

## SAP Concur Getting Started QuickStart Guide



SAP Concur  
Technologies  
Version 1.9

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01/24/2020	Updated Signing in to SAP Concur	1.9	SAP Concur

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- Travel & Expense
- Invoice
- Expense
- Travel
- Request
- Risk Messaging
- SAP Concur for Mobile

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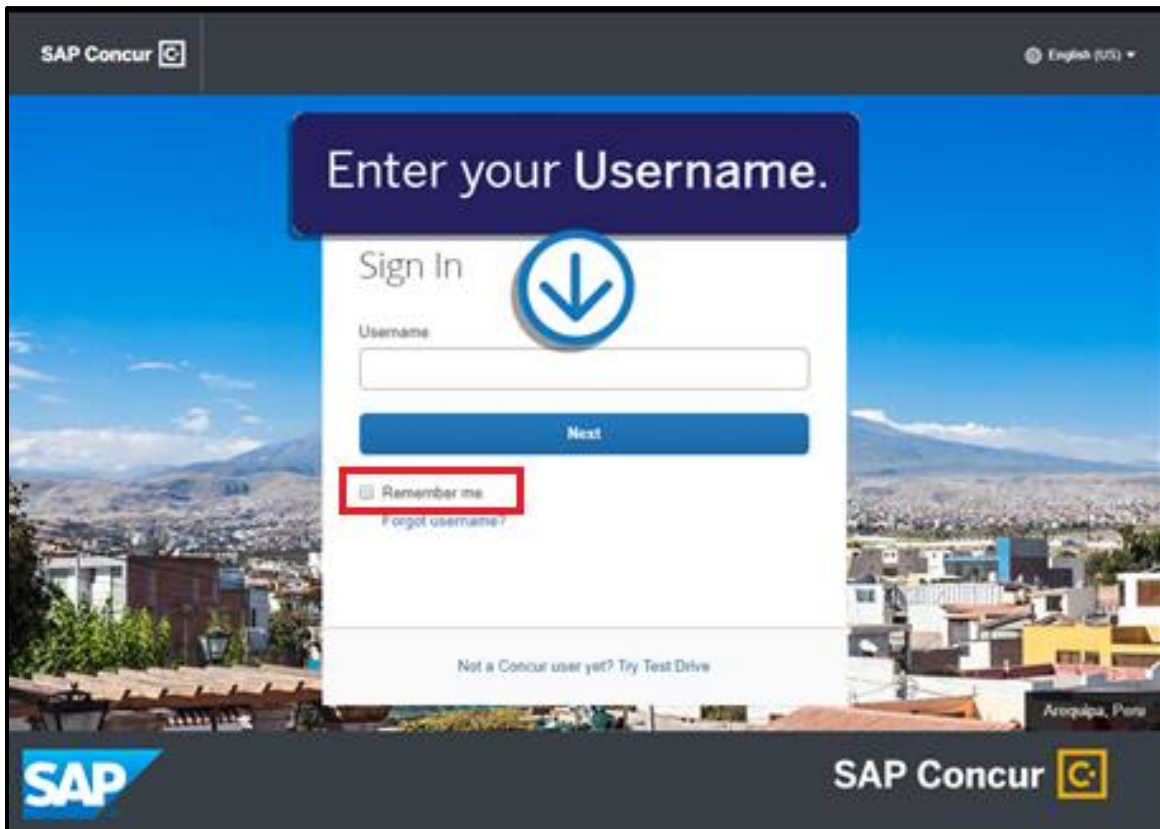
## Welcome to SAP Concur

SAP Concur integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools you need to book travel as well as create and submit expense reports

## Signing In to SAP Concur

1. To sign in to SAP Concur, on the **Sign In** screen, enter your **Username**, and then click **Next**.

You can select the **Remember me** check box to store your password, so that you don't have to enter it the next time you sign in to SAP Concur from this device.



2. Enter your **Password**.

If this is your initial log in to SAP Concur, you enter the temporary password that was provided to you.

**NOTE:** Your **password** is case sensitive.

3. Click **Sign In**.

### Notes:

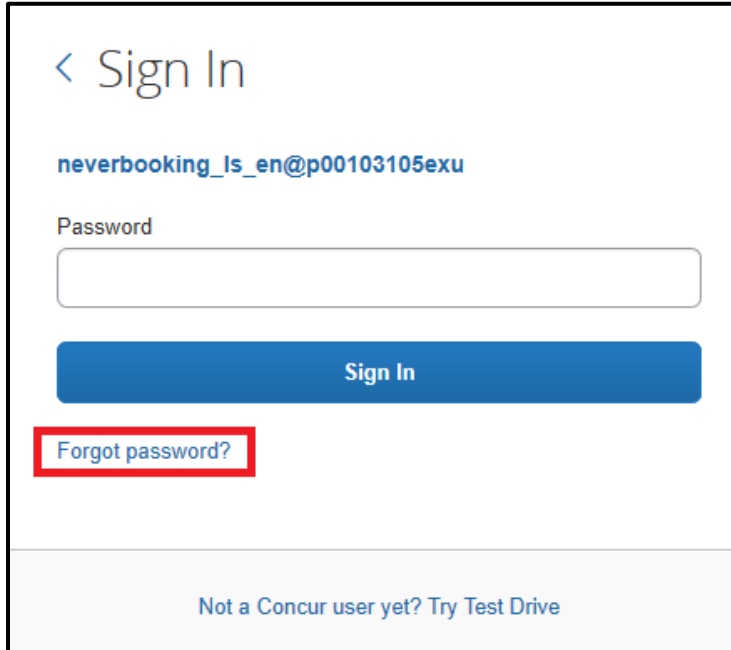
- Log on to SAP Concur following your company's logon instructions.
- Your password is case sensitive.
- If you are not sure how to log on, check with your company's administrator.

## Retrieving and Changing your Password

If you have forgotten your password, you can request to receive it in an email.

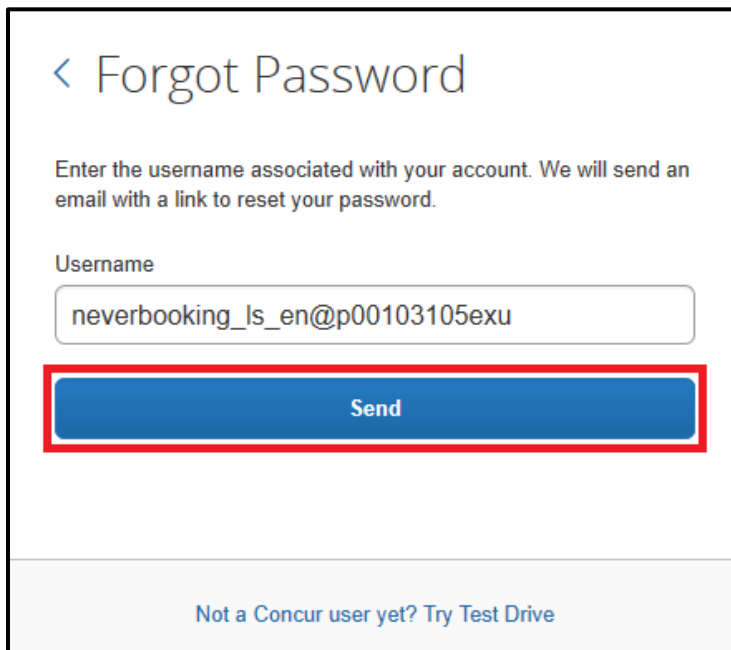
### To retrieve your password

1. On the **Sign In** page, click the **Forgot your password?** link.



2. Enter the username associated with your account, and then click **Send**.

A temporary password will be send to your email address with a link to reset your password.

