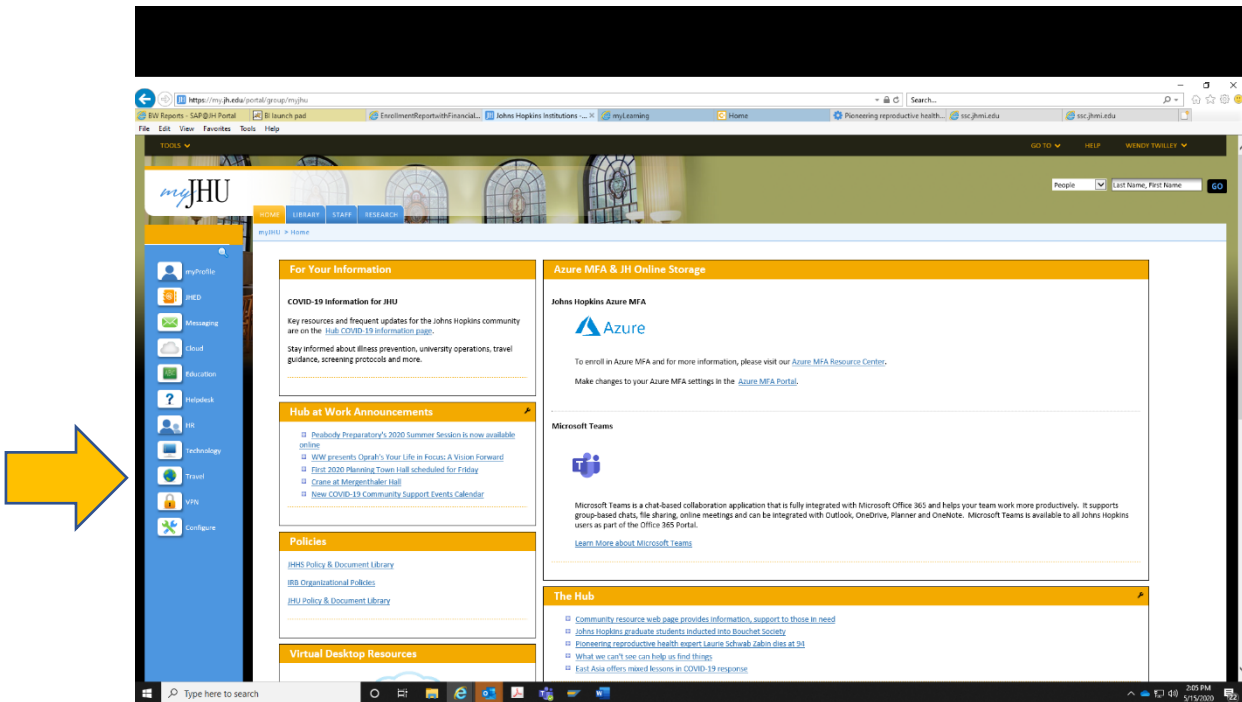


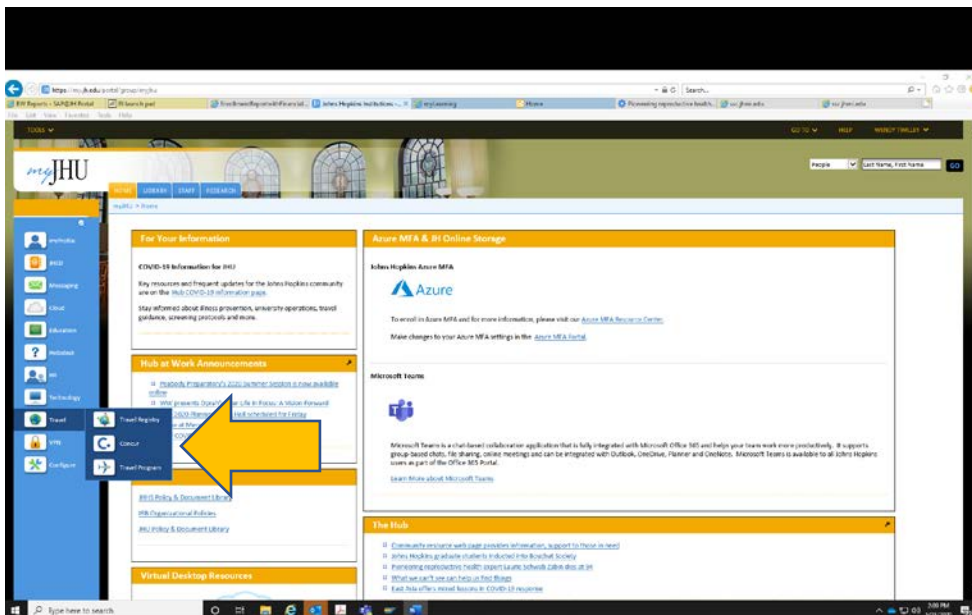
To access Concur

Logon to my.jh.edu

On the menu on left hand side, click on "Travel"



then click "Concur"



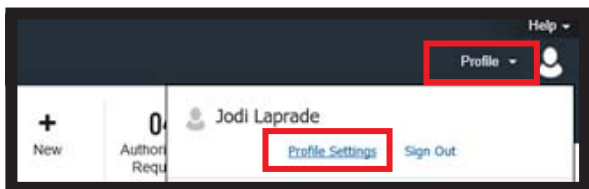
You will then be re-directed to "SAP Concur" page

Updating Your Concur Profile

If you travel or incur expenses, you must access your Concur Profile at least once and update your profile. Updating your profile should be done upon first logging into Concur. You can return to your profile at any time to make edits as needed. Your Concur profile stores your personal information, and expense preferences, some of which are required to be completed.



