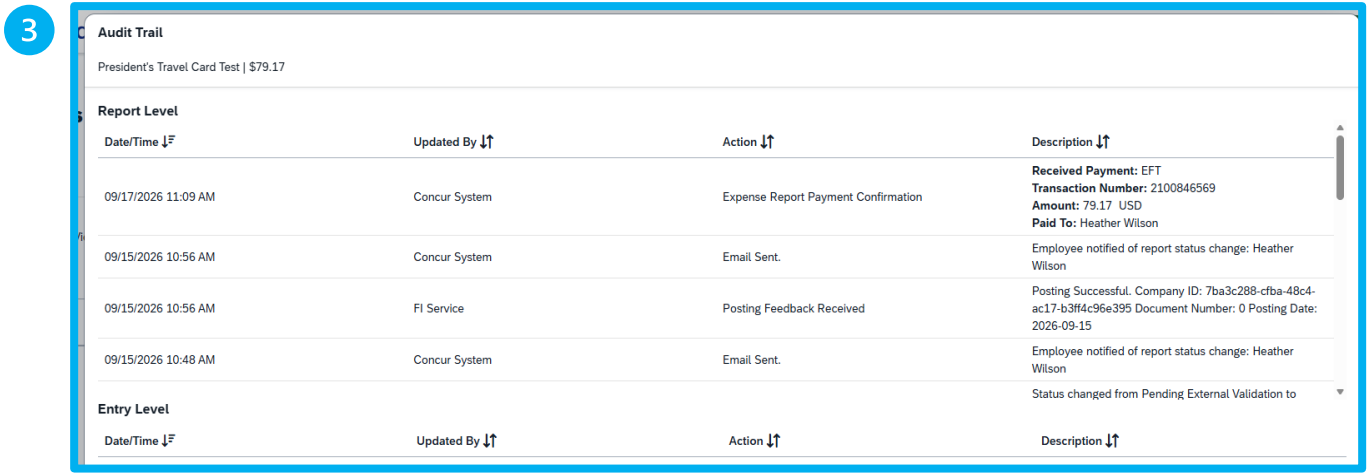
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Expense Report - How to check the status

1. Within the Expense Report, navigate to the **Request Details** link directly below the Request name.
2. Select **Audit Trail** from the drop-down menu.
3. The Audit Trail will open and you can review it.

