<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Version</th>
<th>Author</th>
</tr>
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<tr>
<td>04/01/2016</td>
<td>Create Concur Getting Started QuickStart Guide</td>
<td>1.0</td>
<td>Concur</td>
</tr>
<tr>
<td>04/30/2016</td>
<td>Concur Getting Started QuickStart Guide - Updates</td>
<td>1.1</td>
<td>Concur</td>
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<td>05/12/2016</td>
<td>Concur Getting Started QuickStart Guide – converted to new template</td>
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<td>1.3</td>
<td>Concur</td>
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<td>Screenshot updates</td>
<td>1.3</td>
<td>Concur</td>
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<tr>
<td>06/29/2017</td>
<td>UI and Screenshot updates</td>
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<td>Concur</td>
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<td>Content changes</td>
<td>1.5</td>
<td>Concur</td>
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<td>01/13/2018</td>
<td>Concur Expense Next Generation UI Updates</td>
<td>1.6</td>
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<tr>
<td>07/19/2018</td>
<td>SAP Concur Rebranding</td>
<td>1.7</td>
<td>SAP Concur</td>
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<td>11/04/2019</td>
<td>Updated template</td>
<td>1.8</td>
<td>SAP Concur</td>
</tr>
<tr>
<td>01/24/2020</td>
<td>Updated Signing in to SAP Concur</td>
<td>1.9</td>
<td>SAP Concur</td>
</tr>
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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.

```
< Sign In

neverbooking_is_en@p00103105exu
Password

Sign In

Forgot password?

Not a Concur user yet? Try Test Drive
```

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

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

```
< Forgot Password

Enter the username associated with your account. We will send an email with a link to reset your password.

Username
neverbooking_is_en@p00103105exu

Send

Not a Concur user yet? Try Test Drive
```
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.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Task Bar</td>
<td>This section provides Quick Tasks (links) so you can:</td>
</tr>
<tr>
<td></td>
<td>• Start a new report, request, cash advance, payment request, etc.</td>
</tr>
<tr>
<td></td>
<td>• Open reports and requests</td>
</tr>
<tr>
<td></td>
<td>• Manage available expenses</td>
</tr>
<tr>
<td>My Tasks</td>
<td>This section shows your available expenses, open reports, and approvals requiring attention.</td>
</tr>
</tbody>
</table>
Concur Expense and Concur Travel

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

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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.** |

---

**SAP Concur**

Hello, William

**TRIP SEARCH**

**COMPANY NOTES**

Welcome to Concur
Welcome to Concur!

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.

**MY TASKS**

09 Available Expenses→

- 04/11 Delta $431.40
- 04/05 American Airlines $602.70
- 02/23 Courtyard $605.41
- 02/23 Avis $527.82
- 01/12 Courtyard $1,369.93

09 Open Reports →

- 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

00 Required Approvals →

Great! You currently have no approvals.
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.

<table>
<thead>
<tr>
<th>Your Information</th>
<th>Personal Information</th>
<th>Change Password</th>
<th>System Settings</th>
<th>Mobile Registration</th>
<th>Travel Reassignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information</td>
<td>Your home address and emergency contact information.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Information</td>
<td>Your company name and business address or your remote location address.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Card Information</td>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Profile Options</td>
<td>Carrier, Hotel, Rental Car and other travel-related preferences.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank Information</td>
<td>Bank Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Preferences</td>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Password</td>
<td>Change your password.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Settings</td>
<td>Which time zone are you in? Do you prefer to use a 12 or 24 hour clock? When does your workday start/end?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Information</td>
<td>How can we contact you about your travel arrangements?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-Receipt Activation</td>
<td>Enable e-receipts to automatically receive electronic receipts from participating vendors.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Reassignment</td>
<td>Going to be out of the office? Configure your backup travel manager.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Delegates</td>
<td>Delegates are employees who are allowed to perform work on behalf of other employees.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Preferences</td>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile Registration</td>
<td>Set up access to Concur on your mobile device.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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**.

![SAP Concur Car Reservations screenshot](image-url)
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. From 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, you enter general information for your expense report. Enter the 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, 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 checkbox(es) for the expense you want to add to this report, and then click Move. From the Expense tab, complete the required and optional fields as needed.
7. Click **Attach Receipt** to upload any required receipts for the expense.
8. From the **Attach Receipt** window, click **Browse** to locate the image file, and then click **Attach**.

![Training Conference](image)

9. For any expenses that require itemizations, click **Itemize**.
10. Complete all required and optional fields as necessary.
11. Click **Save Itemizations**.
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 an 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 submit the expense report for approval

1. Once the expense report is complete, click Submit Report to send it to the approver.
2. Perform a final review, and then click Submit Report.

To print your expense report

1. Click Print/Email.

2. Select one the following print options:
   - Fax Receipt Cover page – Fax cover page to use with Concur Imaging
   - Detailed Report – Prints a detailed Report
   - Receipt Report – Lists expenses that require receipts
   - Copy of Detailed Report – Prints a detailed report copy

3. Double-click the expense in the Expenses pane to review all expenses for accuracy before submitting your report.
4. After reviewing your expenses and attaching your receipts, click **Submit Report** to submit the report for approval.

Your new expense report and its status are listed in the **Active Reports** list. From this page, you can check the status of any submitted report.
Correcting and Resubmitting an Expense Report

Your approver will return your expense report to you if any changes or additional information are required. Returned reports appear on the Concur home page in the Open Reports section.

To correct and resubmit an expense report

1. From the SAP Concur home page, click Open Reports.

Your returned reports appear in the Active Reports section.

2. Click the RETURNED expense report.

3. Click the Details menu, and then select Comments to review your approver’s comments.
4. Review the comments, make any corrections that need to be made, and then click **Save**.

5. Select the expense you need to correct and make the changes.

6. After making your corrections, click **Submit Report**.

![Office Supplies Expense Report](image)

You will be prompted for any necessary receipts you need to attach to the report.

7. In the **Final Review** window, click **Submit Report**.

8. Review the expense report status and summary, and then click **Close**.

9. Your report is corrected and resubmitted for approval.