Welcome!

You have been approved to travel under the NASA RSES contract.

All travel must be booked through Concur/World Travel, Inc.

Booking outside of the Concur system may result in delayed or denied reimbursement.

Upon your first login to Concur, you will be required to update your personal profile. Step-by-step instructions for completing this process are provided in the following slides.

In your welcome email you received the following required information for your travel:

TDN# Dates of travel

Event name & # Location

You will need this information for booking & reimbursement.

ANALYTICAL MECHANICS ASSOCIATES

RSES Travel Team

RSEStravel@ama-inc.com

Log In & Update Your Profile in Concur

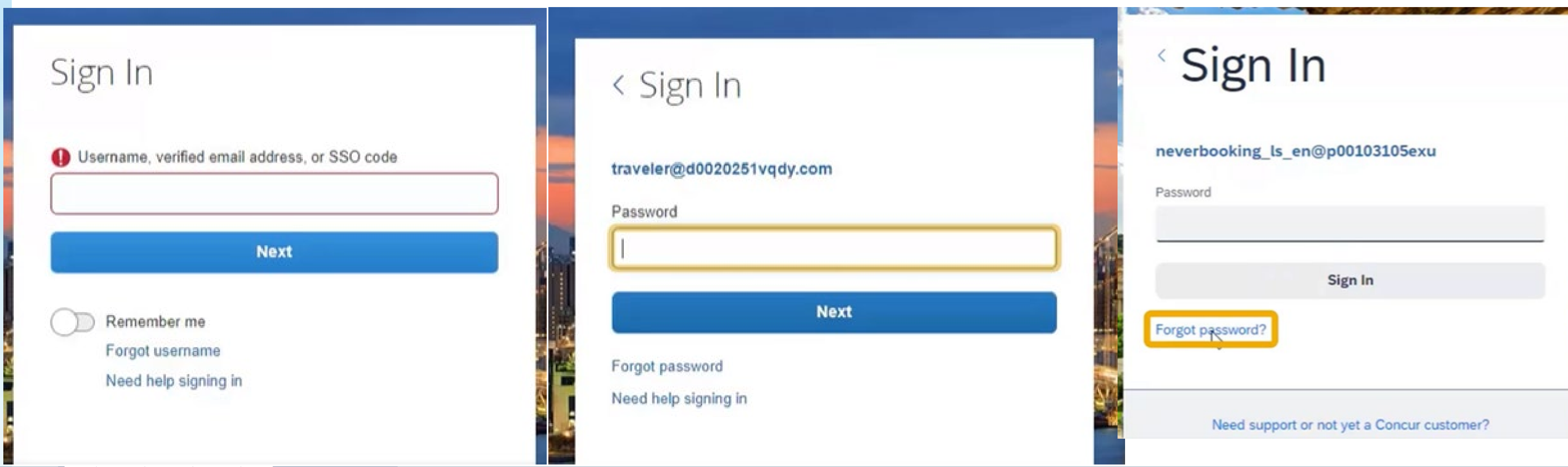
Presented by: RSES Travel Team

ANALYTICAL MECHANICS ASSOCIATES

www.concursolutions.com

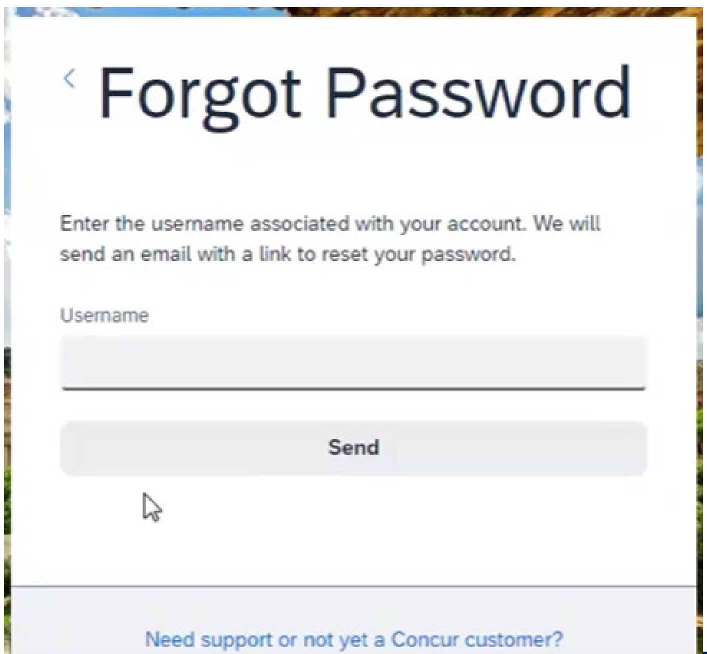
Sign In to Concur

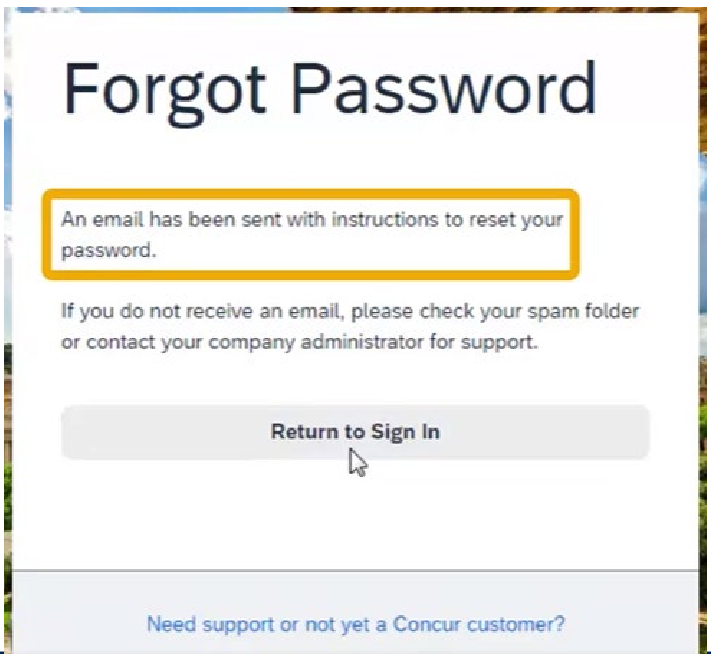
- Go to www.concursolutions.com
- To log into your SAP Concur account, please follow the steps outlined below:
  - Enter your username (given to you in your ‘Welcome!’ email)
  - Hit Next and then select the option SAP Concur Password.
  - Then select ‘Forgot Password’



Changing Your Password

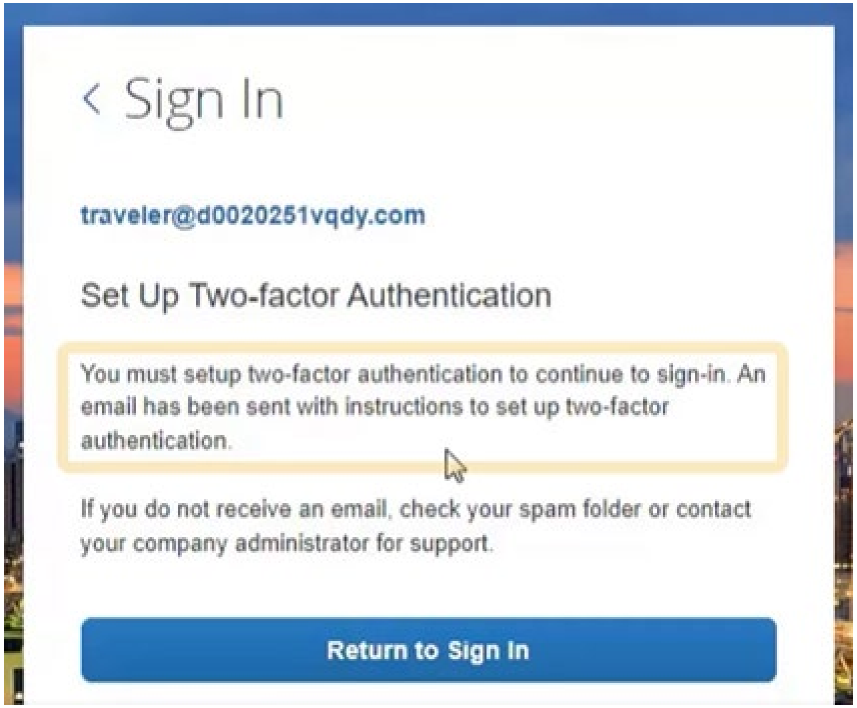
- You will then be prompted to re-enter your username
- After doing so, an email will be sent to your personal email address with instructions to reset/create a new password
    - ***Check Your Spam! This email may likely go to your spam folder***
- Once your password has been updated, you may log into your Concur account
- If you experience any issues, please contact the Travel Help Desk at rsestravel@ama-inc.com





