Navigating Guide – Concur Travel & Expense

This document can be used by staff members who require a guide for navigating around the Concur Travel & Expense website. It can be used without any additional training in Concur.

If any additional guidance is required, the user can request one-on-one training by calling x2319 or by emailing CorporateCards@exchange.curtin.edu.au.

Queries regarding Corporate Cards and Concur should be addressed to the above contact details.

Note that the use and acquittal of Corporate Cards are governed by the Curtin University Purchasing Policy. This policy is available at the following web address:
http://www.policies.curtin.edu.au/policies/viewpolicy.cfm?id=6d21357b-f633-11dc-a3de-45785751f674

1. OVERVIEW

Concur Travel & Expense is an Expense Management System used by Curtin University to manage Corporate Credit Card transactions. It is an online system used by Corporate Cardholders, Delegates and Approvers to ensure proper acquittals of all Curtin ANZ Visa expenditure.

To access Concur Travel & Expense:
- Log into Concur: https://director.concursolutions.com/?entity=p00013321qix

  Login ID: Your Staff ID
  Password: Must be at least 8 characters, with at least one numeric character
• The Concur interface:

Once you’ve logged in, this page appears. The default page is the ‘My Concur’ tab.
2. NAVIGATION

The Concur interface has several tabs at the top of the page:

- My Concur
- Expense
- Profile
- Help
- Log Out

Each tab can be accessed simply by clicking on it. The features of each tab will be outlined below.

2.1. My Concur

The ‘My Concur’ tab displays information regarding your active Expense Reports and any Corporate Card expenditure that have yet to be assigned. This page provides a summary of your pending work/transactions.

To view your active Expense Reports, click on the report name.

You can also create new Concur Expense Reports. See Section 2.2.3 (below).

In addition, if you are a Delegate, you can select and view the work/transactions of your cardholder(s).
2.2. **Expense**
The ‘Expense’ tab displays information regarding all your Expense Reports.

There are three separate headings:
- View Reports
- View Charges
- New Expense Report

The features of each heading will be outlined below.

![Three separate headings](image)

### 2.2.1. View Reports
The ‘View Reports’ heading is the default ‘Expense’ tab page. Stated alternatively, this means that if you click on the ‘Expense’ tab (see section 2.2.), it automatically brings you to the ‘View Reports’ page. This page displays information regarding your active Expense Reports. It also allows you to edit any active Expense Reports:

![Click on the report to edit data](image)
To view all the different types of reports, click on ‘View’. For example, to view all Expense Reports created, click on ‘View’ then select ‘All Reports’:

2.2.2. View Charges
The ‘View Charges’ heading displays information regarding your unacquitted/pending transactions. Report name information will be displayed for any transactions that are currently sitting in a pending report.
2.2.3. New Expense Report
Click on ‘New Expense Report’ and you will see this page. You can create new Expense Reports. Note that you are only required to complete the ‘Report Name’ field. The convention used for naming reports is:

Faculty or Division – School or Area – Cardholder’s Initials – Month – Year

For example:
- Faculty or Division: Curtin Business School
- School or Area: Economics and Finance
- Cardholder’s Name: Curtin University
- Month: January
- Year: 2010

Report Name: CBS-ECF-CU-JAN-2010

For more information in regards to Corporate Card acquittals, see the guides available here: [http://finance.curtin.edu.au/forms/index.cfm](http://finance.curtin.edu.au/forms/index.cfm)
2.3. Profile
The ‘Profile’ tab displays information regarding your personal details and preferences.

There are three separate headings:
- Personal Information
- System Settings
- Concur Mobile Registration

Feel free to navigate around this tab. Note that all your work details are already inputted into ‘Personal Information’. You do not have to provide any additional details.

Note also, that you can change your layout/system preferences in ‘Expense Preferences’ and ‘System Settings’.

‘Concur Mobile Registration’ is a feature for mobile phones.

2.4. Help
Hover over the ‘Help’ tab and you will see a drop-down menu. Click on ‘Expense Help’ for help with Concur. A pop-up window appears and you may find helpful Concur tips and guides.
2.5. Log Out
Click here to log out of your Concur session. Concur will ask you to confirm this, click on ‘OK’.

Click here