

SAP Concur Getting Started Quick Start Guide

SAP Concur



SAP Concur
Version 1.7

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Modified for the Poarch Band of Creek Indians
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PCI Getting Started Guide



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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. Log in to www.pci-ctp.com
2. Select **Login to CONCUR**
3. You will be taken to the Concur home page.
4. On the **Sign In** screen, enter your **User Name** and **Password**.

Username is your work email address and **Password** is what you use to log into your work computer.

5. Click **Sign In**.



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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.

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.

Expense and Travel

PCI uses Expense *and* Travel, 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, Car Rental, 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 .

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SAP Concur

RequestsTravelExpenseInvoiceApprovalsApp Center

Administration | Help

Profile

SAP Concur

Hello, William

New

13 Authorization Requests

01 Purchase Requests

02 Payment Requests

09 Available Expenses

09 Open Reports

TRIP SEARCH

COMPANY NOTES

Flight Search

Round TripOne WayMulti 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

MY TRIPS (2)

APR 23-27 Trip from Seattle to Memphis

More

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.

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
02/23 Courtyard \$605.41
02/23 Avis \$527.82
01/12 Courtyard \$1,389.93

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

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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.

1. **Your Information** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
2. **Travel Settings** - Enter travel preferences, add international travel information, and your Frequent-Traveler programs. You can also add your travel assistants and arrangers.
3. **Request Settings** - Select request information, add or remove delegates, enter email settings, select approvers, and add or remove attendees.
4. **Expense Settings** - Enter expense preferences, add bank information and company card information. You can also enter expense delegates and approvers.
5. **Invoice Settings** – Enter invoice preferences, add invoice delegates and approvers.
6. **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**.



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2. On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.
3. Also Enable the E-Receipt Activation.

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:

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- 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.

Profile Personal Information Change Password System Settings Mobile Registration Travel Vacation Reassignment

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs

Request Settings
Request Information
Request Delegates

E-Receipt Activation

Enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers! Click here to enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers!
[E-Receipt Activation](#)

Once you complete the e-receipt activation, the e-receipts generated by your transaction with a participating supplier will be automatically collected and matched with your itineraries and expense reports. You can access and print these e-receipts at any time from your Trip Library. If your company uses Expense, then your e-receipts will be automatically matched with your itineraries and expense reports, as applicable, so you can avoid keying in folio data and submitting paper receipts for your expense reports. Participating suppliers of our e-receipt program are identified by our icon during the online booking process:

View sample e-receipts: [Car](#) [Hotel](#) [Taxi](#)

Concur Mobile Registration

Once in Profile Settings, select **Concur Mobile Registration** located on the bottom of the right hand column.

SAP Concur Requests Travel Expense Approvals Reporting App Center Administration Help

Profile Personal Information Change Password System Settings Concur Mobile Registration Concur Mobile Devices Travel Vacation Reassignment

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Sponsored Guest Users
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees

Expense Settings
Expense Information
Expense Delegates
Expense Preferences

Concur Mobile

Manage your expenses and business travel on your mobile device.

To get started, enter your email address below and we will send you a link to download the app.

[Get Started](#)

Or, review your sign-in details:

Username: snk18a@acu.edu
Password: Use the same password you use to sign in to Concur for Web. If you don't know your password, you may reset your password or create a Concur Mobile PIN



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Signing into App

1. Username will be your PCI e-mail address.
2. Password will be the same one you use to log onto your computer.

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** > **Act on behalf of another user**.
2. 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 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.

The screenshot shows the user profile for Sue Peterson. At the top, there is a user icon and the name "Sue Peterson". Below this, there are two links: "Profile Settings" (highlighted with a dashed box) and "Sign Out". Below the links, there is a section titled "Acting as other user" with a question mark icon. Under this section, there are three radio button options: "Act on behalf of another user" (selected), "Act as user in assigned group (Proxy)", and "Book travel for any user (Self-assign)". Below the radio buttons, there is a text input field labeled "Choose a user". At the bottom of the section, there are two buttons: "Cancel" and "Start Session".

The screenshot shows the user profile for William N. Never. At the top, there is a user icon and the name "William N. Never". Below this, there are two links: "Profile Settings" (highlighted with a dashed box) and "Sign Out". Below the links, there is a section titled "Acting as other user" with a question mark icon. Under this section, there are three radio button options: "Act on behalf of another user" (selected), "Act as user in assigned group (Proxy)", and "Book travel for any user (Self-assign)". Below the radio buttons, there is a text input field labeled "Choose a user". At the bottom of the section, there are two buttons: "Cancel" and "Start Session". Below the "Start Session" button, there is a button labeled "Done acting for others".