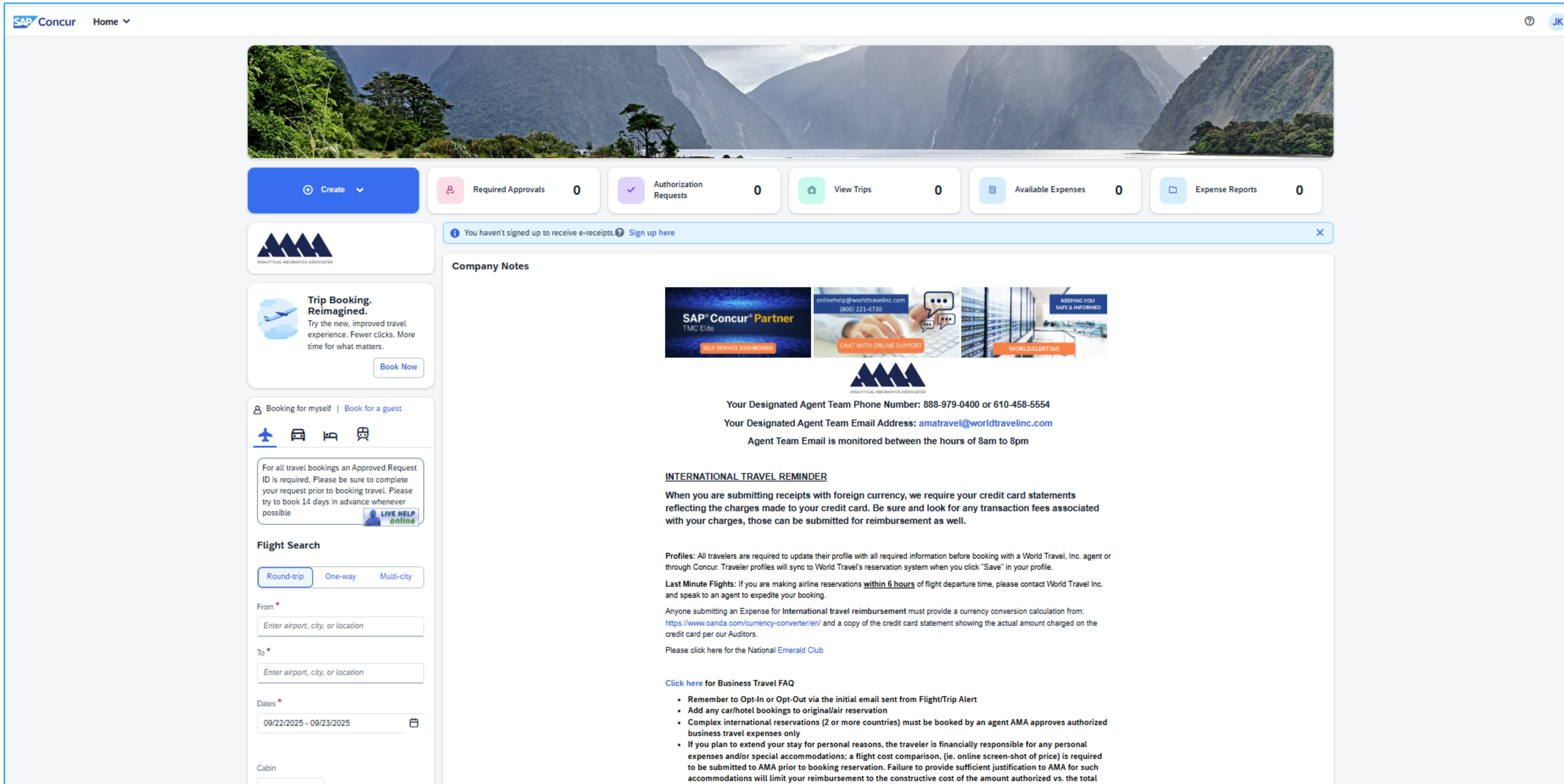
2 Factor Authentication (2FA)

- You will also be asked to set up Two-Factor Authentication
- Please follow all steps to ensure this is set up properly
- If you need assistance, please reach out to Concur Support
  - Call 855-895-4815 and select the Authorized Support Contact option from the menu.

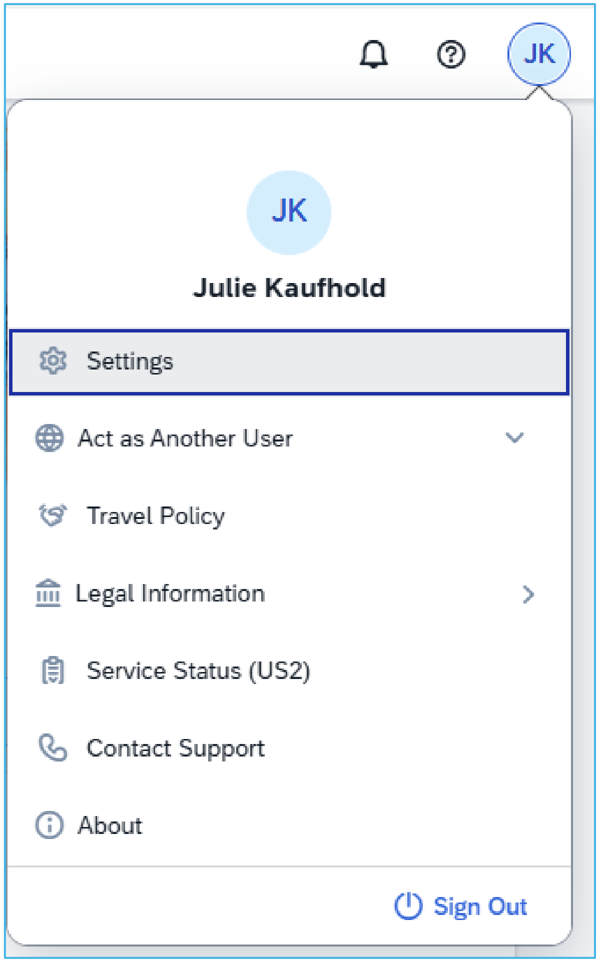


Concur Homepage

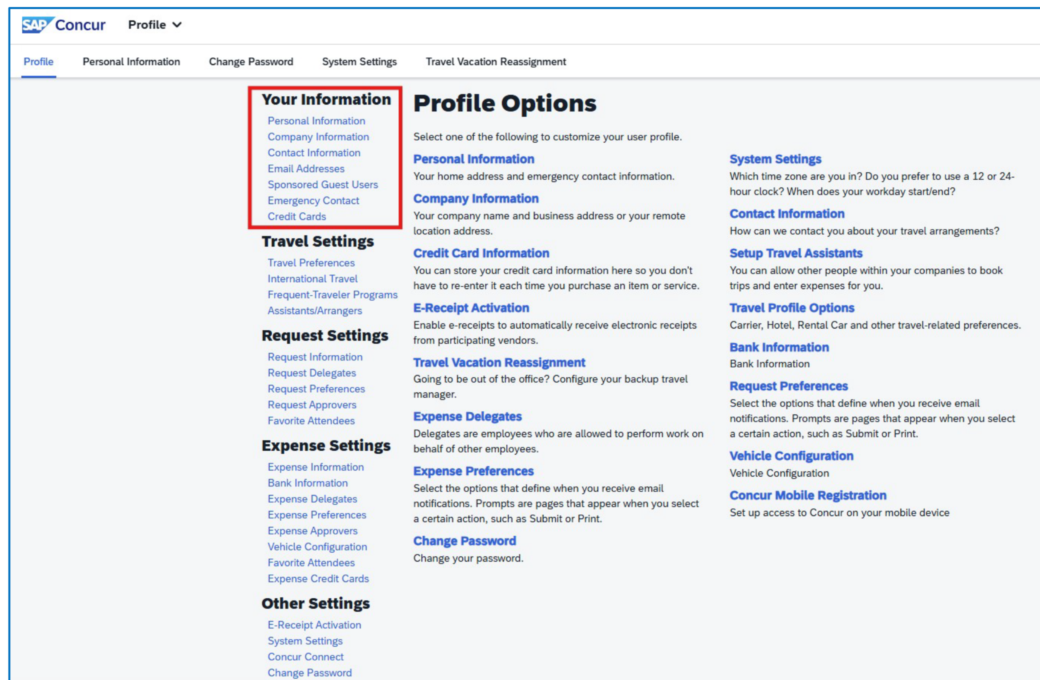
- Below is an example of the home screen
- Take note of the ‘Company Notes’ section – this will have useful travel updates you may need



