SAP Concur Getting Started QuickStart Guide

SAP Concur

SAP Concur

Technologies

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

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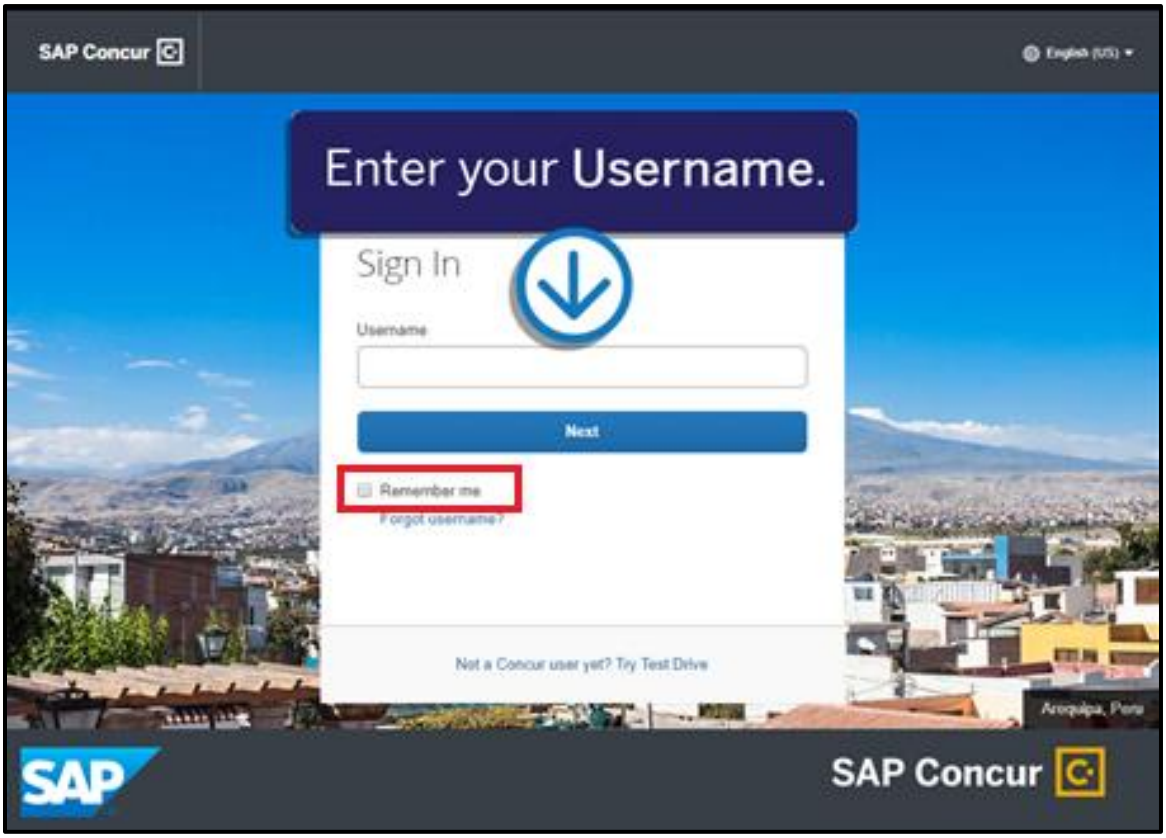
Welcome to SAP Concur

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:

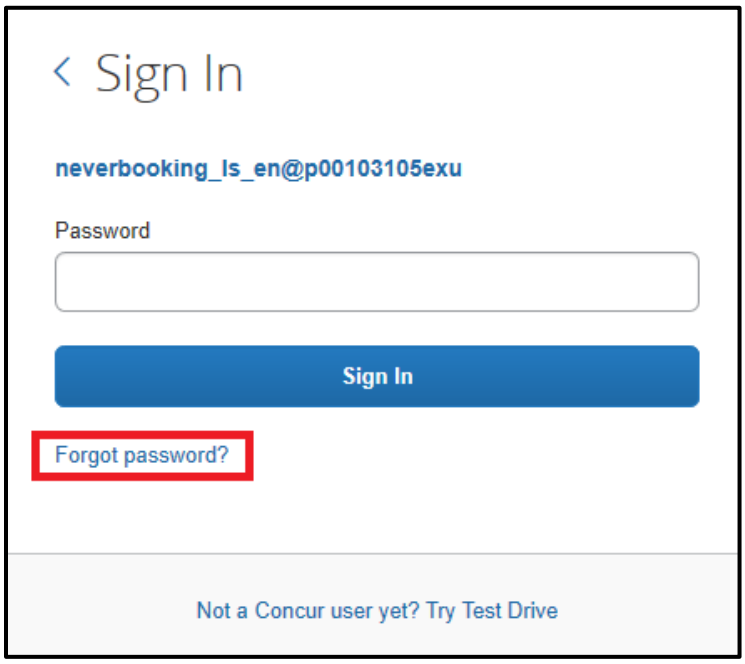
   - Log on to SAP Concur following your company's logon instructions.
   - Your password is case sensitive.
   - If you are not sure how to log on, check with your company's administrator.