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Using Concur Request

From the SAP Concur home page select Request, then New request to create.

Request Header

Enter all required information on header. If booking flight, hotel, or rental car thru Concur select **“Self-booked in Concur Travel”** as booking type. If making reservations outside of Concur or doing online classes select **“No reservations needed”**.

Edit Request Header
Test UI from app | Request ID: 34XF

Request Name *
Test UI from app

Start Date *
07/10/2022

End Date *
07/15/2022

Main Destination City *
US | New York, New York

Main Destination Country
UNITED STATES (US)

Trip Type *
Training or conference

Booking Type *
No reservations needed

Purpose *
Test

Employee Type *
Employee

Department *
(07) Finance

Fund Source *
(100800) Tribal Government

Comment

Cancel Save

If the “Trip Type” requires an attachment you will receive an error message the first time you save the header. An attachment option will appear, upload the required attachment and resave to clear error message. Required Attachments could be Training Agenda, Conference Schedule, or other various documents management would need to see for approval.

Test UI from app \$2,998.30

Not Submitted | Request ID: 34XF

Request Details | Print/Share | Attachments

CASH ADVANCES: 1

Amount
\$498.30

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Expenses

The Expected Expense is where you will add all expenses expected on travel.

Add Expected Expense

Search for an expense type

01. Travel Expenses

Daily Allowance

Hotel Reservation

Hotel Tax

Incidentals

02. Transportation

Air Ticket

Airline Fees

Car Rental

Parking

Personal Mileage

Personal Mileage - No Company Car Used

Railway Ticket

Taxi

07. Fees

Note: Car  rental will require an additional approval process and will be questioned for reasonableness. If reasonable alternative sources of transportation are available, i.e. - Uber, Taxi, Lift, the rental of a car will not be approved. Expenses for alternative transportation can be requested in the Expense Tab under Taxi.

Cash Advance – Per Diem

To request per diem you will select add then daily allowance. Concur is automatically setup to pull the GSA rates and calculate for the Destination City. So just select Daily Allowance and save.

Add Expected Expense

Search for an expense type

01. Travel Expenses

Daily Allowance

Hotel Reservation

Hotel Tax

Incidentals

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The cash advance box has now been moved. To find it do the following after creating the daily allowance expense:

1. Click Request Details
2. Click Add Cash Advance

3. Click into Cash Advance, add Requested Disbursement Date, and save.

**** Completing these steps will request a check for you Per Diem in advance, otherwise you will be reimbursed for Per Diem when you return ****

Note: Once Concur has calculated the per diem for the Cash Advance it will ask for confirmation to recalculate and update the Cash Advance Amount on the Request Header. Always click yes to update, and in most cases there will be no need for you to manually change the cash advance amount.

Note: Per Diem will NOT need to be entered into workplace when entered into Concur.

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Cash Advances – Group Travel Per Diem

Cash Advance – Group Travel was created specifically for programs that travel in large groups and are allowed the full GSA per diem rate. Concur will automatically calculate GSA Per Diem Rates. You can also find GSA Rates on the travel website www.PCI-CTP.com under the FQA's – Useful Links. If one of the meals were provided for the program participants, the employee entering the travel request for all participants must deduct this amount from the Per Diem amount received as they are completing the expense report. Then the funds should be reimbursed by the participant. Best practices state to calculate the amounts needed for meals that will be provided, if known and do not distribute these funds. (This is simply a recommendation and is at the digression of the managers and directors in the department.)

On the request header you will need to select **Trip Type “Group Travel”** and attach the agenda.

Edit Request Header
Test UI from app | Request ID: 34XF

Request Name *
Test UI from app

Start Date *
07/10/2022

End Date *
07/15/2022

Main Destination City *
US | New York, New York

Main Destination Country
UNITED STATES (US)

Trip Type *
Group Travel

Booking Type *
Self-booked in Concur Travel

Purpose *
Test

Employee Type *
Employee

Department *
(07) Finance

Fund Source *
(100800) Tribal Government

Comment

Cancel Save

Test UI from app \$2,934.50

Not Submitted | Request ID: 34XF

Request Details | Print/Share | Attachments

CASH ADVANCES: 1

Amount
\$434.50

EXPECTED EXPENSES

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Enter the expenses as needed for the Group Travel. In the Expense tab you will select Daily allowance as explained in the Cash Advance – Per Diem section for the employee entering the travel. Program participants per diem will be entered using Program Expenses - Group Travel Per Diem.