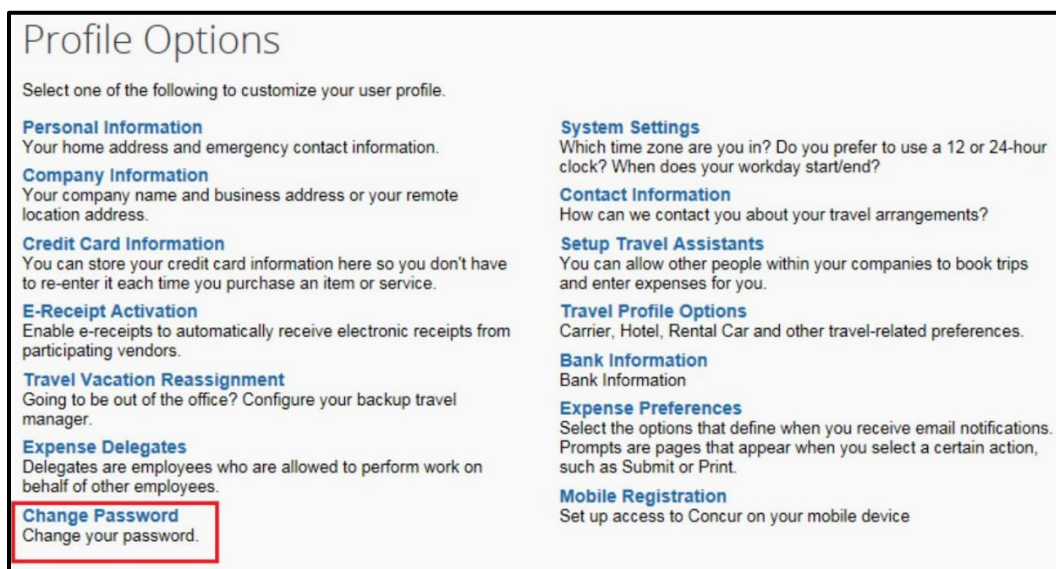


## To change your password

1. After you log in, in the upper right corner of the page, click **Profile**, and then click **Profile Settings**.



2. On the **Profile Options** page, click **Change Password**.



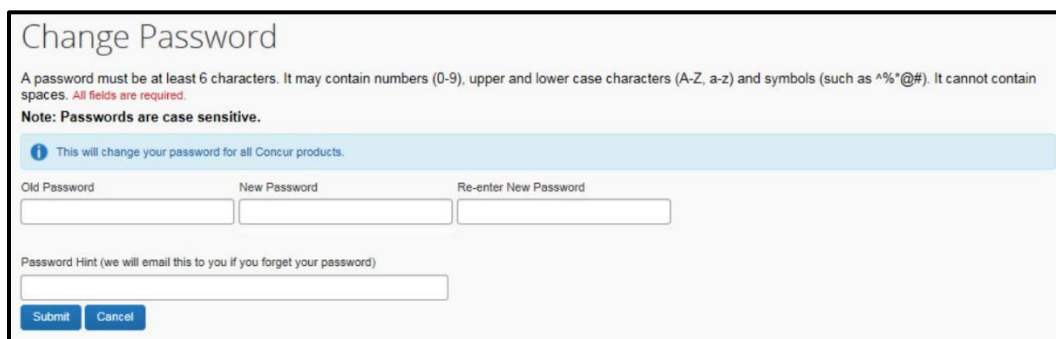
**Profile Options**

Select one of the following to customize your user profile.

- Personal Information**  
Your home address and emergency contact information.
- Company Information**  
Your company name and business address or your remote location address.
- 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.
- E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- Travel Vacation Reassignment**  
Going to be out of the office? Configure your backup travel manager.
- Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.
- Change Password**  
Change your password.
- 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?
- Contact Information**  
How can we contact you about your travel arrangements?
- Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.
- Bank Information**  
Bank Information
- 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.
- Mobile Registration**  
Set up access to Concur on your mobile device

3. Enter and confirm your new password.


Note that your password must be at least seven characters with at least one number and one letter.



**Change Password**

A password must be at least 6 characters. It may contain numbers (0-9), upper and lower case characters (A-Z, a-z) and symbols (such as ^%\*#@#). It cannot contain spaces. All fields are required.

**Note:** Passwords are case sensitive.

 This will change your password for all Concur products.

Old Password  New Password  Re-enter New Password

Password Hint (we will email this to you if you forget your password)

4. To act as a reminder, enter a hint for the password, and then click **Submit**.

## Exploring the SAP Concur Home Page

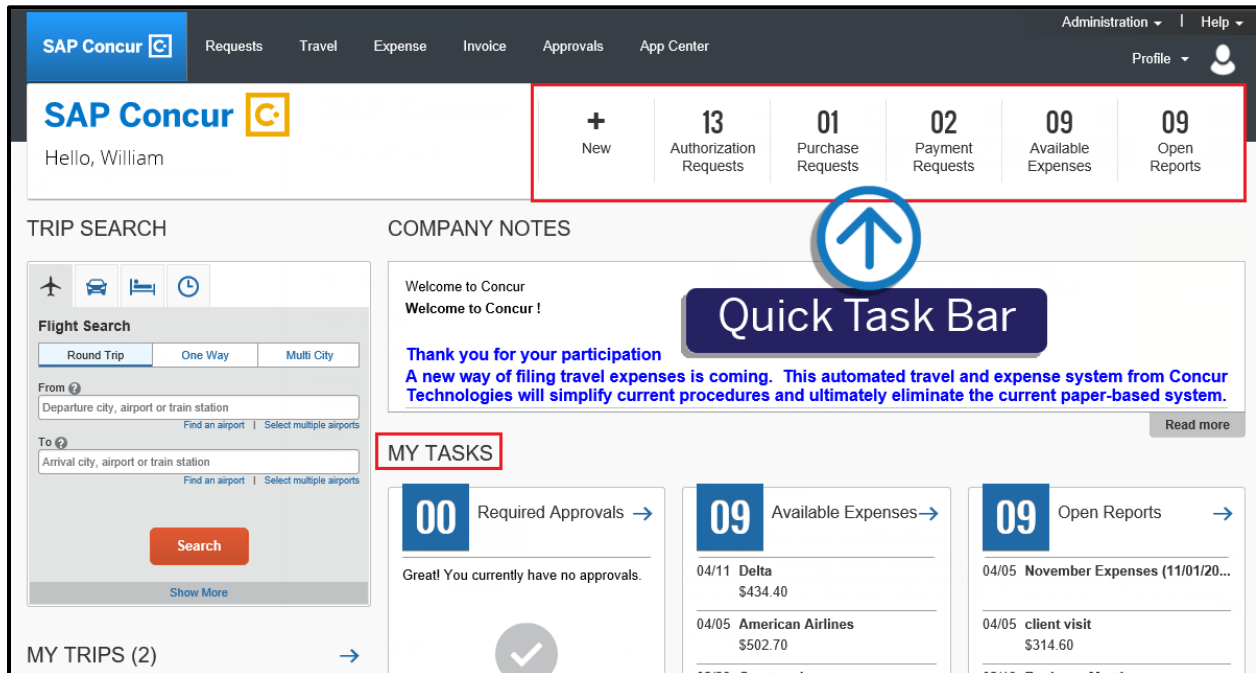
The SAP Concur home page contains the following sections.