1. Click Profile => Profile Settings.

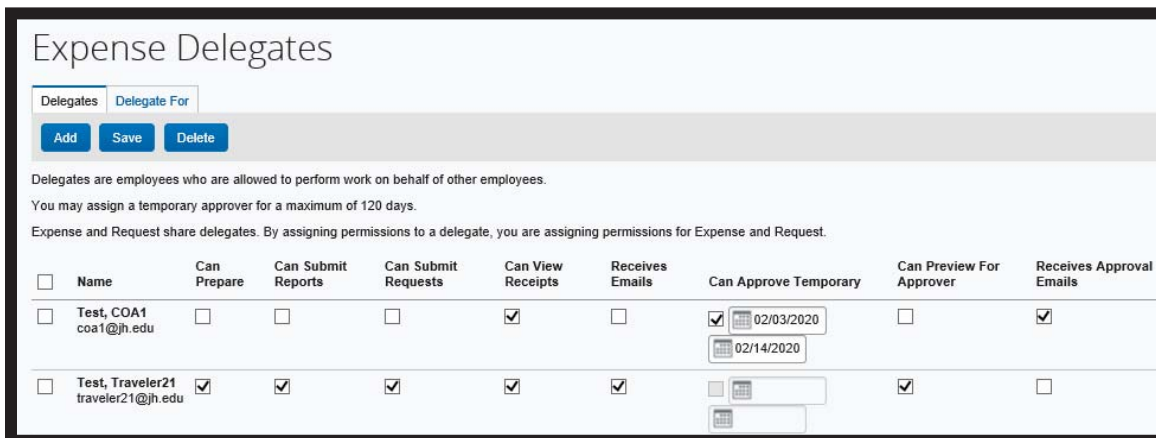


You will find the most common categories of profile tasks under Profile Options in the middle of the page. You can also use the menus on the left hand side to select a specific setting to update.

<p>Your Information</p> <ul style="list-style-type: none"> Personal Information Company Information Contact Information Email Addresses Emergency Contact Credit Cards <p>Travel Settings</p> <ul style="list-style-type: none"> Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers <p>Request Settings</p> <ul style="list-style-type: none"> Request Information Request Delegates Request Preferences Request Approvers Favorite Attendees <p>Expense Settings</p> <ul style="list-style-type: none"> Expense Information Expense Delegates Expense Preferences Expense Approvers Favorite Attendees <p>Other Settings</p> <ul style="list-style-type: none"> E-Receipt Activation System Settings Connected Apps Concur Connect Change Password Travel Vacation Reassignment Concur Mobile Registration 	<p>Profile Options</p> <p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>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.</p> <p>E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>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.</p> <p>Change Password Change your password.</p> <p>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?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p>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.</p> <p>Concur Mobile Registration Set up access to Concur on your mobile device</p>
--	---

If you have updated your Concur Travel Profile settings, you will not need to re-enter the information. Concur Travel and Concur Expense share the same profile screen. However, there are settings that are specific to Concur Expense that should be completed.

- Click the **Expense Delegates** link to add delegates to perform tasks on your behalf, if you will not be completing expense transactions for yourself. Refer to the **Adding Request and Expense Delegates Quick Reference Guide** for additional information.



Expense Delegates

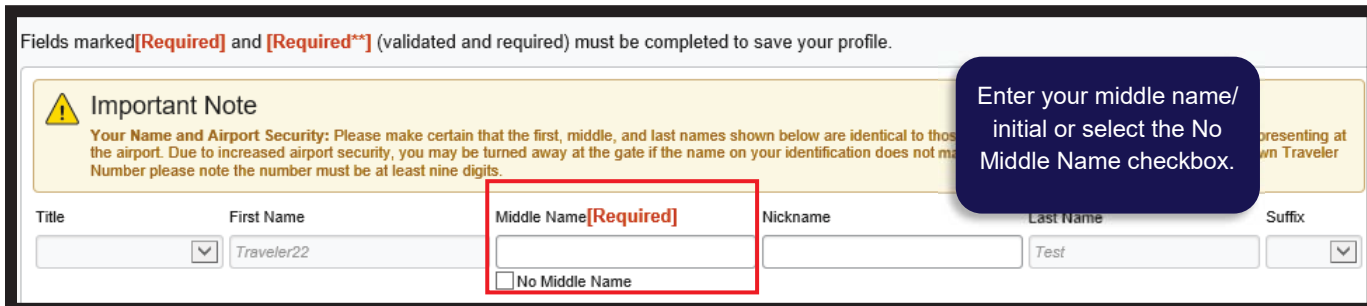
Delegates Delegate For

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.
 You may assign a temporary approver for a maximum of 120 days.
 Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Test, COA1 coa1@jh.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 02/03/2020 02/14/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test, Traveler21 traveler21@jh.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click the **Personal Information** link. This screen contains **[Required]** fields that need to be completed. Some fields are grayed out. This means the information has been pre-populated from your HR data record, and is not editable. The remainder is at your discretion to complete. You can click **Save** as you go, or click any **Save** button once you have filled in the information on this screen.

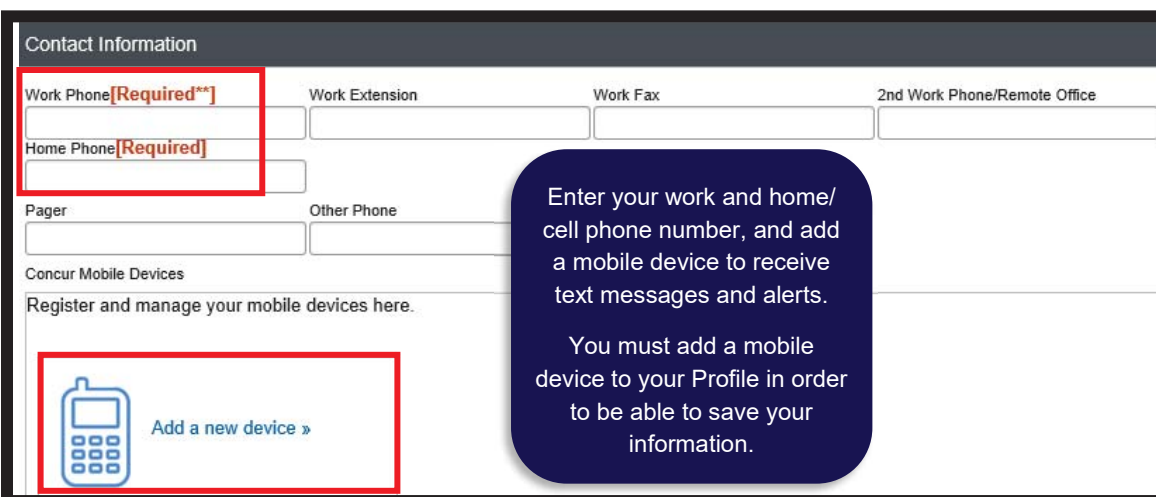


Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Important Note
 Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on your identification. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your identification. Number please note the number must be at least nine digits.

