

# WELCOME TO CONCUR TRAINING

Presented by: JSU Travel Team and  
Christopherson Business Travel



# How to Submit a Travel Request and Expense Report in Concur

Welcome to our comprehensive guide on using Concur for all your travel and expense management needs. This presentation will walk you through the complete process of submitting travel requests and expense reports using the SAP Concur platform.

We'll provide detailed step-by-step instructions with actual screenshots from the Concur interface, making it easy for you, the new users, to navigate the system with confidence. By the end of this presentation, our hope is that you'll be able to efficiently manage your business travel from initial request to final reimbursement.



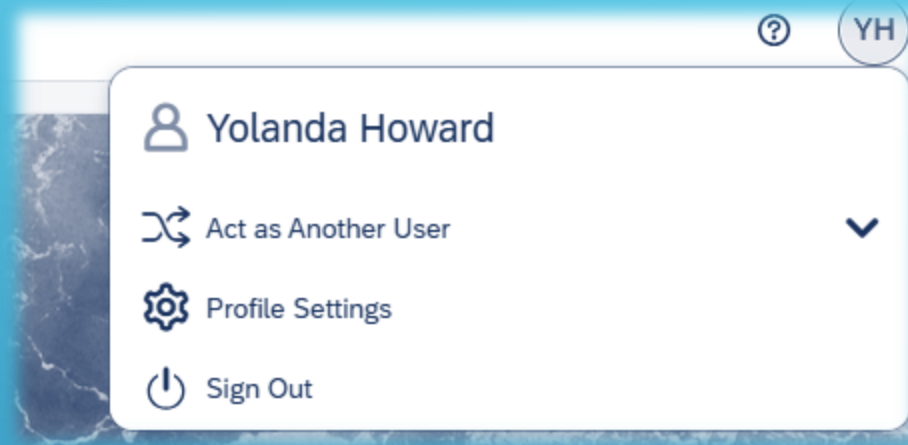


Begin by navigating to THEE JSU Portal and entering your J-number email address, pressing next, and continuing with Jackson State University SSO. If you're a first-time user, you may need to set up your account using the activation email once logged in.

## Accessing Concur and Starting Your Request



# Navigating to Your Profile & Verifying Email in Concur



## Profile Options

Select one of the following to customize your user profile.

### Personal Information

Your home address and emergency contact information.

### Company Information

Your company name and business address or your remote location address.

### Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

### E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

### Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

### Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Personal Car

Personal Car

### Concur Mobile Registration

Set up access to Concur on your mobile device

### System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

### Contact Information

How can we contact you about your travel arrangements?

### Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

### Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

### Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

### Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

### Change Password

Change your password.

1. Log in → Concur Solutions
2. Go to Profile → Click your name > Profile Settings
3. Build Profile → Add personal info, travel preferences, and rewards programs
4. Expense Delegates → Assign or manage delegates for expense reporting
5. Activate E-Receipts → Enable automatic receipt capture
6. Verify Email → Under Email Addresses, click Verify and confirm via email link
7. Save Changes → Ensures smooth booking, expense processing, and notifications

