Concur Travel & Expense

Section 1: Getting Started

Step 1: Log on to Concur Travel & Expense

1	In the **User Name** field, enter your ***EmployeeID@domain*** *(i.e., 00123456@sog.ga.gov) Your User Name and initial password will be provided.*
2	In the **Password** field, enter your ***password***.
3	Click **Login**.

If you are not sure how to access Concur Travel & Expense, check with the Concur Georgia Travel local administrator for your agency.

Attention:

Throughout Concur, REQUIRED fields are marked with red bars.

Section 2: Use My Concur

Step 1: Explore the available options

1	Explore the **Trip Search** section.
2	Look at the **Weather** section.
3	Explore the **Travel Info** section.
4	Explore the **Company Info** section.
5	Locate the **Expense Reports** (may be labeled **Active Work** for your agency**)** section. *Active Work will appear if your agency uses Authorization Requests or Cash Advances.*
6	View the **Approval Queue** section. *This section appears only if you are logged on as an approver.*
7	Locate the **Trip List** section.

Section 3: Update Your Profile

Step 1: Change your password

1	At the top of the My Concur page, click **Profile**.
2	From the **Other Settings** menu on the left side of the page, click **Change Password**.
3	In the **Old Password** field, enter your current password.
4	In the **New Password** field, enter your new password.
5	In the **Re-enter New Password** field, enter your new password.
6	In the **Password Hint** field, enter a hint or reminder for instances when you have forgotten your password.
7	Click **Submit**.

Step 2: Verify your time zone, date format.

1	At the top of the My Concur page, click **Profile**.
2	From the **Other Settings** menu on the left side of the page, click **System Settings**.
3	On the **System Settings** page, update the appropriate information, and then click **Save**.

Step 3: Update your personal information

1	At the top of the My Concur page, click **Profile**.
2	Click **Personal Information** in the middle of the page.
3	On the **Personal Information** page, update any required information, and then click **Save**.

Step 4: Set up a Travel Arranger or Assistant

1	At the top of the My Concur page, click **Profile**.
2	Select **Personal Information**.
3	Scroll down to the **Assistants and Travel Arrangers** section.
4	Click **Add an Assistant** located to the right of the section.
5	In the **Search Criteria** field, type the last name of the person you wish to add as an assistant/travel arranger.
6	Click **Search**.
7	From the **Assistant** dropdown menu, select the appropriate assistant.
8	Select **Can Book Travel for Me**.
9	Select **Is my primary assistant for travel**, if necessary.
10	Click **Save**.

Step 5: Verify Expense Information

1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Information**.
3	On the **Expense Information** page, verify the pre-populated information.

Contact GA Travel & Expense local administrator for your agency if any Expense Information is incorrect.

Step 6: Add an Expense Delegate

1	At the top of the My Concur page, click **Profile**.

2	On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
3	On the **Expense Delegate** page, click **Add Delegate**.
4	In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
5	From the list of matches, select the appropriate person. Click **Add.**
6	Select the responsibilities you wish this delegate to perform on your behalf.
7	Click **Save**.
Step 7: Change Expense Preferences	
1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Preferences**.
3	In the **Send email when**… section, select the appropriate actions.
4	In the **Prompt**…section, select the appropriate actions.
5	In the **Display**…section, select the appropriate options.
6	Click **Save**.
Step 8: Verify Expense Approvers	
1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Approvers**.
3	On the **Expense Approvers** page, verify that your default expense approver is correct.
If the approver name listed for the Expense Approver is incorrect or if the field is blank, contact the GA Travel & Expense local administrator for your agency.	
Step 9: Add Personal Car	
1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Personal Car**.
3	On the **Personal Car** page, click **New**.
4	In the **Vehicle ID** field, enter a name for your vehicle. Include Tier I in the name.
5	Click on the **Vehicle Type** drop down arrow and choose *Car – Tier I*.
6	Click **Save.**
7	Click **New.**
8	In the **Vehicle ID** field, enter a name for your vehicle. Include Tier I in the name.
9	Click on the **Vehicle Type** drop down arrow and choose *Car – Tier II*.
10	Click **Save.**
Note: *If you report mileage expense for a motorcycle or personal aircraft, add them as well.*	
Step 10: Add a Favorite Attendee	
1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Favorite Attendee**.
3	On the **Favorite Attendee** page, click **New Attendee**.
4	From the **Type** dropdown menu, select the appropriate Attendee Type.
5	In the **Last Name** field, enter the last name of the new attendee.
6	In the **First Name** field, enter the first name of the new attendee.
7	In the **Attendee Title** field, enter the job title of the attendee.
8	In the **Company** field, enter the company where the attendee is employed.
9	Click **Save** or **Save & Add Another**