Enter your middle name/initial or select the No Middle Name checkbox.

Title: ▼ First Name: Middle Name **[Required]**: No Middle Name Nickname: Last Name: Suffix: ▼



Contact Information

Work Phone **[Required**]**: Work Extension: Work Fax: 2nd Work Phone/Remote Office:

Home Phone **[Required]**:

Pager: Other Phone:

Concur Mobile Devices
 Register and manage your mobile devices here.

Enter your work and home/cell phone number, and add a mobile device to receive text messages and alerts.
 You must add a mobile device to your Profile in order to be able to save your information.

The **Email Addresses** section is pre-populated with your Hopkins email address. Do not change it. Click the **Verify** link to verify the email address so receipts can be electronically sent to **receipts@concur.com**. Refer to the **Verifying Email Addresses Quick Reference Guide** for additional information.


Email Addresses Go to top

Please add at least one email address.

- [▶ How do I add an email address?](#)
- [▶ Travel Arrangers / Delegates](#)
- [▶ Why should I verify my email address?](#)
- [▶ How do I verify my email address?](#)

Verify your email addresses

+ Add an email address

	Email Address	Verification Status	Verify	Contact?	Actions
Email 1	approver@jh.edu	<input checked="" type="checkbox"/> Not Verified	Verify	Yes	

Emergency Contact Go to top

Name [Required]

Relationship
 Other

Street Address same as employee

City

State/Province

Postal Code

Country/Region
United States of America

Phone [Required]

Alternate Phone

Enter your emergency contact details.

Travel Preferences Go to top

Eligible for the following discount travel rates/fare classes

AAA/CAA
 Government
 Military
 Senior/AARP

Enter travel preferences and any frequent traveler/ advantage programs.

Air Travel Preferences ?

Seat

Seat Section

Special Meals

Ticket Delivery

Preferred Departure Airport ?

Other Air Travel Preferences

Medical Alerts

Hotel Preferences

Room Type

Smoking Preference

Foam pillows
 Rollaway bed

Crib

Message to Hotel Vendor ?

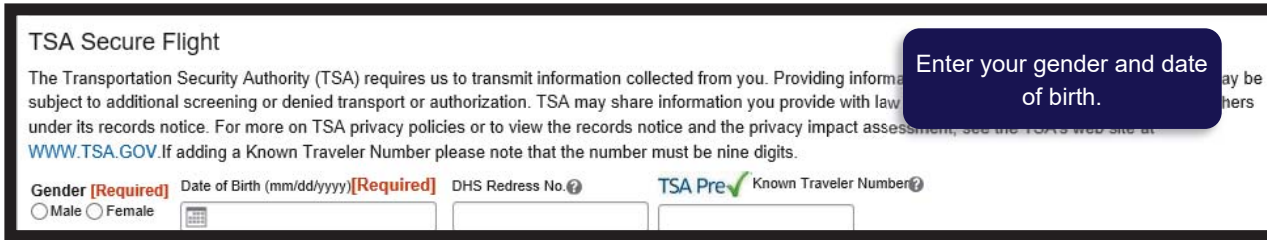
I prefer hotel that has:

a gym
 a pool
 a restaurant
 room service
 Early Check-in

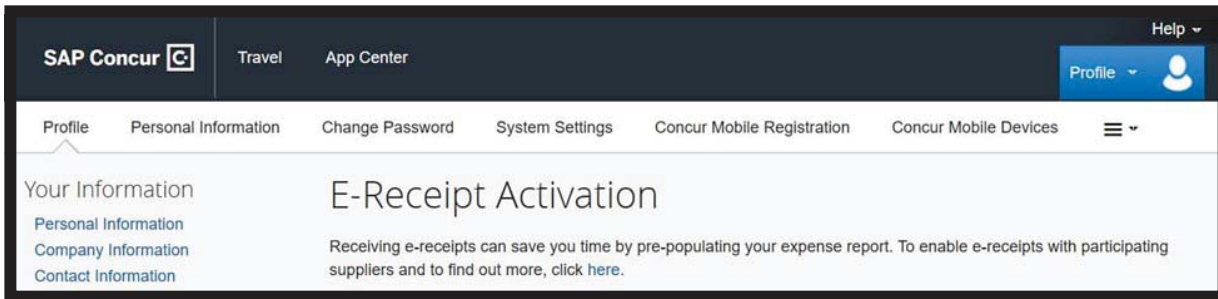
Accessibility Needs

Wheelchair access
 Blind accessible

Car Rental Preferences



4. Click the **E-Receipt Activation** option on the left hand side of the page. E-Receipt activation enables expense receipts to be sent automatically from vendors who partner with the Concur network to the Available Expenses library. Refer to the **Activating E-Receipts Quick Reference Guide** for additional information.

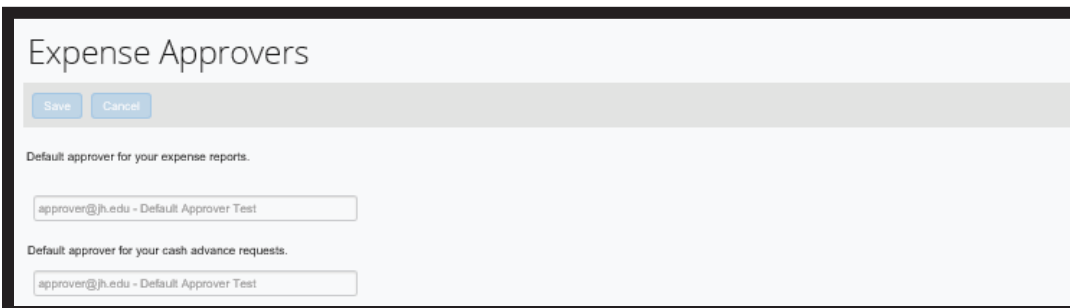


Other sections that can be completed/reviewed are Favorite Attendees and Expense Approvers.