# Creating a New Travel Request

## 1 Navigate to Requests

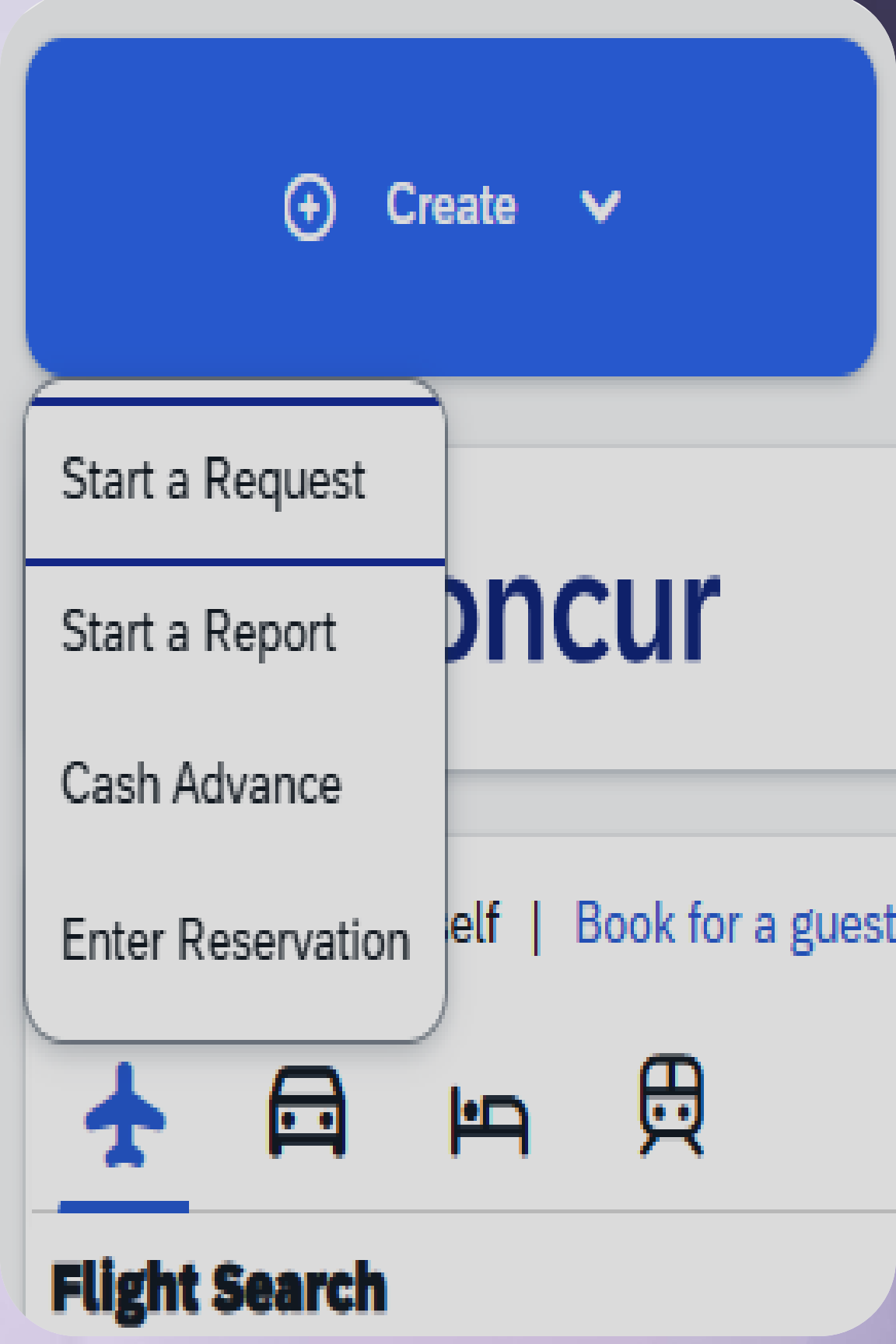
From your dashboard, locate and click on the “Start a Request” tab in the main navigation menu to access all your current and past travel requests.

## 2 Initiate New Request

Look for the prominent **Create** button in the upper-right corner of the Manage Requests screen. This will open the request creation form.

## 3 Prepare Request Information

Before proceeding, gather all necessary trip details, including destination, travel dates, purpose, and estimated expenses. To complete your request efficiently, we recommend submitting 14 days prior to travel.



# Filling Out the Request Header

H

## Complete All Required Fields

Fields marked with red asterisks (\*) must be filled in before you can proceed. These typically include trip name, purpose, and travel dates.



## Name Your Trip Clearly

Use a descriptive format such as "New York, NY 8/10-8/15/2025" that includes destination and dates for easy reference.



## Select Appropriate Policy

Choose either Domestic or International Policy from the dropdown menu based on your travel destination.

## Create New Request

JSU HBCU CONFERENCE

Self-booked in Concur Travel

Request/Trip Start Date \*

06/18/2025

Request/Trip End Date \*

06/21/2025

Request/Trip Purpose \*

Conference Attendee

Traveler/Trip Type \*

Employee Out-of-State Travel

Are you traveling with students? \*

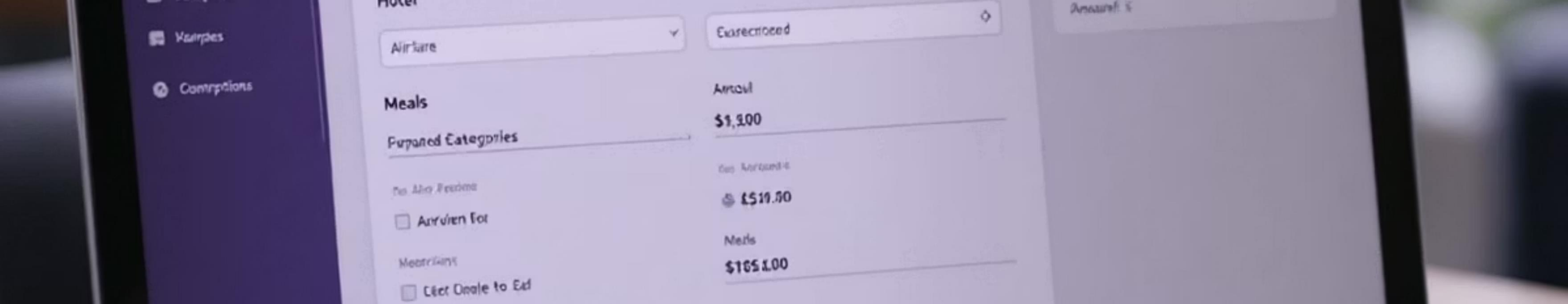
No

Destination City \*

Destination Country

Cancel

Create Request



# Adding Expected Travel Expenses

## Transportation Expenses

- Airfare or train tickets
- Local transportation
- Rental car fees
- Mileage reimbursement

