Concur
Travel and Expense Management System

PPPL Concur Implementation Team

07/18/2019

Agenda

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  - Concur Benefits
  - Request, Travel, and Expense Process Visual
  - Getting Started in Concur
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Introduction to Concur

What is Concur Request, Travel and Expense?

- The Concur Request, Travel and Expense System integrates travel authorizations, bookings, and expense reports in one easy-to-use application. Travel transactions stream directly into expense reports.

Introduction to Concur

Concur Benefits

- Improved assistance in travel booking and reimbursement
  - DOE/PPPL's comprehensive travel policy compliance and controls are built into Concur, including the GSA per diem rates, ensuring that reservations are within compliance, and that you can complete your expense reports correctly and according to PPPL's policy.

- User friendly experience
  - No more paper travel approval form and travel voucher
  - Provide you with a seamless travel request, booking, and expense report experience
  - Save you time submitting expense reports, which leads to quicker employee reimbursement
  - Send email notifications regarding document route and review approval status
  - No need for paper receipts for vendors who email receipts directly to your Concur

Introduction to Concur

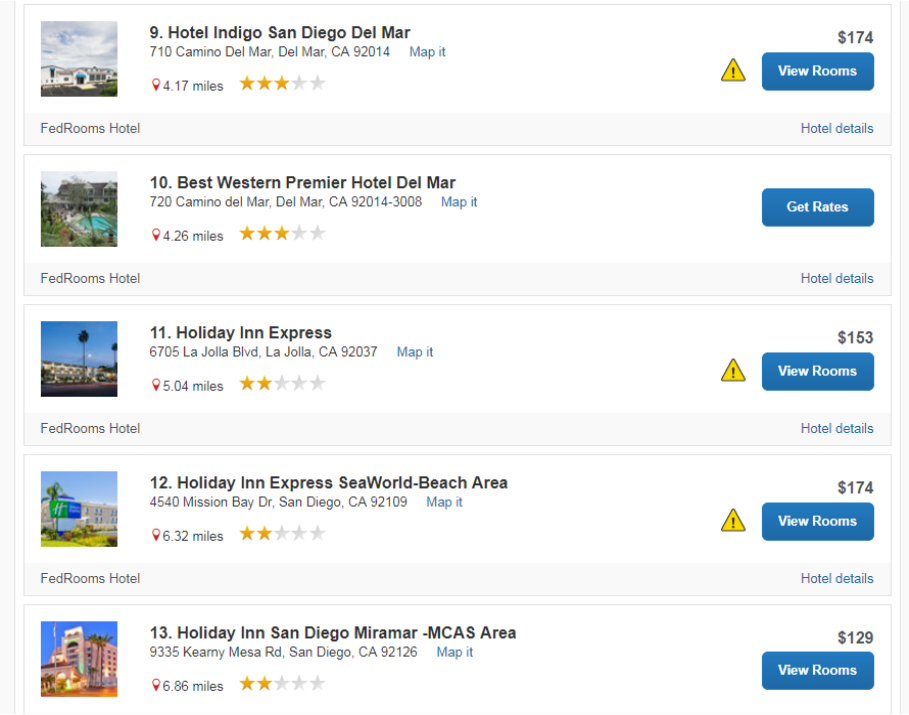
Concur Benefits

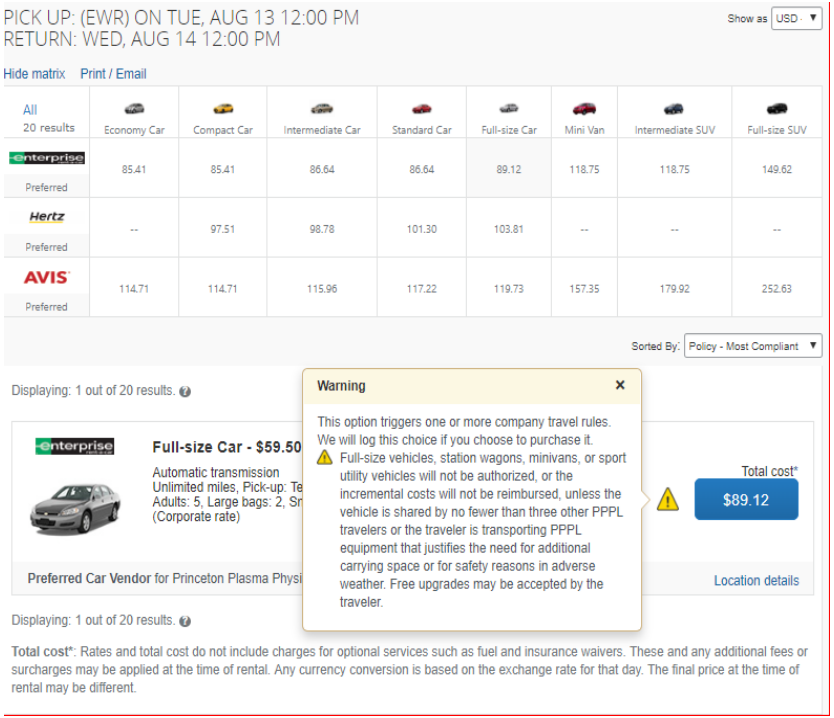
- Travel Card automation
  - Automatically imports posted credit card transactions daily
  - Travel card data will pre-populate information from the transaction into an expense report

- Mobile capabilities
  - Book a flight, rental car or hotel on the go
  - Take a photo to upload your receipts
  - Create, submit and approve expense reports using the Concur mobile application

Introduction to Concur

Built-in Compliance Rules





Introduction to Concur

Status updates and approval notifications

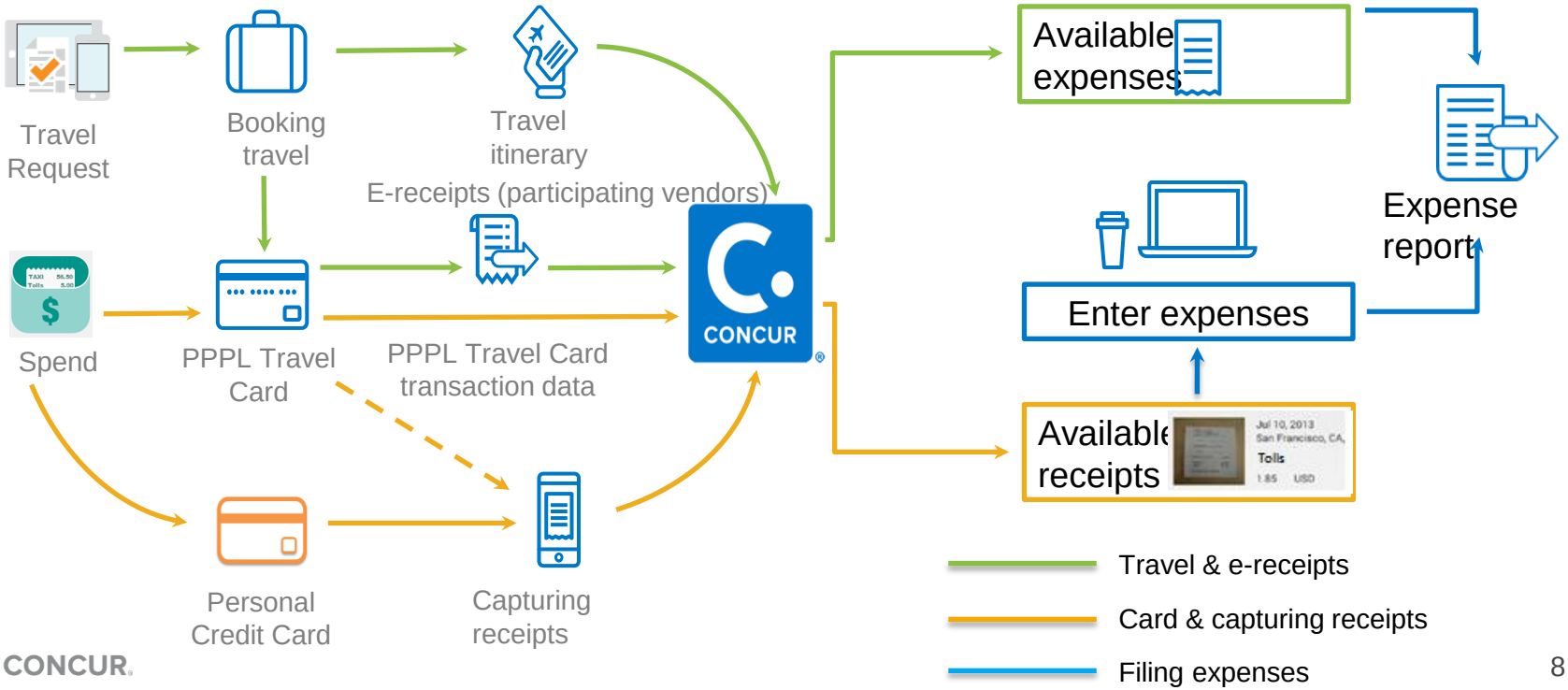
- Status Updates are sent via email:
  - Request:
    - Upon Travel Office approval of request
    - Upon FTMS approval of foreign travel
  - Travel:
    - Upon submission of booking
    - Upon ticketing
  - Expense:
    - Upon Accounting review and approval