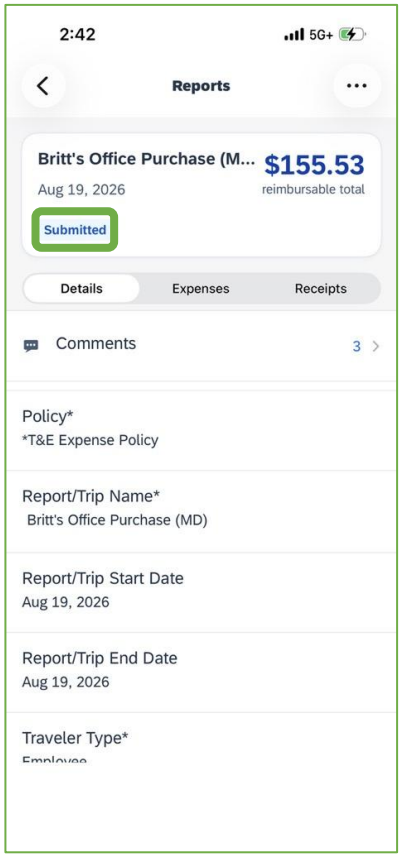


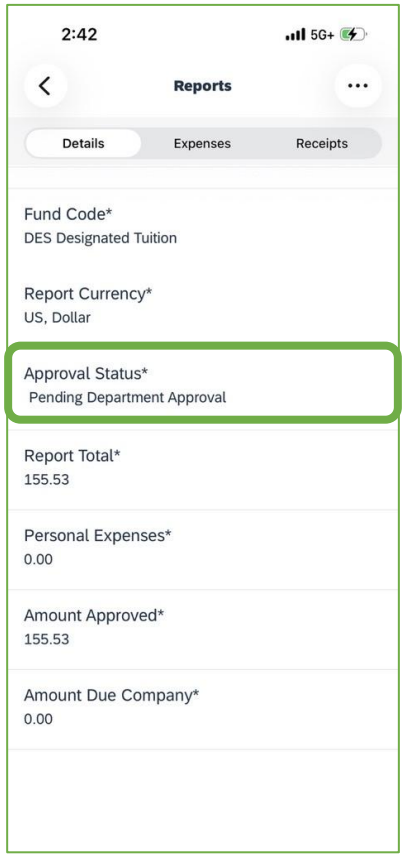


Expense - How to check the status **(Mobile App)**

Checking Report Status: Open the **Expenses tab** and scroll to **Submitted**. Select the report to review.

The current report status is displayed at the top of the report. To view where the report is in the approval process, scroll down to the **Approval Status section**, which shows the report's progress through the approval chain.



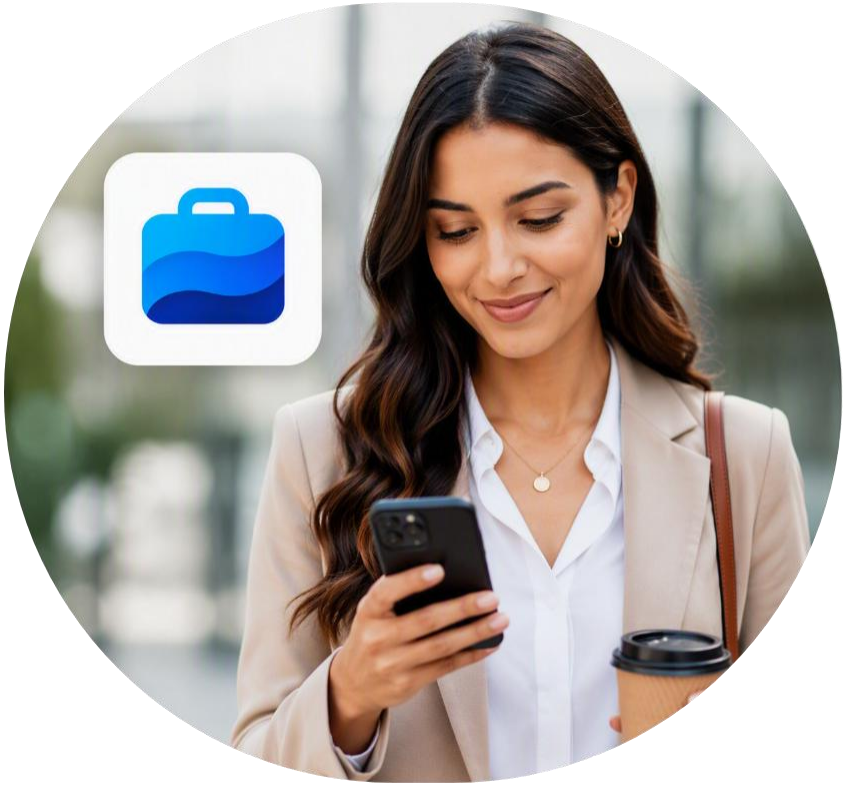


Mobile App

Mobile Application – download

SAP Concur

App Store



Google Play

What the Mobile App Can Do

Review, submit, capture, approve, and book—on the go.

Review & submit

Review and submit travel requests and expense reports.

Capture & upload receipts

Photograph receipts or upload photos and files.

Approve on the move

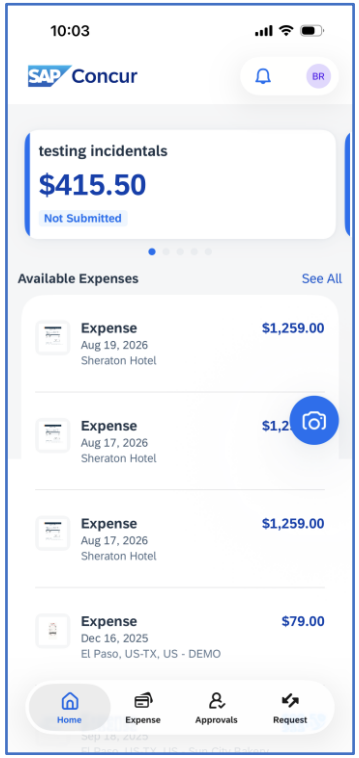
Approvers can view pending items and approve in the app.