**Note:** To return to the SAP Concur home page from any other page, click the SAP Concur logo on the top left of the screen.


### Concur Expense only

If your company uses Concur Expense only, you will see these sections.

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none"><li>Start a new report, request, cash advance, payment request, etc.</li><li>Open reports and requests</li><li>Manage available expenses</li></ul>
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.



**SAP Concur** | Requests | Travel | Expense | Invoice | Approvals | App Center | Administration | Help

Profile | 

**SAP Concur** | Hello, William


**Quick Task Bar**


- + New
- 13 Authorization Requests
- 01 Purchase Requests
- 02 Payment Requests
- 09 Available Expenses
- 09 Open Reports

**TRIP SEARCH**

Flight Search

Round Trip | One Way | Multi City

From   
Departure city, airport or train station  
[Find an airport](#) | [Select multiple airports](#)

To   
Arrival city, airport or train station  
[Find an airport](#) | [Select multiple airports](#)

**Search**

[Show More](#)

**COMPANY NOTES**

Welcome to Concur  
Welcome to Concur !

**Quick Task Bar**

[Thank you for your participation](#)  
A new way of filing travel expenses is coming. This automated travel and expense system from Concur Technologies will simplify current procedures and ultimately eliminate the current paper-based system.  
[Read more](#)

**MY TASKS**

- 00** Required Approvals →  
Great! You currently have no approvals.
- 09** Available Expenses →
  - 04/11 Delta \$434.40
  - 04/05 American Airlines \$502.70
- 09** Open Reports →
  - 04/05 November Expenses (11/01/20...
  - 04/05 client visit \$314.60

**MY TRIPS (2)** →



## Concur Expense and Concur Travel

If your company uses Concur Expense *and* ConcurTravel, you will see these sections.

Section	Description
Trip Search	This section provides the tools you need to book a trip with any or all of the following:  <b>Flight:</b> Use to book a flight. You can also book hotel and reserve a car at the same time.  <b>Car, Hotel, Limo, or Rail:</b> Use to book hotels, reserve rental cars, etc. if not including them while booking a flight ( <b>Flight</b> tab).
Alerts	This section displays informational alerts about Travel features.
Company Notes	Content is provided by your company administrator.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists <b>Required Approvals</b> , <b>Available Expenses</b> , and <b>Open Reports</b> .

The screenshot displays the SAP Concur web application interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Invoice, Approvals, and App Center. The main header area includes the SAP Concur logo, a greeting "Hello, William", and several summary cards: "New" (1), "Authorization Requests" (13), "Purchase Requests" (01), "Payment Requests" (02), "Available Expenses" (09), and "Open Reports" (09). Below the header, the interface is divided into several sections:

- TRIP SEARCH:** Contains a "Flight Search" form with tabs for Round Trip, One Way, and Multi City. It includes fields for "From" (Departure city, airport or train station) and "To" (Arrival city, airport or train station), both with "Find an airport" and "Select multiple airports" links. A "Search" button and a "Show More" link are at the bottom.
- COMPANY NOTES:** Displays a welcome message and a blue announcement: "Thank you for your participation. A new way of filing travel expenses is coming. This automated travel and expense system from Concur Technologies will simplify current procedures and ultimately eliminate the current paper-based system." A "Read more" link is provided.
- MY TASKS:** A central section with three main cards:
  - Required Approvals:** Shows "00" and a message "Great! You currently have no approvals." with a checkmark icon.
  - Available Expenses:** Shows "09" and a list of expenses:
 

Date	Expense	Amount
04/11	Delta	\$434.40
04/05	American Airlines	\$502.70
02/23	Courtyard	\$605.41
02/23	Avis	\$527.82
01/12	Courtyard	\$1,389.93
  - Open Reports:** Shows "09" and a list of reports:
 

Date	Report	Amount
04/05	November Expenses (11/01/20...	
04/05	client visit	\$314.60
02/19	Business Meeting	
02/19	client visit	
01/30	Trip to Seattle	
- MY TRIPS (2):** Shows a card for "APR 23-27 Trip from Seattle to Memphis" with a "More" link and a clock icon.

## Updating Your Expense Profile

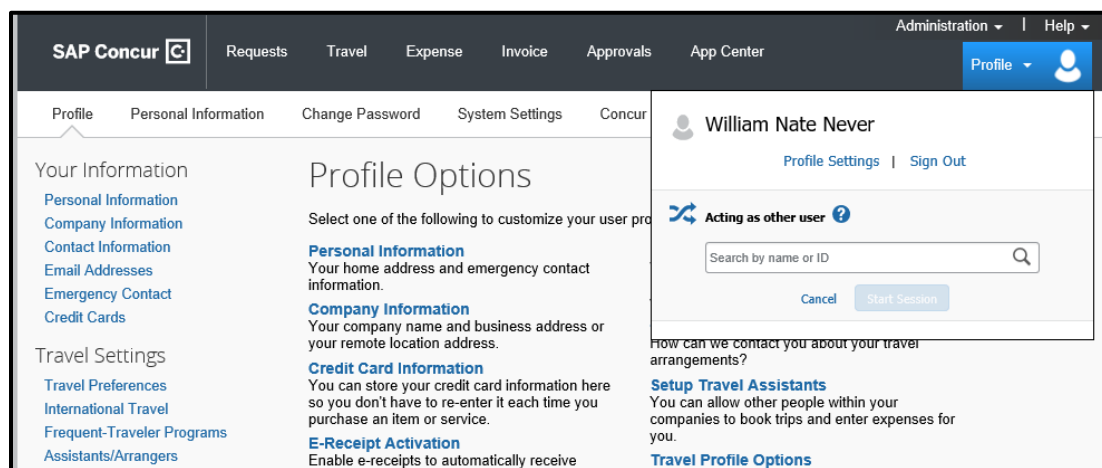
You use the **Profile Options** page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information changes.

**Note:** Depending on your company's configuration, some of these options might not be available to you. Contact your SAP Concur administrator for more information.

- **Your Information** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Travel Settings** - Enter travel preferences, add international travel information, and your Frequent-Traveler programs. You can also add your travel assistants and arrangers.
- **Request Settings** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Expense Settings** - Enter expense preferences, add bank information and company card information. You can also enter expense delegates and approvers.
- **Invoice Settings** - Enter invoice preferences, add invoice delegates and approvers.
- **Other Settings** - Provides settings such as E-Receipts Activation and Concur Mobile Registration that you can set or update.

To access your Profile page

1. Click **Profile > Profile Settings**.



2. On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.

**Profile Options**

Select one of the following to customize your user profile.