Retrieving and Changing your Password

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

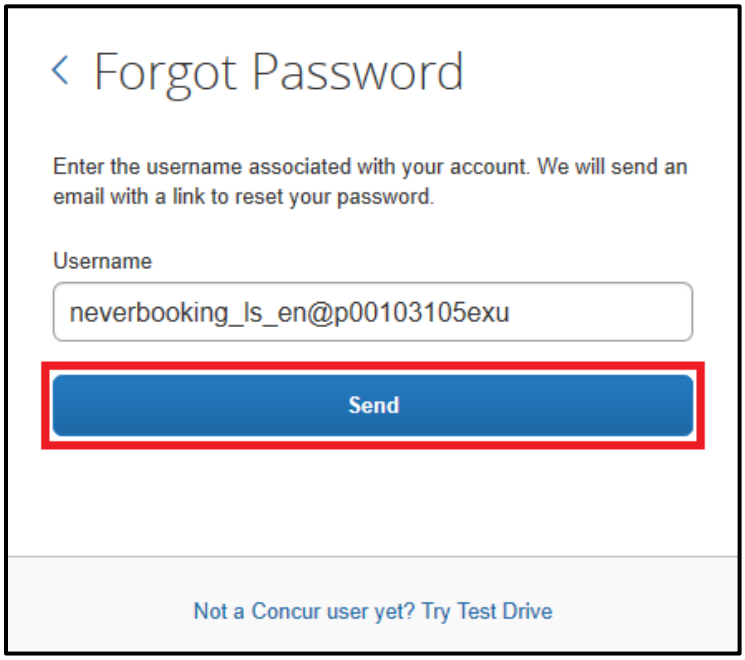
To retrieve your password

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



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

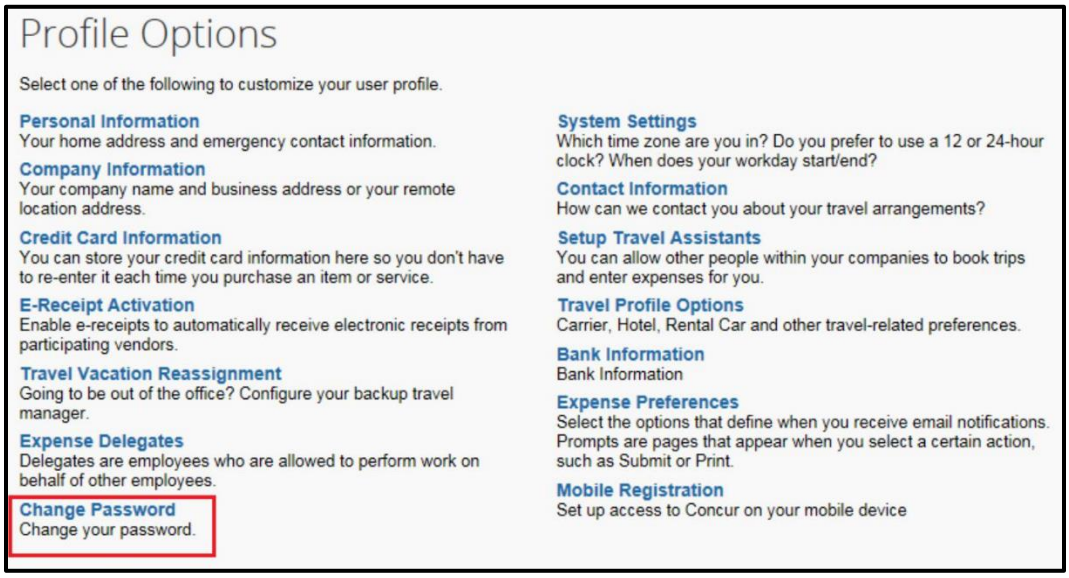
   A temporary password will be send to your email address with a link to reset your password.



To change your password

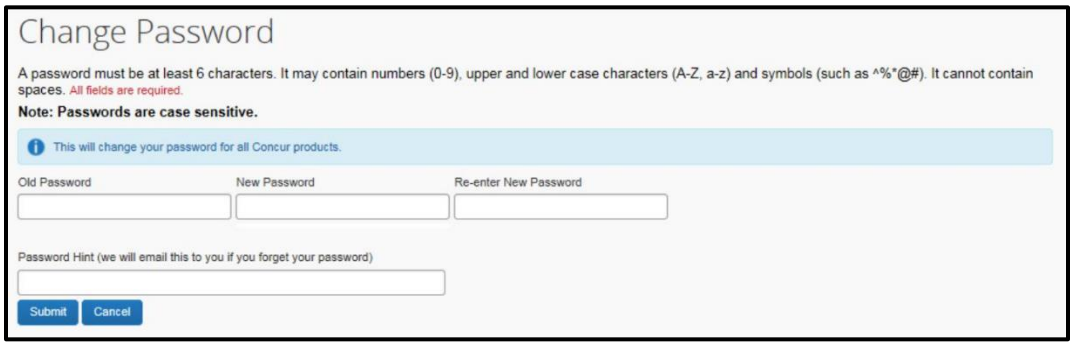
1. After you log in, in the upper right corner of the page, click **Profile**, and then click **Profile Settings**.

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



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.



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

Exploring the SAP Concur Home Page

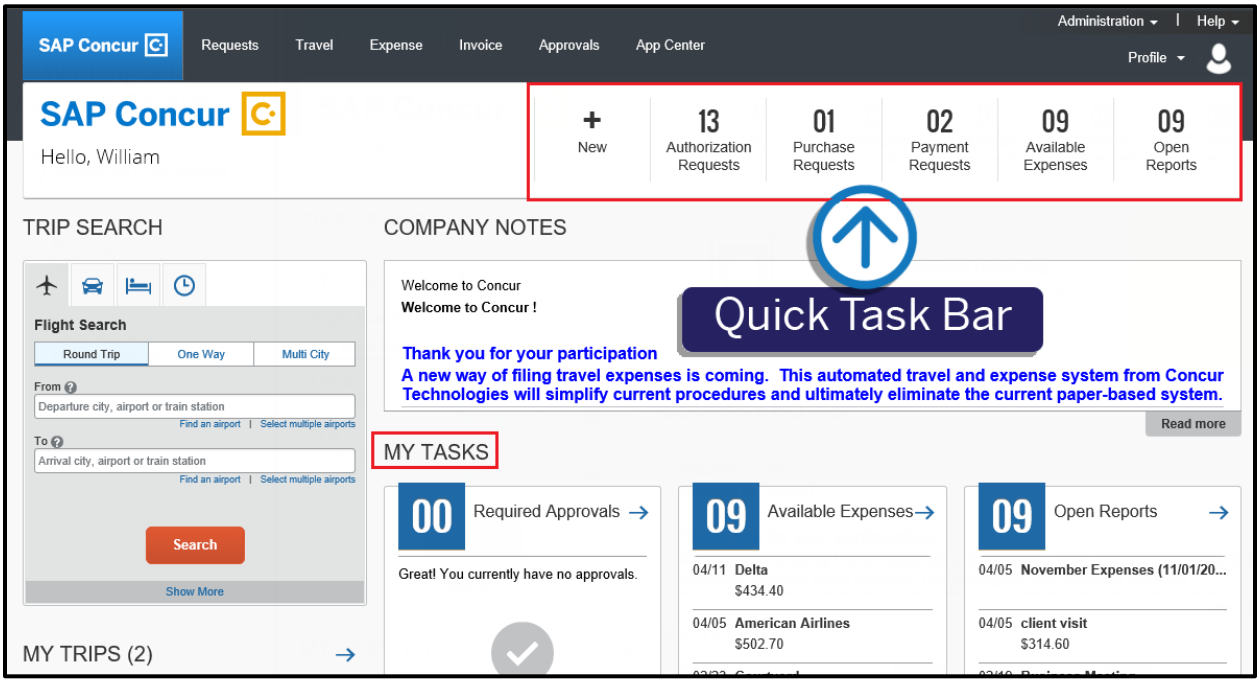
The SAP Concur home page contains the following sections.

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.

