

Concur Reference Guide

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Version 1 – 3/23/18

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Filling Out Your Profile

Step 1: Login to Concur

Step 2: In the upper right hand corner of the screen select the profile button, then click on the profile settings link

The screenshot displays the SAP Concur user interface. At the top, the navigation bar includes 'SAP Concur', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right side of the navigation bar, there are links for 'Support' and 'Help', and a 'Profile' button with a user icon. Below the navigation bar, the user's name 'Brian Christopher Graaf' is displayed, along with a 'Profile Settings' link (highlighted with a red box) and a 'Sign Out' button. The main content area is divided into several sections: 'TRIP SEARCH' with a search form, 'ALERTS' with two informational messages, and 'COMPANY NOTES' with a welcome message. The 'TRIP SEARCH' section includes a 'Mixed Flight/Train Search' form with fields for 'From' and 'To', and a 'Search' button. The 'ALERTS' section contains two messages: one about Triplt Pro subscription and another about e-receipts. The 'COMPANY NOTES' section displays a blue link: 'Welcome to Concur Travel & Expense Online!'.

Step 3: Select the Personal Information link and fill out the required fields.

Step 4: Go back to the profile settings (select profile>profile settings) page and select the bank information link. Fill out the required fields and select save in the lower left-hand corner. This information will be used to reimburse you.

The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and menu items: Travel, Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Support and Help, and a Profile dropdown menu with a user icon. Below the navigation bar, a secondary menu lists: Profile, Personal Information, Change Password, System Settings, Concur Mobile Registration, and Travel Vacation Reassignment. The main content area is titled "Profile Options" and contains a list of settings categories. The "Bank Information" link under the "Travel Profile Options" section is highlighted with a red box. The categories and their descriptions are as follows:

- Your Information**
 - Personal Information
 - Company Information
 - Contact Information
 - Email Addresses
 - Emergency Contact
 - Credit Cards
- Travel Settings**
 - Travel Preferences
 - International Travel
 - Frequent-Traveler Programs
 - Assistants/Arrangers
- Expense Settings**
 - Expense Information
 - Bank Information
 - Expense Delegates
 - Expense Preferences
 - Expense Approvers
 - Company Car
 - Favorite Attendees
 - Personal Credit Cards
- Profile Options**

Select one of the following to customize your user profile.

 - Personal Information**
You 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.
 - Company Car**
Company Car
 - Concur Mobile Registration**
Set up access to Concur on your mobile device
 - 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.
 - Change Password**
Change your password.

Booking Domestic Travel through Concur

Step 1: Enter your departure and arrival cities and dates on the left-hand side of the screen and select the search button.

The screenshot shows the SAP Concur Travel & Expense Online interface. The left sidebar contains a 'Mixed Flight/Train Search' form with fields for 'From', 'To', 'Depart', and 'Return', along with a 'Search' button. The main content area displays a 'Welcome to Concur Travel & Expense Online!' message, a 'Getting Started' section, and a 'Note: ALL HOTELS ARE GUARANTEED FOR LATE ARRIVAL.' The top navigation bar includes 'SAP Concur', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'.

Step 2: Concur will return the available flights for the parameters you entered. You can sort the flights via the matrix at the top, the airport filters on the left and sort buttons above the flights.

Once you find a flight that works, press the select button to the right of the flight. If you see this icon



next to the flight, it means that the flight is out of policy. To determine what the policy violation is, click on the icon and an explanation will pop up in a new dialogue box. If you choose a flight that is out of policy, provide a detailed explanation for your supervisor.

Trip Summary

Select Flights or Trains

Round Trip
ATL - SFO
Depart: Fri, 03/30/2018
Return: Fri, 04/06/2018

Finalize Trip

Change Search

Depart - Fri, Mar 30

Depart 06:00 A - 11:48 A
Arrive 09:43 A - 07:45 P

Display Settings

Hide Propeller Planes

Airport Filters

- Departure: ATL - Atlanta, GA
Arrival: OAK - Oakland, CA, SFO - San Francisco, CA, SJC - San Jose, CA

Connecting Airport Filters

ATLANTA, GA TO SAN FRANCISCO, CA
FRI, MAR 30 - FRI, APR 6

Show as USD

Hide matrix Print / Email

Table with columns for airlines (United, American Airlines, Delta, Multiple, Spirit Airlines, Southwest, JetBlue, Alaska Airlines, Frontier) and rows for flight types (All, Nonstop, 1 stop, 2 stops, 3 stops).