Category	Sub-category	Link
Your Information	Personal Information	<a href="#">Personal Information</a>
	Company Information	<a href="#">Company Information</a>
	Contact Information	<a href="#">Contact Information</a>
	Email Addresses	<a href="#">Email Addresses</a>
	Emergency Contact	<a href="#">Emergency Contact</a>
	Credit Cards	<a href="#">Credit Cards</a>
	Travel Settings	<a href="#">Travel Settings</a>
	Travel Preferences	<a href="#">Travel Preferences</a>
	International Travel	<a href="#">International Travel</a>
	Frequent-Traveler Programs	<a href="#">Frequent-Traveler Programs</a>
Request Settings	Request Information	<a href="#">Request Information</a>
	Request Delegates	<a href="#">Request Delegates</a>
	Request Preferences	<a href="#">Request Preferences</a>
	Request Approvers	<a href="#">Request Approvers</a>
	Favorite Attendees	<a href="#">Favorite Attendees</a>
Expense Settings	Expense Information	<a href="#">Expense Information</a>
	Bank Information	<a href="#">Bank Information</a>
	Expense Delegates	<a href="#">Expense Delegates</a>
	Expense Preferences	<a href="#">Expense Preferences</a>
	Expense Approvers	<a href="#">Expense Approvers</a>
Invoice Settings	Invoice Information	<a href="#">Invoice Information</a>

## Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing and submitting reports.

### To work as a delegate

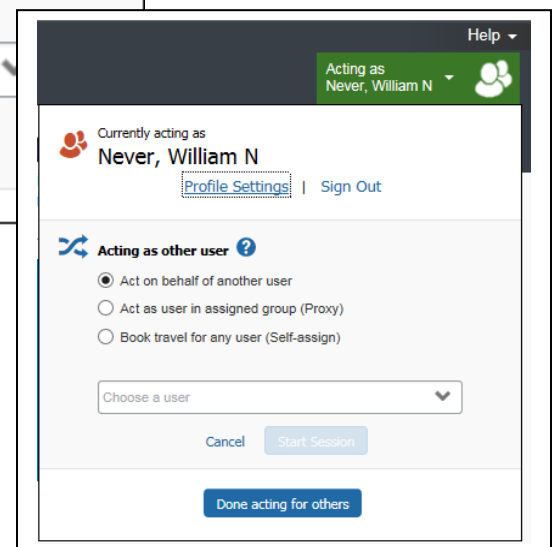
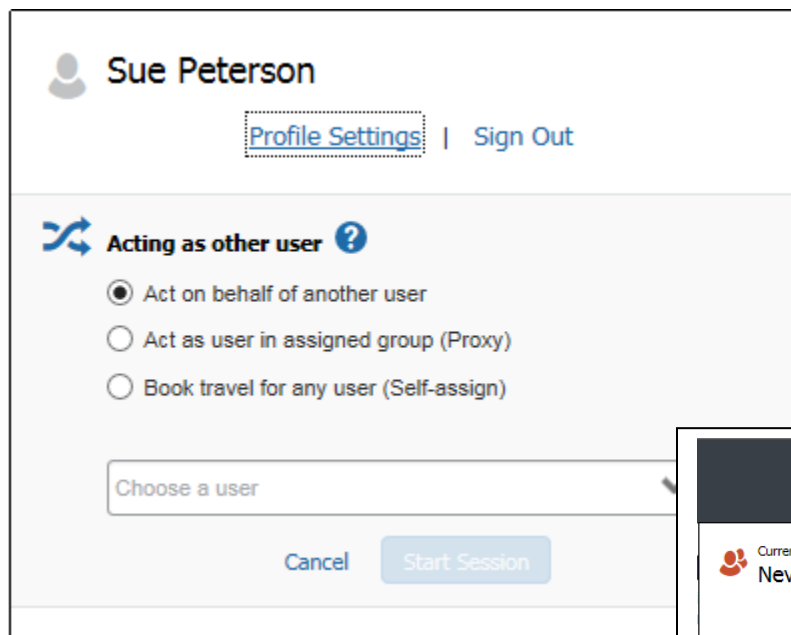
1. Click **Profile**, and then verify that the **Act on behalf of another user** option is selected.
2. Search for and select the appropriate user's name.
3. Click **Start Session**.

**Note:** The **Profile** menu now displays **Acting as** and shows the name you just selected.




You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.



4. To select a different user, follow the same steps as above but select a different name.
5. To return to your own tasks, click **Acting as**, and then click **Done acting for others**.

**Note:** The **Profile** menu now appears.



## Using Concur Travel

From the SAP Concur home page, use the Flight  tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations *without* a flight, use the Hotel  and Car  Search tabs, respectively.

**Note:** If your company is configured to use rail, then the Flight  tab may show Air / Rail .

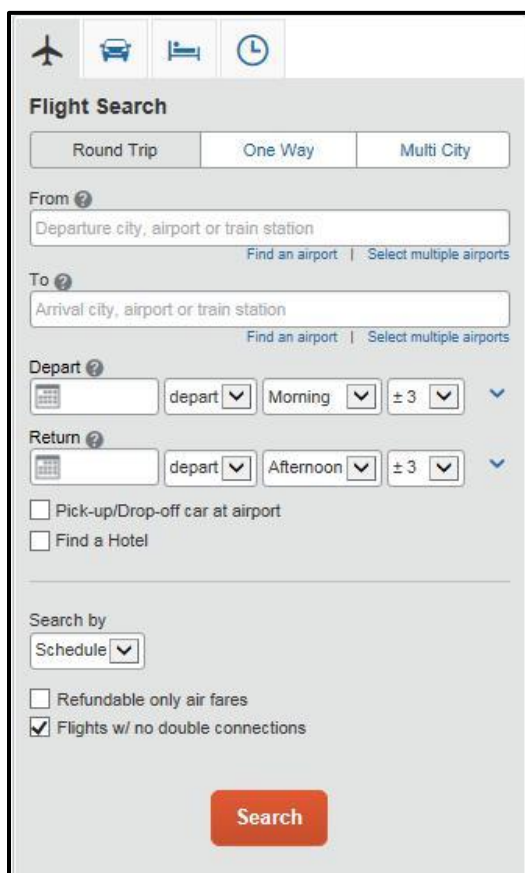
### Flight Reservations

You can access the Flight  tab (or Air / Rail  ) on the left side of the SAP Concur home page.

#### To search for a flight

1. On the SAP Concur home page, on the **Flight** tab, select one of the following options:
  - Round Trip
  - One Way
  - Multi City

If you have a car, hotel, limo or rail to book without airfare, use the corresponding tabs.



The screenshot shows the 'Flight Search' form in the SAP Concur interface. At the top, there are four tabs: Flight (selected), Car, Hotel, and Clock. Below the tabs, the 'Flight Search' section contains the following fields and options:

- Trip Type:** Three buttons: 'Round Trip' (selected), 'One Way', and 'Multi City'.
- From:** A text input field with a placeholder 'Departure city, airport or train station'. Below it are links 'Find an airport' and 'Select multiple airports'.
- To:** A text input field with a placeholder 'Arrival city, airport or train station'. Below it are links 'Find an airport' and 'Select multiple airports'.
- Depart:** A date picker, a 'depart' dropdown, a time dropdown set to 'Morning', and a duration dropdown set to '± 3'.
- Return:** A date picker, a 'depart' dropdown, a time dropdown set to 'Afternoon', and a duration dropdown set to '± 3'.
- Options:** Two checkboxes: 'Pick-up/Drop-off car at airport' (unchecked) and 'Find a Hotel' (unchecked).
- Search by:** A dropdown menu set to 'Schedule'.
- Filters:** Two checkboxes: 'Refundable only air fares' (unchecked) and 'Flights w/ no double connections' (checked).
- Search Button:** A red button labeled 'Search' at the bottom.

