

Concur Refresher Quick Guide



This Refresher Quick Guide reviews the basics of Concur with links to resources where you can get more in-depth training. Refer to the [Travel and Expense Portal](#) for all Travel and Expense and Concur information. For a full, searchable library of all training materials related to Travel and Expense and Concur, visit the [Columbia Finance Training Library](#).

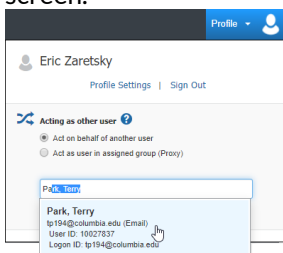
1.

Logging In as a Delegate



If you provide support to help book travel or submit Expense Reports for a colleague, they can set you up as a **Delegate** in Concur to act on their behalf. You can also setup the Concur Profile on their behalf, once they have made you a delegate. Refer to the [Job Aid: Managing Delegates](#) for guidance on how to set up Delegates. Refer the [Setting up Your Concur Profile](#) training guide for additional information on how to setup a Travel and Expense Profile.

1. Navigate to <https://travel-expense.finance.columbia.edu/> and Log into Concur. Click Profile on the top right of your screen.



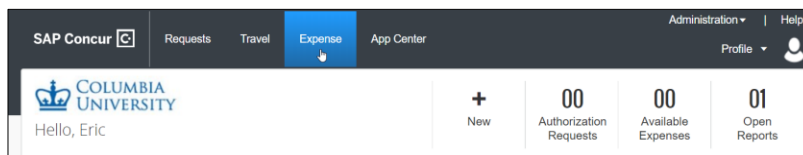
2. Select **Act on behalf of another user**.
3. **Search by name or UNI of the colleague**. Only those users that have given you Delegate access will appear.
4. Select the name of the person you want to act on behalf of.
5. Click **Start Session**.

2.

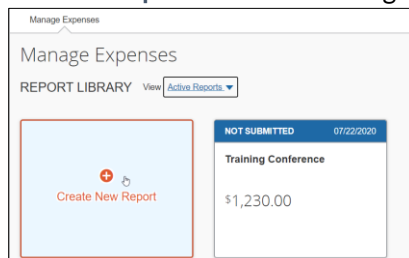
Creating an Expense Report



For complete instructions on completing Report Details, adding Expense Items to your Expense Report or the expense report of a Guest or Student, and submitting the Report into workflow, please refer to the [Creating Expense Reports in Concur](#) job aid. You can also use the Concur mobile app; refer to the [Creating an Expense Report Using the Concur Mobile App](#) job aid.



1. Click the **Expense** tab. The Manage Expenses screen appears.



2. Click **Create New Report**. The Create New Report screen appears. Refer to the [training guidance](#) for more detail.

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3.

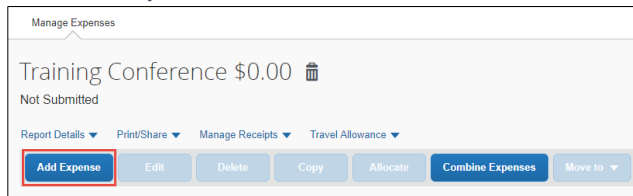
Adding a Group Meal to an Expense Report



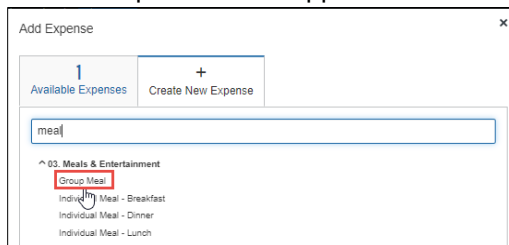
To learn how to add a group meal to an Expense Report in Concur, exclude tax / tip, and itemize when the meal expense includes alcohol and/or exceeds the policy thresholds, refer to the [Expensing Group Meals in Concur](#) training guide.

After initially creating your Expense Report, you will be on the Manage Expenses screen of your Report.

1. Click Add Expense.



The Add Expense screen appears.



