

## CONCUR TRAVEL & EXPENSE TRAINING

Concur is NATCA's electronic vouchering and travel booking tool. Now that you are signed up for Concur you will submit all your "out of pocket expenses" (cash vouchers) electronically and not on paper.

Unless you have transactions that require approval by different budget managers you should only be submitting one expense report a month.

Below are login instructions as well as instructions and links to training videos. These videos contain the most pertinent information however further help is available on the upper right corner of the Concur site under **Help**.

### Save the Link:

- Click this link to access Concur Travel & Expense: [www.concursolutions.com](http://www.concursolutions.com)

### Login ID and Initial Password:

Your login is the first letter of your first name followed by your last name, for example Joe Smith is "jsmith@natca". Your initial password is "welcome" which you will be immediately prompted to change.

### Profile Setup:

- [Logging on to Concur](#)
- [Exploring the Concur Home Page](#)
- [Updating your Expense Profile](#)
  - Bank Information-This must be done 24 hours before you can submit any cash vouchers.
    - Click **Profile**
    - On the left menu, select **Bank Information** under **Expense Settings**.
- [Updating Your Travel Profile](#)

### Receipts:

To comply with federal regulatory agencies, NATCA still requires a detail receipt of every transaction. However, expense reports with original paper receipts are no longer required. Instead, electronic receipts will be required as follows:

- [Concur Receipt Store](#)
  - In compliance with DOL and IRS requirements, scanned or faxed copies of original unaltered receipts are accepted by NATCA. We still recommend that you store your original receipts in a safe place for up to 5 years.
- [E-Receipts Activation](#)
  - E-receipts provide a detail feed into Concur for airline, car rental and hotel booked through Concur Travel.

### Mobile Registration:

To register, scroll over **Profile** and then click **Concur Mobile Registration**

- [iPhone](#)
- [iPad](#)
- [Blackberry](#)
- [Android](#)

## Booking Travel:

You may book air, hotel and car through Concur. Air travel will be prepaid by NATCA however hotel and car must be paid by the traveler and then reimbursed along with your other out of pocket expenses. Trips booked through Concur require approval before they are finalized.

In order to assure your travel request goes to the correct approver, you must have the approver listed in your profile before booking travel. Under **My Profile**, go to **Personal Information**. Under **Company Information**, make sure the correct manager is listed.

- [Introduction to Travel & Expense](#)
- [Booking a Flight](#)
- [Booking a Hotel](#)
- [Booking a Car](#)
- [Changing a Trip \(After Purchase\)](#)

## Preparing & Submitting an Expense Report:

- [Starting a New Expense Report](#)
- [Adding Credit Card Transactions to an Expense Report](#)
  - For any travel prepaid by NATCA, your Concur account will populate with a credit card feed that you must use to voucher the transaction to which it pertains. Credit card feeds take up to 7 days to populate into your profile. The feed will appear under Available Expenses and must have the first icon under Source as shown in this example:

### Available Expenses

<input type="checkbox"/> Expense Detail	Expense Type	Source	Date ▲	Amount
<input type="checkbox"/> Southwest Airlines	Air & Rail	  	11/03/2015	\$287.96

- [Adding an Out of Pocket Expense to an Expense Report](#)
- [Itemizing Nightly Lodging Expenses](#)
  - You are required to itemize room, meal, parking, internet, etc. charges however NATCA does not require you break out nightly room charges.
- [Itemizing Expenses](#)
- [Allocating Expenses](#)
- [Adding Attendees to Business Meal](#)
- [Converting Foreign Currency Transactions](#)
- [Entering Personal Car Mileage](#)
- [Submitting an Expense Report](#)
- [Correcting and Resubmitting an Expense Report](#)
- [Creating an Expense Report Based on a Completed Trip](#)

## Approving Expense Reports:

- [Reviewing and Approving an Expense Report](#)
- [Sending Back an Expense Report](#)
- [Adding an Additional Review Step](#)
- [Approving or Rejecting a Travel Request](#)

For any travel related questions please call World Travel at (877) 549-1571.