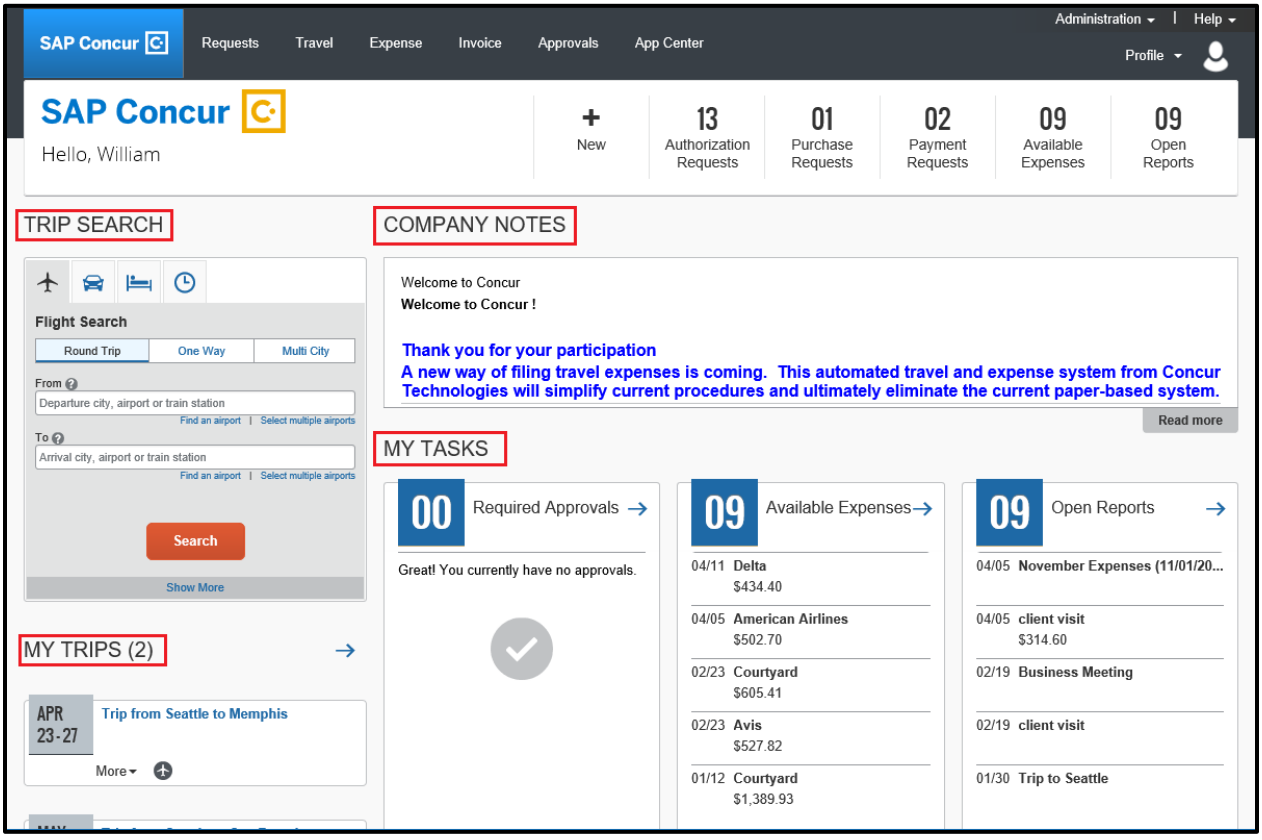
Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: • Start a new report, request, cash advance, payment request, etc. • Open reports and requests • Manage available expenses
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.



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: **Flight:** Use to book a flight. You can also book hotel and reserve a car at the same time. **Car**, **Hotel**, **Limo**, or **Rail:** Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (**Flight** 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 **Required Approvals, Available Expenses,** and **Open Reports**.



Updating Your Expense Profile

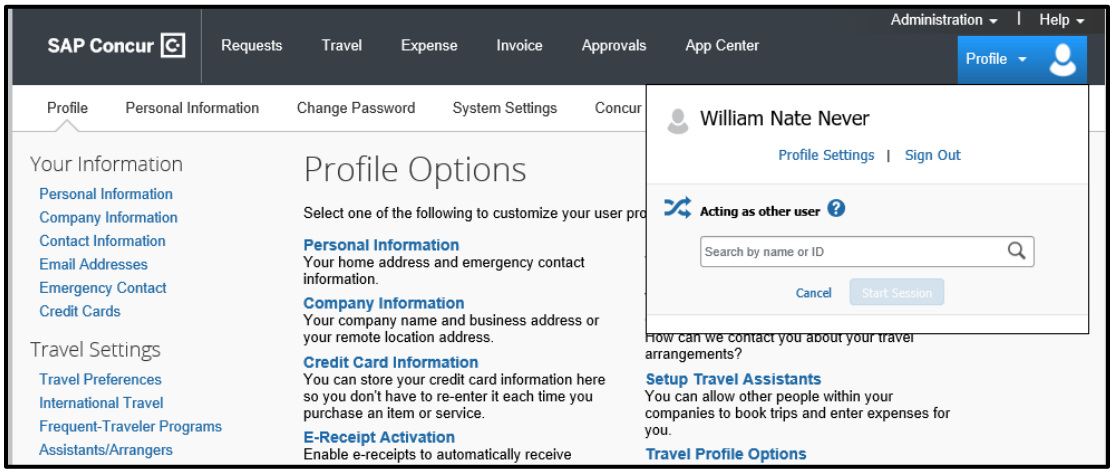
You use the **Profile Options** page to customize your user profile. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information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