Section 4: Set Up Receipt Store Account

Step 1: Verify your Email Addresses	
1	From **My Concur** select **Expense** then select **View Receipt Store.**
2	Enter your email address and click **Submit.** Up to three email addresses may be registered.
Note: *An email address can only be registered with Concur ONCE. Before linking an Expense Delegate's email address to your image account, be certain they don't need to retain it for their own account.* *Concur will send an email to your linked email addresses with a Validation Code for each linked email account.*	
3	From **My Concur** select **Expense** then select **View Receipt Store.** Enter the validation code in the **Code** box and click **Verify**. You will then be able to email receipt images to your Receipt Store at myinbox@concursolutions.com.

Section 4: Make a Travel Reservation

Step 1: Make a flight reservation

1	On the **Flight** tab, select one of these: • Round Trip • One Way • Multi-Segment
2	In the **Departure City** and **Arrival City** fields, enter the cities for your travel.
3	In the **Departure** and **Return** fields, select the appropriate dates and times.
4	If you need a car, select **Pick-up/Drop-off car at airport**.
5	If you need a hotel, select **Find a Hotel**. (More information appears; make the appropriate choices.)
6	Select **Non-Refundable.**

Policy Note: *Refundable fares must be within $100 of a Non-Refundable fare. To search and compare pricing on Refundable and Non-Refundable fares select **Refundable**.*

Policy Note: *Choose lower cost flights within +/- 2 hours of preferred flight times when this fare saves $200 or more roundtrip.*

Policy Note: *Choose connecting flights over non-stop when it adds 2 hours or less to travel time and saves $200 or more. Not required if change of airline at the connection point is required.*

Policy Note: *Domestic flights – coach class only. Upgrades after booking at travelers expense. International flights – see Travel Policy.*

Policy Note: *Cancellations, Voids and Exchanges – see Travel Policy.*

7	In the **Search Flights By** field, select either **Price** or **Schedule**.
8	Click **Search**.
9	Before clicking **Reserve** for the appropriate flights, click **show details**.
10	Click the **View Seat Map** icon next to the flight.
11	Click any green (unoccupied) seat (move the mouse pointer over a seat to see the number). Click **Select Seat**, and then click **Close**.

Note: *Air Travel Insurance is <u>automatically</u> included at no cost when you book your company paid reservation through Concur. You **do not** need to purchase it separately*.

12	Click **Reserve**.

Note: *Access the airline website directly to process baggage. Usually less expensive if done online.*

Policy Note: *Reimbursement allowed for up to 2 checked bags.*

Step 2: Select a rental car

1	If you specified that you need a car on the **Flight** tab, you will see car results for the car search.

Policy Note: *If your trip exceeds 100 miles or you will be gone longer than 24 hours, a Rental Car is recommended.*

*Enterprise and National rental car contracts are mandatory statewide. Renting outside the Statewide vendor contract requires an approved **Statewide Contract Waiver Request (SPD-NI005)** and must be attached to your Expense Report*.

4	Select the appropriate rental car, and then click **Reserve**.

Step 3: Select a hotel

*If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose your rental car.*

1	Use the filter options to narrow your search by **Amenity**, **Neighborhood**, or **Chain**.

Policy Note: *Travelers are required to submit a copy of the Occupancy Tax Exemption Form to in-state lodging vendors at registration. Link to form at top of the availability page.*

2	Click **Show Details** for a specific hotel to view more detailed information.
3	A rate range appears. Click **choose room** to view rates and details about the room.
4	When ready to reserve your room, click the radio button to the left of the rate, and then click **Reserve.**
5	Check your itinerary, and then click **Next**.

Step 4: Complete the Booking

1	Enter your trip information in the **Trip Name** and **Trip Description** fields.
2	Click **Next** to finalize your reservation.
3	To complete the booking, click **Purchase Ticket**.

Section 5: Cancel or Change Airline, Car Rental, or Hotel Reservations

Flight changes are available for e-tickets with a single carrier. You can change the time or date of a ticketed flight that has not yet occurred. Your change options will be with the same airline and routing.