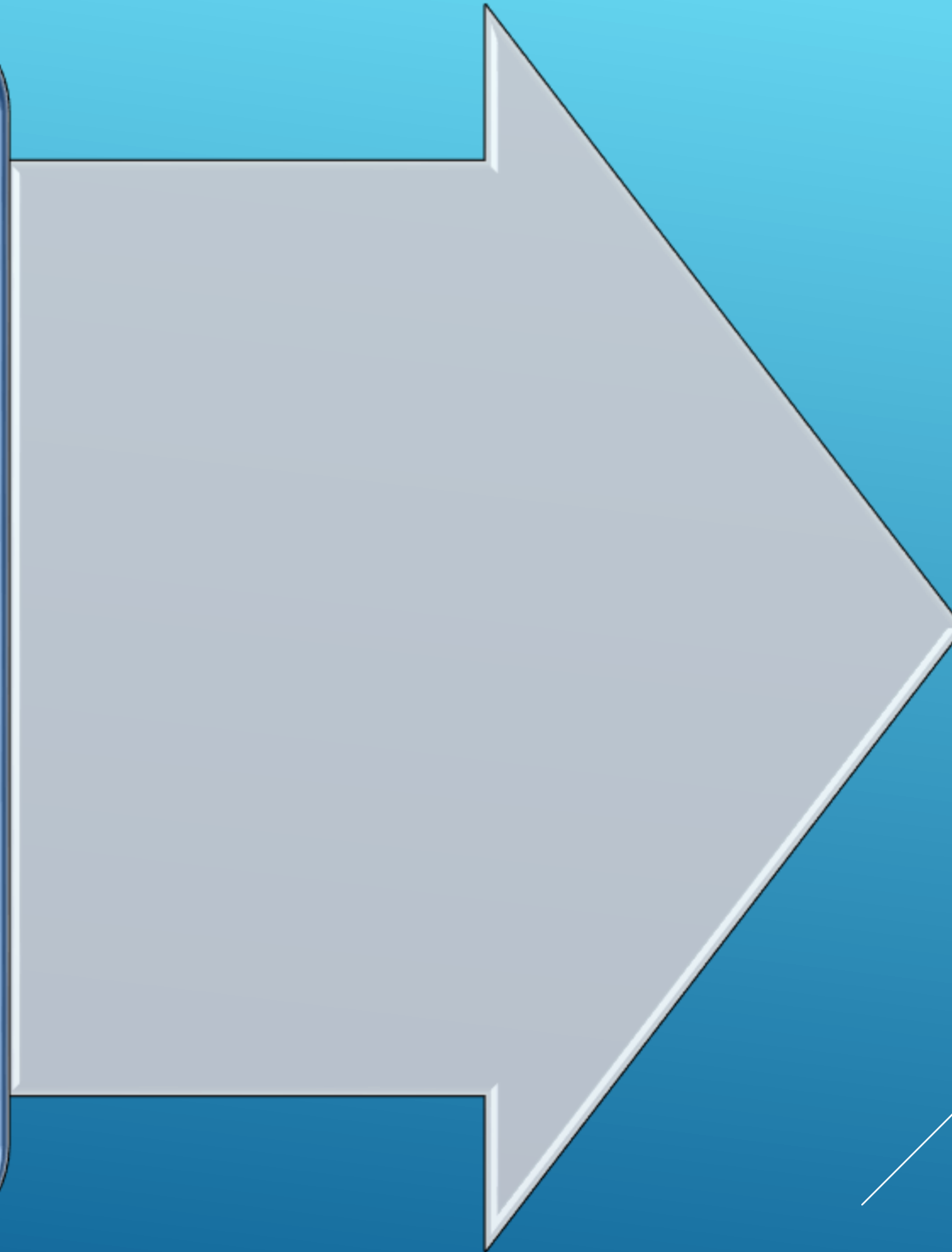
## Accommodation Expenses

- Hotel room charges
- Resort or facility fees
- Taxes and surcharges

## Daily Expenses

- Meals and per diem
- Internet access
- Business entertainment

**NOW WE  
WILL DO A  
LIVE  
TRAVEL  
REQUEST**





# Booking Travel with an Approved Request

## 1. Receive Approval

Get notification that your travel request is approved

## 4. Arrange Ground Transport

Book rental car or other local transportation



## 2. Book Transportation

Select flights or other transportation options

## 3. Reserve Lodging

Choose hotel accommodations within policy

Once your request is approved, you can proceed with booking your travel arrangements directly through Concur's integrated booking tools. The system will automatically link these bookings to your original request, simplifying the expense reporting process later.