Book travel

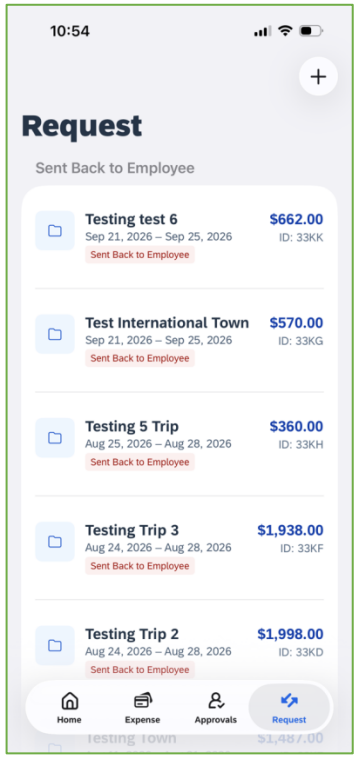
Book flights, hotels, and rental cars from your phone.

Mobile Application

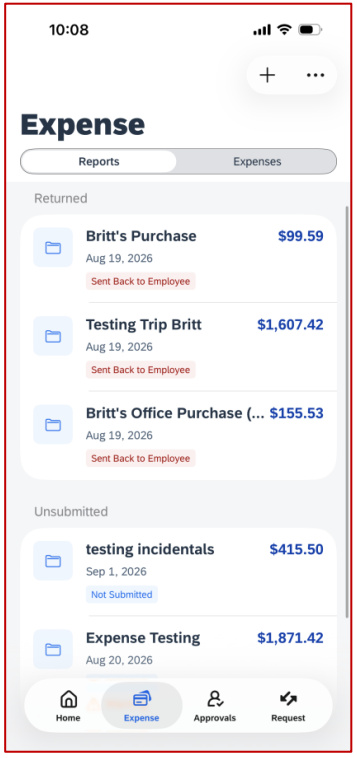
SAP Concur



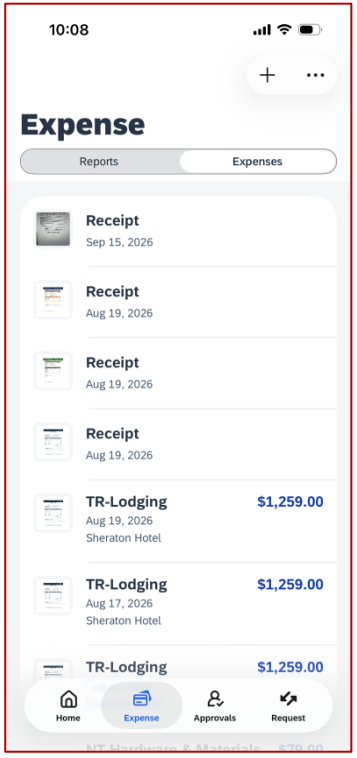
Home Screen



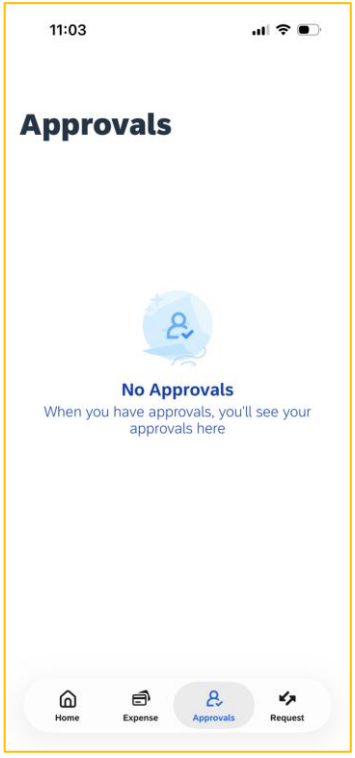
Request Screen



Expense Screen



Expense Screen

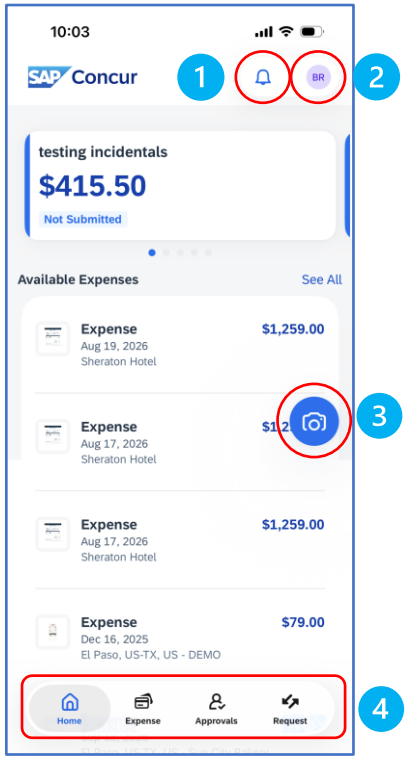


Approvals Screen

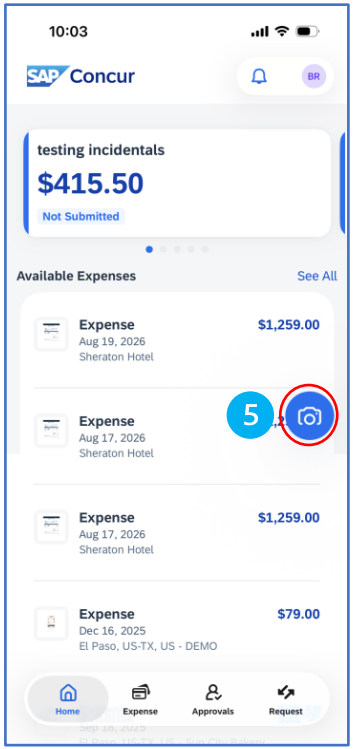