- Travelers will be notified if a request or expense report is returned for correction/ additional information

- Approving managers will receive an email notification when a report is sent to them for approval

Introduction to Concur

Your new request, travel and expense process



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Getting Started in Concur

- Update your Employee Profile (one time)
- Download and install Concur Mobile and TripIt app on your phone (optional)
  - Enable eReceipts
  - Activate your free TripIt Pro subscription
- Create* and submit your travel request
- Book* your travel via Concur (or contact Graycar***) once you are notified to do so
- Travel and capture your receipts via Concur Mobile app
- Prepare** and submit your Expense Report
- Check the status of your request or report

* *Can be done by your Request Delegate or Travel Arranger*
** *Can be done by your Expense Delegate*
*** *Contact Graycar if you require assistance during the booking process*

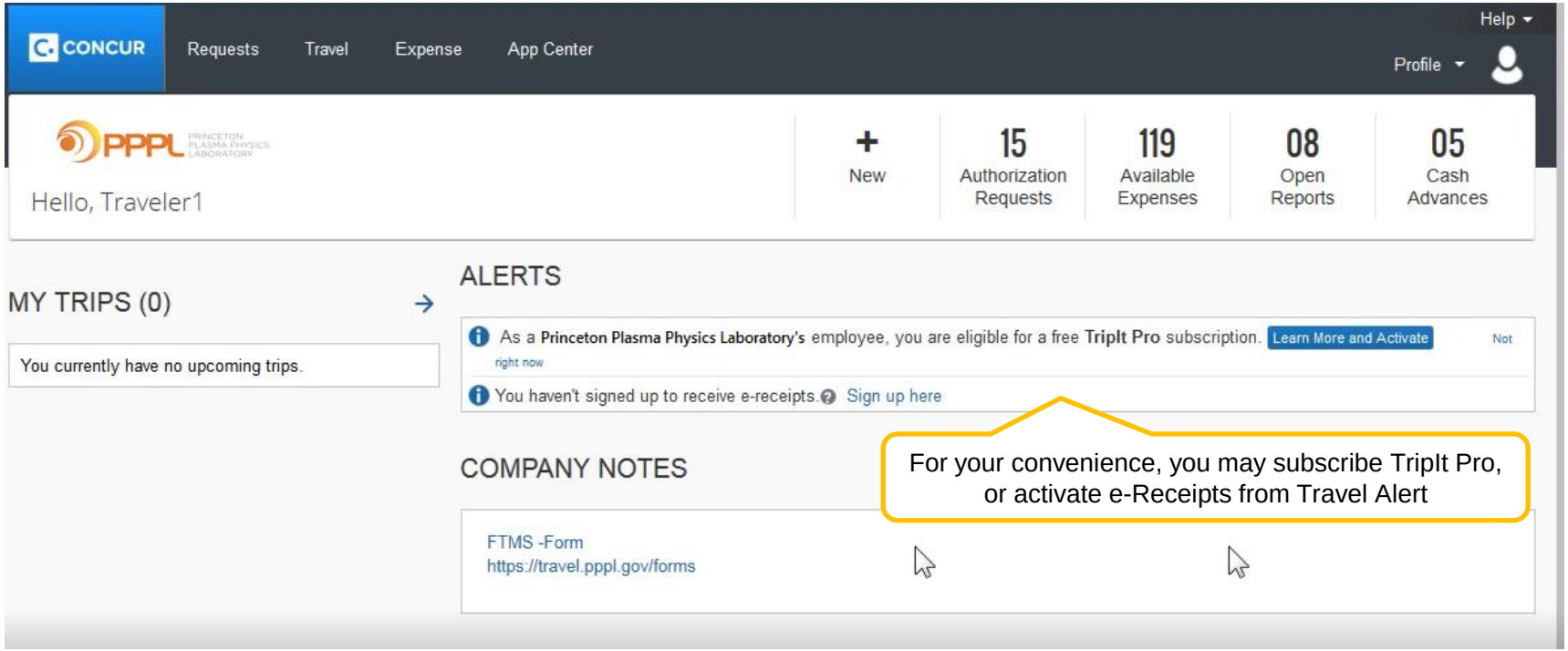
Introduction to Concur

Updating Employee Profile

- What are key fields that need to be confirmed or updated in your profile?
  - Ensure that your first, middle, and last name are identical to those on the photo identification that you will be presenting at the airport
  - Contact Information, you must enter Work Phone or Home Phone