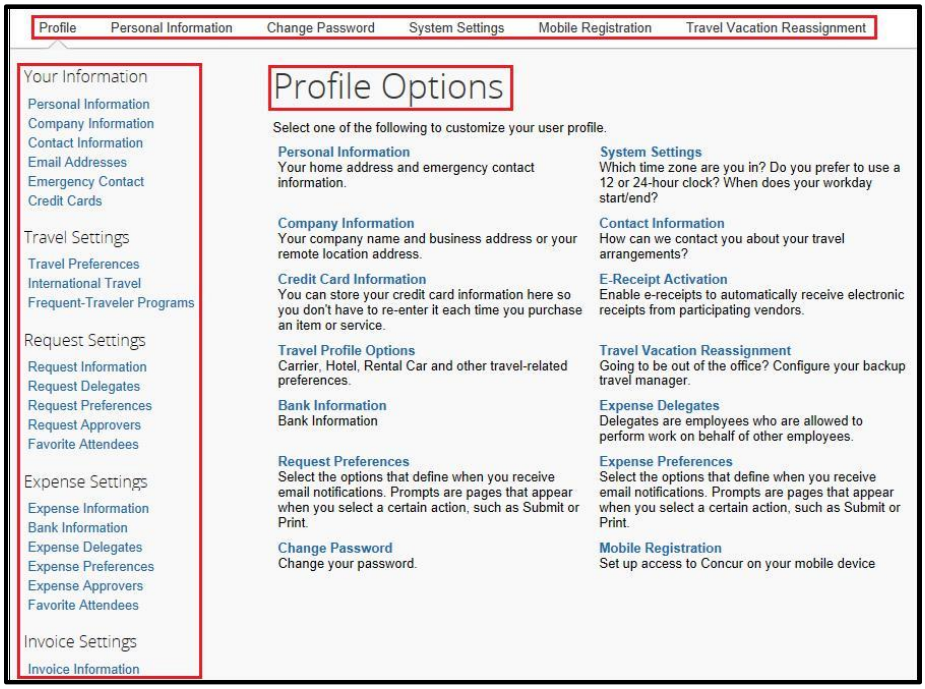
- **Your Information** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
- **Travel Settings** - Enter travel preferences, add international travel information, and your Frequent-Traveler programs. You can also add your travel 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.



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.

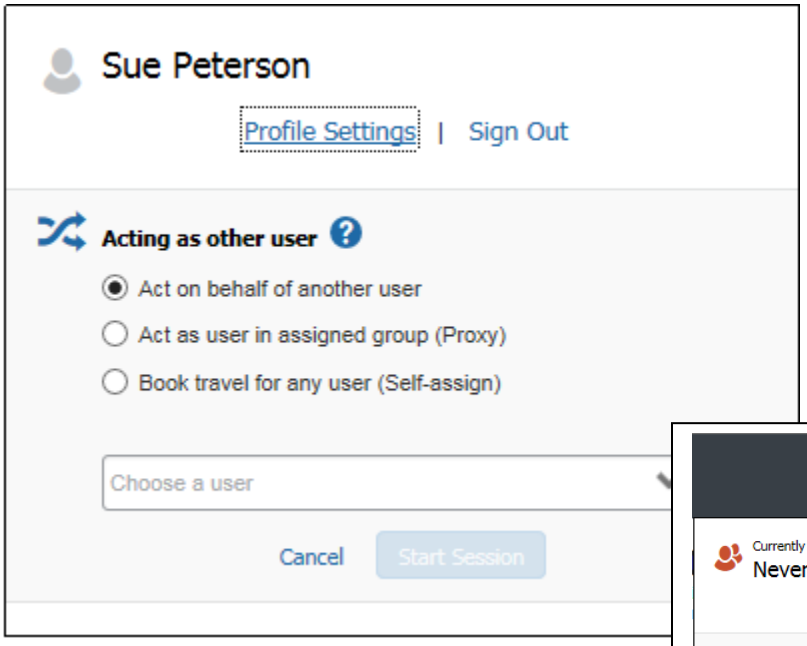
To work as a delegate

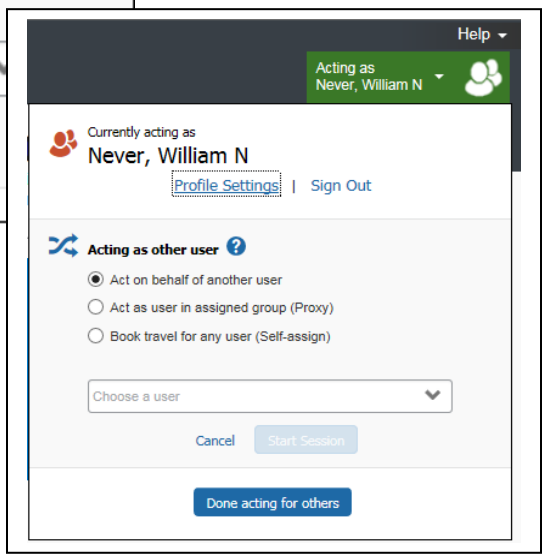
1. Click **Profile**, and then verify that the **Act on behalf of another user** option is selected.
2. Search for and select the appropriate user's name.
3. Click **Start Session**.

   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**.

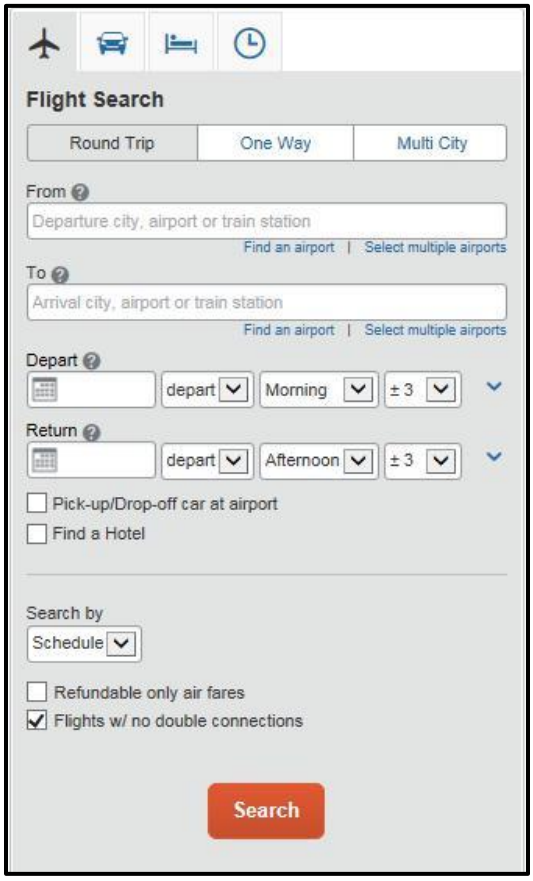
Flight Reservations

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.



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.