Add Expected Expense

Search for an expense type

Parking

Personal Mileage

Personal Mileage - No Company Car Used

Railway Ticket

Taxi

07. Fees

Agency Booking Fees

08. Other

Miscellaneous

Registration Fees

09. Relocation/Ex-Pat

Relocation Expenses

11. Program Expenses

Flat Rate Per Diem

Group Travel Per Diem

Enter # of program participants into **# of Travelers**, Concur will automatically calculate # of participants by the GSA rate for the selected city.

Click Save and select “Yes” to update the Cash advance amount on the Request Header.

Confirm

?

You have added or changed the amount of at least one expected expense that is managed by Cash Advance. Do you want the Cash Advance amount to be updated? Click Yes to recalculate the Cash advance amount. Click No to save the changes on the Expected Expense only.

No

Yes



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Continue entering all other required expenses as needed for travel. Once everything is entered, the Cash Advance will be issued by check, like regular Per Diem, to the person entering the request..

Note: Per Diem will NOT need to be entered into workplace when entered into Concur.

*** If gift cards need to be purchased for a program participants' Per Diem, the Cash advance request would be the same as above. The person entering the travel would need to enter the fee for gift cards into the request under "Miscellaneous" and pay for the gift card fee using the travel card. The check issued for the cash advance would be used to load the gift cards. The receipt for the gift cards would then be used on the expense report as supporting documentation for the miscellaneous charge. ***

Cash Advances – Flat Rate Per Diem

Cash Advance – Flat Rate Per Diem was created specifically for programs that travel in large groups and only receive \$25 per day per diem to participants for travel. Everything is the same as Group Travel Per Diem except the amount the participant receives.

Personal Mileage

There are two options for car mileage. Either option will trigger a Cash Advance to be issued:

- **Personal Mileage** – based on the standard IRS rate for the mileage you plan to travel. Examples of when this option should be used:
 - When no company car is available for travel, or
 - You are driving to and from the airport from either your home or work.
- **Personal Mileage – No company Car Used** – you will be issued a Cash Advance based on the GSA rate for the mileage you plan to travel. This option should be used when there is a company car available, but you choose to take your own vehicle instead.

Note: Once Concur has calculated the mileage rate for the Cash Advance, it will ask for confirmation to recalculate and update the Cash Advance Amount on the Request Header. Always click yes to update, and in most cases there will be no need for you to manually change the cash advance amount.

Airline Fees

Airlines will charge various fees for flying and the most prominent is baggage fees. As the traveler, you must put in a request to have your car pre-loaded. A reasonable estimate can be used as a request. In addition, most major airlines have a fee list on their websites to be used as a reference.

Incidental

Hotels will often put a hold on your card for incidentals. If you plan on using your travel card for these incidentals you will need to add this to the request. As with airline fees, a reasonable estimate can be used as a request or the traveler is responsible for calling the hotel to verify correct amounts.

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Registration Fees

If the travel request is for a conference, training or other various events that require a registration fee, the traveler will use their travel card to pay for the fees.

Other various expenses

The above examples do not limit the type of request that could be entered for travel. If there are other expenses that you anticipate will be incurred but are not listed in request use “Miscellaneous” and give a description as to why the funds will be needed.

Allocating Expenses

Once all expenses have been entered, expenses should be allocated if you are traveling on behalf of another department or multiple departments. This can be done as follows:

Click one or all expenses in the request that need to be allocated, then click “Allocate”.

Add Expense	Edit	Delete	Copy	Allocate	Combine Expenses	Move to ▾					
☐	Alerts ▴▾	Receipt ▴▾	Payment Type ▴▾	Expense Type ▴▾	Vendor Details ▴▾	Date ▴▾	Requested ▴▾				
☐			Cash	Tuition/Training Reimbursement	All Atmore, Alabama	06/27/2022	\$150.00				
☐			Cash	Personal Car Mileage		06/27/2022	\$65.54				
☐			Cash	Hotel	Allegro Resorts New Orleans, Louisiana	06/24/2022	\$800.00 Itemized				
							\$1,015.54				

The “Allocations for Request” box will appear. Select Allocate by “Percentage” or “Amount” then click “Add”. If you regularly allocate between these departments then you may want to “Add to Favorites”.