  - Verify your email address. Your “@pppl.gov” email address is already populated in your profile. Verifying your email address allows you to email your receipts to receipts@concur.com
- Additional updates (Optional)
  - Assign an expense delegate who can update your expense settings, and prepare expense reports for you
  - Assign a request delegate who can update your request settings and prepare travel requests for you
  - Assign a travel arranger who can update your travel settings, and book travel on your behalf

Introduction to Concur

Travel Alert



For your convenience, you may subscribe TripIt Pro, or activate e-Receipts from Travel Alert

Introduction to Concur

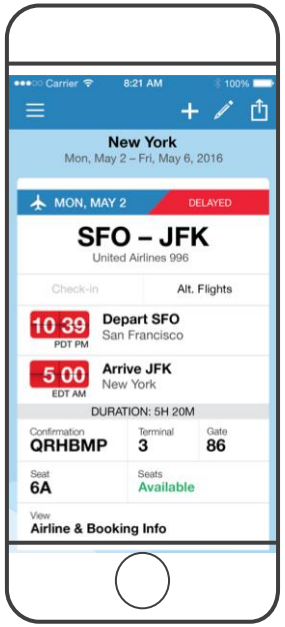
TripIt Pro Benefits

Organize all travel plans in one place, accessible anytime, anywhere, on any device.

Get real-time flight alerts.

Easily find alternative flights.

Navigates you through the airport.



How to activate TripIt Pro?

- Download TripIt Pro from the link on PPPL travel website
- Navigate to the Concur home page. Under the Travel Alerts section, Click the 'Learn more and activate'

Introduction to Concur

Activate E-receipts

Benefits of E-receipt:

- Once travelers complete the E-receipt activation, e-receipts generated by their transactions with participating suppliers will be automatically sent to Concur and matched with itineraries.
- Travelers can access and print these e-receipts at any time from their trip library

How to activate E-receipts?