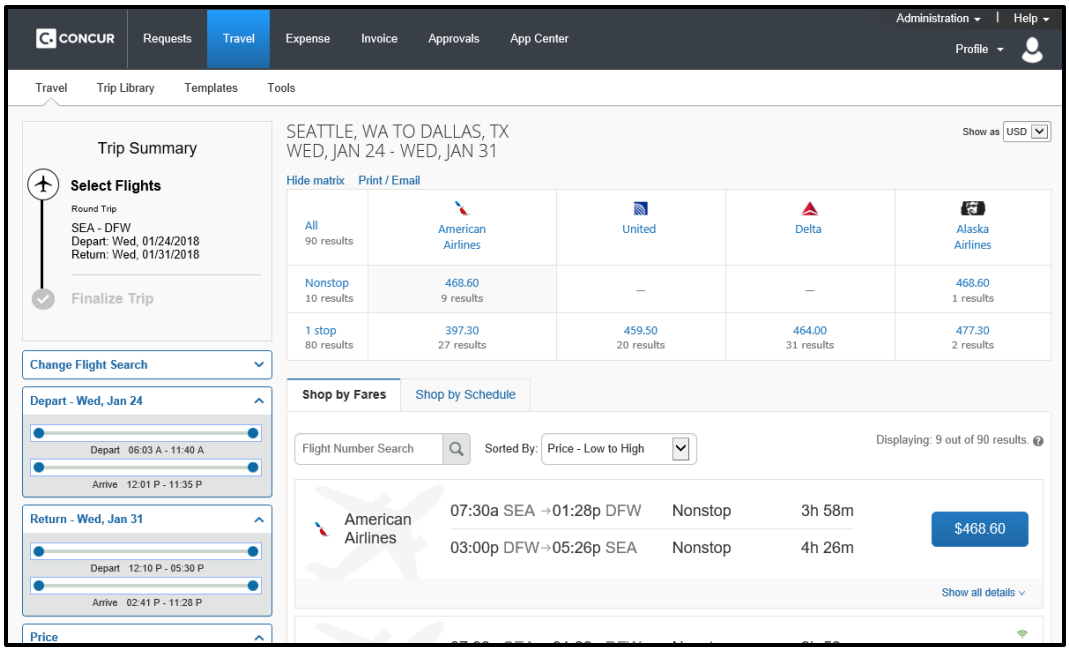
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.

   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.**

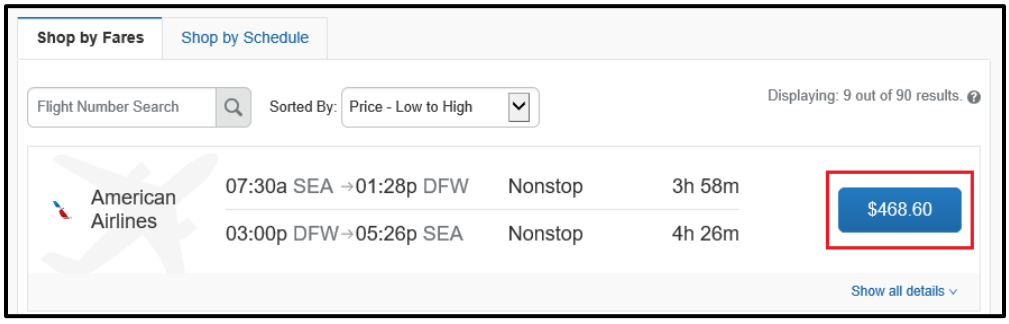
To make the reservation

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.

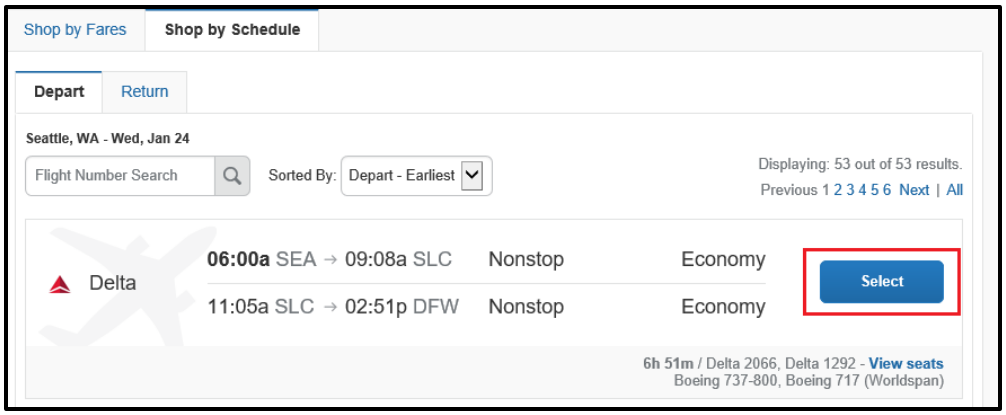


- If you selected **Price** on the previous page, then the **Shop by Fares** tab is initially active.
- If you selected **Schedule** on the previous page, then the **Shop by Schedule** tab is initially active

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.



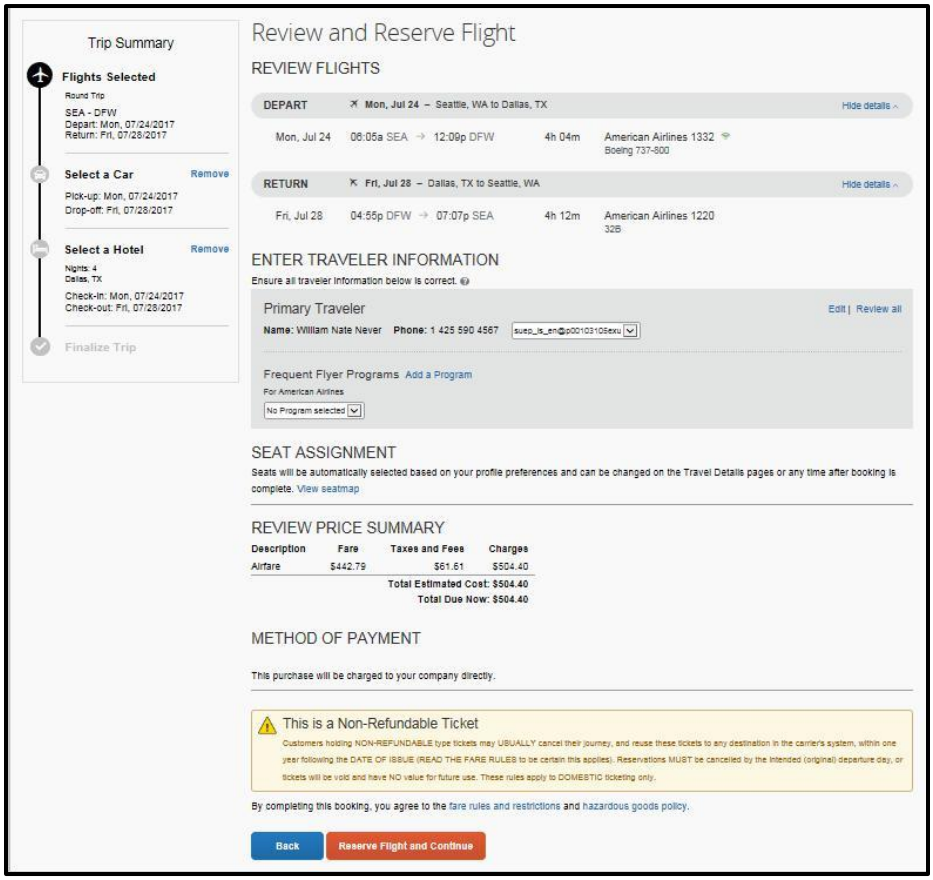
   - On the **Shop by Schedule** tab, click **Select** for the appropriate flight options.