Shop by Fares Shop by Schedule

Concur Travel will display available unused tickets to you as you are searching for your flights. This feature is intended to give you access to additional information that will help you make cost-effective decisions regarding your travel plans.

Depart Return

Atlanta, GA - Fri, Mar 30

Flight Number Search

Sorted By: Depart - Earliest

Displaying: 130 out of 130 results.
Previous Page: 1 of 13 Next All

Southwest

06:00a ATL -> 07:25a DEN Nonstop
08:20a DEN -> 10:00a OAK Nonstop

Economy Economy

Select

Step 3: Once flights for both legs are selected, a confirmation and seat selection screen will load. Select your desired seats and then click on the reserve flight and continue button at the bottom of the page.

SAP Concur **Travel** Expense Approvals Reporting - App Center Support | Help - Profile

Travel Trip Library Templates Tools

Trip Summary

Flights Selected

Round Trip
ATL - SFO
Depart: Fri, 03/30/2018
Return: Fri, 04/06/2018

Finalize Trip

Review and Reserve Flight

REVIEW FLIGHTS

DEPART ✕ Fri, Mar 30 – Atlanta, GA to Oakland, CA / 41m layover in Phoenix, AZ [Hide Details](#)

Fri, Mar 30 07:45a ATL → 09:14a PHX 4h 29m American Airlines 575
Airbus Industrie A319

Layover in Phoenix, AZ ⌚ 41m *Phoenix Sky Harbor Intl Airport*

09:55a PHX → 11:58a OAK 2h 03m American Airlines 493
Airbus Industrie A319

RETURN ✕ Fri, Apr 6 – Oakland, CA to Atlanta, GA [Hide Details](#)

Fri, Apr 6 11:30a OAK → 09:59p ATL 7h 29m American Airlines 837
Airbus Industrie A320-100/200

ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct.

Primary Traveler [Edit](#) | [Review all](#)

Name: Brian Christopher Graaf **Phone:** 404-443-1149

Frequent Flyer Programs [Add a Program](#)

For American Airlines

SELECT SEATS

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

| Flight | Seat | |
|--------|----------------|-------------------------------|
| AA 575 | Main Cabin (G) | Select a seat |
| AA 493 | Main Cabin (G) | Select a seat |
| AA 837 | Main Cabin (G) | Select a seat |

REVIEW PRICE SUMMARY

| Description | Fare | Taxes and Fees | Charges |
|---------------------------------------|----------|----------------|----------|
| Airfare | \$492.71 | \$78.45 | \$571.16 |
| Total Estimated Cost: \$571.16 | | | |
| Total Due Now: \$571.16 | | | |

METHOD OF PAYMENT

This purchase will be charged to your company directly.