- Activate e-receipts by navigating to the Concur home page. If you have not signed up for e-receipts, there will be an icon under the Travel Alerts section inviting you to sign up. Click the Sign Up Here button to accept the terms and activate e-receipts. (see screen shot on slide #11), or
- Activate it via user profile

E-Receipt Partner:

Introduction to Concur

Concur Mobile App

Benefits:

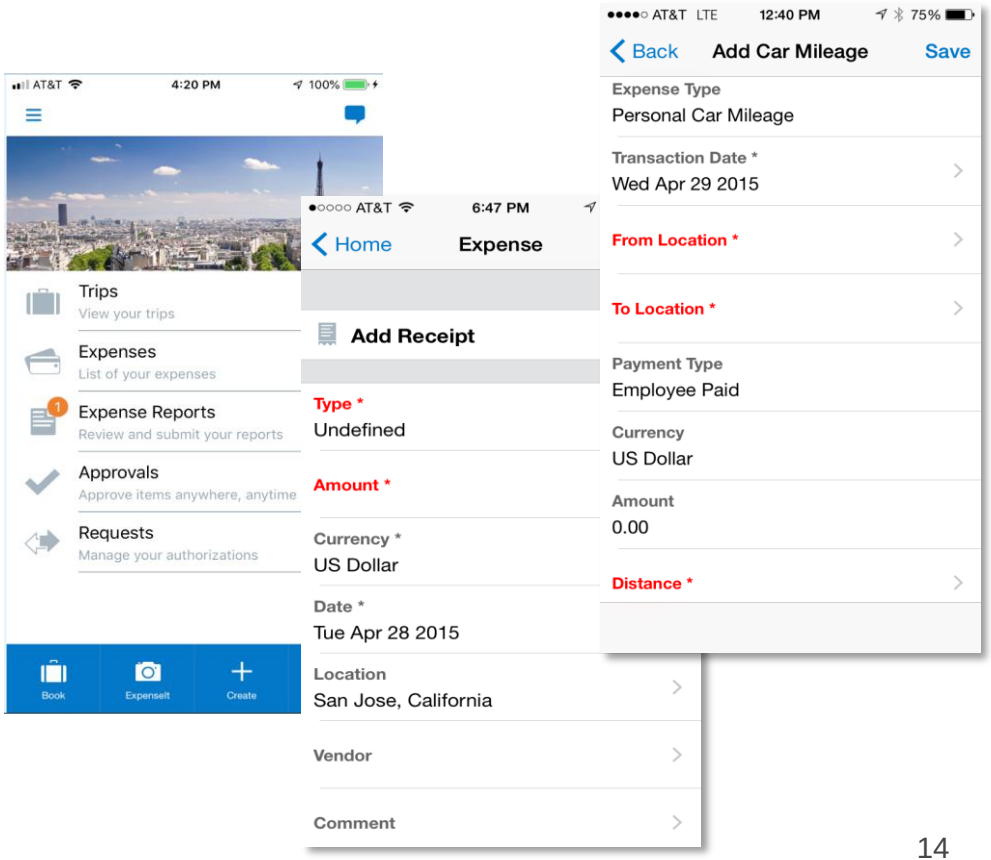
- Book your trip on the go
- Instantly capture receipt images
- Mileage tracking
- Approve or reject expense reports

How to Activate:

- Complete Mobile Registration via user profile in Concur
- Download Concur App from PPPL travel website

Concur Mobile Trainings

http://www.concurtraining.com/pr/mobile



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ExpenseIt

Benefits: Simply take a photo of a receipt with your smartphone, and **ExpenseIt** automatically analyze the receipts, creates and categorizes an expense entry, it even itemizes hotel bills.

ExpenseIt comes with the Concur Mobile App.

Concur ExpenseIT Trainings

Click on the icon to start the video

Android

iPhone

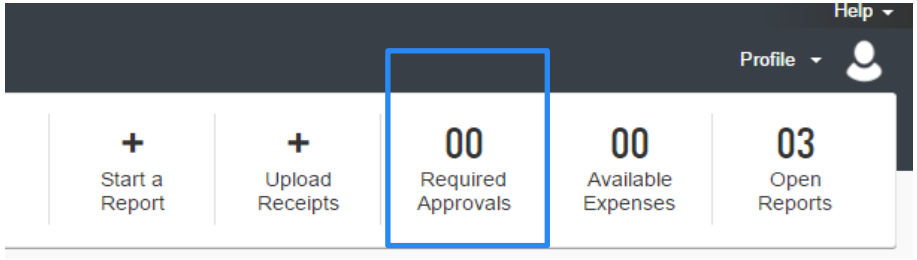
Introduction to Concur

Approvals

Approvals must be done within 5 calendar days; if you do not approve within the time limit, the request/expense report will be escalated.