Mobile Application – Home

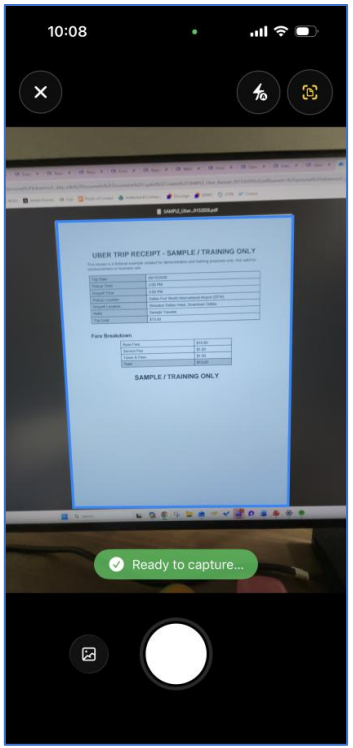
SAP Concur

1. **Notification Center:** Your messages appear here.
2. **Profile:** Personal settings. Delegates can use **Act As** to upload receipts and enter expenses.
3. **Camera:** Capture receipts fast.
4. **Navigation Bar:** Expenses, approvals, and requests.
5. Tap the **Camera icon** to capture receipts on the go. Receipts land in **Expenses** for entries or reports.