2. In the **From** and **To** fields, enter the cities for your travel.  
**Note:** When you type in a city, airport name, or code, Travel will automatically search for a match.
3. Click in the **Depart** and **Return** date fields, and then select the appropriate dates from the calendar.
4. Select **depart** or **arrive**, the time of day you want to fly, and time range from the dropdown arrows.  
**Note:** Travel will automatically search before and after the time you select.
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.  
**Note:** Depending on your company's configuration, you can automatically reserve a car, which allows you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.
6. If you need a hotel, select the **Find a Hotel** check box. You can choose to search for the hotel by the number of miles you specify from the following:
  - Airport
  - Address
  - Company Location
  - Reference Point / Zip Code (a city or neighborhood)
7. Select **Schedule** or **Price** from the **Search by** dropdown arrow.
8. To search only fully refundable fares, select the **Refundable only air fares** check box.
9. If you do not want a flight with a double connection, select the **Flights w/ no double connections** check box.
10. Click **Search**.

### To make the reservation

1. Review the search results and select the most appropriate option for your flight.
2. To filter the results, select a column, row, or cell in the airline grid at the top of the results screen or use the sliding scales on the left. You can easily switch between the **Shop by Fares** tab and the **Shop by Schedule** tab by clicking on the tab.

The screenshot shows the SAP Concur Travel interface. The top navigation bar includes 'CONCUR', 'Requests', 'Travel' (selected), 'Expense', 'Invoice', 'Approvals', and 'App Center'. The right side has 'Administration', 'Help', 'Profile', and a user icon. The main content area is titled 'SEATTLE, WA TO DALLAS, TX WED, JAN 24 - WED, JAN 31'. Below this, there's a 'Trip Summary' section on the left with 'Select Flights' and 'Finalize Trip' options. The central part shows a table of flight results categorized by airline: All (90 results), American Airlines (468.60, 9 results), United (—), Delta (—), and Alaska Airlines (468.60, 1 result). Below the table, there are tabs for 'Shop by Fares' and 'Shop by Schedule'. The 'Shop by Fares' tab is active, showing a flight search bar, a 'Sorted By: Price - Low to High' dropdown, and a list of flight options. The first option is an American Airlines nonstop flight from SEA to DFW for \$468.60. A 'Show all details' link is visible at the bottom right of the flight list.

- If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
  - If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active
3. To select your flight, do one of the following:
- On the **Shop by Fares** tab, select the cost button for the appropriate flight options.

This is a close-up of the 'Shop by Fares' tab. It shows the 'Flight Number Search' bar, the 'Sorted By: Price - Low to High' dropdown, and the text 'Displaying: 9 out of 90 results'. Below this, there's a list of flight options for American Airlines. The first option is a nonstop flight from SEA to DFW for \$468.60. The cost button '\$468.60' is highlighted with a red rectangle. A 'Show all details' link is visible at the bottom right of the flight list.

- On the **Shop by Schedule** tab, click **Select** for the appropriate flight options.

Shop by Fares | **Shop by Schedule**

Depart | Return

Seattle, WA - Wed, Jan 24

Flight Number Search   Sorted By: Depart - Earliest

Displaying: 53 out of 53 results. Previous 1 2 3 4 5 6 Next | All

Delta	06:00a SEA → 09:08a SLC	Nonstop	Economy	<input type="button" value="Select"/>
	11:05a SLC → 02:51p DFW	Nonstop	Economy	

6h 51m / Delta 2066, Delta 1292 - [View seats](#)  
Boeing 737-800, Boeing 717 (Worldspan)

- Click the appropriate link to show all of the flight details.
- Review the flight details for your trip.
 

**Note:** Depending on your airfare provider, you can click the **View seats** link to select your seat on the flight. Select the appropriate **Available** seat from the **Seat Map**.
- Click the fare amount button to select these flights.
- Add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.

**Trip Summary**

**Flights Selected**  
Round Trip  
SEA - DFW  
Depart: Mon, 07/24/2017  
Return: Fri, 07/28/2017

**Select a Car** [Remove](#)  
Pick-up: Mon, 07/24/2017  
Drop-off: Fri, 07/28/2017

**Select a Hotel** [Remove](#)  
Nights: 4  
Dallas, TX  
Check-in: Mon, 07/24/2017  
Check-out: Fri, 07/28/2017

**Finalize Trip**

**Review and Reserve Flight**

**REVIEW FLIGHTS**

**DEPART** ☒ Mon, Jul 24 - Seattle, WA to Dallas, TX [Hide details](#)

Mon, Jul 24	06:05a SEA → 12:09p DFW	4h 04m	American Airlines 1332 Boeing 737-800
-------------	-------------------------	--------	--

**RETURN** ☒ Fri, Jul 28 - Dallas, TX to Seattle, WA [Hide details](#)

Fri, Jul 28	04:55p DFW → 07:07p SEA	4h 12m	American Airlines 1220 32B
-------------	-------------------------	--------	-------------------------------

**ENTER TRAVELER INFORMATION**  
Ensure all traveler information below is correct. [Edit](#) | [Review all](#)

**Primary Traveler**

Name: William Nate Never Phone: 1 425 590 4567

**Frequent Flyer Programs** [Add a Program](#)  
For American Airlines

**SEAT ASSIGNMENT**  
Seats will be automatically selected based on your profile preferences and can be changed on the Travel Details pages or any time after booking is complete. [View seatmap](#)

**REVIEW PRICE SUMMARY**

Description	Fare	Taxes and Fees	Charges
Airfare	\$442.79	\$61.61	\$504.40
<b>Total Estimated Cost:</b>		<b>\$504.40</b>	
<b>Total Due Now:</b>		<b>\$504.40</b>	

**METHOD OF PAYMENT**  
This purchase will be charged to your company directly.

**This is a Non-Refundable Ticket**  
Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

- Click **Reserve Flight and Continue**.




## Car Reservations

If you requested a car on the **Flight** tab (or **Air / Rail**) **Search**, the rental car search results appear.