Direct contact with Travel Consultant to book reservations may incur additional charges.

1	At the top of the **My Concur** page, click **Travel.**
2	In the In the **Upcoming Trips** section of My Concur, click the name of the trip.

3	Click **Change Trip**.
4	On the itinerary, click the appropriate link to: • Email your itinerary • Change seat • Change the flight day or time for travel (you cannot change the airline) • Add, change, or cancel parking • Add, change, or cancel a taxi • Add, change, or cancel car rental • Add, change, or cancel hotel • Add, change, or cancel dining
5	To cancel your entire trip, in the **Upcoming Trips** section of My Concur, click the name of the trip.
6	Click **Cancel Trip**, and then click **OK**.

Section 6: Create an Expense Report from a Completed Trip

ONLY create Expense Reports after trip has been ***COMPLETED.***

DO NOT combine in-state, out-of-state and international travel expenses. All required fields have red bars.

1	Click on **My Concur**
2	In the **Trip List** section locate the completed trip to be expensed. Click the **Exp Report?** Icon next to the trip. Concur Travel & Expense will create an expense report for you and attach the applicable expenses to the report.
3	Verify that the Smart Expense items are correct.
3	Add any out of pocket expenses. See Section 7, Step 2.

***Note**: Prior to submitting an Expense Report you can attach specific receipts to specific line items. If you attach receipts after you click Submit, they can only be Expense Report level receipts.*

3	Print, submit, and provide receipts. *Refer to sections 10 and 11 of this guide for details regarding printing, providing receipts and submitting your expense report.*

Section 7: Create a New Expense Report -No Travel Booked in Concur

Step 1: Create the report

If you have booked travel with Concur Travel see Section 6 to create Expense Report.

1	In the **Expense Reports** (may be labeled **Active Work** for your agency**)** section of My Concur, click **New Expense Report**.
2	The current system date defaults in the **Report** Date field.
3	In the **Report Name** field, enter a name for the expense report. Include the travel dates in the Report Name. (i.e. Banking Conference 0612 to 0618)
4	Click on the arrow in the **Trip Type** field and select the appropriate trip type: In-State Travel, International Travel or Out Of State travel from the drop down menu.
5	Click on the calendar icon in the **Trip State Date** field, click on trip start date.
6	Click on the calendar icon in the **Trip End Date** field, click on trip end date.
7	In the **Business Purpose** field, enter the business purpose for the expense report.
8	Complete all required and optional fields.
9	Click **Next**.
10	A **Travel Allowance** window opens: Will this trip include Travel Allowance Expense? Select Yes if Per Diem applies to this trip.

Policy Note: *On day of departure /return, Travel Allowance is calculated at 75% of Per Diem rate and is based on the last location of the travel day.*

Multiple travel destinations: Departure day- Based on where you spend the night; Return Day – based on where you spent the night before returning home.

Travel Allowances for single day where travel exceeds 30 miles from the home/office location and continuous travel is 13 hours or greater are calculated at 75% of Per Diem based on last travel location.

Step 2: Add out-of-pocket expenses to the new expense report. Required fields have red bars.

1	On the **New Expense** tab to the right, search or scroll to locate the appropriate expense type and click on it.
2	Click on the calendar icon in the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3	The purpose of the trip is populated from entering Step 1, Section 7.
4	Enter the merchant name for the expense in **Vendor Name** (i.e. Staples, FedEx)
5	Start entering the name of the city where the merchant was located in the **City** field. When the correct city and state (or country) appears select it

***Note:** This field acts like a search field. To restrict the search to the US click the arrow next to "all countries" and select United States.*

6	Verify the **Payment Type** is correct. Click

	the arrow in the **Payment Type** field to choose from Out of Pocket or Company Paid.
7	In the **Amount** field, enter the amount spent on the expense.
Note: *Click the **Personal Expense** box for any personal and non-reimbursable items on the receipt See Travel Policy for Miscellaneous expenses-reimbursable and non-reimbursable.*	
8	If you have scanned your receipt into your computer, click **Attach Receipt** to locate the file and attach it. If you emailed or faxed your receipt to Concur, click **Receipt Store** and select the receipt to attach it to the expense item.
9	Click **Save.**

Section 8: Review or Edit a Report

1	In the **Expense Reports** (may be labeled **Active Work** for your agency**)** section of My Concur, click the name of the report that you want to review to open it.
2	Select the expense item you want to correct, make the change and **Save.**
3	To correct details for the overall trip, select the **Details** Tab, then select **Report Header** from the dropdown menu. Make any changes and **Save**.
3	Click **Save**.