# Welcome to Christopherson

Jackson State University



# Introductions

---



Angela Cain

---

Vice President, Operation Manager

Kevin Lee

---

Business Development Manager

Michelle Arriola

---

Account Executive

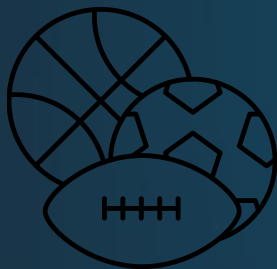
Luke Beachley

---

Customer Success Manager



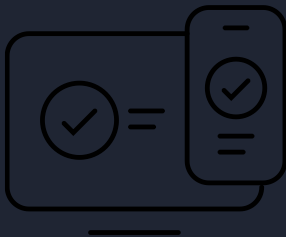
Higher education advisor team  
7A.M. – 7 P.M., Central Time



Athletic and group  
specialists



VIP services  
available



Online Tool support team



Integrated  
after-hours service



Account Team Trio



## We Value People. We Create Value. Big agency ability. Small firm personality.

- **University Experience** – Christopherson has 30+ years of experience navigating the needs of traveling for higher education.
- **Service Solution** – A best-in-class travel management company with proven track record in delivering **innovative, local services and solutions**.
- **Premium service offering** – Designated consultant team to JSU. Agents and support teams who will learn JSU's traveler's preferences and needs.
- **Flexible travel partner** – Nimble and agnostic approach. Christopherson focuses on feedback and suggestions to increase **traveler satisfaction**.





# Corporate Travel Management is distinct from “Leisure” Travel

---



- Christopherson Services are primarily geared towards customization and integration of your organizations unique travel policies. We assure compliance with your State, University or corporate regulations. This allows you to benefit from partner relationships and issue resolutions. Basically, termed Managed Travel.
- When your traveler's book through Christopherson Business Travel, the traveler contributes in maintaining that relationship with your preferred vendors as well as leveraging your organizations discount with preferred vendors and trackable market share.
- Visibility with our inhouse tool security logic and if your organization has a partnership with a chosen Duty of Care organization, that can be integrated in your process for visibility during emergencies with your travelers' bookings.

# Corporate Travel Management is distinct from “Leisure” Travel

---



- **Consumer traveler websites utilize distressed inventory and is not meant to be a low fare search. When booking outside the travel management company the traveler is left to manage their own bookings.**
- **Caveat– If a traveler does not book through CBT, they cannot be tracked by your Duty of Care company and cannot be reported via any reports as well as not counting towards any market share with air, cars, or hotels at time of negotiation for a bigger discount.**

# Important contacts



Contact Type	Types of Services	Contact Information
<b>Individual Advisor Bookings</b> 24/7 assistance available via phone Emails are monitored M-F 7AM-7PM CT	<ul style="list-style-type: none"><li>• Complex international bookings</li><li>• Emergency afterhours assistance</li><li>• Multi-city reservations</li><li>• Trips that combine personal &amp; business</li></ul>	<ul style="list-style-type: none"><li>• <a href="mailto:university.travel@cbtravel.com">university.travel@cbtravel.com</a></li><li>• 855-223-4134 Toll Free</li><li>• 801-214-8918 Local</li></ul>
<b>Concur Travel Reservation Support</b> Business hours: M-F 9 AM-6 PM CT	<ul style="list-style-type: none"><li>• Navigational support for Concur Travel</li><li>• Questions on errors/issues with Concur Travel</li><li>• Simple international reservations</li></ul>	<ul style="list-style-type: none"><li>• <a href="mailto:onlinesupport@cbtravel.com">onlinesupport@cbtravel.com</a></li><li>• 888-535-0179</li></ul>
<b>Group Travel for 10+ Travelers</b> Business hours: M-F 7AM-7PM CT	<ul style="list-style-type: none"><li>• Group air reservations</li><li>• Hotel room blocks</li><li>• Budget quotes for group travel</li><li>• Charter transportation</li></ul>	<ul style="list-style-type: none"><li>• <a href="mailto:universitygroups@cbtravel.com">universitygroups@cbtravel.com</a></li><li>• 866-371-3580</li></ul>