Completing Your Concur Profile



- Click on your initials at the top right on the home page
- Click 'Profile Settings'
- Under Profile Options, go to 'Personal Information'

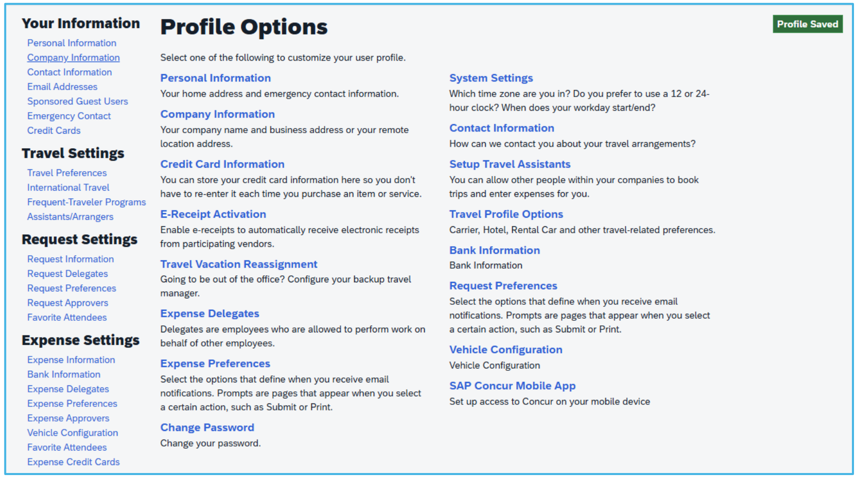


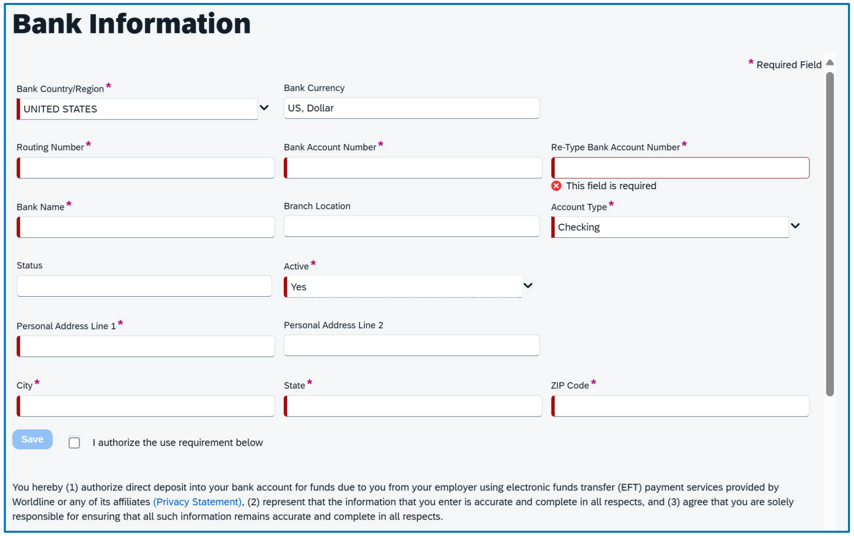
Completing Your Concur Profile

- Please ensure all fields marked as required are completed. When entering your information, note the following:
  - Use your full legal name as it appears on your government-issued identification.
  - Home address and direct deposit information are required for billing and reimbursement purposes.
  - Enter your contact information including a phone number.
  - Add an emergency contact.
  - Verify your email
- Enter your email address and be sure to complete the verification link process.
- Travel preferences are optional but recommended if you have special requirements.
- You may also add any applicable travel discount program information.
- Enter your passport information to assist with airline ticketing.
- Credit Card information: All travel reservations will be charged to the RSES/AMA company card. DO NOT ADD YOUR PERSONAL CARD*

** REQUIRED** Banking Information

- Once you have clicked save on the previous page you will return to the profile options page.
- Under ‘Expense Settings’ > click ‘Bank Information’
- Enter your banking information, the associated home address, etc.
- Your reimbursements will be paid to you via electronic transfer. To do this, you must put in your banking information.





RSES Guest Travel – How to Book in Concur

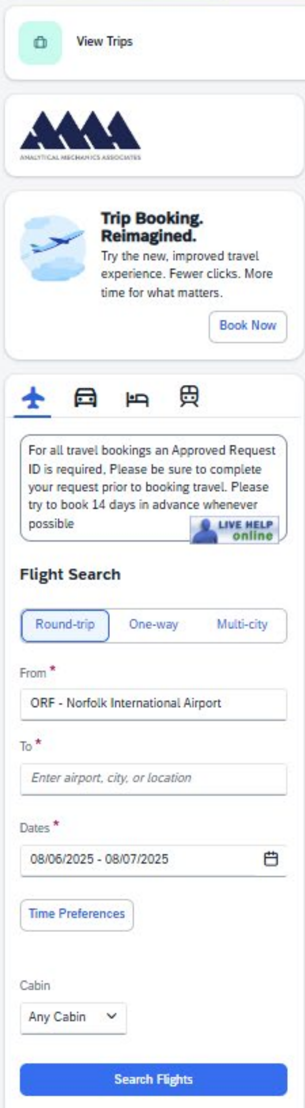
www.concursolutions.com

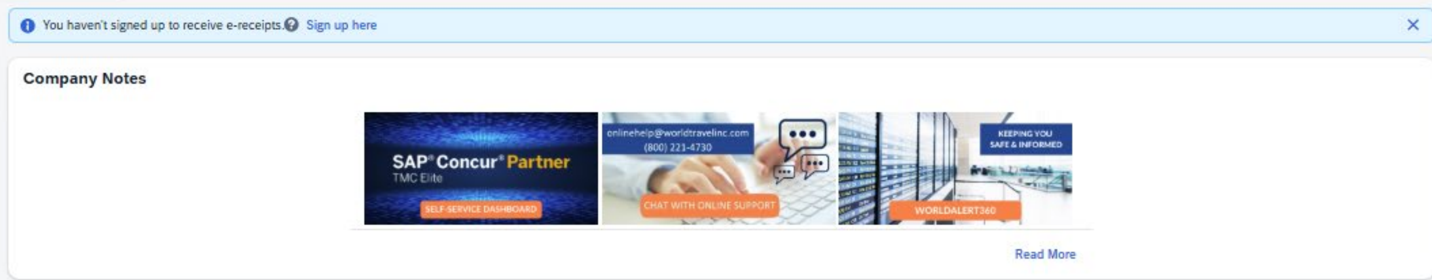
ANALYTICAL MECHANICS ASSOCIATES

Before You Start!

- Hotel rates **<u>MUST</u>** follow government per diem rates for the specified timeframe of your trip. If there is a reason you cannot stay within the government rate, a justification must be provided and approved by your Technical Point of Contact (TPOC) in advance of booking the reservation.
- For hotel blocks:
  - The cardholder/admin must maintain a roster and provide receipts to accounting
  - You must annotate if the room charges will be split between each traveler
  - Per Diem rules still apply for room blocks
- Per Diem Rates: <u>Home | GSA</u>
- For travel out of the country
  - You MUST book flights that comply with the **<u>Fly America Act</u>** **.**When booking flights OCONUS, you will need to use an American airline carrier to fly out of the US, then once you are in the foreign country you may use their airlines for the last portion of your flight. This means you will need to book *multiple* flights. We suggest that you call and speak to a World Travel agent that can assist you with your booking. You can reach them at **888-979-0400**.
- Airfare
  - Book Economy airfare only
  - Follow the Fly America Act when booking international flights. The Fly America Act requires that federally funded air travel uses U.S. flag air carriers.
- Rental Car
  - Reserve a Compact car. Concur (Enterprise / National) offers perks, such as Emerald Aisle, which allows an upgraded selection of vehicles that will match cost of the Compact requirement.
  - Do not refuel car at the rental company.
  - Renting box trucks requires approval by your NASA event organizer.