4. Click the appropriate link to show all of the flight details.
5. 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**.

6. Click the fare amount button to select these flights.
7. Add or choose a different frequent flier program. Travel automatically selects the corresponding frequent flier program from the profile, if available.



8. 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

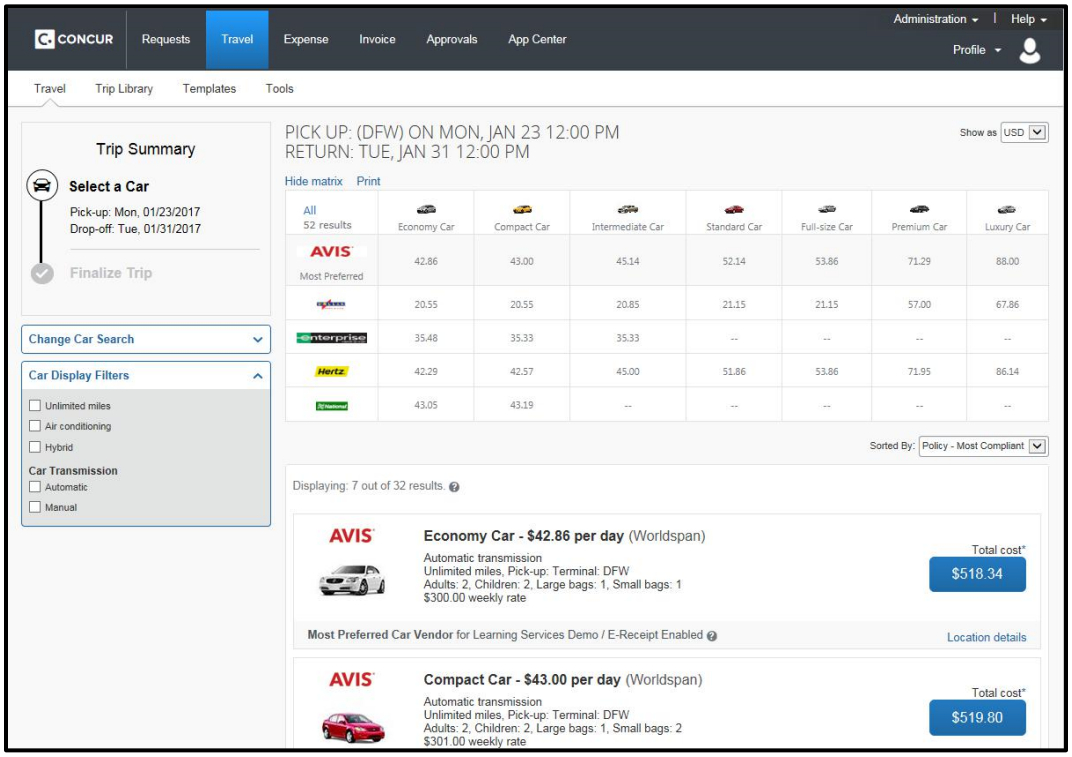
- If you selected **Pick Up/Drop off car at airport** on the **Flight** tab, you will see the results for the car search.
- If you selected **Automatically reserve this car**, Travel will add your car and then display your hotel results.

  – 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.



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

Hotel Reservations

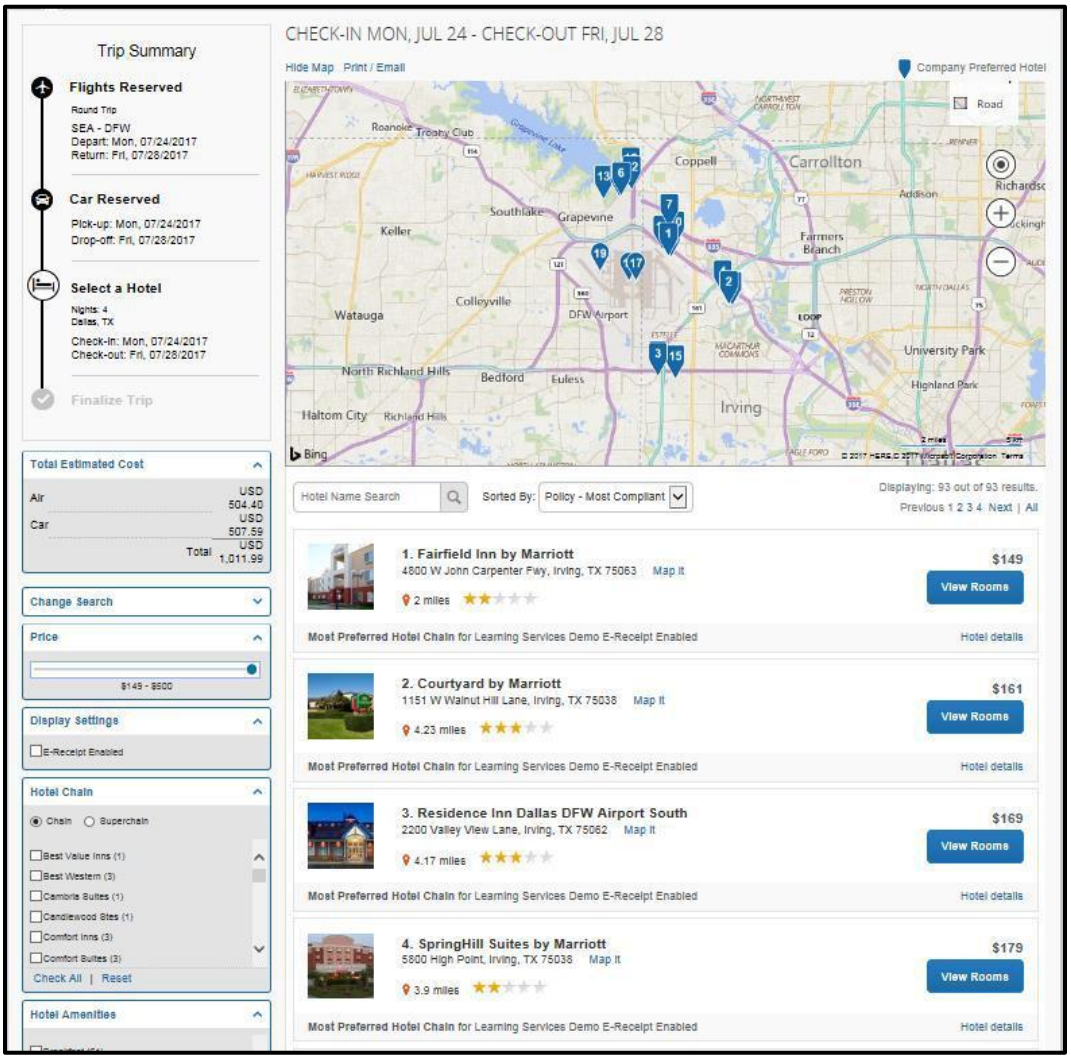
Note: Before booking, canceling, or changing your hotel reservation, verify the hotel's cancellation policy. Hotel cancellation policies have recently become much stricter. Fees will likely apply.