5. Click the **Favorite Attendees** option on the left hand side of the page to create and save a group of attendees that can be easily added to an expense, such as a business meal. Refer to the **Creating an Attendee Group Quick Reference Guide** for additional information.



6. Click the **Expense Approvers** option on the left hand side of the page to view your default expense approvers.



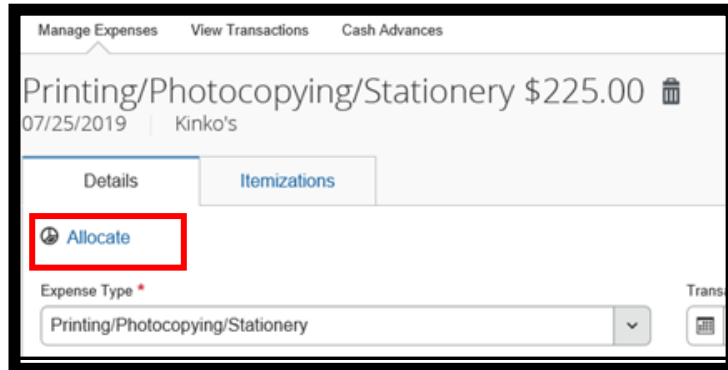
Allocating Expenses

You are able to change or split the cost object charged for one or more expenses on a report by percentage or amount. If you frequently use the same cost object allocation, you can save the allocation as a Favorite, and easily apply it to current and future expenses.

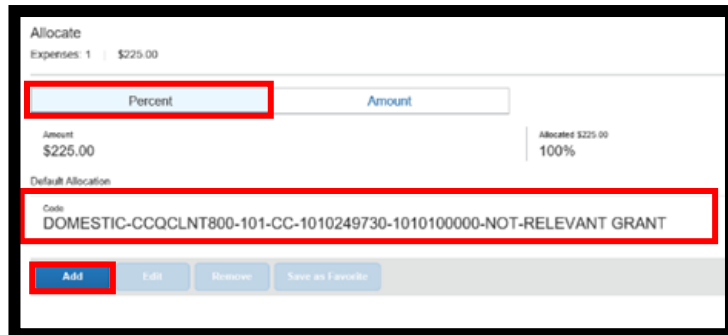


Allocate by Percentage

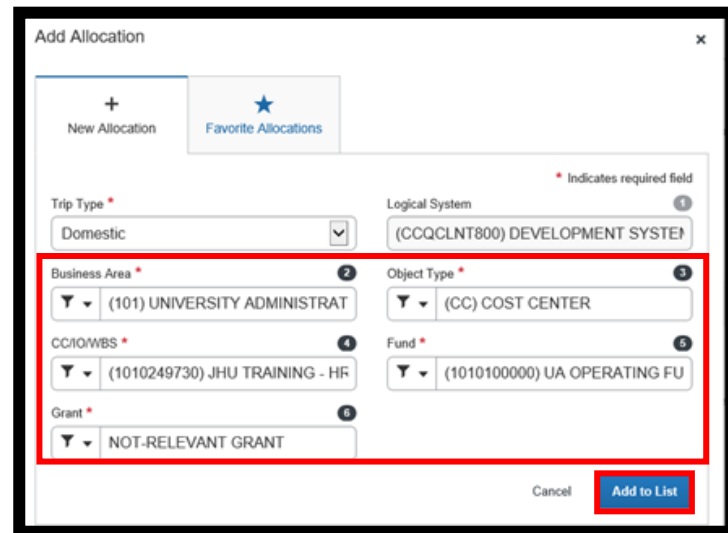
1. Add the expense to the report, and complete all required fields.
2. Click **Allocate**.



3. The cost object defined on the Report Header will display. Click the **Percent** tab.
4. Click **Add**.



5. To change any portion of the cost object, start with Business Area, and click on the drop-down to select the value for each of the fields you wish to change. Proceed to Object Type, CC/IO/WBS, Fund, and Grant.
6. Click **Add to List**.



- A new Allocation line appears. The percentage will be 100%.
- Click **Add** to enter additional allocations. As you add allocations, Concur will equally distribute the percentages. You can manually adjust the percentage amounts, but the percentage allocation total must equal 100%.

Allocate x

Expenses: 1 | \$225.00

Percent

Amount

Amount \$225.00 | Allocated \$225.00 100% | ✔ Remaining \$0.00 0%

Default Allocation

Code FOREIGN-CCQCLNT800-101-CC-1010640100-1010100000- NOT-RELEVANT GRANT Percent % 0

Add
Edit
Remove
Save as Favorite

<input type="checkbox"/>	Trip Type	Logical System	Business Area	Object Type	CC/IO/WBS	Fund	Grant	Code	Percent %
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	UNIV ADMINISTRATION	UA OPERATING FUNDS	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-101-CC-1010000000-1010100000- NOT-RELEVANT GRANT	100

- Click **Save** to save your allocations for the expense, and click **Save Expense**.

-or-

Click **Save as Favorite** to be able to reuse the allocation for other expenses. See the “Save a Favorite Allocation” section of this Quick Reference Guide for more information.