Booking Travel in Concur

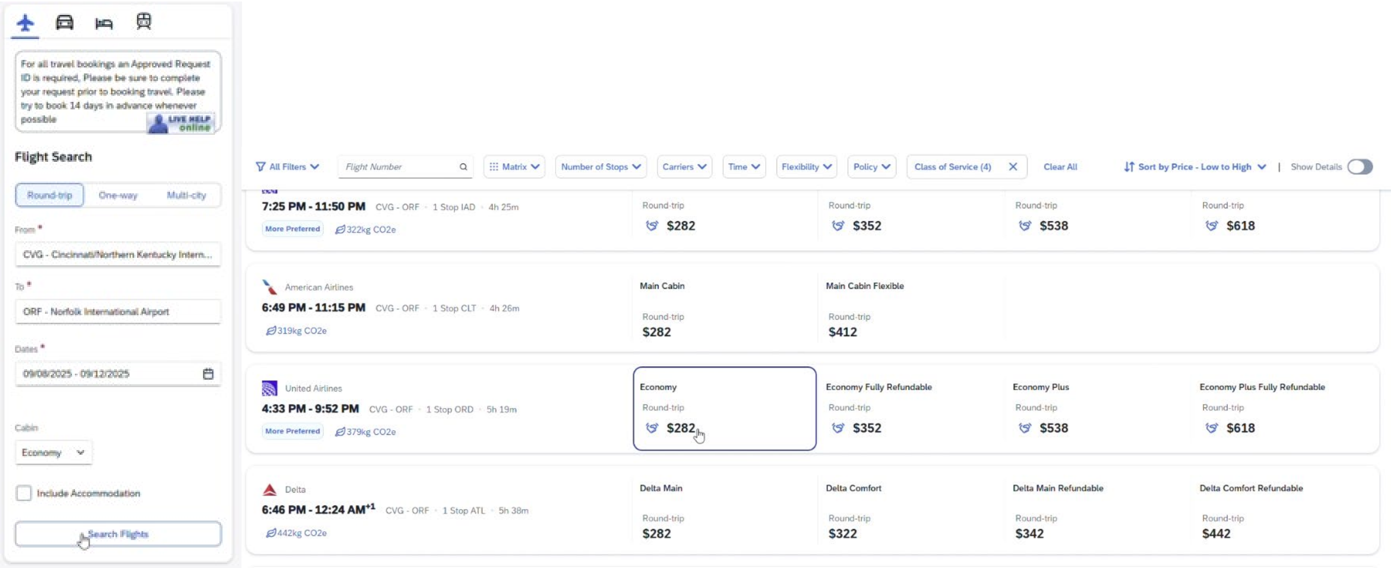




- From the Concur homepage, you can search for flights, rental cars, trains, and hotels.

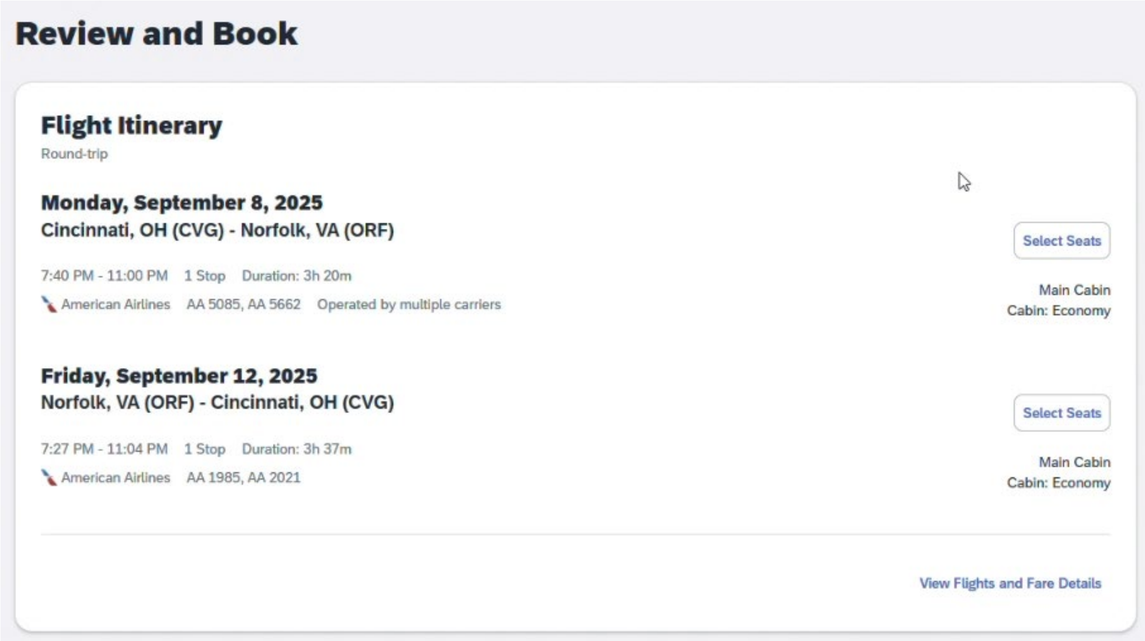
Booking Travel

- All airfare must be booked ‘Economy’ class
  - Select the best option and lowest price for your flight
- Airfare should be a non-refundable ticket
  - Refundable tickets are only allowed with special permission from your manager – documentation is required
- International flights must follow the Fly America Act
- Hotels – ALL nights must be within the GSA per diem rate – you will need prior authorization if any nights will be more than the GSA per diem rate
- Rental cars – prefer that you use National – book compact and can upgrade from emerald isle but only be charged for a compact



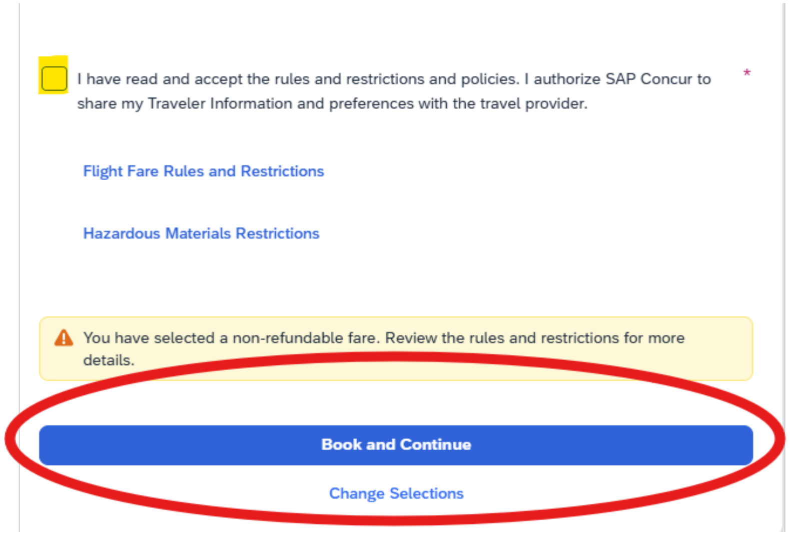
Booking Travel

- All airfare should be the non-refundable option
  - Prior permission must be obtained from the TPOC/TSM for special circumstances to purchase refundable airfare.
- Once you have chosen the preferred flight, click ‘Select Fare’.
- If you’re flying round trip, you will need to choose “two” flights, one for departure and one for return.
- After selecting your flights, you will be prompted to select your seats for each flight segment.