Select the appropriate Department and Funding source where you would be allocating the travel and click save.

The travel request will automatically be routed to the employee’s direct manager, then the Cost Object Approvers (COA’s) which are the Department Directors for the allocating funding sources.

Request Header

Segments

Expense Summary

Approval Flow

Audit Trail

Manager Approval:

CROMARTIE, DOMINIC A.

(07/30/2019 Approved)

Cost Object Approval:

▼ Tribal Government (07-100800): SPEEGLE, DARYL T.

▼ Tribal Government (70-100800): MARTIN, KARLA S.

▼ IHS - Administration (41-300100): BAKER, EDITH T.

Request Administrator:

(this step may be skipped)

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Submit Request

Once all anticipated expenses have been entered into the request, it can be submitted for review and approval.

Note: If you have to call to make reservations thru the Travel Management Company then you may need the Request Number. Just remember even though you have a request number at this point you still have to wait until your request is completely approved and your card will be loaded approximately 24 hours after the approval.

Recall a Request

You cannot change, cancel, or delete a Request that has been submitted unless you **Recall** it first.

1. Click **Requests, Manage Requests**. Click the **Request Name**.
2. Click **Recall**, then **Yes** to confirm the recall.
3. **Cancel Request**, or make necessary changes, **Save**, and **Submit**.



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Approval Flow

The approval flow for travel request in Concur is the employee's direct manager, then the Division Director. The travel request can be forwarded to another Manager or Director for approval if needed.

Select "More Actions" then "Approve and Forward" in the request approval.

Expense type	Details	Date	Amount	Requested	Approved
Air Ticket	Pensacola (PNS) - Orlando (MCO) : Round Trip	07/05/2022	\$500.00	\$500.00	\$500.00
					\$500.00

Type last name first to lookup users in the "User-Added Approver" box.

Manager Approval

COLLINS, LISA

+ Add Step

User-Added Approver

baker, e

+ Add Step

BAKER, EDITH T. (ebaker@pci-nsn.gov)
Employee ID: 100363 Logon ID: ebaker@pci-nsn.gov
ebaker@pci-nsn.gov

Cost Object

+ Add Step

Pending Booking

+ Add Step

Cancel Save

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The process would be the similar for Division Directors who need to forward travel request to Chief of Staff except they would add the step after the COA.

Edit Approval Flow

Manager Approval

COLLINS, LISA

+ Add Step

User-Added Approver

Search by Last Name Delete

+ Add Step

Cost Object Approval

+ Add Step

User-Added Approver

swe

SWEAT, TERRY J. (tsweat@pci-nsn.gov)
Employee ID: 100977 Logon ID: tsweat@pci-nsn.gov
tsweat@pci-nsn.gov

+ Add Step

Pending B

+ Add Step

Cancel Save

Once all COA's approve the request it will automatically route to the Processor if a rental car has been selected then to the Admin for issuance of funds to card and cash advance.

Note: At any point the Traveler can check the "Approval Flow" to see where the request is in the approval process.

Request Details

Request

Request Header

Request Timeline

Audit Trail

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Using Concur Travel

Flight Reservations

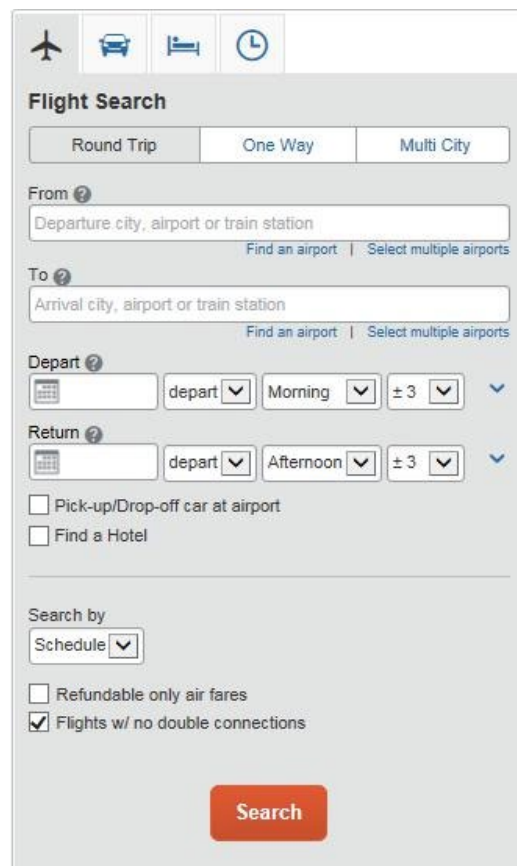
You can access the Flight  tab (or Air / Rail ) on the left side of the SAP Concur home page.