Add
Edit
Remove
Save as Favorite

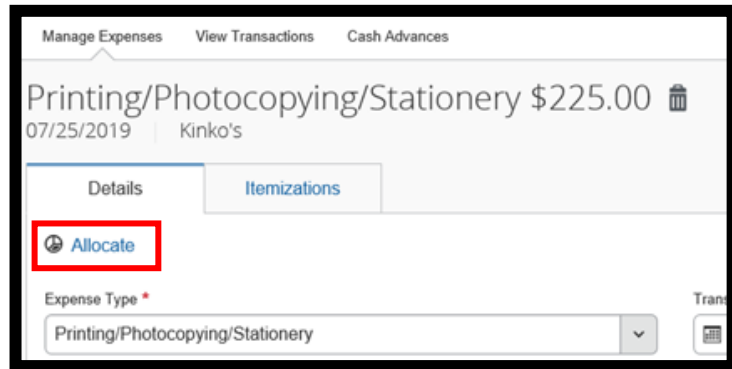
<input type="checkbox"/>	Trip Type	Logical System	Business Area	Object Type	CC/IO/WBS	Fund	Grant	Code	Percent %
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	UNIV ADMINISTRATION	UA OPERATING FUNDS	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-101-CC-1010000000-1010100000- NOT-RELEVANT GRANT	50
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	OFFICE OF RESEARCH INFORMATION RESERVE	UA DISCRETIONARY FUNDS	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-101-CC-1010000204-1310100000- NOT-RELEVANT GRANT	50

Cancel
Save

Allocate by Amount

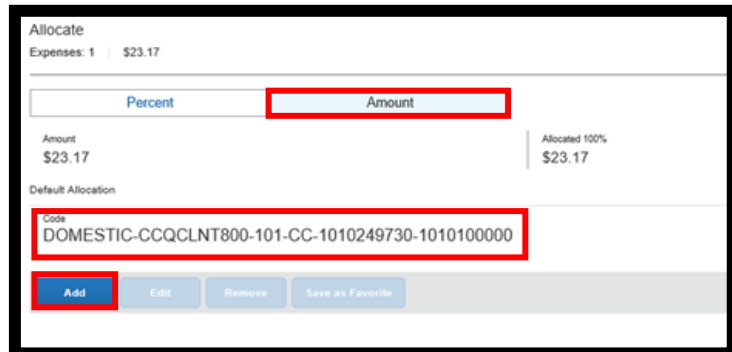
1. Add the expense to the report, and complete all required fields.

2. Click **Allocate**.



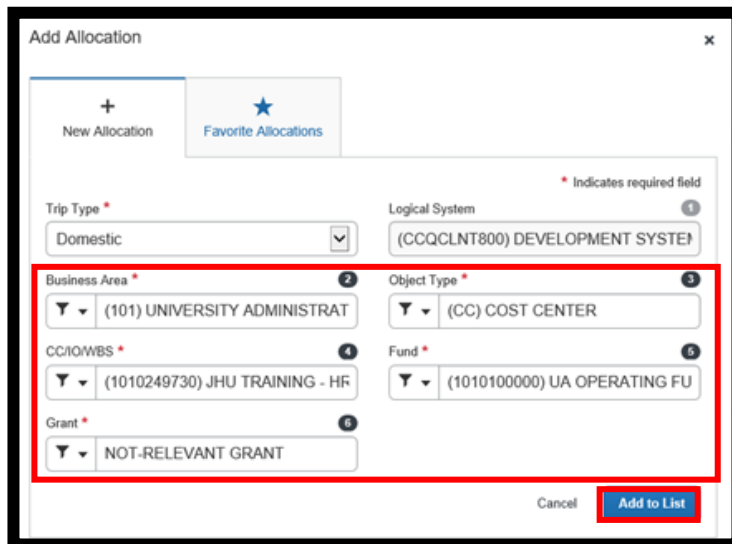
3. The cost object defined on the Report Header will display. Click the **Amount** tab.

4. Click **Add**.



5. To change any portion of the cost object, click on the drop-down and select the value for each of the fields you wish to change. Start with Business Area, and proceed to Object Type, CC/IO/WBS, Fund, and Grant.

6. Click **Add to List**.



7. A new Allocation line appears. The dollar amount equals the total expense amount.
8. Click **Add** to enter additional allocations. As you add allocations, Concur will equally distribute the amounts. You can manually adjust the amounts, but the total allocation amounts must equal the expense amount.

Allocate

Expenses: 1 | \$225.00

Percent

Amount

Amount \$225.00 Allocated 100% \$225.00 ● Remaining 0% \$0.00

Default Allocation

Code *DEFAULT* Amount USD \$0.00

Add
Edit
Remove
Save as Favorite

<input type="checkbox"/>	Trip Type	Logical System	Business Area	Object Type	CC/IO/WBS	Fund	Grant	Code	Amount USD
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	UNIV ADMINISTRATION	UA OPERATING FUNDS	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-101-CC-1010000000-10101000000-NOT-RELEVANT GRANT	225.00

9. Click **Save** to save your allocations for the expense, and click **Save Expense**.

-or-

Click **Save as Favorite** to be able to reuse the allocation for other expenses. See the “Save a Favorite Allocation” section of this Quick Reference Guide for more information

Add
Edit
Remove
Save as Favorite

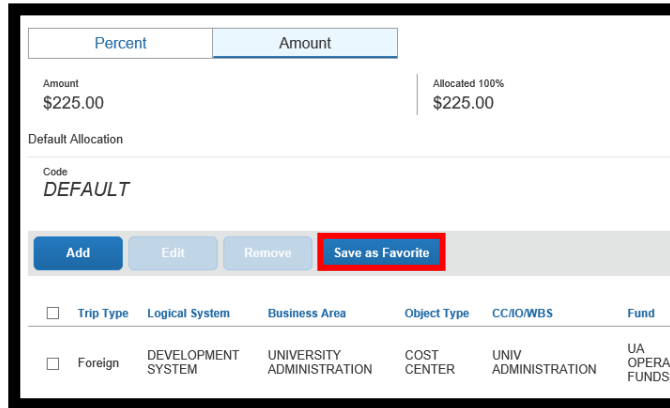
<input type="checkbox"/>	Trip Type	Logical System	Business Area	Object Type	CC/IO/WBS	Fund	Grant	Code	Amount USD
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	UNIV ADMINISTRATION	UA OPERATING FUNDS	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-101-CC-1010000000-10101000000-NOT-RELEVANT GRANT	112.50
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	APPLIED PHYSICS LAB	COST CENTER	APL ENDOWMENT ACCOUNT	APL OPERATING	NOT-RELEVANT GRANT	Foreign-CCQCLNT800-104-CC-1040000005-10104000000-NOT-RELEVANT GRANT	112.50

Cancel
Save

Save a Favorite Allocation

If you use the same expense allocation over and over, you can save it as a Favorite once you have created the allocation.