Home Screen





Mobile Application - Request

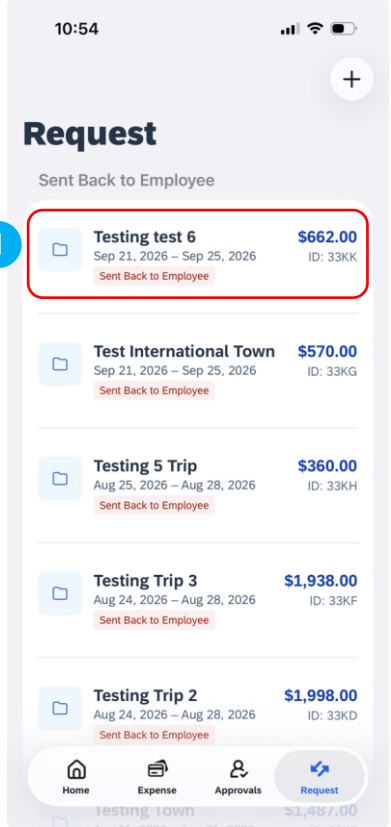
SAP Concur

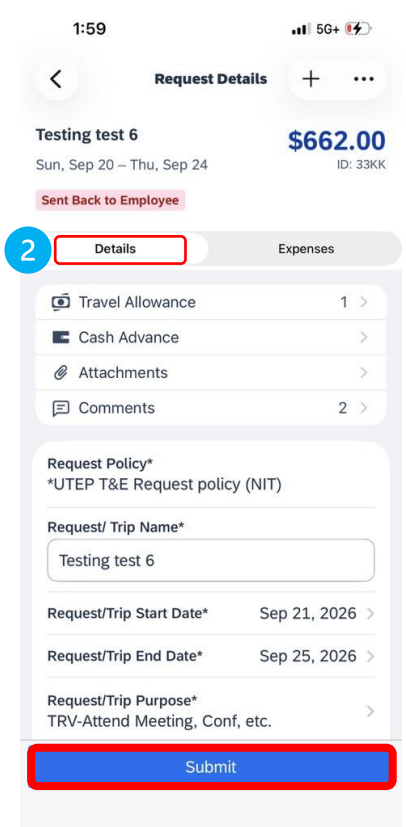
On the Go with Concur Use the SAP Concur mobile app to view and review Travel Requests, check request details and expenses, and submit requests right from your mobile device.

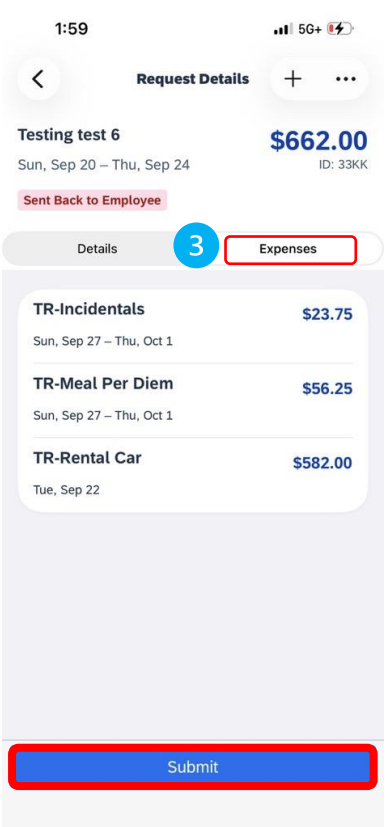
1. **Request:** Create and manage travel requests, including delegate-created ones.

2. **Details tab:** allowances, cash advances, attachments, comments — then **Submit**.

3. **Expenses tab:** per diem and related expenses.