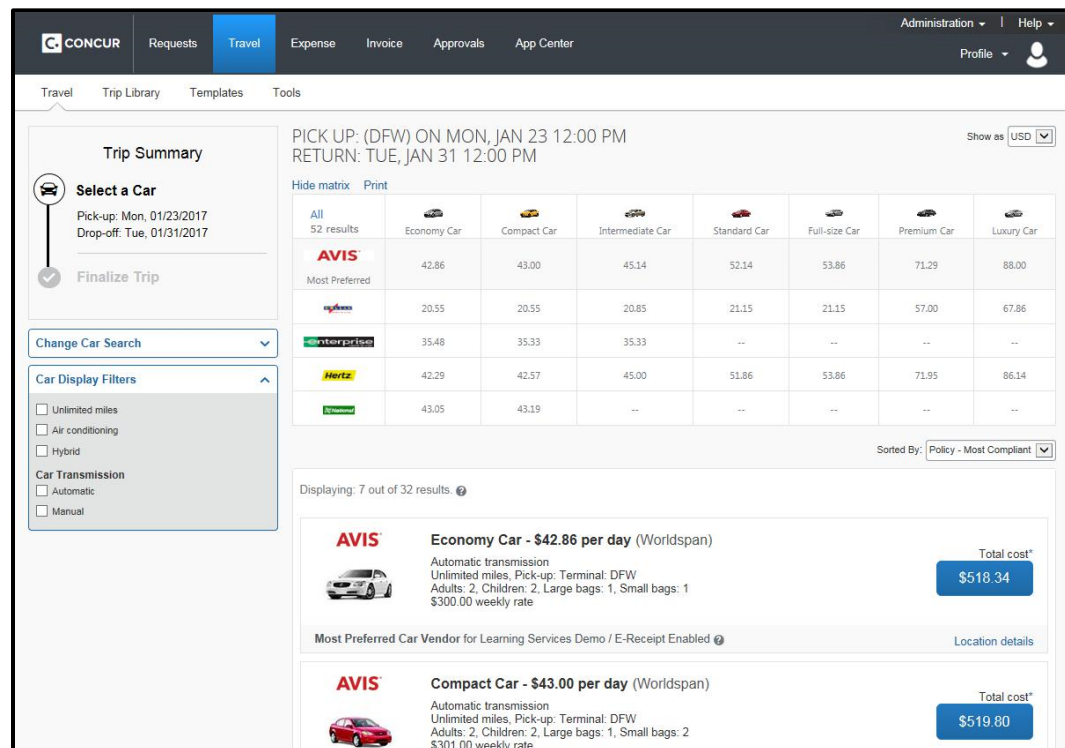
### To select a rental car

- If you selected **Pick Up/Drop off car at airport** on the **Flight** tab, you will see the results for the car search.
- If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.
- Or –

- Click the **Car**  tab on the left side of the SAP Concur home page, and then select your Pick-up and Drop-off dates and time, and then click **Search**.

1. Click the **Total cost** button next to the appropriate rental car.

**Note:** You can sort the car results to help find your selection.



The screenshot shows the SAP Concur Travel interface. The top navigation bar includes 'CONCUR', 'Requests', 'Travel' (selected), 'Expense', 'Invoice', 'Approvals', and 'App Center'. The right side has 'Administration', 'Help', and a user profile. Below the navigation bar, there are tabs for 'Travel', 'Trip Library', 'Templates', and 'Tools'. The main content area is titled 'Trip Summary' and shows 'Select a Car' with pick-up and drop-off dates. A table displays search results for various car categories: All, Economy Car, Compact Car, Intermediate Car, Standard Car, Full-size Car, Premium Car, and Luxury Car. The table lists prices for different vendors like Avis, Hertz, and Enterprise. Below the table, there are filters for 'Car Display Filters' and 'Car Transmission'. The bottom section shows detailed information for two selected cars: an Avis Economy Car and an Avis Compact Car, including their total costs and rental details.

	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car
<b>AVIS</b>	42.86	43.00	45.14	52.14	53.86	71.29	88.00
Most Preferred							
<b>Enterprise</b>	20.55	20.55	20.85	21.15	21.15	57.00	67.86
<b>Hertz</b>	35.48	35.33	35.33	--	--	--	--
<b>Enterprise</b>	42.29	42.57	45.00	51.86	53.86	71.95	86.14
<b>Enterprise</b>	43.05	43.19	--	--	--	--	--

Sorted By: Policy - Most Compliant

Displaying: 7 out of 32 results.

**AVIS Economy Car - \$42.86 per day (Worldspan)**  
Automatic transmission  
Unlimited miles, Pick-up: Terminal: DFW  
Adults: 2, Children: 2, Large bags: 1, Small bags: 1  
\$300.00 weekly rate  
Total cost\* \$518.34


**AVIS Compact Car - \$43.00 per day (Worldspan)**  
Automatic transmission  
Unlimited miles, Pick-up: Terminal: DFW  
Adults: 2, Children: 2, Large bags: 1, Small bags: 2  
\$301.00 weekly rate  
Total cost\* \$519.80

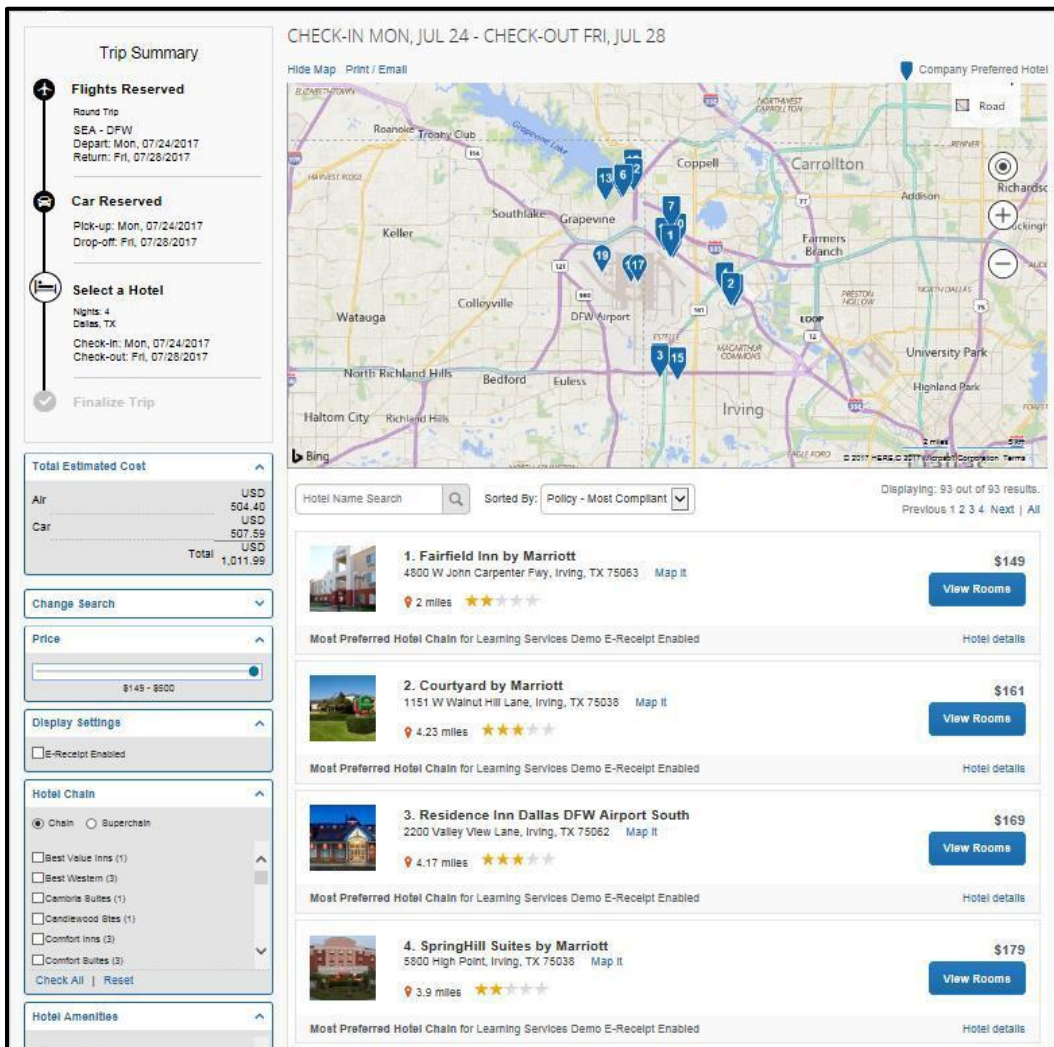
2. Review your car rental details, and then click **Reserve Car and Continue**.
3. Review your travel details, and then click **Next**.