# Non-employees (guest) bookings



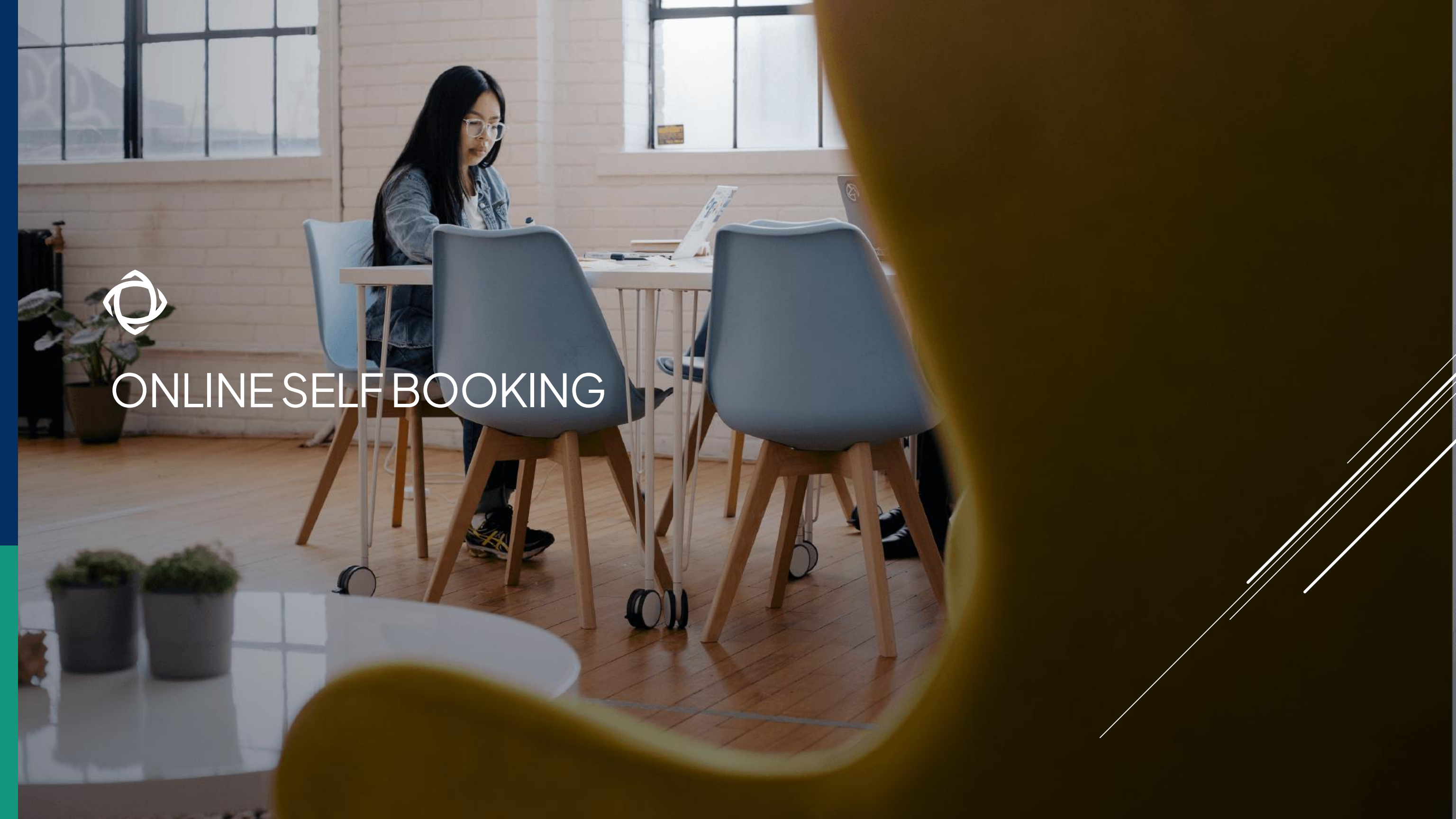
- ← Any traveler who does not have a travel profile is defined as a guest
- ← For security purposes, request for non-JSU employees with a full-service advisor would need to be requested by a JSU profiled traveler
- ← In order to book with a full-service advisor arrangers will be asked to verify 2 of the following items:
  - phone number
  - date of birth
  - managers name
  - home address
  - employee ID
  - department
  - emergency contact







# ONLINE SELF BOOKING





# Concur Traveler Profiles

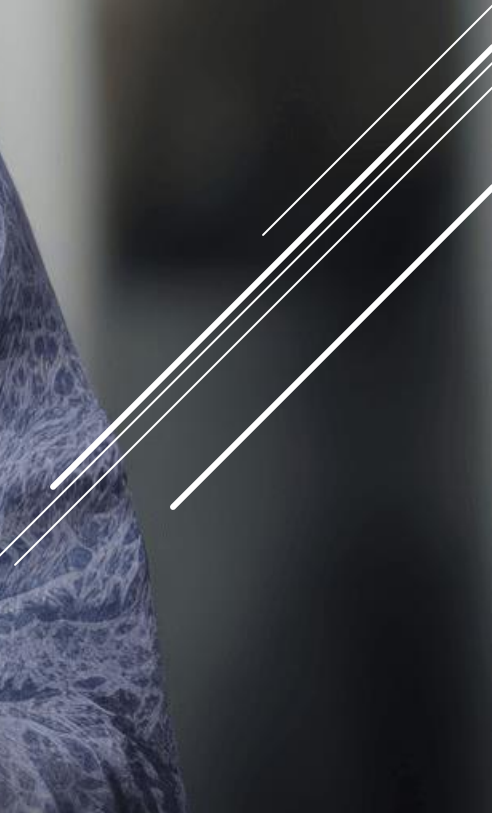


1. Concur profile information has been transferred to Christopherson, Please validate your traveler profile information for accuracy.
2. Login to Concur the same way as you have before.
3. **TSA** requires name to match government identification

The screenshot displays the SAP Concur user interface. At the top left is the 'SAP Concur' logo. In the top right corner, there is a user profile icon and the text '00 View Trips'. The main content area is divided into two columns. The left column, titled 'Trip Search', contains a 'Rule Class' dropdown menu set to 'AUT Class Sabre', a 'Your Custom Trip' input field, and a 'Flight Search' section. The 'Flight Search' section includes tabs for 'Round-trip' (selected), 'One-way', and 'Multi-city'. Below these are fields for 'From' (ATL - Hartsfield-Jackson Atlanta Inter...) and 'To' (CDG - Paris-Charles De Gaulle Airport), and a 'Dates' field showing '07/26 - 07/27'. The right column, titled 'Alerts', features a notification about connecting to TripIt with a 'Connect to TripIt' button. Below the alerts is a section titled 'My Trips (0)' with the message 'You currently have no upcoming trips.' A blue arrow points from the text in the first list item to the 'My Trips' section.