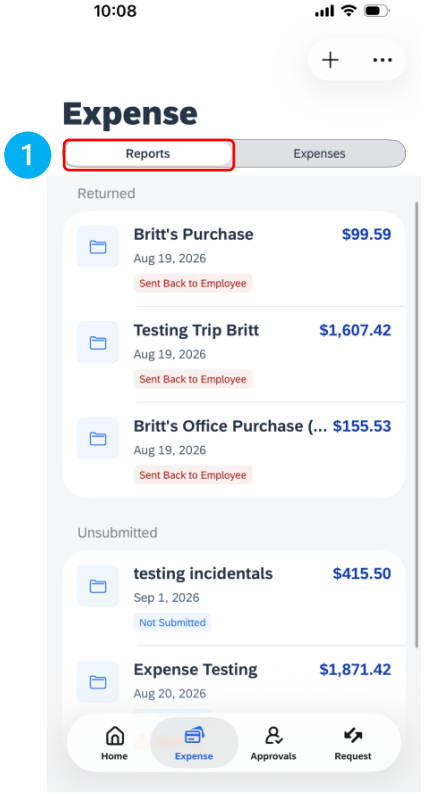


Mobile Application - Expense

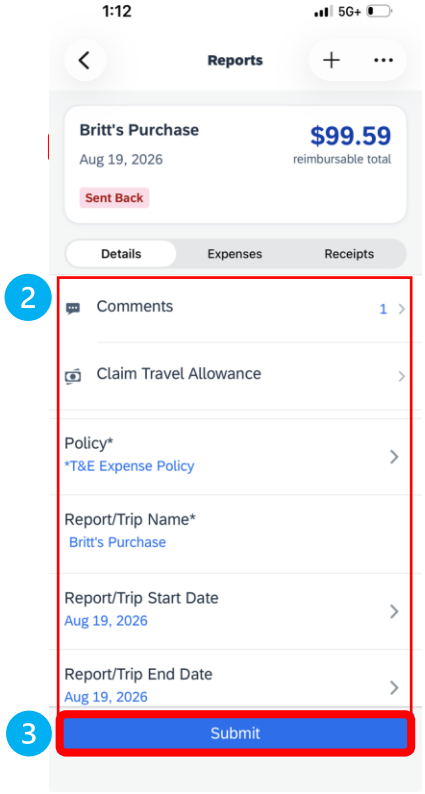
SAP Concur

Expenses on the Go Use the SAP Concur mobile app to view and review Expense Reports, manage expenses and receipts, and submit reports right from your mobile device.

1. Expense Reports: View and edit reports created for you.
2. Update entries, receipts, and documentation.
3. Submit delegate-created reports for approval.