## Hotel Reservations

**Note:** Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.

### To select a hotel

- If you requested a hotel on the **Flight** tab (or **Air / Rail**) **Search**, the hotel search results appear.
- Or –
- Click the **Hotel**  tab on the left side of the SAP Concur home page, and then select your **Check-in** and **Check-out** dates and time, and then click **Search**.



**Trip Summary**

**Flights Reserved**  
Round Trip  
SEA - DFW  
Depart: Mon, 07/24/2017  
Return: Fri, 07/28/2017

**Car Reserved**  
Pick-up: Mon, 07/24/2017  
Drop-off: Fri, 07/28/2017

**Select a Hotel**  
Nights: 4  
Dates: TX  
Check-in: Mon, 07/24/2017  
Check-out: Fri, 07/28/2017

**Total Estimated Cost**

	USD
Air	504.45
Car	507.59
<b>Total</b>	<b>1,011.99</b>

**Hotel Search Results:**

Hotel Name Search: [Search] Sorted By: Policy - Most Compliant

Displaying: 93 out of 93 results. Previous 1 2 3 4 Next | All

- 1. Fairfield Inn by Marriott**  
4800 W John Carpenter Fwy, Irving, TX 75063 Map it  
2 miles ★★☆☆☆ **\$149** View Rooms
- 2. Courtyard by Marriott**  
1151 W Walnut Hill Lane, Irving, TX 75038 Map it  
4.23 miles ★★☆☆☆ **\$161** View Rooms
- 3. Residence Inn Dallas DFW Airport South**  
2200 Valley View Lane, Irving, TX 75062 Map it  
4.17 miles ★★☆☆☆ **\$169** View Rooms
- 4. SpringHill Suites by Marriott**  
5800 High Point, Irving, TX 75038 Map it  
3.9 miles ★★☆☆☆ **\$179** View Rooms

1. Use the filter options to narrow your search by **Hotel Chain** or **Amenities**.
2. Click **View Rooms** to view room rates.
3. When you are ready to reserve your hotel room, click the rate button next to the desired room type.

4. Review the information on the **Review and Reserve Hotel** page, select the check box to agree, and then click **Reserve Hotel and Continue**.

## Completing the Reservation

You can add or make changes to the car or hotel as well as change the dates of the flight before you complete your reservation.

### To complete the reservation

1. Review the **Travel Details**, and then click **Next**.  
**Note:** Depending on your company's configuration you may be able to add parking, taxi, wifi, or dining at this time.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.  
The trip name and description data are for your record keeping. You can choose to send a copy of the confirmation to additional recipients.
3. Click **Next**.  
You will see the name, itinerary, and ticketing deadline, along with the total estimated cost
4. Click **Confirm Booking** to finalize your trip.
5. On the **Pre-populating Your Expense Report** page, you can add transportation and parking expenses, and then click **Finish**.

## Cancelling or Changing a Reservation

### To change an airline, car rental, or hotel reservation

1. At the top of the SAP Concur home page, click **Travel**.
2. On the **Upcoming Trips** tab, click the name of the trip you want to change.

#### Notes:

- Flight changes are available for e-tickets that include a single carrier.
  - If the trip is already ticketed but has not occurred, you can change the time and/or date of the flight. Your change options will be with the same airline and routing.
  - Directly contact your travel agency, the appropriate Website, or vendor if you did not book your trip using Travel.
3. To change a trip, in the **Action** column, click **Change Trip**.
  4. On the **Itinerary** page, select the portion of the trip you want to change.
  5. To cancel your entire trip, in the **Action** column, click **Cancel Trip**, and then click **OK**.

**Note:** When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips

6. To create an expense report for this trip, click **Expense**.

## Creating an Expense Report

To create an expense report

1. On the SAP Concur home page, place your mouse pointer over **New** on the Quick Task Bar, and then click **Start a Report**.
2. On the **Create a New Expense Report** page, complete all required fields (indicated with a red bar) and the optional fields as directed by your company, and then click **Next**.

**Create New Report**

\* Indicates required field

Report Name \*

Report Date: 01/02/2018

Company \*: (10) United States

Cost Center \*: (3030) Mid Market

Policy \*: Travel & Expense Policy

Business Purpose \*

Department \*: (300) Sales

Project Code: Search by Code

Comment

3. Click **New Expense** to create a new expense, or select one from the **Expense Type** list.

After you select the expense type, the **Expense Type** fields automatically populate.

**Manage Expenses**

**Business Trip**

Buttons: + New Expense, + Quick Expenses, Import Expenses, Details, Receipts, Print / Email

Buttons: Delete Report, Submit Report

Expense Type: [Dropdown]

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

**01-Transportation**

- Airfare
- Airfare Fees
- Car Rental
- Gas - Petrol (rental car only)
- Mileage (personal car only)
- Parking - Tolls
- Parking Subsidy (Bellevue Employees Only)
- Taxi-Shuttle-Train