Section 9: Using Special Features

Convert Foreign Currency Transactions

1	Click **New Expense**.
2	On the **New Expense** tab, select the appropriate expense type.
3	Complete all required fields as usual *except* **Amount**.
4	In the **Amount** field, enter the amount spent on the expense.
5	Select the "spend" currency from the dropdown list to the right of the **Amount** field.
6	Click the appropriate mathematical symbol (multiply or divide) to change the conversion format, if required.
7	Click **Save**

Itemize Nightly Lodging Expenses

Step 1: Itemize nightly lodging expenses

1	For a new item, on **New Expense** tab select the **Hotel** expense type. OR For an item coming into the expense report from a Completed Trip Itinerary Click on the hotel expense item to be itemized.
2	Click the **Transaction Date** field, and then use the calendar to add or correct the date of the transaction.
3	Verify or select the vendor from the Vendor dropdown list.
4	Enter location of hotel in **City**. (i.e. Moultrie, GA)
5	Verify the **Payment Type**.
6	In the **Amount** field, enter the **total** amount of the receipt.
7	Click **Itemize**.
8	On the **Nightly Lodging Expenses** tab in the **Number of Nights** field, enter the number of nights for your hotel stay (the **Check-in Date** will be filled in once you enter the number of nights).
9	In the **Room Rate** field, enter the amount you were charged per night for the room.
10	In the **Room Tax** fields, enter the amount of each room tax that you were charged.
11	In the **Additional Charges (each night)** section from the first **Expense Type** drop down menu, select the appropriate expense type.
12	In the **Amount** field, enter the amount of the expense.
13	Repeat steps 9-10 using the second **Expense Type** field if you have more than one additional recurring charge.
14	Click **Save Itemizations**.

Step 2: Add remaining lodging itemizations

1	If the **Amount Remaining** displayed at the top of the **Expense** tab on the right is more than zero, click the **Expense Type** dropdown arrow, and then select the appropriate expense from the dropdown list.
2	Enter the amount of the expense in the **Amount** field. Check the **Personal Expense** box if this is a personal non-reimbursable expense on the receipt.
3	Click **Save**.
4	Repeat steps 1-3 until the **Remaining Amount** equals $0.00.

Step 3: Travel Itinerary Exception Error

Perform this step if you receive a red flag exception message:" This entry cannot be submitted until a Travel Allowance Itinerary is created."

1	Click on the **Details** tab. Select **New Itinerary.**
2	In the **New Itinerary Stop** column, enter your departing location in the **Depart From (city)** field until you can select a matching location.
3	***Enter your departure time in the Time field.***
4	Enter your destination in the **Arrival In (city)** field.
5	Enter your arrival time in the **Time** field.
6	Click **SAVE**. The itinerary will be attached to the Expense Report.

Allocate Expenses

1	Complete all expenses as usual.
2	Click **Details** tab and select **Allocations** from the dropdown list.
3	Select the expense(s) you wish to allocate from the Expense List. You may choose multiple or all the expense items.
4	In the upper right-hand corner of the window, click **Allocate Selected Expenses**.
5	In the **Allocate By** field, enter the appropriate **Percentage** or **Amount**.
6	Click **Add New Allocation**, and then repeat steps 5-6 for each new allocation. *Note that there is a running total of how much remains to be allocated to the right of the window title (Allocations).*
7	Click in the field under the **Department** column heading, and then select the department if this is configured for your agency. *Add new allocations as necessary. Default information is your home department.*
8	Click in the field under the **Program** column heading, and then select the department. Verify **Fund Source** and the remaining fields. Correct if necessary.
9	Click **Save**, and then click **OK**.
10	In the **Allocate Report** window, click **Done**.

***Note:** Once manual allocations are entered, the last 5 ways allocations were performed can be easily recalled from "most recently used" option.*

Itemize Expenses

1	On the **Expense Report** page, click the expense item you want to itemize (use more than one expense code).
2	Click **Itemize**.
3	On the **New Itemization** tab, click the **Expense Type** dropdown arrow and select the appropriate expense from the dropdown list.
4	Complete all required and optional fields such as **Vendor, Transaction Date** and **Amount.**
5	Click **Save**.
6	Repeat steps 3-5 until the **Remaining Amount** equals $0.00.