2. Click Create New Expense.

3. Search and select the Group Meal Expense type. Refer to the [training guidance](#) to continue.

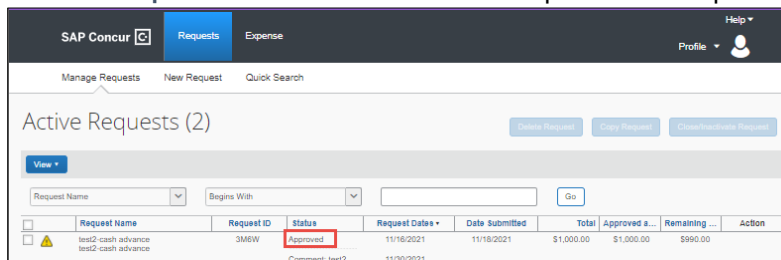
4.

Reconciling Pre-Trip and Travel/Cash Advance Requests

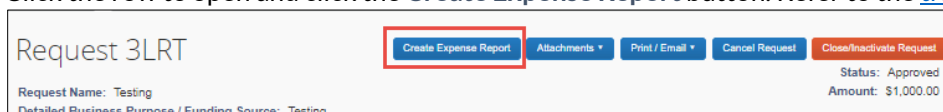


If you were required to submit a Pre-Trip Request, you will need to attach the approved Request to an Expense Report in order to be reimbursed for expenses. If you submitted a Travel/Cash Advance, you will need to attach the approved Request to an Expense Report in order to reconcile the advance. For complete detailed instructions, refer to the [Reconciling Pre-Trip and Travel/Cash Advance Requests in Concur](#) job aid.

1. Click the Requests tab to access the Active Requests. The Request must have an Approved status in order to reconcile it.



2. Click the row to open and click the Create Expense Report button. Refer to the [training guidance](#) for more detail.



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5.

Reconciling Corporate Card and Columbia Air/Rail Central Pay Transactions



If you used your Travel and Expense Corporate Card to make purchases or the Columbia Air/Rail Central Pay mechanism to purchase air or rail tickets, you must reconcile those transactions in an Expense Report after returning from your trip. Refer to the [Reconciling Corporate Card and Columbia Air/Rail Central Pay Transactions in Concur](#) video for detailed instructions.

After initially creating your Expense Report, you will be on the Manage Expenses screen of your Report.

1. Click **Add Expense**.

Manage Expenses

Training Conference \$0.00 🗑️

Not Submitted

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

The Add Expense screen appears.

Add Expense

99+ Available Expenses + Create New Expense

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	CU Corporate Card	Undefined	HOTEL MERCURE Seattle, Washington	06/30/2019	\$404.79
<input type="checkbox"/>	CU Corporate Card	Undefined	Courier Services Seattle, Washington	06/30/2019	\$82.32

Close Add To Report

2. Click the **Available Expenses** tab. The Available Expenses tab displays unreconciled Corporate Card and Columbia Air/Rail Central Pay transactions.
3. Select the check box for the transaction and click **Add to Report**. Refer to the [training guidance](#) for more detail.

6.

Adding a Missing Receipt Declaration



Original receipts must be provided if the expense is equal to or in excess of \$50 and for all air, lodging, and rental car expenses. For Expense items missing receipts, a Missing Receipt Declaration must be added and justification is required by the payee. The Missing Receipt Declaration cannot be added by a Preparer Delegate or Approver. Please refer to the [Adding a Missing Receipt Declaration to a Concur Expense Item](#) job aid for detailed instructions, including guidance on how to add additional supporting documentation.

1. When viewing the Expense list in your Expense Report, where one or more Expense items are missing receipts, click the **Manage Receipts** drop down menu and select **Missing Receipt Declaration**.

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Add Expense Edit Manage Attachments Allocate Combine Expenses Move to ▾

Alerts Receipt Payment Type Expense Type Vendor Details Date ▾ Requested

Cash/Personal Credit Card Instructional Supplies 10/05/2020 \$60.00

The Create Receipt Declaration appears.

Create Receipt Declaration

A receipt is required for this expense. If you are missing your receipt please use this missing receipt affidavit. To create a Missing Receipt Declaration, select the expense(s) below that require a receipt.

<input type="checkbox"/>	Expense Type	Vendor	Date	Amount
<input checked="" type="checkbox"/>	Instructional Supplies		10/05/2020	\$60.00

I certify that these expenses were actual and reasonable and incurred in accordance with University policy for the official business of Columbia University.

Cancel **Accept & Create**

2. Select the checkboxes for the Expense Items that are missing receipts and click **Accept & Create**. Refer to the [training guidance](#) for more detail.