**02-Lodging**

- Hotel
- Hotel Phone
- Laundry

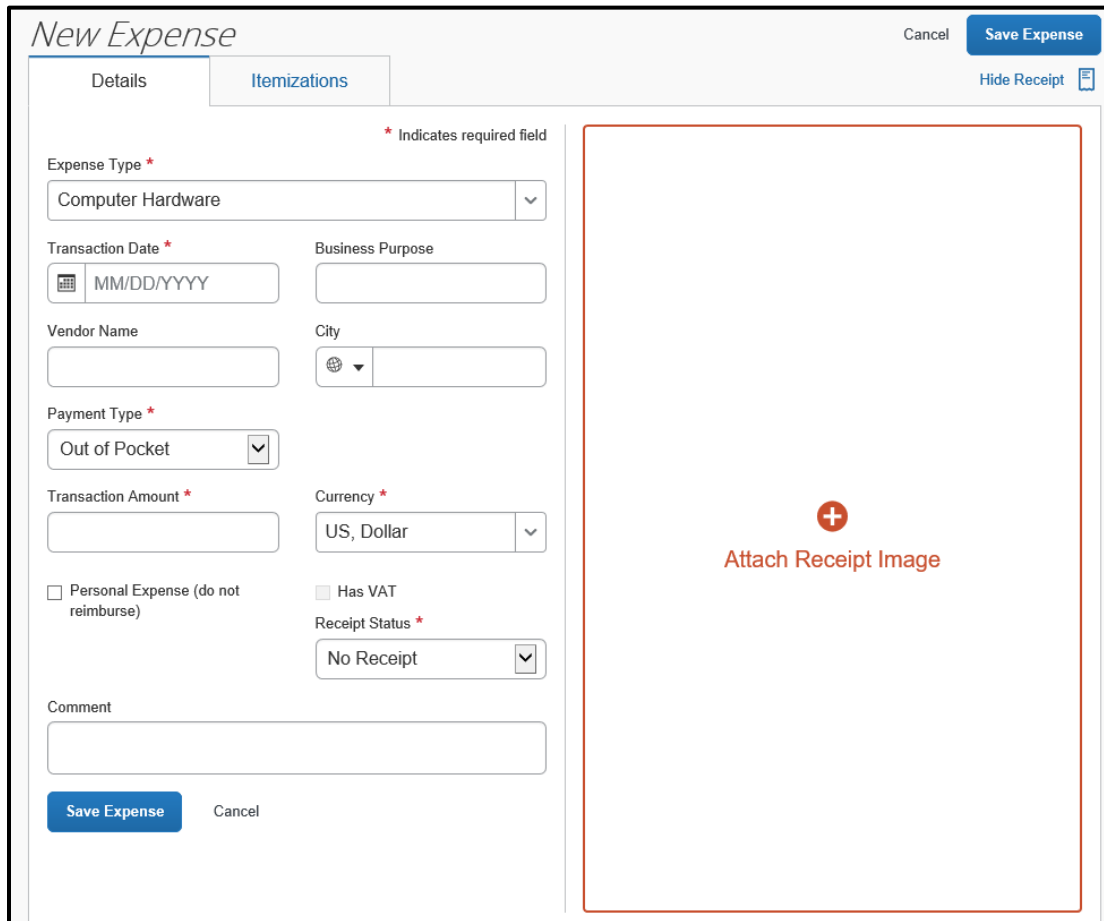
**03-Meals and Entertainment**

- Beverages
- Business Meals - Meetings
- Entertainment
- Individual Breakfast

Date	Expense Type	Amount	Requested
Adding New Expense			

4. Complete all required fields and the optional fields as directed by your company, and then click **Save**.

- Note:** To delete an unsubmitted report, click **Delete Report**.
- Click **Import Expenses**, and then select **Available Expenses**.
  - Select the check box(es) for the expense you want for add to this report, and then click **Move**.
  - From the **Expense** tab, complete the require and optional fields, as needed (required fields are indicated with a red asterisk).
  - Click **Attach Receipt** to upload any required receipts for this expense.



**New Expense** Cancel Save Expense

Details Itemizations Hide Receipt

\* Indicates required field

Expense Type \*  
Computer Hardware

Transaction Date \*  
MM/DD/YYYY

Business Purpose

Vendor Name

City

Payment Type \*  
Out of Pocket

Transaction Amount \*

Currency \*  
US, Dollar

☐ Personal Expense (do not reimburse)

☐ Has VAT

Receipt Status \*  
No Receipt

Comment

Save Expense Cancel

+  
Attach Receipt Image

- From the **Attach Receipt** window, click **Browse** to locate the image file, and then click **Attach**.
- For any expenses that require itemizations, click **Itemize**.
- Complete all required and optional fields, as needed.
- Click **Save Itemizations**.

Once you have itemized the **Remaining** amount of the charge, an alert displays a green **Success** checkmark.

SAP Concur


RequestsTravelExpenseInvoiceApprovalsApp Center

Administration | Help

Profile

Manage ExpensesView Transactions


✓ Success! You have cleared all alerts on this expense.

Computer Hardware \$349.00 

04/18/2018

CancelSave Expense

DetailsItemizations

Show Receipt 

Amount	Itemized	✓ Remaining
\$349.00	\$349.00	\$0.00

Create ItemizationEditDeleteCopy

<input type="checkbox"/> Date	Expense Type	Amount
<input type="checkbox"/> 04/18/2018	Trade Shows	\$300.00
<input type="checkbox"/> 04/18/2018	Meetings	\$49.00

13. Click **Save Expense**.

## Activating E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to SAP Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

Your company must be enabled to accept e-receipts, and you must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data. Contact your SAP Concur administrator for more information.

## Enabling E-Receipts

Once your company has e-receipts enabled, a message will appear on the SAP Concur home page, prompting you to sign up.

**Note:** Depending on your company's configuration, this option might not be available to you. Contact your SAP Concur administrator for more information.

### To sign up for e-receipts

1. Either:
  - On the SAP Concur home page, click **Sign up here**. The **E-Receipt Activation** page appears.
  - Or -
  - Click **Profile > Profile Settings > E-Receipts Activation** (in the **Other Settings** section of the left-side menu).

**Note:** One or both of these options might be available to you.
2. Click **E-Receipt Activation**. The **E-Receipt Activation and User Agreement** appears.
3. Click **I Accept**. The E-Receipts confirmation appears.
4. Once you have accepted the user agreement, all of your corporate cards are opted-in. You can choose to opt-out a particular card in **Profile > Credit Cards**. Select the **Edit** icon for the card and uncheck the **Receive e-receipts for this card** check box.





## Uploading receipts using Available Receipts

Available Receipts work with the SAP Concur Imaging Service to provide receipt images that the user can either email or upload images to, and then use to attach images at the line item expense entry level (only). Images in supported format are uploaded using a SAP Concur-verified email address provided by the user during signup, and these images are then available to that user (only) for the purpose of attaching to report expense entries.

### To attach a receipt image to an expense entry using Available Receipts

1. Select an entry to open it in **Details** view.
2. Click **Attach Receipt Image**.
3. Select the receipt image you want to attach, and then click **Attach**.
4. The receipt image is attached to the expense entry and displays on the right side of the screen.

**Note:** You can **Detach** or **Append** the image from the receipt pane.

## Printing and Submitting an Expense Report

When you complete your expense report, you can print it to save a hard copy for your records or to review required receipts.

### To preview and print the expense report

1. On the expense report page, click **Print/Share**, and then select one of the options from the dropdown list. Your company determines the options that are available.

Report Details		Print/Share	Manage Receipts	
<input type="checkbox"/> Alerts		<input type="button" value="Add"/>	<input type="button" value="Fax Receipt Cover Page"/>	<input type="button" value="Copy"/>
<input type="checkbox"/>		<input type="button" value="Detailed Report"/>	<input type="button" value="Allocate"/>	<input type="button" value="Combine Expenses"/>
<input type="checkbox"/>		<input type="button" value="Receipt Report"/>	<input type="button" value="Move to"/>	
<input type="checkbox"/>		<input type="button" value="Copy of Detailed Report"/>		

Expense Type	Vendor Details	Date	Requested
Car Rental	Avis Chicago, Illinois	11/19/2017	\$103.00 Allocated
Dinner	Pacific Beach Ale House Chicago, Illinois	11/18/2017	\$35.00 Allocated
			<b>\$138.00</b>

2. On the **Detailed Report** screen, review the details, and then click **Print**.

### To submit your expense report

1. On the expense report page, click **Submit Report**. The **Report Totals** window appears.
2. Review the information for accuracy, and then click **Submit Report**.  
The **Report Status** window appears.

3. Click **Close**.

If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.