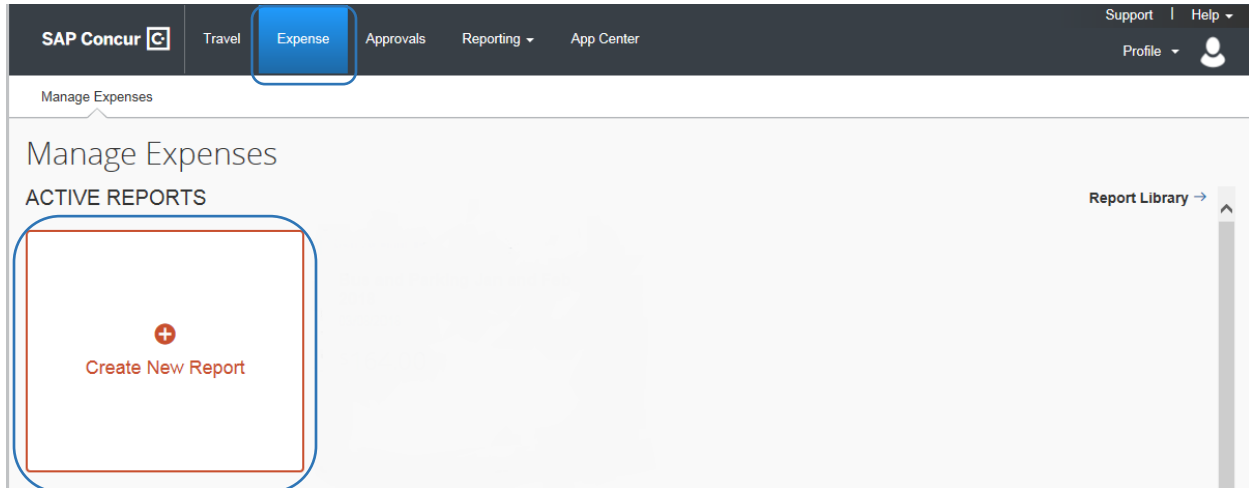
By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

Back
Reserve Flight and Continue

Creating and Expense Report

Step 1: Before you start, make sure you have electronic versions of all receipts that will need to be entered into the system. Each claimed expense is required to have a receipt as supporting documentation and each receipt must be a separate file. Concur supports the following file formats: .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff and each file has a 5mb maximum file size. You will also need the project number and program budget line number. Contact your program officer for this information.

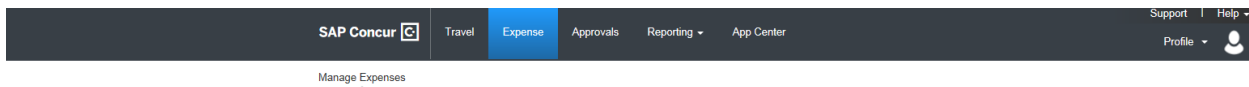
Step 2: At the top of the page select the expenses tab. When the expense page loads, select the create new report button.



Step 3: Fill out the following fields:

- Report Name: Enter the project number, your last name and the trip destination, for multi-leg trips use the region. For example, 807 Smith San Francisco, CA or 807 Smith Africa for a multi-leg trip to several countries in Africa.
- Report Date: enter the date you are creating the report
- Business Purpose: enter the purpose of the trip
- Project: enter the project number

After the fields are filled out click on the next button in bottom right hand corner of the screen.



After the fields are filled out click on the next button in bottom right hand corner of the screen.

Step 4: Once the next button is selected, a dialogue box will appear asking about per diem. Click Yes. Once Yes is selected, another box will appear for you to enter each leg of your trip or select an existing itinerary. Either select an existing itinerary or fill out the required fields and click save at the bottom. Once you selected an existing itinerary or entered all legs, click the next button in the right hand corner.

Travel Allowances For Report: 807 Smith San Francisco, CA

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
807 Smith San Francisco, CA

Add Stop Delete Rows Import Itinerary

| <input type="checkbox"/> | Departure City | Arrival City | Arrival Rate Location |
|--------------------------|----------------|--------------|-----------------------|
| No Itinerary Rows Found | | | |

New Itinerary Stop

Departure City
Atlanta, Georgia

Date 03/02/2018 Time 12:00 PM

Arrival City
San Francisco, California

Date 03/02/2018 Time 3:30 PM

Save

Go to Single Day Itineraries Next >> Cancel

Step 5: Review itinerary and select the Next button in the right hand corner.

Step 6: Adjust per diem amounts for non-business travel days if applicable via the exclude check box on the left hand side. Adjust per diem amount for meal(s) that were provided by selecting the appropriate check box for the meal(s) then select the create expenses button in the right hand corner.