1. Click **Save as Favorite**.



Percent | Amount

Amount: \$225.00 | Allocated 100%: \$225.00

Default Allocation

Code: DEFAULT

Buttons: Add, Edit, Remove, **Save as Favorite**

<input type="checkbox"/>	Trip Type	Logical System	Business Area	Object Type	CC/IO/WBS	Fund
<input type="checkbox"/>	Foreign	DEVELOPMENT SYSTEM	UNIVERSITY ADMINISTRATION	COST CENTER	UNIV ADMINISTRATION	UA OPERA FUNDS

2. Enter a **Favorite Name**.

3. Click **Save**.

4. Click **Save** to save your allocations for the expense, and click **Save Expense**.



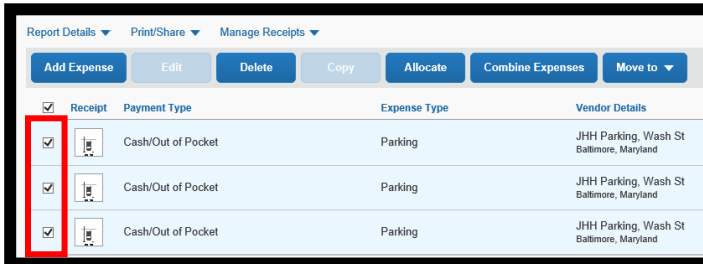
Save as Favorite

Favorite Name: UA/UA Discretionary

Buttons: Cancel, **Save**

To apply the allocation to other expenses:

5. Select the expenses you wish to add the allocation to.

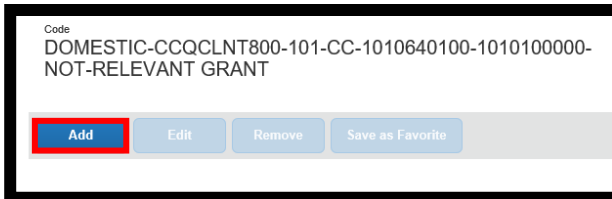


Report Details | Print/Share | Manage Receipts

Buttons: Add Expense, Edit, Delete, Copy, Allocate, Combine Expenses, Move to

<input checked="" type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details
<input checked="" type="checkbox"/>		Cash/Out of Pocket	Parking	JHH Parking, Wash St Baltimore, Maryland
<input checked="" type="checkbox"/>		Cash/Out of Pocket	Parking	JHH Parking, Wash St Baltimore, Maryland
<input checked="" type="checkbox"/>		Cash/Out of Pocket	Parking	JHH Parking, Wash St Baltimore, Maryland

6. Click **Add**.



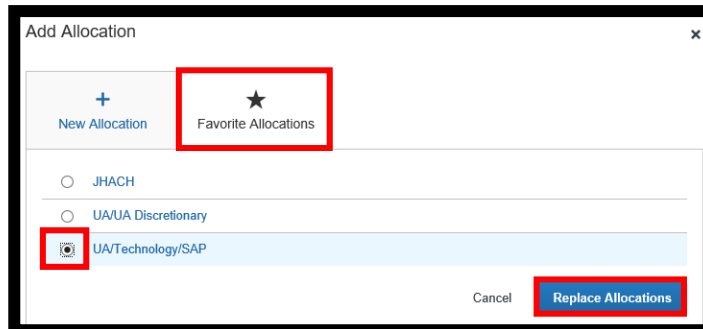
Code: DOMESTIC-CCQCLNT800-101-CC-1010640100-1010100000-NOT-RELEVANT GRANT

Buttons: **Add**, Edit, Remove, Save as Favorite

7. Click the **Favorite Allocations** tab.

8. Select the allocation you wish to apply.

9. Click **Replace Allocations**.



Add Allocation

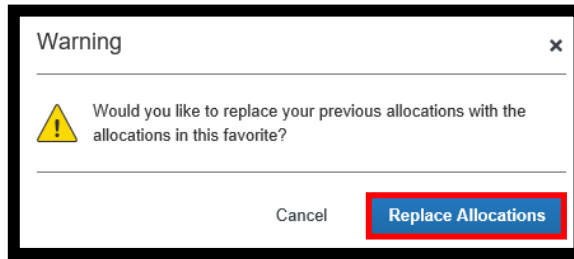
Buttons: + New Allocation, **★ Favorite Allocations**

Options:

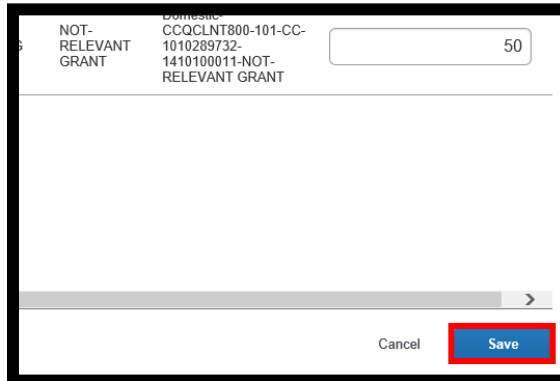
- JHACH
- UA/UA Discretionary
- UA/Technology/SAP**

Buttons: Cancel, **Replace Allocations**

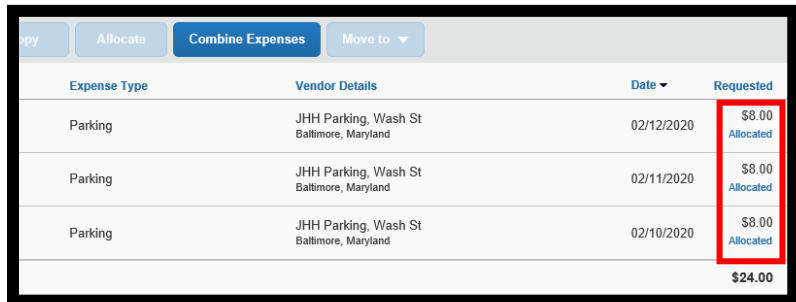
10. Click **Replace Allocations**.