Add Attendees

1	On the **New Expense** tab, select the Group Meals expense.
2	Click the **Transaction Date** field, and then enter the date (mm-dd-yyyy) or use the calendar to select the date of the transaction.
3	The Purpose of Trip field should be populated.
4	Enter the merchant name on the receipt into the **Vendor** field. Verify the **City** field is correct.
5	In the **Amount** field, enter the amount of the expense.
6	Scroll down to the **Attendees** Section.
7	To add a new attendee, click the » icon and select **New Attendee**. Complete the required fields, and then click **Save** or **Save & Add Another.** OR Click **Favorites,** select the attendees for this expense, and then click **Add to Expense.** OR To search for an attendee enter the last name in the **Search Box** and select the correct entry. OR Click the **Search** button. Enter your search criteria, select the attendee. Click **Add to Expense**.
8	Click **Save**.

Add Personal Car Mileage

1	On the **New Expense** tab, select Personal Car Mileage from the **New Expense** List.
2	Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3	In the **From Location** field, enter the starting location of your trip.

4	In the **To Location** field, enter the ending location of your trip.
5	Click the dropdown arrow on **Trip Type** and select appropriate type from list.
6	Verify the personal vehicle used for this tip in the **Vehicle ID** field.
7	Click on the **Mileage Calculator** icon. Enter **<u>all</u>** the waypoints for your trip. Click the box **Deduct Commute** and enter your trip starting point and your office location. To make this a round trip commute deduction, click **Deduct Round Trip**. Click **Calculate Route** or to make mileage round trip, click **Make Round Trip**. Click **Add Mileage To Expense** to update the expense report.
7	Click **Save**.

Copy an Expense

1	On the Expense Report page, from the **Expense List**, select the checkbox next to the expense you wish to copy.
2	Click **Copy**.
3	Click on the new expense.
4	Make all necessary changes to the new expense. The date will increment one day from item you copied from.
5	Click **Save**.

Attach Cash Advances to an Expense Report

Note: *Not all Agencies offer Cash Advances.*

1.	On the Expense Report Page, click on the **Details** tab and under Cash Advances heading on the menu, select **Unassigned**.
2	Click on the box(es) next to the Cash Advances appropriate for the Expense Report. Multiple Cash Advances can be applied.
3	Click **Assign Cash Advance to Report**.

Note: *The Cash Advance does not appear in expenses at this point. To view, click **Print/Email** tab and select ***SOG Detailed Report** to display, print or email the net amount due.*

Detach Cash Advance from Expense Report

1	Open the Expense Report from **View Reports** tab.
2	Click on the **Details** tab and under Cash Advances heading on the menu, select Assigned.
3	Click the box next to the Cash Advance to be detached and then click **Remove From Report.**

Attach Cash Advance that exceeds actual Expense Report Total

1.	On the Expense Report Page, click on the **Details** tab and under Cash Advances heading on the menu, select **Unassigned**.
2	Click on the box(es) next to the Cash Advances appropriate for the Expense Report. Multiple Cash Advances can be applied.
3	Click **Assign Cash Advance to Report**.

Note: *The Cash Advance does not appear in expenses at this point. To view, click **Print/Email** tab and select ***SOG Detailed Report** to display, print or email the net amount of the Expense Report.*

4	On the **New Expense** tab, select **Cash Advance Return** from the expense list.
5	Enter the **Transaction Date** and the **Amount** of the Cash Advance that was not used.

Note: *The Cash Advance Return appears in the expenses list of the report. To view, click **Print/Email** tab and select ***SOG Detailed Report** to display, print or email the net amount due the State. Print this report to submit with your check to return the funds to the State.*

Policy Note: *Any portion of a **Cash Advance** that was not used must be returned to the State, via check, no later than 45 calendar days after the completion of the trip or event.*

Cash Advances open 180 days after the trip or event, will be deducted from the employees pay.

Outstanding Expenses Advances must be reconciled by the traveler before a new one will be issued, except when another trip begins within five working days of the previous trip or when multiple Cash Advances are issued for the same trip.