Travel Allowances For Report: 807 Smith San Francisco, CA

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

| Exclude All <input type="checkbox"/> | Date/Location ▲ | Meals Rate | Breakfast Provided | Lunch Provided | Dinner Provided | Allowance |
|--|---|------------|--------------------------|--------------------------|--------------------------|-----------|
| <input type="checkbox"/> | 03/02/2018 San Francisco, California | \$55.50 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$55.50 |
| <input type="checkbox"/> | 03/03/2018 San Francisco, California | \$74.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$74.00 |
| <input type="checkbox"/> | 03/04/2018 San Francisco, California | \$74.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$74.00 |
| <input type="checkbox"/> | 03/05/2018 San Francisco, California | \$55.50 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$55.50 |

<< Previous Cancel

Step 7: You will notice on the left hand column several these  symbols. This symbol denotes an exception that needs to be address. A description of what needs to be addressed is located in the exceptions list. To address the exceptions click on the expenses on the left hand side of the screen and fill out the required fields denoted with a red stripe on the left hand side of the field and click save.

807 Smith San Francisco, CA

+ New Expense + Quick Expenses Import Expenses Details Receipts Print / Email

Delete Report Hide Exceptions

Exceptions

| Expense Type | Date | Amount | Exception |
|-----------------|------------|---------|---|
| Daily Allowance | 03/03/2018 | \$74.00 | Missing required field: Business Unit, Department, Program Budget Line. |
| Daily Allowance | 03/04/2018 | \$74.00 | Missing required field: Business Unit, Department, Program Budget Line. |
| Daily Allowance | 03/05/2018 | \$55.50 | Missing required field: Business Unit, Department, Program Budget Line. |

Expenses

| Date | Expense Type | Amount | Requested |
|------------|--|---------|-----------|
| 03/05/2018 | Daily Allowance San Francisco, California | \$55.50 | \$55.50 |
| 03/04/2018 | Daily Allowance San Francisco, California | \$74.00 | \$74.00 |
| 03/03/2018 | Daily Allowance San Francisco, California | \$74.00 | \$74.00 |
| 03/02/2018 | Daily Allowance San Francisco, California | \$55.50 | \$55.50 |

Expense

Expense Type: Daily Allowance Transaction Date: 03/05/2018 Business Purpose: Vendor Description: City: San Francisco, California Payment Type: Out of Pocket

Amount: 55.50 USD Project: 807 Business Unit: Department: Program Budget Line: Comment:

Personal Expense (do not reimburse) Show fixed allowances for 03/05/2018

Step 8: After all exceptions have been addressed, add additional expenses that were incurred in the new expense portion of the window. You can click on one of the expense categories listed to enter the expense.

The screenshot shows the 'Manage Expenses' interface for '807 Smith San Francisco, CA'. The 'New Expense' form is active, displaying a grid of 'All Expense Types' categories. The categories are organized into columns and rows, including: 01. Travel (Airfare, Airfare Ticket Tax, Airline Fees, Car Rental, Checked Baggage Fees, Laundry), ...01. Travel (Lodging, Rail), ...02. Transportation (Gas, Mileage, Parking), ...02. Transportation (Tolls/Road Charges), ...03. Meals and Entertainment (Conference Fees, Honorarium, Meeting Space Rental), ...04. Office Expenses (FedEX Shipping), ...05. Communications (Office Supplies/Software, Printing/Photocopying/Stationery, Fax), ...05. Communications (Phone charge/sim card, Skype Minutes, Wi-Fi/Internet Charges), ...06. Fees (Agency Booking Fees, Bank Fees), ...06. Fees (Medical Fees, Passport Application), ...07. Other (ATM Surcharge, Immunization, Passport Photos), and ...07. Other (Supplies, Tips/Gratuities, Visa-entry / Exit Fees). A blue box highlights the 'All Expense Types' grid.

Step 9: After all expenses have been added, select the submit report button in the upper right-hand corner. Your expense report is now complete.

The screenshot shows the 'Manage Expenses' interface for '807 Smith San Francisco, CA'. The 'New Expense' form is still active, but the 'Submit Report' button in the upper right-hand corner is highlighted with a blue box. The 'All Expense Types' grid is still visible, with 'Airfare' selected under the '01. Travel' category. The 'TOTAL AMOUNT' and 'TOTAL REQUESTED' are both \$259.00.