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**.



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**.

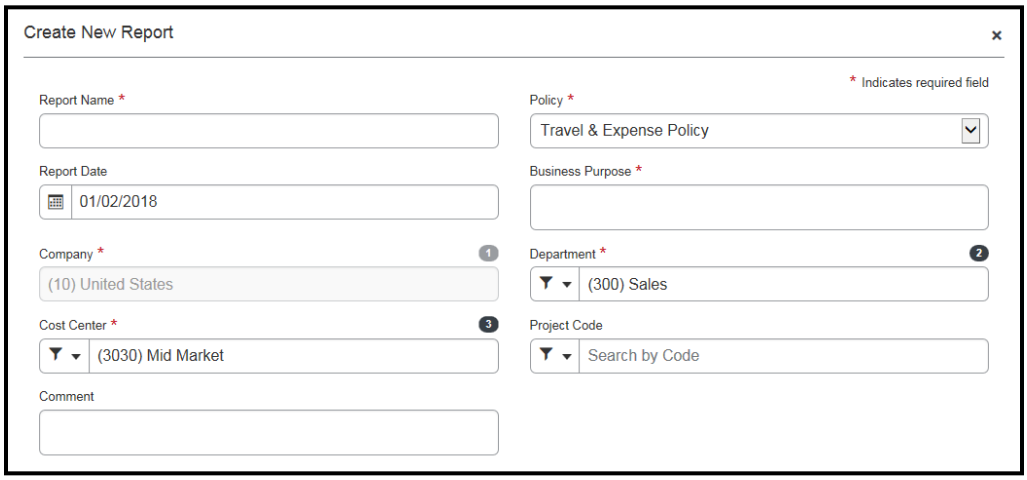
Note: When you cancel a trip, if your ticket is refundable, your ticket will be voided or refunded, as applicable. If your ticket is non-refundable, and you cancel it in accordance with the airline rules, an e-ticket will be retained that you can apply to future trips

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

Creating an Expense Report

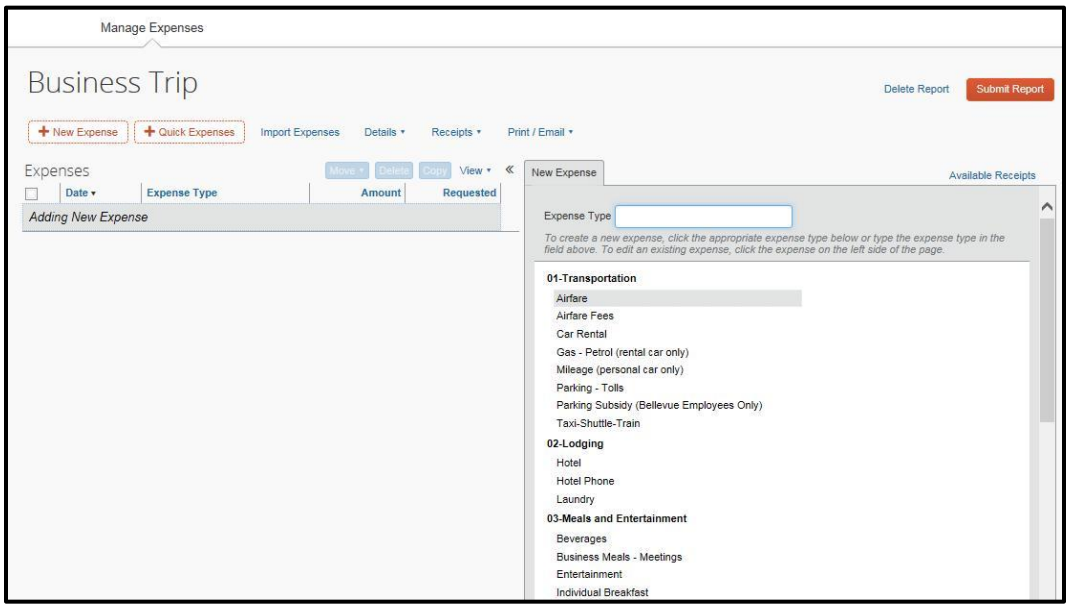
To create an expense report

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**.