Approvals can be done either in the web version of Concur or via the mobile app.

Web Version



Mobile Version

In either instance, the approver can review the expenses and receipts and choose to either approve the report or send back to submitter.

Change in Process

Foreign Trip Booking

1. Traveler completes a condensed FTMS form offline
2. Traveler creates travel request in Concur and attaches completed FTMS form
3. Concur routes trip request for approval(s)
4. After Travel Office reviews and approves the request, Concur notifies the traveler to book the travel arrangements
5. Traveler provides department admin with foreign trip information for input into DOE FTMS system
6. DOE approves the request in FTMS and State Department grants the Country Clearance
7. Travel Office attaches Country Clearance document to the request in Concur
8. Concur generates an email notification to the traveler permitting them to travel. A foreign trip cannot commence without proper Country Clearance and FTMS approval

Note: Foreign trip requests must be submitted 40 days prior to departure date.

Impact on Forms & System

Travel Authorization Form (TAF) - will be decommissioned after this deployment. All new travel requests have to be submitted via Concur. Travel office will reject any requests submitted via TAF.

Foreign Travel Management System (FTMS) Form – will be simplified after the deployment. The new FTMS form can be found on PPPL travel website and your Concur home page.

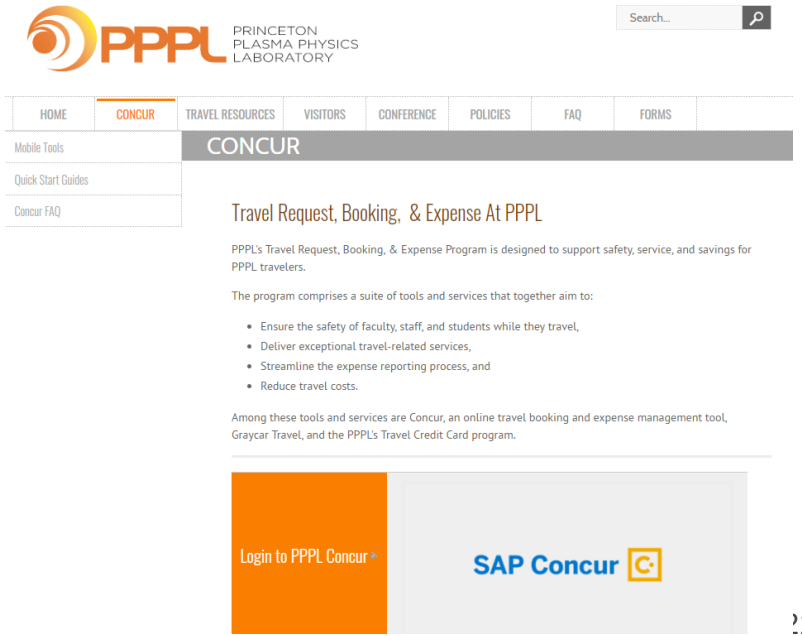
Travel Voucher Form - will remain available for those employees who have submitted TAF **before** 7/29/2019 and whose travel started before August 1. The form will be decommissioned on 10/01/2019. All employees who submit TAF **after** 7/29/2019 must submit an Expense report via Concur to get their travel expense reimbursement.

Concur Training Schedule

Training Type	Date	Location				
			Start	End	Start	End
Lab-wide Information/Training	July 18	MBG Auditorium	11:00 a.m.	12:00 p.m.		
	July 22	MBG Auditorium	1:00 p.m.	2:00 p.m.		
Drop-in Support/Training	July 29	IT Resource Center	12:00 p.m.	1:00 p.m.	3:30 p.m.	5:00 p.m.
	July 30	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	July 31	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	Aug 1	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	Aug 2	IT Resource Center	9:00 a.m.	11:00 a.m.		
	Aug 5	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	Aug 6	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	Aug 7	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.
	Aug 8	IT Resource Center	10:00 a.m.	12:00 p.m.	2:00 p.m.	4:00 p.m.