11. Click **Save**.

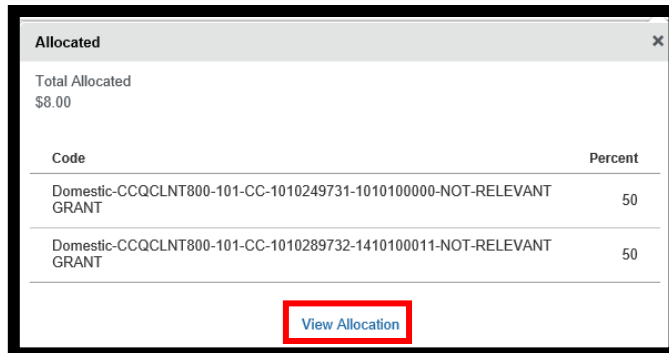


12. An “Allocated” link displays under the expense amount. Click the **Allocated** link to view the allocation.



Expense Type	Vendor Details	Date	Requested
Parking	JHH Parking, Wash St Baltimore, Maryland	02/12/2020	\$8.00 Allocated
Parking	JHH Parking, Wash St Baltimore, Maryland	02/11/2020	\$8.00 Allocated
Parking	JHH Parking, Wash St Baltimore, Maryland	02/10/2020	\$8.00 Allocated
			\$24.00

13. Click the **View Allocation** link to modify the allocation.



To get started with the Johns Hopkins travel program and company:

1. Go to the [Johns Hopkins Travel Portal](http://www.travel.jhu.edu) at <http://www.travel.jhu.edu>
2. Create your Concur Traveler Profile
3. Sign up for Training
4. Book Travel!

(1) [Accessing the Johns Hopkins Travel Portal:](#)

As part of the new travel program, the [Johns Hopkins Travel Portal](#) has been created as your one-stop shop for information related to Johns Hopkins travel. Please bookmark this site in your browser for future reference.

The portal features an array of valuable resources, including:

- Links to the Concur online booking tool
- Johns Hopkins Travel Policies
- Designated contact information for World Travel Inc. (WTI) agents and team
- A list of preferred air, car, and hotel vendors
- Frequently Asked Questions (FAQs)
- Helpful travel links and much more

(2) [Create your Concur Traveler Profile:](#)

Once on the [Johns Hopkins Travel Portal](#), go to “Booking Travel” and click the [Concur](#) icon to access the Johns Hopkins Concur online booking tool. This link will allow you to use [Concur](#) with a single sign-on to create future online bookings.

You must complete your traveler profile in [Concur](#) before attempting to book travel. To create your traveler profile, click on the “Profile” menu on the upper right of the Concur home screen. Click here for detailed instructions on how to [Create Your Traveler Profile](#).

Please gather the following information to maximize your benefits when you create your profile for the first time:

- Personal information (e.g., name, address, contact information) **Please check that your name in the traveler profile is the same as it appears on your ID used when you travel.**
- Travel preference information (e.g., seat preferences, hotel room preferences)
- Loyalty program information
- Passport and Visa information
- Travel arranger information

The Concur Traveler Profile will allow you to expedite future bookings, ensure you receive loyalty benefits such as travel points, and customize your travel requirements.

Questions related to the traveler profile can be directed to 800-221-4730 or onlinehelp@worldtravelinc.com.

(3) Training Opportunities:

If you have not already done so, please go to [myLearning](#) to register for one of the scheduled training sessions to learn more about these topics. Traveler training sessions will provide you with information about navigating the Travel Portal, creating a profile in Concur and booking travel with WTI. Currently available resources include:

- FastFacts – [FF6 - The Johns Hopkins Travel Portal and Concur \(Travel Booking Tool\) PRE-RECORDED](#) (click to register)
- Instructor Led – [Johns Hopkins Travel Program Overview/Concur 101](#) (click to register)

Thank you for your cooperation and support. This transition is an important step for Johns Hopkins and we encourage you to send us feedback as you use these processes.

(4) Booking Travel with WTI:

Once you complete your traveler profile you will be able to use WTI to book travel online or by phone. Please use Concur for simple, online bookings or call one of our dedicated agents for support with complex travel needs. Contact information for our agents and support team are listed below.

Johns Hopkins Dedicated Agent Team

Toll Free Number: 888-433-2556

Calling from outside the United States: 484-348-6310

Email: jhtravel@worldtravelinc.com

Agents Availability: 8 a.m. to 8 p.m. EST, Monday-Friday

After-hours, calls are automatically forwarded to the emergency after-hours service center. Service is available 24/7/365.

Concur Online Travel Support

Toll Free Number: 800-221-4730

Email: onlinehelp@worldtravelinc.com

Helpdesk Availability: 8 a.m. to 8 p.m. EST, Monday-Friday

Questions regarding The Johns Hopkins Travel Program or World Travel, Inc. can be directed to jhtravel@jhu.edu.

Let's Get Started

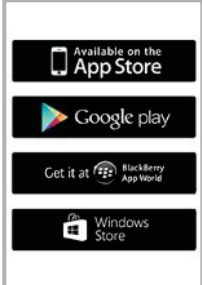
Your Checklist to Start Using SAP Concur Expense


- Click [here](#) for instructions to log in to Concur.

Instructions on setting up your profile:

- [Update your profile settings](#)
 - [Verify email addresses](#)
 - [Activate your e-receipts](#)
- If someone will be submitting travel requests and creating expense reports on your behalf, you will need to set up delegates (one time only). [Click here for information.](#)
 - If you will be acting as a delegate, [click here for instructions.](#)

Next, Let's Download the SAP Concur Mobile App

-  You and your delegate will need to download SAP Concur Mobile to your device.
[Click here to download the SAP Concur app.](#)

-  Install/Open the SAP Concur app.

-  Select "SSO Company Code Sign-In."

- Enter your Company ID - **7T7HK**

If you need help, contact the [Concur Admin](#).

To access all other training materials, go to the top-right corner of the SAP Concur screen and select "Help," then select "Training." There is a vast selection of videos, job aids and quick reference guides.

For additional information about travel and expenses [click here](#).