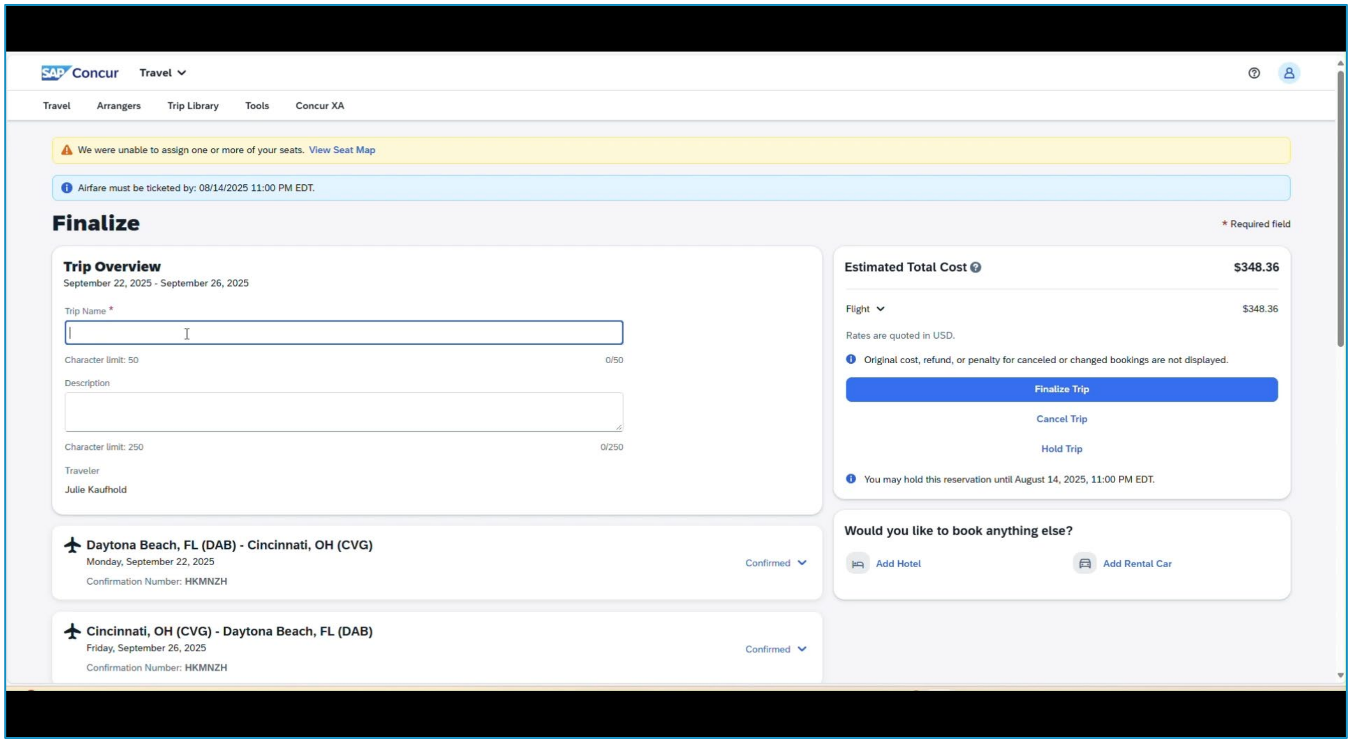
Booking Travel

- Once you have made your selections and filled in the required details, click the checkbox to acknowledge the rules, restrictions and policies statement.
- Click [Book and Continue]



Booking Travel

- Review the options under ‘Would you like to book anything else?’ and repeat steps above to make additional reservations for hotel, rental car, etc. under the same trip.
- PLEASE BOOK ALL TRAVEL ITEMS AT THE SAME TIME
- On the ‘Finalize’ screen you will be able to make additional reservations



Before you Finalize the Trip

- Review all details and bookings before finalizing
- Make any changes needed
- Be sure all required fields are filled in
- Once you have finalized, your booking will be sent for approval by the travel team before official ticketing
- Please book airfare, hotel, rental car, etc. at the same time
  - If you book separately, you will incur multiple booking fees.

How to Create an Expense Report in Concur

Presented by: RSES Travel Team

ANALYTICAL MECHANICS ASSOCIATES

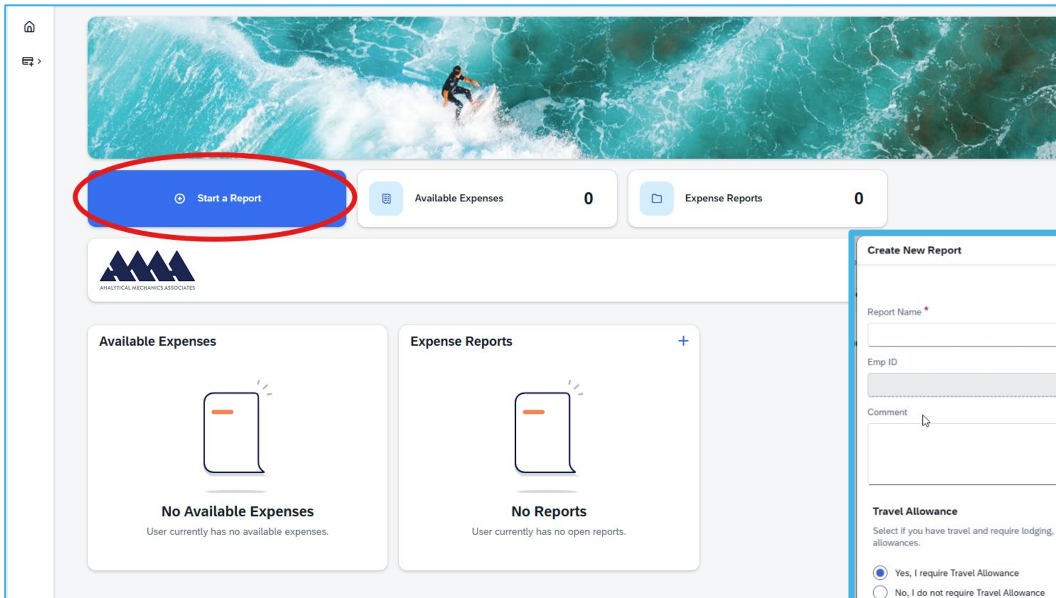
www.concursolutions.com

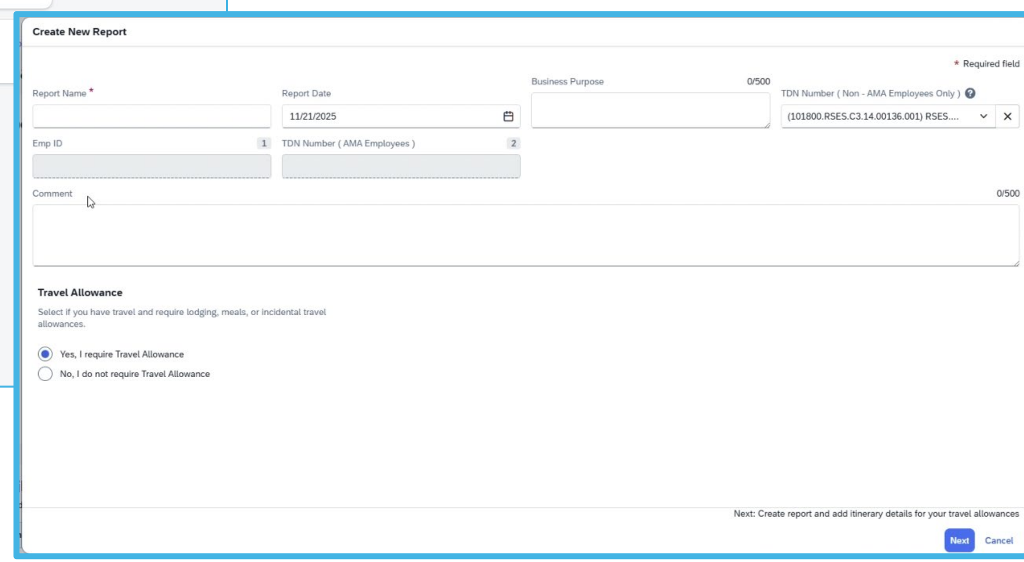
Important!

- Once you have returned from travel, an Expense Report (ER) must be submitted through CONCUR detailing all expenses incurred during the trip.
- It is best practice to submit the ER on the first business day following the return from travel.
  - *NOTE: If an expense report has not been submitted within 30 days of your return, you will forfeit being reimbursed any out-of-pocket expenses. After 30 days, only the company paid expenses will be submitted by the RSES Travel Team on your behalf.
- Record all expenses from the trip within one ER.
- **<u>DO NOT</u>** combine different trips into a single report. If travelers are creating a report for multiple trips, please create a separate report for each individual trip.
- Check that your TDN number for your trip is correctly associated with that specific trip.
- When booking through CONCUR, agent fees are incurred for making reservations. These fees are usually $5 each and will show as ‘Agent Fee(s)’ on the traveler’s itinerary. These fees must all be accounted for on the ER. They will show up in ‘Available Expenses’ for you to add to an ER, or they can be added manually based on the itinerary.