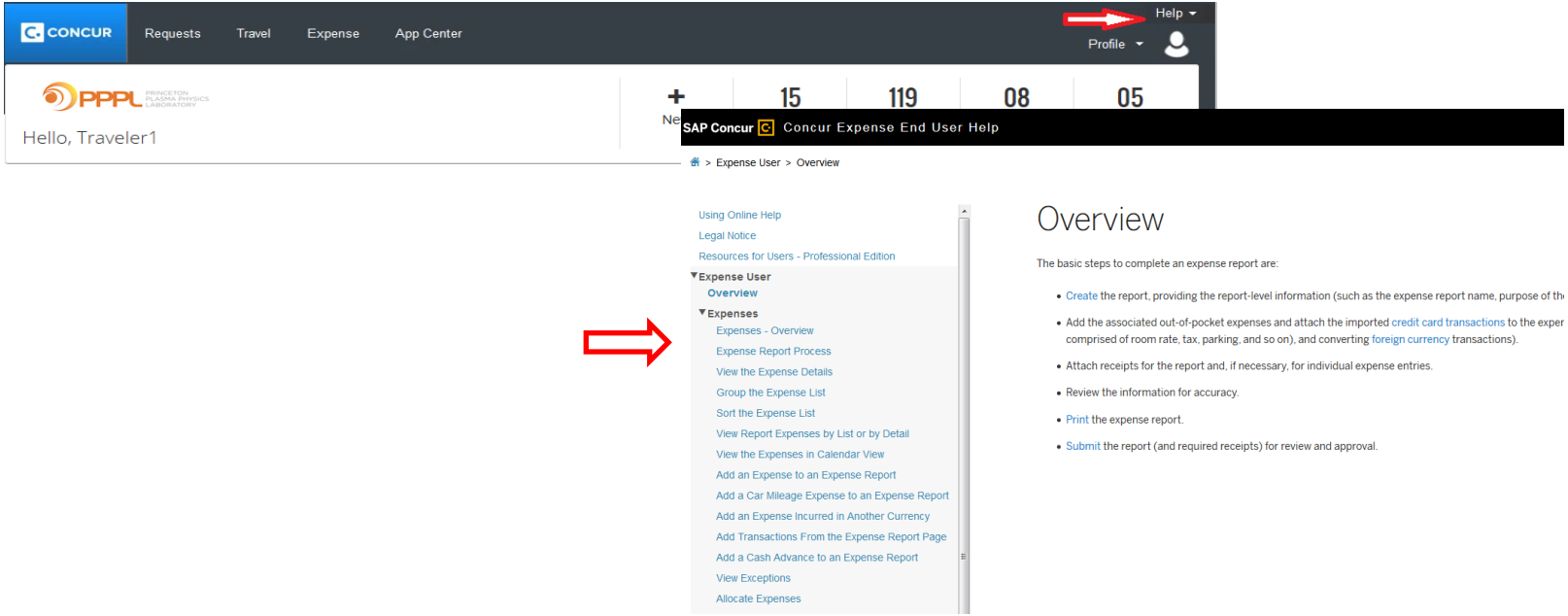
Concur Training and Help Resources

- PPPL tailored training materials, quick reference guides and video demonstrations are located at https://travel.pppl.gov/Concur
  - Mobile Tools: Download link to Concur Mobile, TripIt Pro
  - Quick Start Guides:
    - Video Guides:
      - Basic Concur Training
      - Concur Trip Request Training
      - Concur Travel Training
      - Concur Expense Report Training
      - Step-by-step guides for Request, Travel, Expense, as well as Approvers and Department Admins
    - FAQ



Concur Training and Help Resources

Generic Concur training can be found in the Help section in Concur (the right side of the page).



Concur Training and Help Resources

- If you need help with Concur, please
  - Email: concursupport@pppl.gov or
  - Contact Travel Office