# LIVE CONCUR BOOKING DEMO







## Booking Christopherson Groups and Events



# Advisors –individual traveler for group bookings



1. **Advisors can be called, emailed, or via JSU smart sheet**
  - ▶ **universitygroups@cbtravel.com**
  - ▶ **866-371-3580 Toll Free**
2. **Please advise preferences, budget concerns, etc on the smartsheet or email**
3. **You will receive a final itinerary via email for the booked trip from Christopherson**



# Group Bookings



**GROUP** = 10 or more travelers on the same flights, to and from the same destinations for the same event or occasion.

- Complete the **University Group** form and email to [universitygroups@cbtravel.com](mailto:universitygroups@cbtravel.com)
- Often there is a single group coordinator who collaborates with the advisor
- Individuals do not manage their own arrangements
- Group bookings would use the same form of payment

**CHRISTOPHERSON**  
BUSINESS TRAVEL

Use this form to request travel for 9+ travelers OR athletic teams of 6+ travelers.  
Please email your completed form to [universitygroups@cbtravel.com](mailto:universitygroups@cbtravel.com).

**PRIMARY CONTACT INFORMATION**

**GROUP NAME\***

ENTER GROUP NAME

**CONTACT NAME\***

ENTER FIRST & LAST NAME

**PHONE\***

ENTER PHONE

**EMAIL\***

ENTER EMAIL ADDRESS

**UNIVERSITY/CAMPUS NAME\***

ENTER UNIVERSITY/CAMPUS NAME

**DEPARTMENT\***

ENTER CAMPUS DEPARTMENT OR ATHLETICS

**IF ATHLETICS, PLEASE SELECT FROM BELOW**

☐ MENS

☐ WOMENS

☐ COED

☐ SPORT: ENTER SPORT NAME

☐ CLUB/REC: ENTER CLUB/REC SPORT NAME

**SERVICES REQUESTED\***

☐ AIR

☐ HOTEL

☐ CAR RENTAL

☐ CHARTER BUS

**AIR** (Click arrow to expand/collapse)

**DEPARTURE**

**NUMBER OF TRAVELERS:** ENTER NUMBER OF TRAVELERS

**DEPARTURE CITY:** ENTER CITY

**ARRIVAL CITY:** ENTER CITY

**PREFERRED DATE:** CLICK TO SELECT DATE

**DATE FLEXIBILITY:**CLICK TO SELECT DATE FLEXIBILITY

**PREFERRED DEPARTURE TIME:** ENTER TIME

**DEPARTURE TIME FLEXIBILITY:**CLICK TO SELECT TIME FLEXIBILITY

**PREFERRED ARRIVAL TIME:**ENTER TIME

**ARRIVAL TIME FLEXIBILITY:**CLICK TO SELECT TIME FLEXIBILITY

**TRAVELING WITH SPECIAL BAGGAGE SUCH AS SPORTS, MEDICAL, OR AV EQUIPMENT**

☐ NO ☐YES, PLEASE EXPLAIN: ENTER SPECIAL BAGGAGE NEEDS

**RETURN**

**DEPARTURE CITY:** ENTER CITY

**ARRIVAL CITY:** ENTER CITY

**PREFERRED DATE:** CLICK TO SELECT DATE

**DATE FLEXIBILITY:**CLICK TO SELECT DATE FLEXIBILITY

**PREFERRED DEPARTURE TIME:** ENTER TIME

**DEPARTURE TIME FLEXIBILITY:**CLICK TO SELECT TIME FLEXIBILITY

**PREFERRED ARRIVAL TIME:**ENTER TIME

**ARRIVAL TIME FLEXIBILITY:**CLICK TO SELECT TIME FLEXIBILITY

**HOTEL** (Click arrow to expand/collapse)

**DESTINATION:** ENTER CITY, STATE OR PREFERRED RADIUS OF A PARTICULAR VENUE

**CHECK-IN DATE:** SELECT DATE

**CHECK-OUT DATE:** SELECT DATE

**BUDGET PER NIGHT:** ENTER BUDGET



# Event Travel



**EVENT** = Usually 10 or more travelers, not traveling together, but traveling to a common destination to attend a meeting, conference or occasion.

- Complete the **Event intake** form and email [university.travel@cbtravel.com](mailto:university.travel@cbtravel.com).
- An advisor will respond with instructions to provide the attendees prior to them booking.
- Attendees book their own travel by contacting an advisor via phone or email and they follow the instructions on how to identify themselves with the specific event.



Thank you for considering Christopherson Business Travel to secure the travel arrangements for your attendees.