Creating an Expense Report

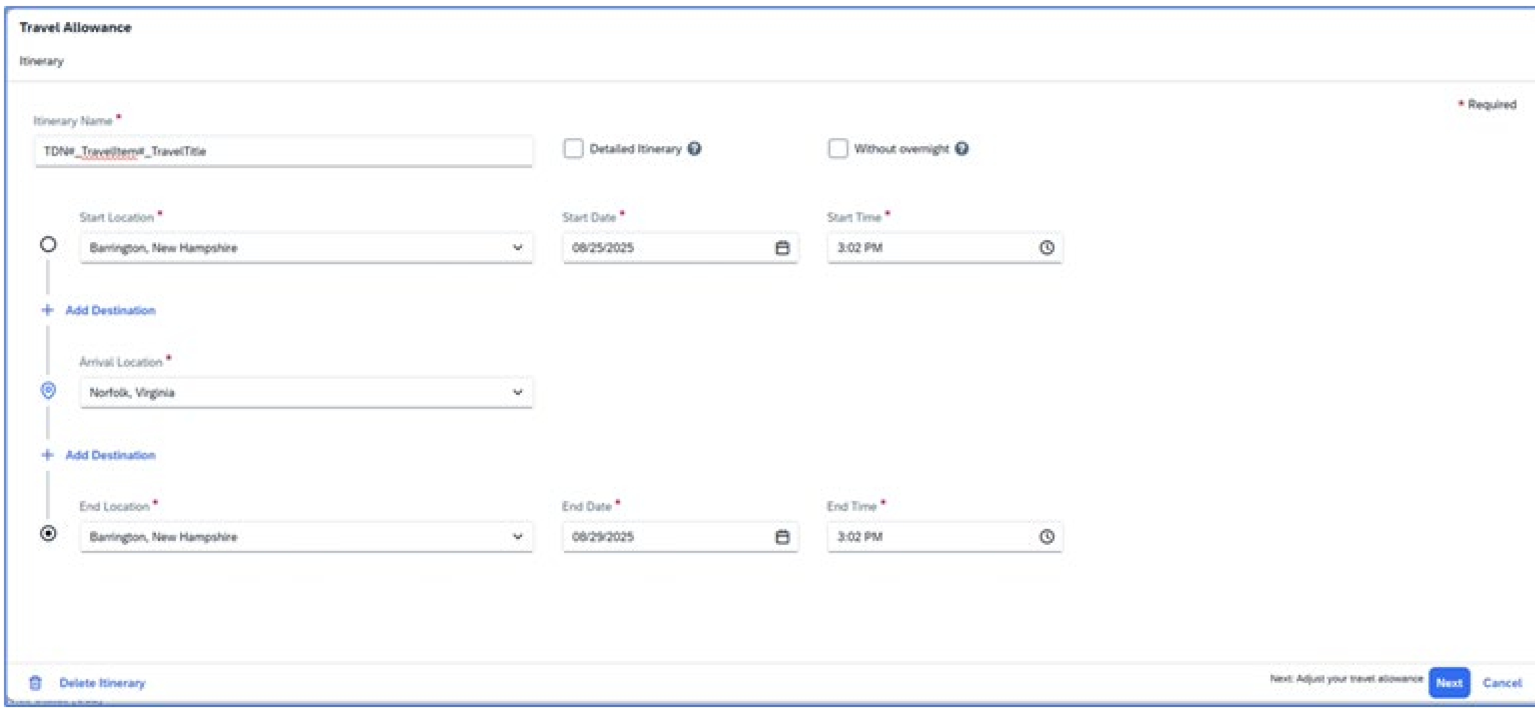
- From the homepage, click 'Start a Report'
- Fill out the required fields
- The report name should be "**TDN#_ Travel Item#_ Trip Name**"
  - Note: An example of this can be found in your "Welcome Back" email.
- Select 'Yes, I require Travel Allowance' to receive per diem (if you are approved for per diem – if not, select 'No")
- Check that the correct TDN# is listed
- Click 'Next'





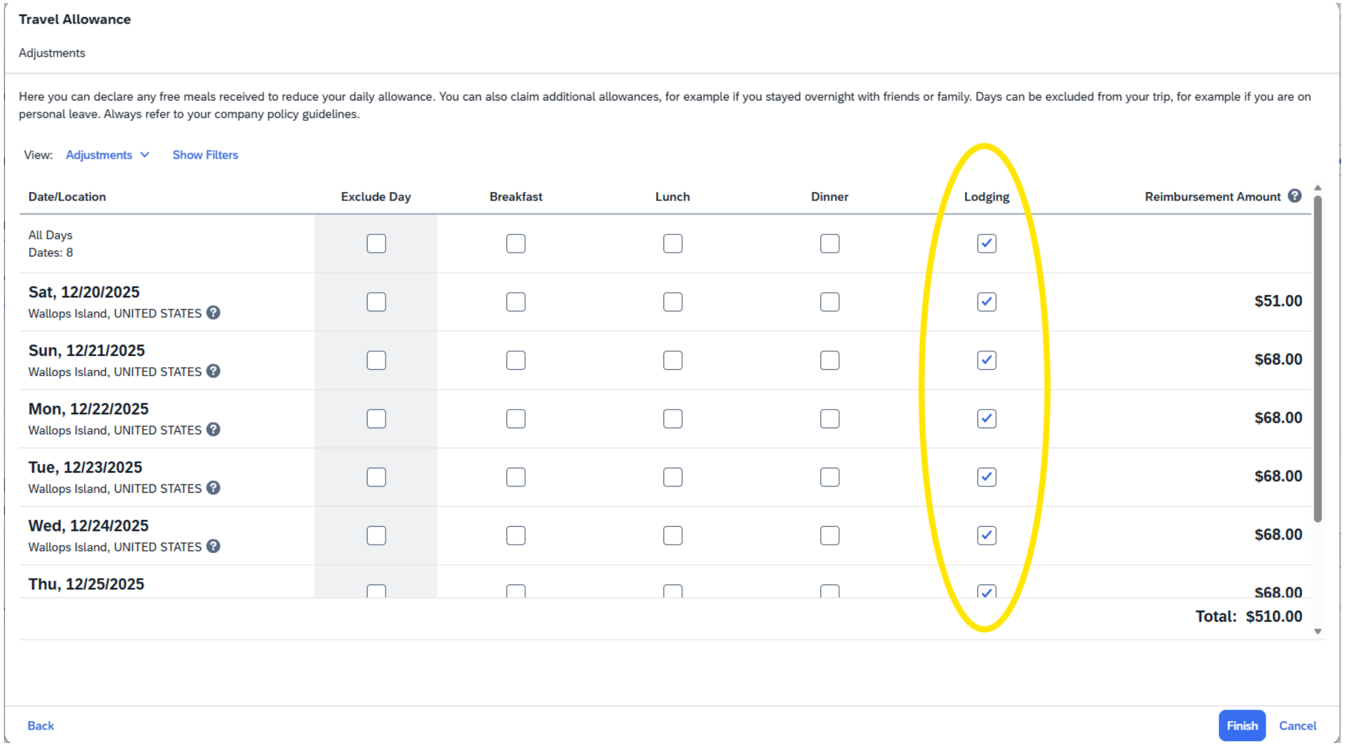
Travel Allowance (Per Diem)

- On the next screen you will see the first travel allowance screen.
- Fill out all fields (including the time).
- Be as accurate as possible.
- Click ‘next’



Travel Allowance (Per Diem)

- Verify that the box for ‘lodging’ is grayed out – if it is not, then you will need to select the top box to remove lodging from the entire trip. Your hotel will be added as a separate line item.
- Here you will also declare any free meals received while on travel (if applicable)
  - Check the box next to any items that are “free to you” to exclude them from the per diem rate.
  - Also check off any days that are personal and not business related
  - Click ‘Finish’


Travel Allowance

Adjustments

Here you can declare any free meals received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: Adjustments   Show Filters