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

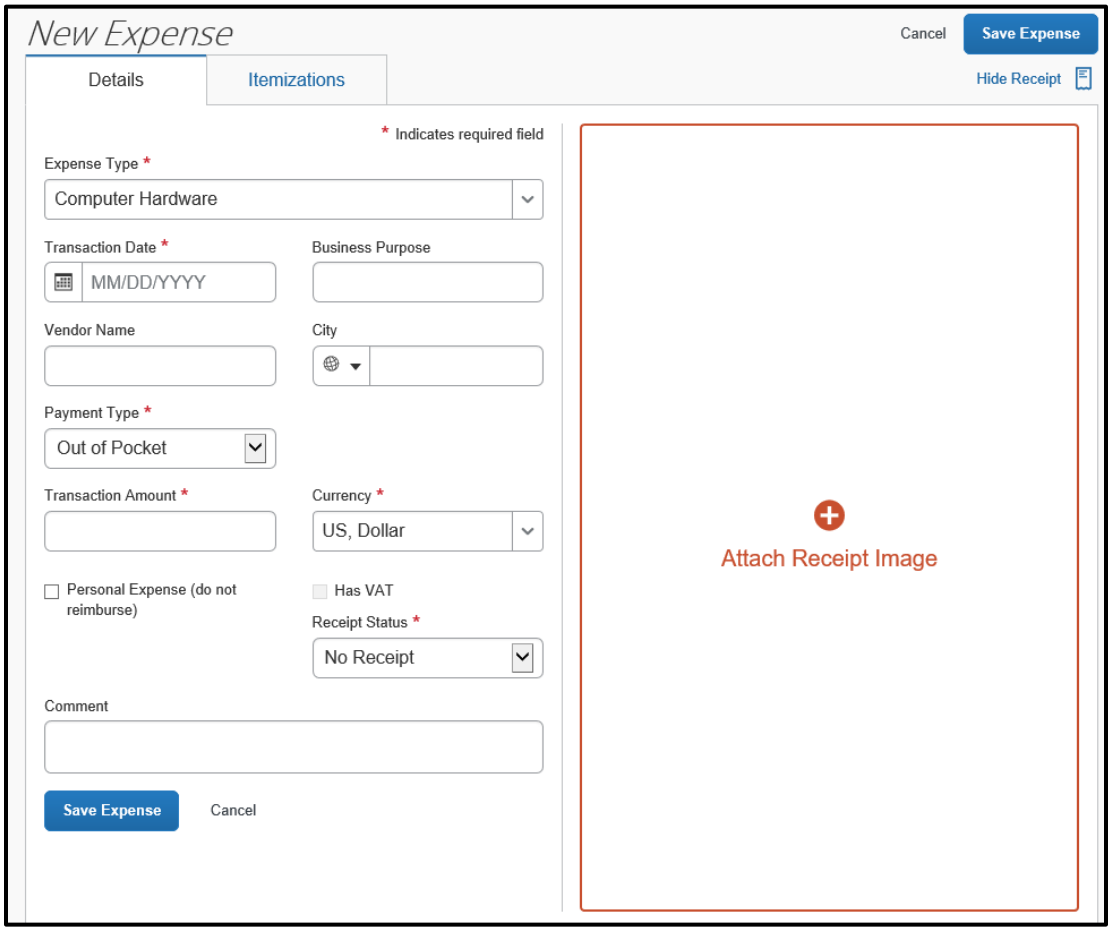
   After you select the expense type, the **Expense Type** fields automatically populate.



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

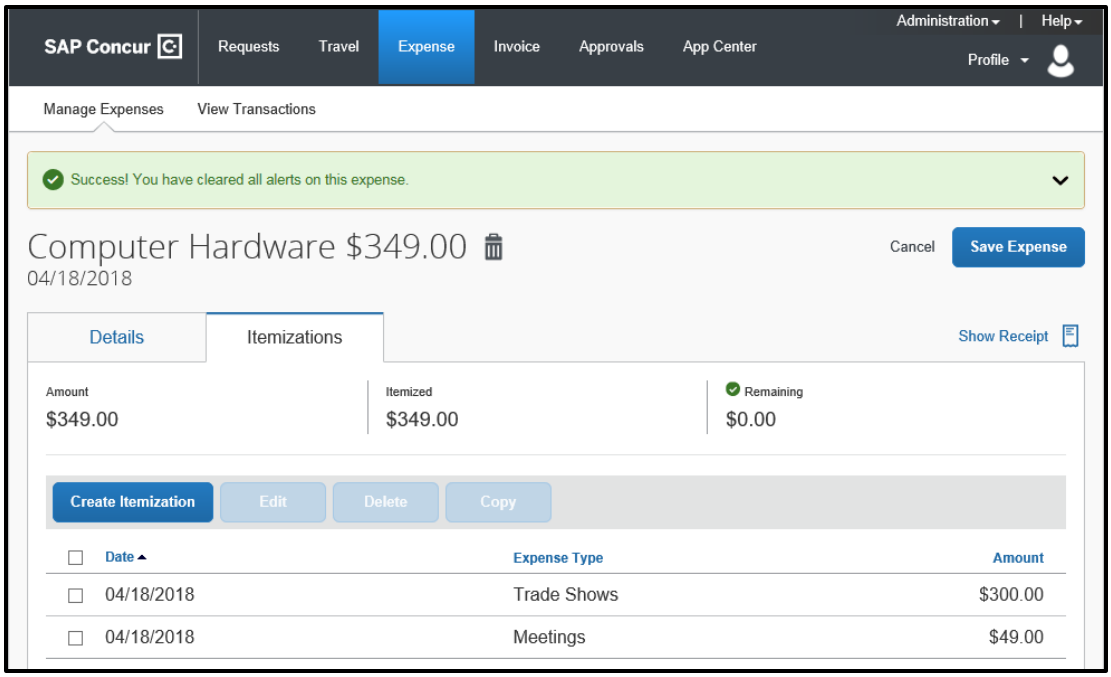
Note: To delete an unsubmitted report, click **Delete Report**.

5. Click **Import Expenses**, and then select **Available Expenses**.
6. Select the check box(es) for the expense you want for add to this report, and then click **Move**.
7. From the **Expense** tab, complete the require and optional fields, as needed (required fields are indicated with a red asterisk).
8. Click **Attach Receipt** to upload any required receipts for this expense.



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

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



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.

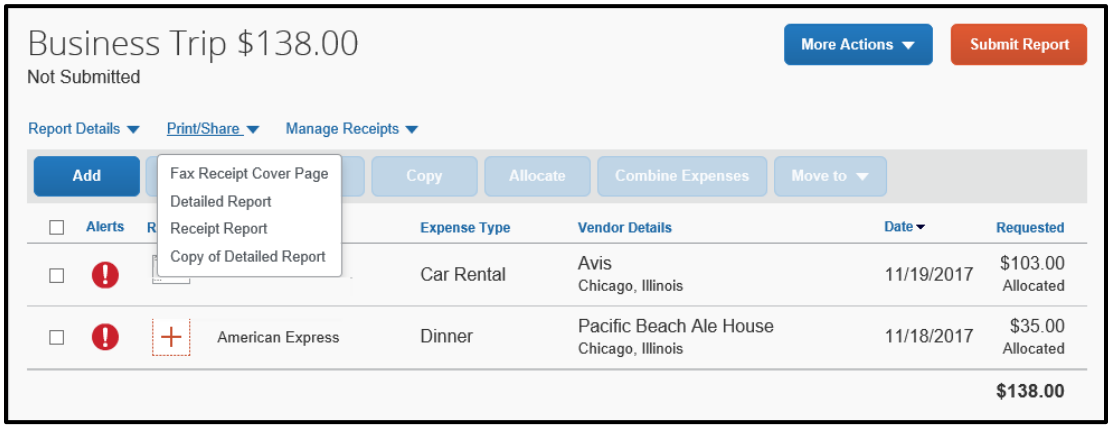
   Note: You can **Detach** or **Append** the image from the receipt pane.

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.



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.