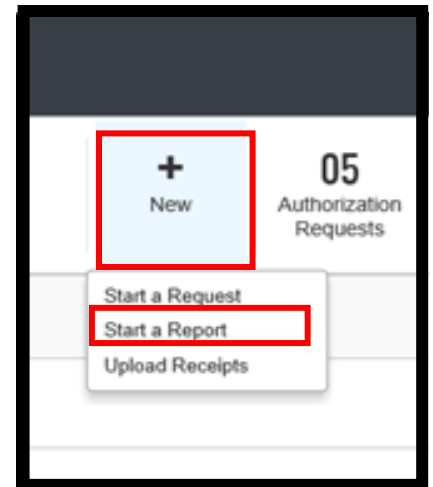
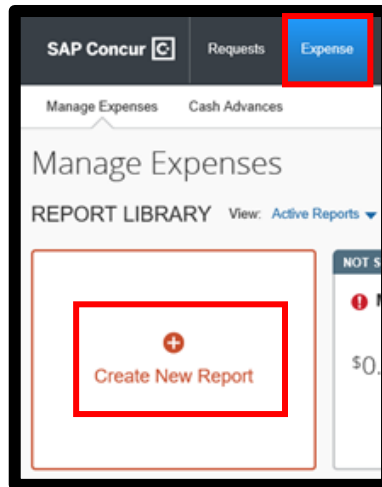
To find the Expense Processing link, go to travel.jhu.edu and then click "Expense Processing" from the left-side menu.

Creating a New Expense Report


The first step in creating a new expense report for travel booked outside of Concur is to complete the report header. The same header is used for both travel and non-travel related expense reports. You cannot create a report with future Start and End dates.







- On the Concur Home Page:
 - Click on **Expense => Create New Report.**
 - or -
 - Place your mouse pointer over **New**, and select **Start a Report.**
- Complete all required Report Header fields (marked with red asterisk).









Create New Report



Report Type * 


Report/Trip Name *  Report/Trip Start Date *  Report/Trip End Date * 

Report/Trip Purpose * 

Trip Type *  Does this trip contain personal travel? *  Additional Information * 

Business Area *  Object Type *  CCROWBS * 

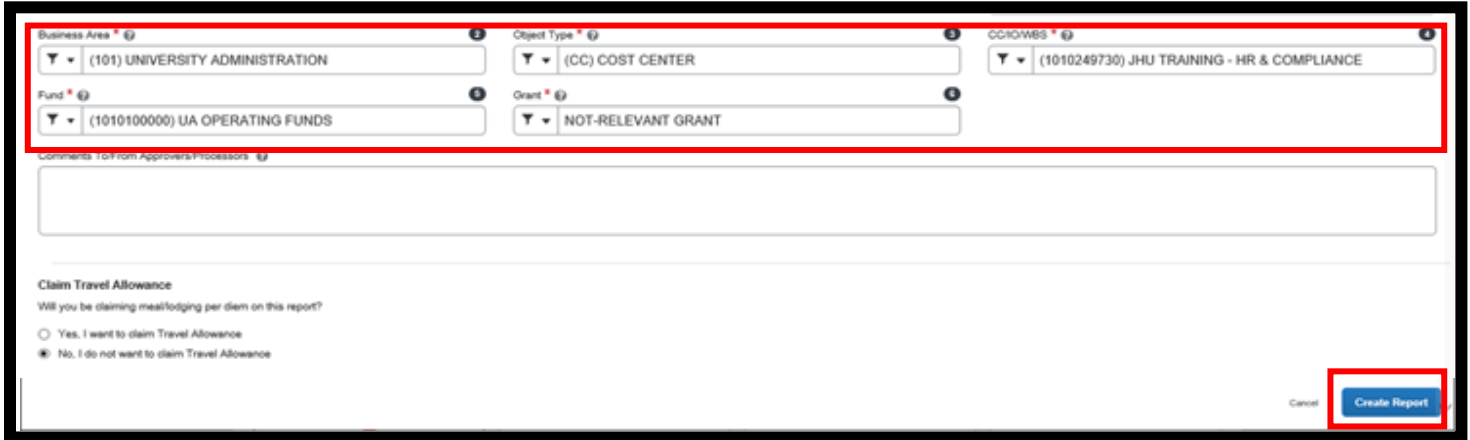
Fund *  Grant * 

Comments To/From Approvers/Processors * 

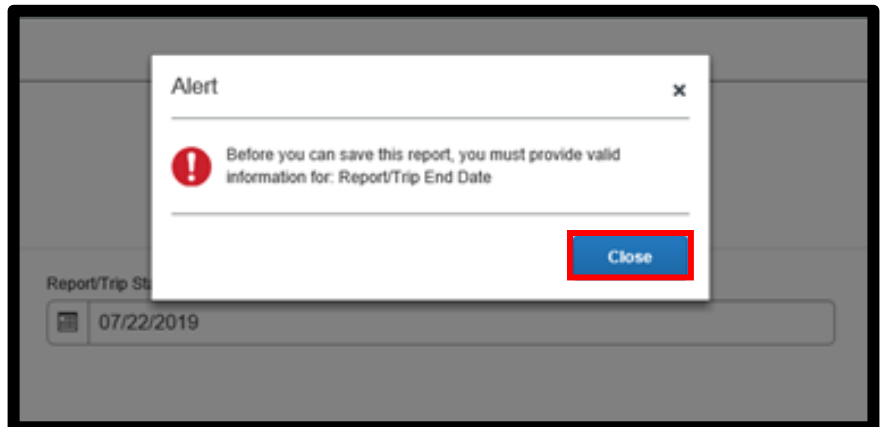
Claim Travel Allowance
 Will you be claiming meal/lodging per diem on this report?
 Yes, I want to claim Travel Allowance
 No, I do not want to claim Travel Allowance

Click the Question Mark for each field to display tool tips.

Your default cost object information automatically populates from your HR data record. All expenses for the report will be charged to this cost object. If you need to charge all expenses to a different cost object, click into each of the fields and select the new cost object.



3. Click the **Create Report** button. If you have not entered all required information, an alert pop-up box displays.
4. Review the message, click the **Close** button, enter the required information, and click the **Create Report** button again.



5. Click the **Add Expense** button to begin entering out-of-pocket expenses or travel card transactions to the report.