Many universities book annual events for a group of people not traveling together but traveling to a common destination to attend a meeting or conference. Before you send the invitations, we will need to collect some information from you that will guide us in securing their travel arrangements. Please fill out the details of this form and forward it to [university.travel@cbtravel.com](mailto:university.travel@cbtravel.com).

Today's Date: Click or tap to enter a date.

Name of University: \_\_\_\_\_

Department within the University: \_\_\_\_\_

Name of the Event: \_\_\_\_\_

#### Primary Contact

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

#### Secondary Contact

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_



- Calendar integration-Optional
- This is your invoice also
- The total charges are noted at the bottom of the itinerary
- For Group Receipt copies please email the group desk or the advisor:  
  
universitygroups@cbtravel.com

Queretaro, Mexico TO Toronto, Canada

WED 28 MAY 2025 - FRI 06 JUN 2025

LOZ0GO

Agency Locator

Booked by Sally Jensen

⚠

Know before you go: Get resources and info for your upcoming trip [here](#).

Passenger

Chris Offerzen

Online Support: (888) 535-0179

Online Email: [onlinesupport@cbtravel.com](mailto:onlinesupport@cbtravel.com)

Phone:

After Hours:

QRO to DFW

Departing: Wed May 28, 2025 at 5:55 AM

Queretaro, Mexico to Dallas, Texas

Status: CONFIRMED

Departure: Queretaro Airport

Arrival: Dallas Fort Worth

Wed May 28, 2025 at 5:55 AM

Wed May 28, 2025 at 9:30 AM

American Airlines Flight 1432

Duration: 2 hours and 35 minutes

Confirmation: PTQ9

Aircraft: Airbus A319

Seat Information

Passenger Name	Seat	Class	Frequent Flyer #
		Economy (G)	4R022P6

DFW to YYZ

Departing: Wed May 28, 2025 at 12:20 PM

Dallas, Texas to Toronto, Canada

Status: CONFIRMED

Departure: Dallas Fort Worth

Arrival: Lester B Pearson Intl

Wed May 28, 2025 at 12:20 PM

Wed May 28, 2025 at 4:25 PM

American Airlines Flight 1111

Duration: 3 hours and 5 minutes

Confirmation: N6VR

Aircraft: Boeing 737-800

Seat Information

Passenger Name	Seat	Class	Frequent Flyer #
		Economy (G)	4R022P6

Ticketing Information

Invoice 288667247

Ticket #	Passenger	Vendor	Type	Payment	Issue Date	Base	Tax	Total
845472		American Airlines	Air	VIXXXXXXXXXXX02	05/21/2025	\$381.00 USD	\$66.37	\$473.67 USD

Total Tax: \$66.37

Total Air Fare: \$473.67

Sub Total: \$473.67

Total Charged: \$473.67

# Groups & event travel request process



1. JSU fills out the form depending on group or event travel request
2. Submit via email address listed on the form
3. Advisors will coordinate on the reservations with main contact from JSU listed on form within 24 hours of submission
4. Option to call 1-866-371-3580

## ► **Best Practices**

1. Fill out the form as completely as possible
2. Include in your email request the departure date for prioritization by the groups department in subject line
3. Include any pertinent additional info  
ex: Wheelchair required







THANK YOU FOR YOUR PARTNERSHIP!  
JACKSON STATE, THEE WE LOVE

# Entering Out-of-Pocket Expenses in Concur

1. Log in → Concur Solutions

2. Go to **“Start a Report”** → Select your open expense report or create a new one

1. Add Expense → Click + New Expense

2. Select Type → Choose **Out-of-Pocket** (e.g., meals, mileage, supplies)

3. Enter Details → Date, vendor, payment type = *Cash/Personal Card*

4. Attach Receipts → Upload or email verified receipts

5. Save & Submit → Review report before final submission

The screenshot shows the 'New Expense' form in Concur. The form is divided into two tabs: 'Details' and 'Itemizations'. The 'Details' tab is active. The form includes the following fields and options:

- Allocate** (icon)
- Expense Type \*** (Required field): Office Equipment/Hardware (dropdown)
- Transaction Date \*** (Required field): MM/DD/YYYY (calendar icon)
- Business Purpose \*** (Required field): (text input)
- Enter Vendor Name**: (text input)
- City of Purchase**: (dropdown)
- Payment Type \*** (Required field): Cash / Out of Pocket (dropdown)
- Amount \*** (Required field): (text input)
- Currency \*** (Required field): US, Dollar (dropdown)
- ☐ **Personal Expense (do not reimburse)**
- Comment**: (text area)

On the right side of the form, there is a section for attaching receipts:

- Add Receipt** (button with an upward arrow icon)
- Click to upload or drag and drop files to upload a new receipt.
- Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
- 5MB limit per file.

