Q. How do I log into Concur Expense?
A. Users/Delegates log into “MySLU”, click on Tools tab and click on icon for ‘Cliqbook and Concur Expense’.

Approvers with group names log in to the same site that is used to approve flights.

ITINERARY

Q. Where do I view my itinerary?
A. Concur Travel & Expense will send your itinerary to you immediately after you confirm the trip. Your agency will email your final itinerary when it is ticketed. In addition, you can view your itinerary from in the Upcoming Trips section on the My Concur or Travel pages.

Q. How can I view the itinerary for flights I have already booked?
A. On the My Concur page, review the Upcoming Trips section. For more detailed information, click the appropriate trip name in the Trip Name/Description column and then click View Itinerary.

Q. When do I load/attach my itinerary?
A. You will load your itinerary to the travel report you are submitting AFTER you have completed your trip. DO NOT attach the itinerary if submitting a travel report for pre-payments made BEFORE your trip has been completed.

Q. What Meal Selection do I choose and WHEN do I choose it?
A. You will make your meal selection choice ONLY on the travel report that you attach your itinerary to AFTER your trip is completed.

USGSA Meal Receipts should be chosen when submitting meal receipts for reimbursement up to the full per diem amount.

USGSA NO Meal Receipts should be chosen for reimbursement of 60% of the daily per diem with NO meal receipts.

Q. What if I get the Travel Allowance Error: Adding this row would cause this itinerary to overlap with another of your itineraries is received?
A. Make sure the itinerary has at least TWO lines (departure & arrival). If the itinerary has all information, make sure the transaction date falls between the dates of the itinerary.
Q. How do I delete or edit an itinerary?
A. To delete or edit an itinerary you must first select the itinerary. You will then be able to delete or edit. [Deleting an Itinerary Manual]

Q. What if the city I traveled to is not available to choose when creating an itinerary?
A. First make sure the spelling is correct (alternate spellings may be a factor i.e. St. and Saint). If the spelling is correct and the city is still not available, choose a city that is close to the actual city traveled to. If there is no close city – the option Any City, USA can be used. If Any City, USA is used, a comment with the actual travel location is required.

HEADER

Q. What Commitment Office should I choose on the Header page?
A. Select Medical Center Finance Office when your expense report is sent to the medical center finance office for approval.
Select Financial Commitments Non-Grant when your expense report is charged to your department and is sent to the financial commitment office.
Select Financial Commitment – Sponsored Programs when your expense report is sent to the financial commitment office and expenses will be charged to grants funds (funds beginning with the number 3).

Q. Why is there an org and fund appearing on the Header page?
A. Every employee has a default org and fund that is associated to their banner ID. This fund will be charged for your expenses unless the expenses are reallocated.

Q. What if I have expenses that should be charged to a different fund and account than appears on the Header page and it is not available in the reallocation window?
A. If the org/fund is not available in the drop down in the reallocation window, in the comment field on the report header, make a note to ‘reallocate to fund #________’. Approvers are trained to look in this field for special instructions.
RECEIPTS

Q. What should I do with my original receipts?
A. Employee should keep original receipts until the report is fully approved and reimbursement received. In case the scanned/faxed receipts cannot be read, you will be able to re-attach them to the report in Concur Expense. Receipts will no longer be stored in the travel office because all receipts are scanned and attached to the reports in Concur Expense.

Q. What if my scanned/faxed receipts are not readable?
A. Try copying them on ‘photo’ setting and changing the darker/lighter setting.

Q. What is the limit of pages that can be attached or scanned?
A. You cannot attach images more than 3mb, saving a scanned file as a PDF file may reduce the size. In regards to faxing there is no page limit but if you get a 10mb for a fax there may be issues opening the image.

POLICY

Q. What happens if I do not comply with company policy?
A. When you go outside of your company policy, Concur Travel & Expense notifies you by showing policy flags. These indicators may just contain information regarding policy (yellow) or require you to make changes (red) before submitting expense report. If out of policy, the expense may not be reimbursable.

Q. Who is reimbursed from the Concur Expense system?
A. ONLY employees and American Express for employees’ T&E card expenses are paid from Concur Expense.

Q. What type of expenses should be entered into Concur Expense?
A. Any reimbursement requests formerly submitted on eSeeDPV, BEEV, or ETERV for employees.

Q. What is the ‘non-travel’ policy type?
A. Expenses incurred outside of travel mode that were formerly submitted on BEEVs or eSeeDPVs. For example: reimbursement for lunch with an applicant, books, etc.
Q. What if I have expenses charged to my T&E card, but they are not in the Concur tool to attach?
A. You should wait to submit those expenses until you do see them in the tool and can match them to a report. Do not enter the expenses manually since the payment will NOT go to Amex as it should. Some vendors do not submit charge card expenses timely and there could be a week delay.

Q. When can the employee expect reimbursement to be direct deposited?
A. When the report shows a status of ‘extracted for payment, reimbursement should occur within three business days.

Q. When will we see transactions in Banner?
A. Files are loaded into the general ledger each week.

Q. Can we view these expenditures in Banner using the View Document screen?
A. Viewing documents will be in the Concur Expense system only.

Q. How will the expenditure appear in Banner and WebFocus reports (e.g., description, document code)?
A. The file feeds will start with a "FC" reference number. In the Webfocus reports, travels will appear with the trip id numbers beginning with "A". Non-travel reports will appear with "VB + report key" from the Concur Expense tool.

Q. How do I get help for using Concur Expense?
A. Click Help on the Concur page. In the Help section, you can find specific instructions for the task you are trying to complete. You can also view demonstrations of the most important tasks. Manuals are posted on the university Travel website at [http://www.slu.edu/x32563.xml](http://www.slu.edu/x32563.xml). You can also contact Lori Myers at lmyers7@slu.edu or Sharon Gajewski at sgajewsk@slu.edu.

Q. Do students and guests enter expenses in Concur Expense?
A. No. Their expenses should be submitted on the ETERV, or eSeeDPV. Concur Expense is for SLU employees only.

Q. Is there a wild card to expand searches in Concur Expense?
A. Yes, the asterisk (*) can be used for a wild card.
PROFILE

Q. What if I do not book my own travel?
A. In Concur Travel & Expense, you can select an assistant or arranger to reserve your travel.
   1. On the My Concur page, click Profile and then click the Assistants link at the top of the page.
   2. Click Add an Assistant to add the person who you would like to authorize to reserve your travel. This person can now update your profile and also make travel arrangements for you.

Q. What if I do not submit my own expense reports?
A. In Concur Travel & Expense, you can select an assistant or arranger to reserve your travel.
   1. On the My Concur page, click Profile and in the left hand menu look for Expense Settings.
   2. Click on Expense Delegates and then click Add Delegate to add the person who you would like to authorize as an expense delegate. By checking the box by the appropriate box and saving, you are authorizing the delegate to perform this duty.

Q. When a report is returned to the employee in Concur Expense, do the changes have to be made again?
A. After testing this is what we found:
   1. Any changes in the approved amount reverts back to original amount entered. The approver will need to reduce again.
   2. Approval flow will revert back to original defaults. Additional approvers will need to be added again.
   3. All comments will stay.
   4. All allocations will stay.
   5. All receipts will still be attached.

For additional information including Concur Manuals – please visit the SLU-Concur web page.