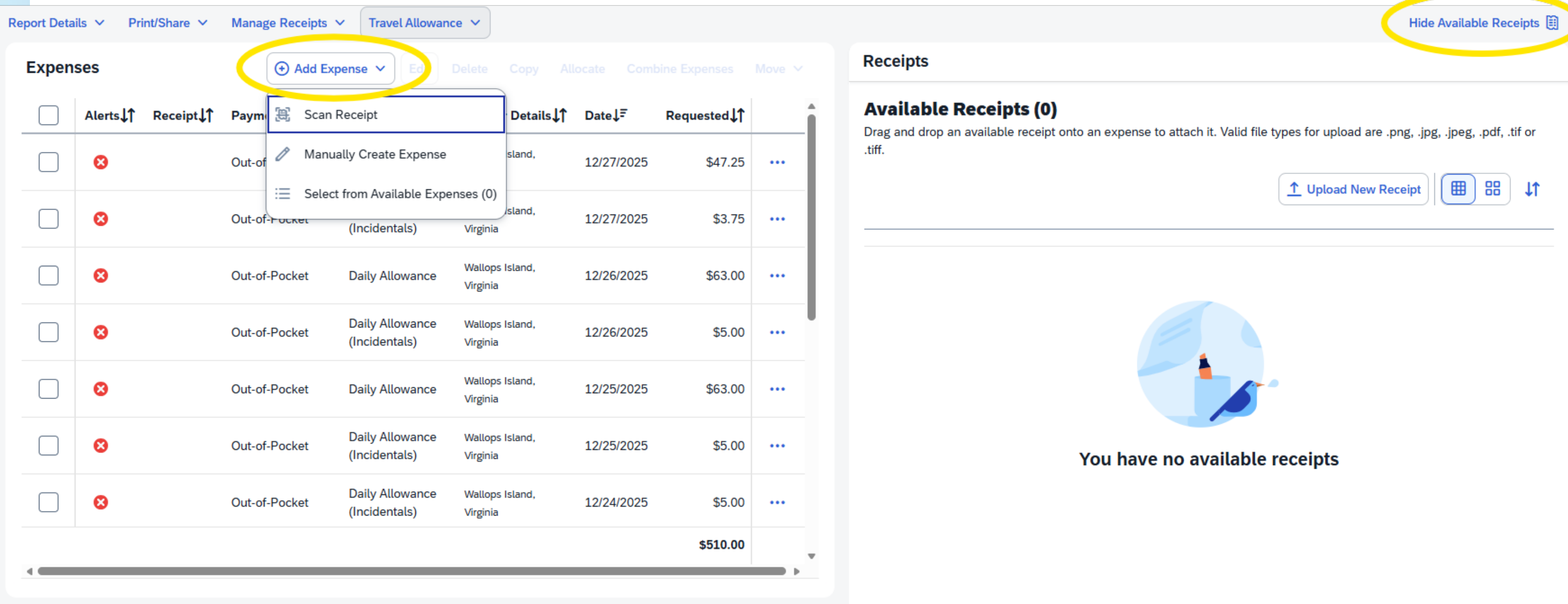
Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Reimbursement Amount
All Days Dates: 8	☐	☐	☐	☐	☑	
Sat, 12/20/2025 Wallops Island, UNITED STATES	☐	☐	☐	☐	☑	$51.00
Sun, 12/21/2025 Wallops Island, UNITED STATES	☐	☐	☐	☐	☑	$68.00
Mon, 12/22/2025 Wallops Island, UNITED STATES	☐	☐	☐	☐	☑	$68.00
Tue, 12/23/2025 Wallops Island, UNITED STATES	☐	☐	☐	☐	☑	$68.00
Wed, 12/24/2025 Wallops Island, UNITED STATES	☐	☐	☐	☐	☑	$68.00
Thu, 12/25/2025	☐	☐	☐	☐	☑	$68.00

Total: $510.00

Back   Finish   Cancel

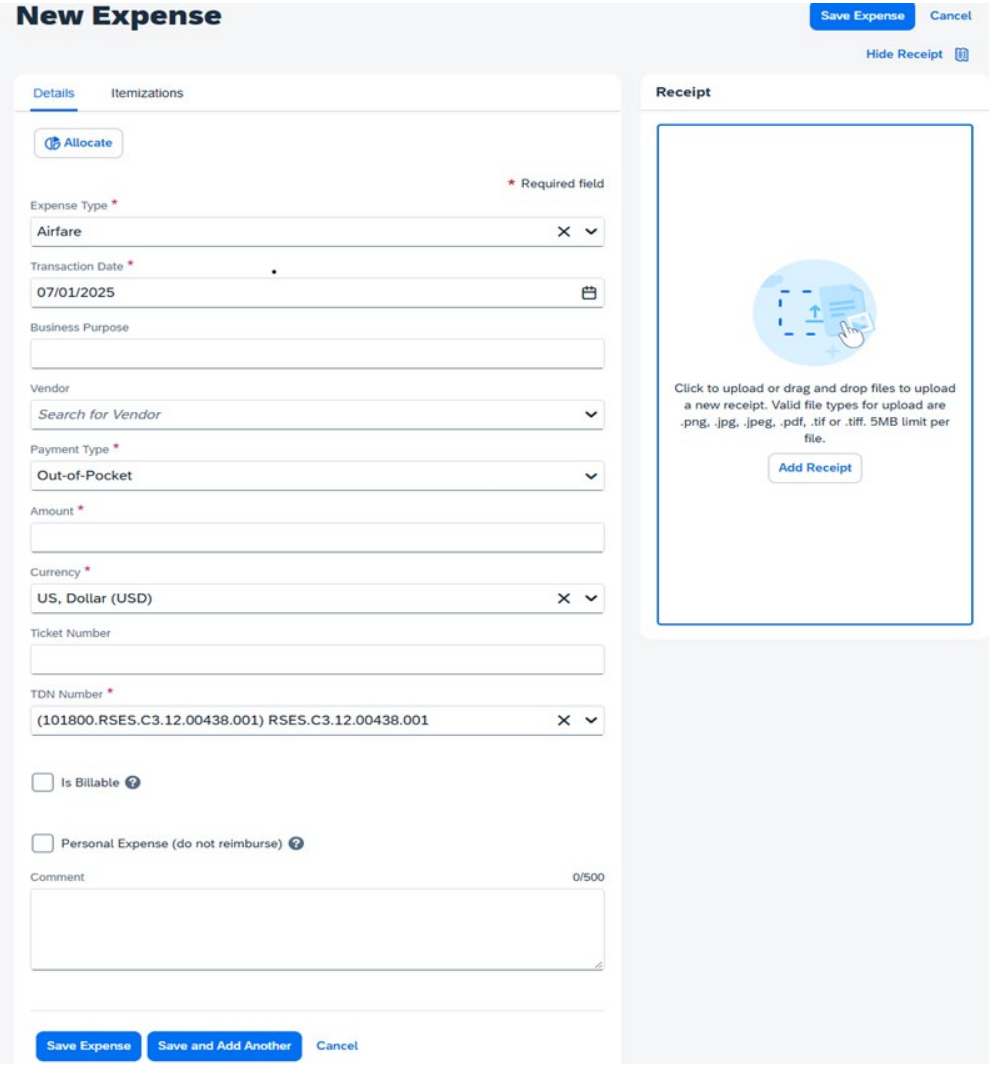
Adding Expenses

- You can now add your incurred expenses to the trip by either manually creating the expense or by selecting from already available expenses or receipts that will populate based on your booked itinerary
- Click ‘Add Expense’ and select one of the options from the drop-down menu to begin adding expenses.
- You can also choose to show/hide your available receipts on the right side.