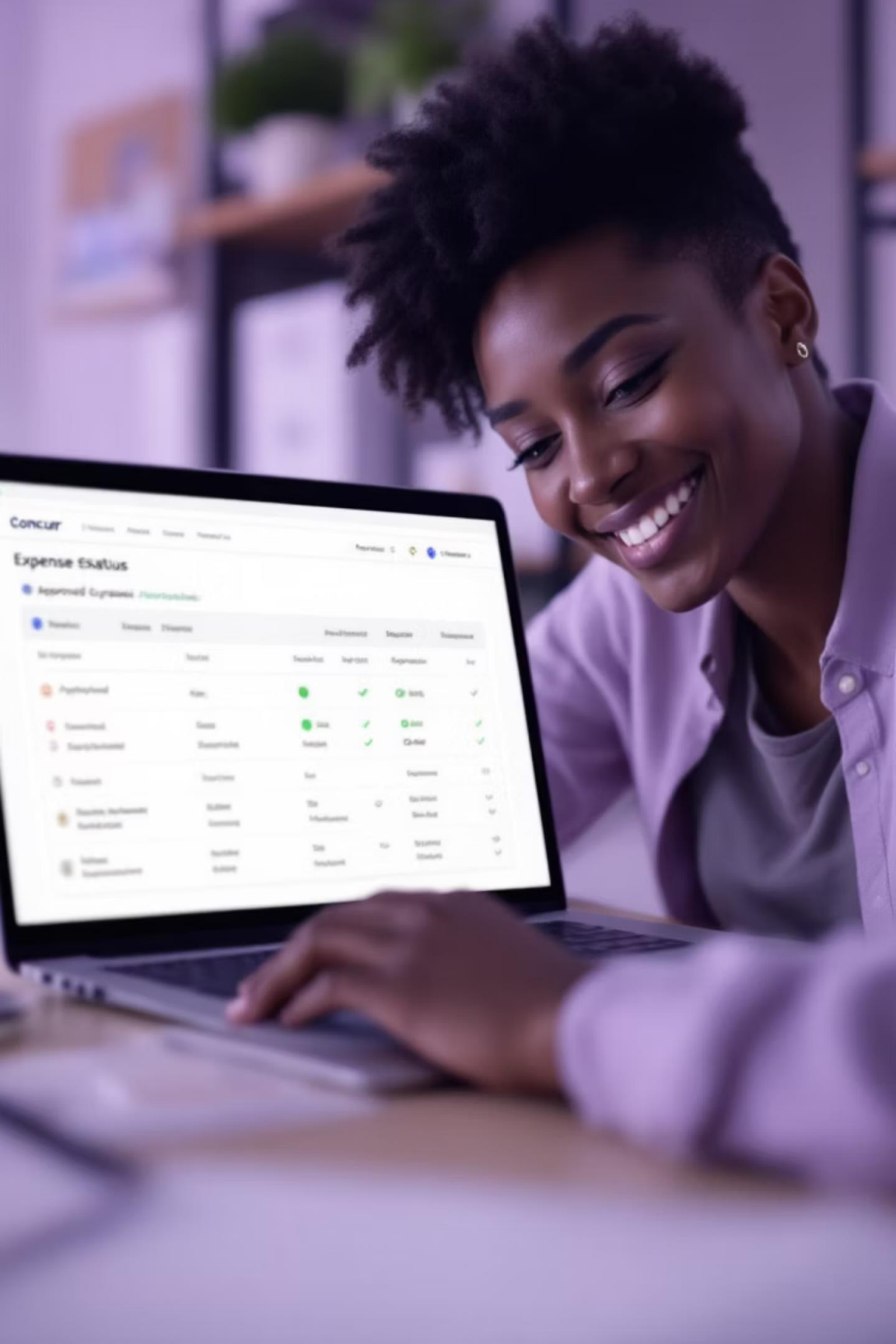
At the top right of the form, there are buttons for **Cancel**, **Save Expense**, and **Hide Receipt** (with a receipt icon).





FINALLY, WE ARE READY TO  
COMPLETE YOUR EXPENSE  
REPORT LIVE





# Summary and Tips for Successful Processing

24-48

Processing Hours

Average approval time for most organizations.

10

Days to Submit

Recommended maximum time after travel to file expenses

100%

Receipt Compliance

Target for attaching all required documentation

Remember to double-check all dates, destinations, and receipts before submitting any requests or reports. Track the approval status through your Concur dashboard and respond promptly to any questions from approvers. Following these best practices will ensure smooth processing and timely reimbursement.

For additional help, consult your organization's travel policy or contact your travel administrator with specific questions about your company's Concur implementation.



***One-on-one sessions  
are available upon  
request.***

*THEE STANDARD for the Culture*

# CONTACT INFORMATION FOR JSU TRAVEL DEPARTMENT

Yolanda Howard: [travel@jsums.edu](mailto:travel@jsums.edu) 601-979-0869

Vernea Weathers: [vernea.w.weathers@jsums.edu](mailto:vernea.w.weathers@jsums.edu) 601-979-0695

Kimberly R. Harris: [kimberly.r.harris@jsums.edu](mailto:kimberly.r.harris@jsums.edu) 601-979-0978



# Questions and Answers Session