Expense Screen



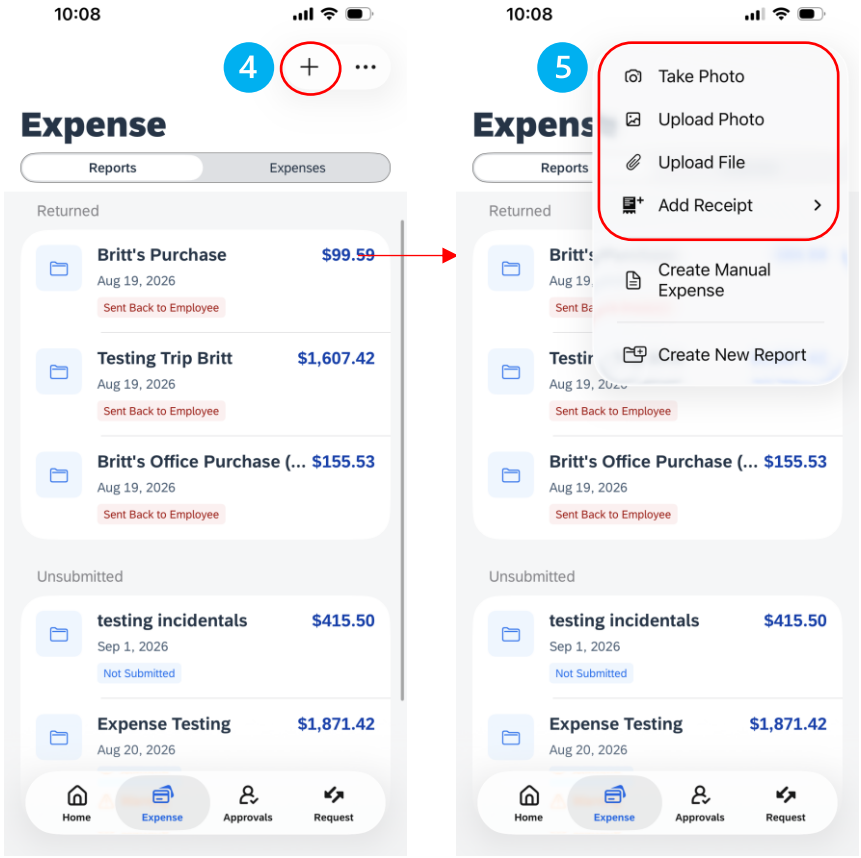
Expense Screen

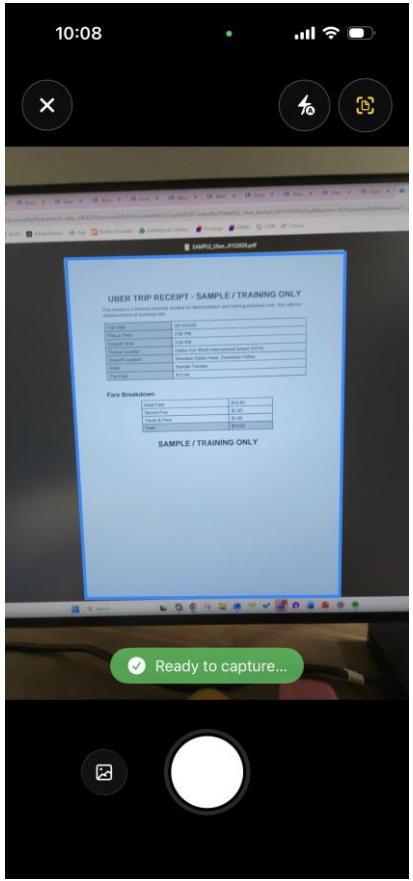
Mobile Application - Expense

SAP Concur

4. **Adding Receipts:** Tap + to take a photo, upload a photo, or upload a file.

5. We'll use Take Photo — most common while traveling.



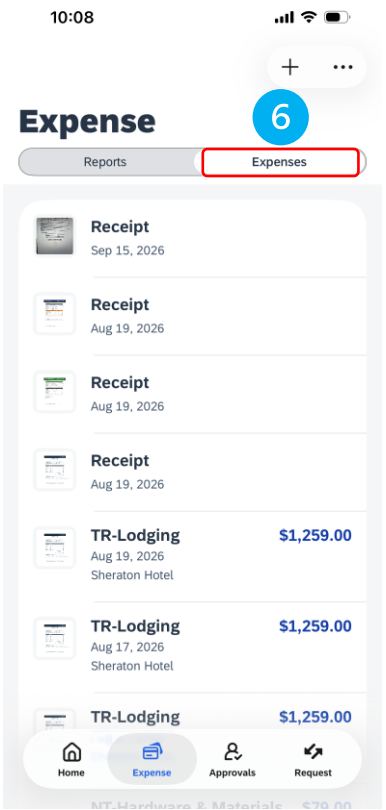


Mobile Application - Expense

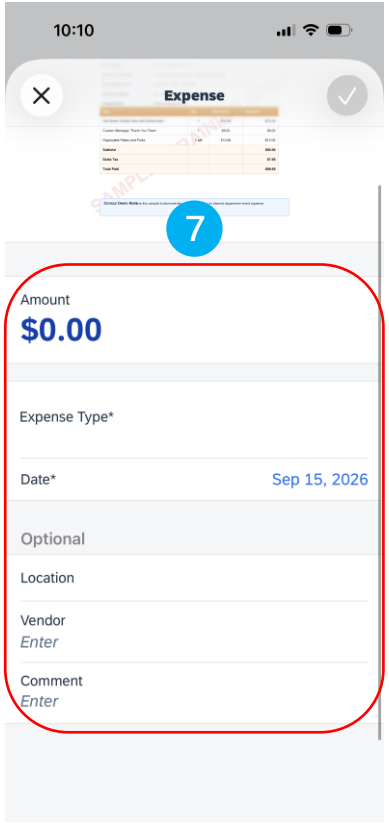
SAP Concur

6. Expenses: Stores all uploaded receipts.

7. Enter the expense details manually or use ExpenseIt to automatically read your receipt and fill in the expense information for you..







Resources & Support

Help when you need it

Self-service resources

Training Website
Concur timelines and training materials

Quick Guides
Step-by-step help for common tasks

Videos
Concur 101 and Travel Request walkthroughs

FAQs
Updated answers to common questions

Personal support

Office Hours
Drop-in help after go-live, online or in person
Bring a live document to office hours for a walkthrough.

1:1 Support
Personalized help for high-volume users

Questions? Concur project team: travel@utep.edu

Thank you!

Concur was designed to help you spend less time managing travel and expenses and more time focusing on teaching, research, service, **and supporting our students**.