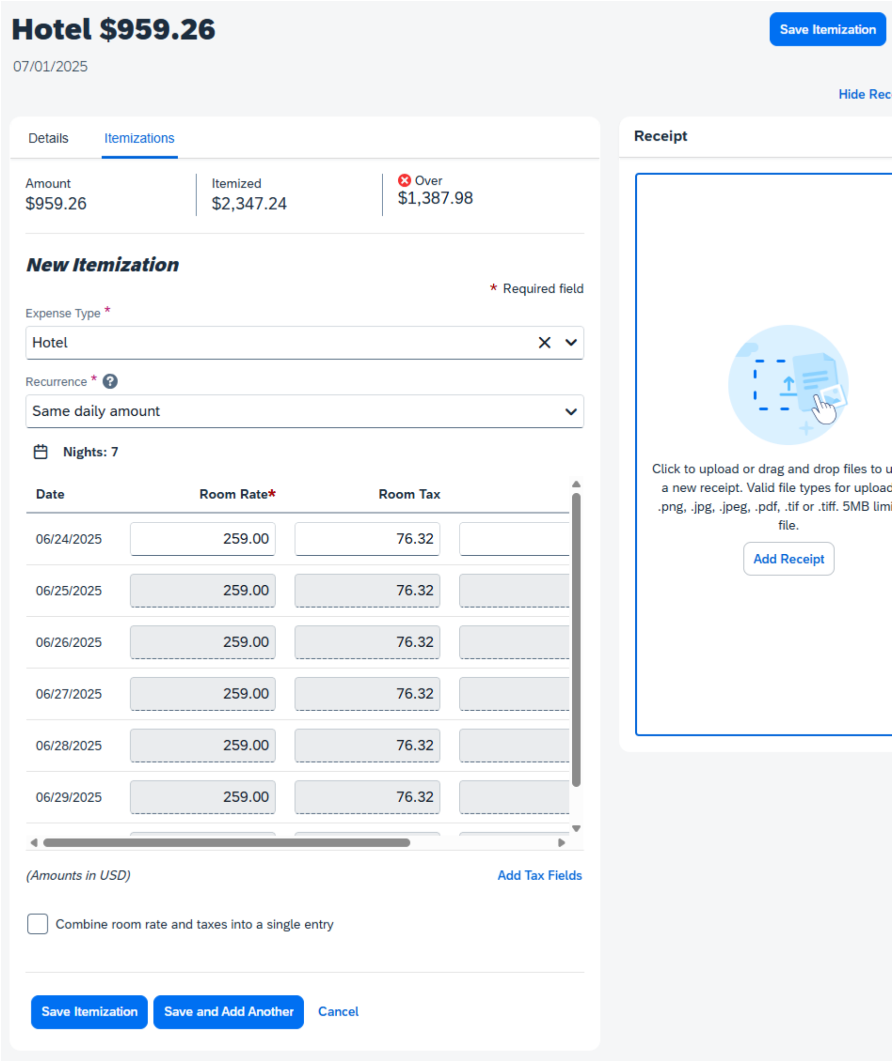
Manually Adding an Expense

- Select ‘Manually Create Expense’
- Select which type of expense to be added
- Fill in the required fields under the new expense
- For payment type; select either out-of-pocket or company paid
- Attach the receipt by clicking on ‘Add Receipt’
- ****ONLY attach the receipt for the specific expense – DO NOT combine receipts for different charges.**
- Click ‘Save Expense’
- Repeat these steps to add the rest of your expenses for your trip.
- ***If you are adding a hotel you will need to itemize the room and tax rates.



Hotel Itemization

- When you are adding a hotel, **you will need to itemize the room and tax rates.**
- Fill out the room rate and the tax rate for each night
- Under ‘Recurrence’, select if the rates are the same each night or not.
- Click ‘Save Itemization’ to add it to your ER
- Make sure your attached receipt reflects form of payment



**Ensure that you have added all Agent Fees incurred while booking travel **

- Check in your ‘Available Expenses’ section of the Expense page
- When booking flights, hotel, or rental cars through Concur, agent fees WILL be incurred.
  - On your receipt these are labeled as ‘Service Fee Number’
- The service fee number must match the number shown on the receipt emailed to you from World Travel, Inc.
- Be sure to upload the WTI email receipt with the corresponding agent fee expense.

Invoice

Invoice Number: 3109982
Invoice Issued: 11/21/2025
Ticket Number: 0067349484632

Delta Air Lines Flight 5595 - November 29

Base Fare	$300.64 USD
Total Tax	$37.85 USD
Total Ticket Amount	$338.49 USD
Form of Payment	VI410039XXXXXX3496

Invoice Number: 3109982
Invoice Issued: 11/21/2025
Ticket Number: 5267349484633

Southwest Airlines Flight 371 - December 05

Southwest Airlines Flight 933 - December 05

Base Fare	$123.89 USD
Total Tax	$34.29 USD
Total Ticket Amount	$158.18 USD
Form of Payment	VI410039XXXXXX3496

Issue Date	11/21/2025
Form of Payment	VI410039XXXXXX3496
Service Fee Number	8900915271344
Service Fee Amount	$5.00 USD

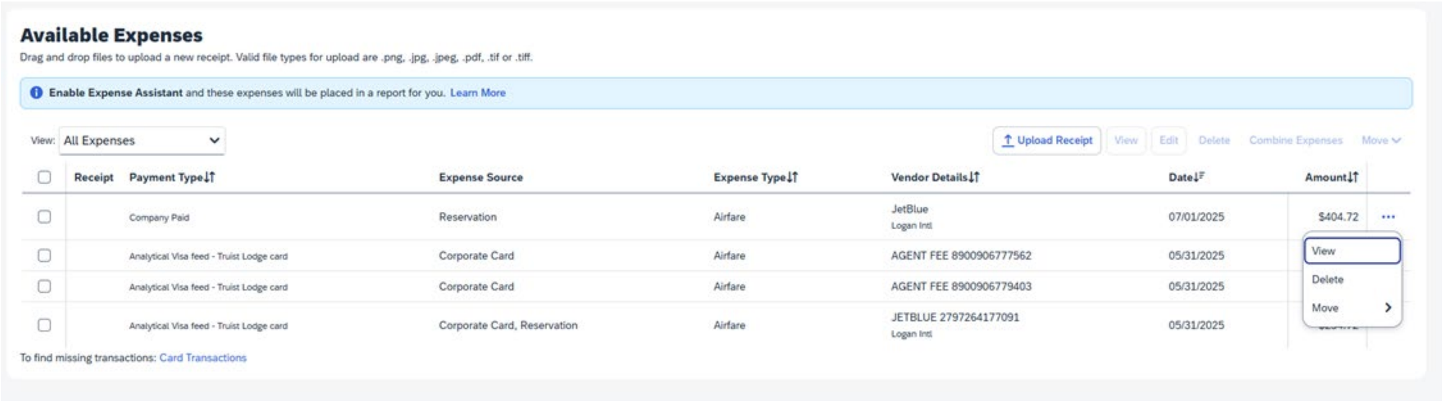
Issue Date	11/21/2025
Form of Payment	VI410039XXXXXX3496
Service Fee Number	8900915271345
Service Fee Amount	$5.00 USD

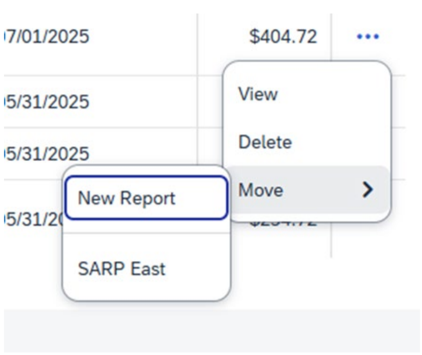
Total Invoice Amount	506.67

☐	Analytical Visa feed - Truist Lodge card	Corporate Card	Airfare	AGENT FEE 8900906777562	05/31/2025	$5.00	•••
☐	Analytical Visa feed - Truist Lodge card	Corporate Card	Airfare	AGENT FEE 8900906779403	05/31/2025	$5.00	•••

To add an expense from ‘Available Expenses’

- Select ‘Select from Available Expenses’
- Check the box of the expense(s) you wish to add to the report
  - You can add them one at a time or multiple at a time
- Click the ‘…’ on the right and select ‘move’ > choose which report to add them to





International Travel Expenses

- For international travel expenses, you may be asked to provide a screenshot or redacted electronic document showing the transaction, along with the receipt. This helps verify the currency conversion to U.S. Dollars.
- If additional documentation is needed, please hide all personal details except:
  - Your name
  - The transaction name
  - The transaction amount
  - Last four digits of the card number

Finally….

- Once you have added all expenses incurred on your trip, click ‘Submit Report’
- The ER will now be processed by accounting.
- Please keep an eye on your email after submission, accounting or the travel team may have follow-up questions for you that need to be answered in a timely manner.
- If you have any questions or concerns, don’t hesitate to reach out to the travel team.
  - Email the travel team – **RSEStravel@ama-inc.com**
  - World Travel - reservation or ticketing questions
    - US: **1-877-788-5294**
    - OCONUS: **484-617-3177**
  - Concur IT – booking issues
    - US: **1-800-221-4730**
    - OCONUS: **1-484-948-2999**

Useful Links

- www.concursolutions.com
- Download the mobile app
  - CTE Customer Portal
  - Mobile Expense Management Software and Apps for Business - SAP Concur
- Concur Support – lower left on every page
- Per Diem information
  - Home | GSA
  - U.S. Department of State | Home Page
- Currency Converter
  - Currency Converter | Foreign Exchange Rates | OANDA