Employees who require a payroll deduction for un-reconciled Cash Advances to collect amounts due to the State will not be eligible for Cash Advances in the future.

Section 10: Fax or Attach Receipts

Fax your receipts from your Expense Report

1	From the **Print/Email** dropdown menu, select *** SOG Fax Receipt Cover Page**
2	Click **Print.**
3	Fax the cover page and the receipts to the number on the cover page.
4	To verify the receipts were successfully attached, from the **Receipts** dropdown menu, select **Check Receipts**.

Attach scanned images of your receipts

1	On the **Expense Report** page, from the

	Receipts dropdown menu, select **Attach Receipt Images**.
2	Click **Browse**. Locate the files you want to attach.
3	Click the file, and then click **Open**.
4	To attach another image, click **Browse**, and then repeat the process.
5	Click **Attach**.
6	Click **Close**, when finished.
7	To view the attached receipts, from the **Receipts** dropdown menu, select **View Receipts**.
Attach Line Item Receipts from Receipt Store	
1	Click on Receipt Store.
2	Click on the appropriate receipt and drag it to the appropriate expense entry and drop it.
Delete attached receipt images	
1	On the **Expense Report** page, from the **Receipts** dropdown menu, select **Delete Receipt Images**.
2	In the confirmation window, click **Yes**.
Note: *Do not try to delete individual attached receipt images from here. Deleting will delete ALL attached images. You can detach an individual receipt from the expense entry line.*	

Section 11: Print & Submit or Resubmit Expense Reports

Preview, print, and submit your report	
1	From the **Print/Email** menu, select ***SOG Detail Report.**
2	After reviewing the document, click **Print**, and then click **Close.**
3	On the upper right of **Expense Report** page, click **Submit Report**.
4	In the **Final Review** window, click **Accept and Submit Report**.
5	In the **Report Submit Status** window, click **Close**.
Policy Note: *Expense reports must be submitted within 45 days of travel completion but recommend submitting within 10 days of your trip close*	
Correct and resubmit a report sent back by your approver	
1	In the **Expense Reports** (sometimes also labeled **Active Work)** section of My Concur, read the approver's comment in the **Status** column.
2	Click the report name (link).
3	Make the requested changes.
4	Click **Save**.
5	Click **Submit Report**.

Section 12: Review & Approve Expense Reports

Step 1: Review and approve a report	
1	In the **Approval Queue** section of My Concur, click the name of the Expense Report that you want to view.
2	On the **Expense Report** page, click the expense you want to view. Check it for accuracy and policy.
3	To approve the entire Expense Report, click **Approve.**
Step 2: Send an expense report back to an employee	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	Click **Send Back to Employee**.
3	In the **Send Back Report** page, add comments in the **Comment** box.
4	Click **OK**.
Step 3: Send single expenses back to an employee	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	Review the expense report for accuracy and policy.
3	Click the expense that you wish to send back for correction.
4	Select the **Send Back Expense?** checkbox.
5	Click **Approve**.
You can send back expenses on an expense report without sending back the entire report. You will repeat the steps for each expense that needs to be sent back.	
Step 4: Add an additional review step for an expense report	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	Click **Approve & Forward**.
3	In the **Approval Flow** window, click the **Search Approvers By** dropdown arrow.
4	Select the desired search option from the

	dropdown list.
5	In the **User-Added Approver** field, type the search criteria.
6	From the list of options displayed by the search, select the appropriate approver.
7	Click **Approve**.

Section 13: Request Cash Advance

If your agency does not allow Cash Advances it will not appear under the Expense tab.

Emergency Cash Advances cannot be processed through Concur.

1	At the top of the My Concur page, click **Expense**.
2	Click **New Cash Advance**
3	Enter a name in the **Cash Advance Request Name** field.
4	In the **Amount** field and the amount you are requesting.
5	Use the **Comment** field to provide any additional information necessary.
6	Click **Submit** at the bottom right of the window.

Section 14: Review and Approve Cash Advance Requests

Step 1: Review and approve a report

1.	In the **Approval Queue** section of My Concur, click the **Cash Advances**.
2	Click the **Cash Advance Name** you want to Review.
3	Click **Audit Trail** to review history and **Close** to close Audit Trail window.
5	Click **Comments** to view Comment History. Click **Close** to exit Comment History window.
6	Select **Approve** to approve the request.
7	Click **OK**.