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 SAP Concur. At the top, there are four tabs: 'Flight' (selected), 'Car', 'Hotel', and 'Limo'. Below the tabs, the 'Flight Search' section has three buttons: 'Round Trip', 'One Way', and 'Multi City'. The 'From' field is labeled 'Departure city, airport or train station' and has a 'Find an airport' link and a 'Select multiple airports' link. The 'To' field is labeled 'Arrival city, airport or train station' and also has 'Find an airport' and 'Select multiple airports' links. The 'Depart' section has a date picker, a 'depart' dropdown, a 'Morning' dropdown, and a '± 3' dropdown. The 'Return' section has a date picker, a 'depart' dropdown, an 'Afternoon' dropdown, and a '± 3' dropdown. There are two checkboxes: 'Pick-up/Drop-off car at airport' and 'Find a Hotel'. The 'Search by' section has a 'Schedule' dropdown. At the bottom, there are two checkboxes: 'Refundable only air fares' and 'Flights w/ no double connections' (checked). A red 'Search' button is at the bottom right.

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.

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Note: Travel will automatically search before and after the time you select.

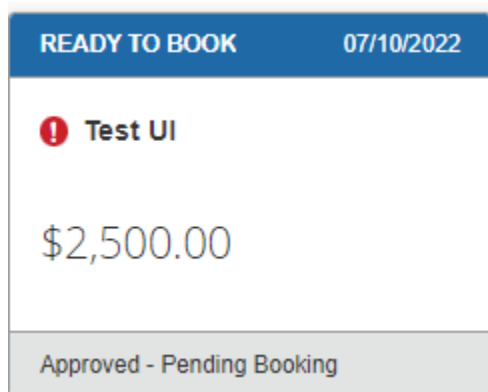
5. If you need a car, select the **Pick-up/Drop-off car at airport** check box.

Note: 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. Car Rentals require justification and prior approval.

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. Your travel must be approved to book the reservation. Go to the approved request and it will say "Ready to Book" when in this approval status.



2. Click Book Travel in the right hand corner.
3. Concur will run a Template for times and dates entered on request. If these times and dates do not pull flights or you need to rerun for different times select "Change Flight Search".
4. Review the search results and select the most appropriate option for your flight.
5. 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.

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SEATTLE, WA TO DALLAS, TX
WED, JAN 24 - WED, JAN 31

Hide matrix Print / Email

All	American Airlines	United	Delta	Alaska Airlines
90 results				
Nonstop 10 results	468.60 9 results	—	—	468.60 1 results
1 stop 80 results	397.30 27 results	459.50 20 results	464.00 31 results	477.30 2 results

Shop by Fares Shop by Schedule

Flight Number Search Sorted By: Price - Low to High Displaying: 9 out of 90 results. ?

American Airlines	07:30a SEA → 01:28p DFW	Nonstop	3h 58m	\$468.60
	03:00p DFW → 05:26p SEA	Nonstop	4h 26m	

Show all details v

- 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

6. To select your flight, do one of the following:

- On the **Shop by Fares** tab, select the cost button for the appropriate flight options.

Shop by Fares Shop by Schedule

Flight Number Search Sorted By: Price - Low to High Displaying: 9 out of 90 results. ?

American Airlines	07:30a SEA → 01:28p DFW	Nonstop	3h 58m	\$468.60
	03:00p DFW → 05:26p SEA	Nonstop	4h 26m	

Show all details v

- 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	Select
	11:05a SLC → 02:51p DFW	Nonstop	Economy	

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

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7. Click the appropriate link to show all of the flight details.
8. 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**.
9. Click the fare amount button to select these flights.
10. 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 08:05a 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. ⓘ

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

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
		Total Estimated Cost: \$504.40	
		Total Due Now: \$504.40	

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 canceled 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.

[Back](#)
[Reserve Flight and Continue](#)

11. Click **Reserve Flight and Continue**.

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Car Reservations

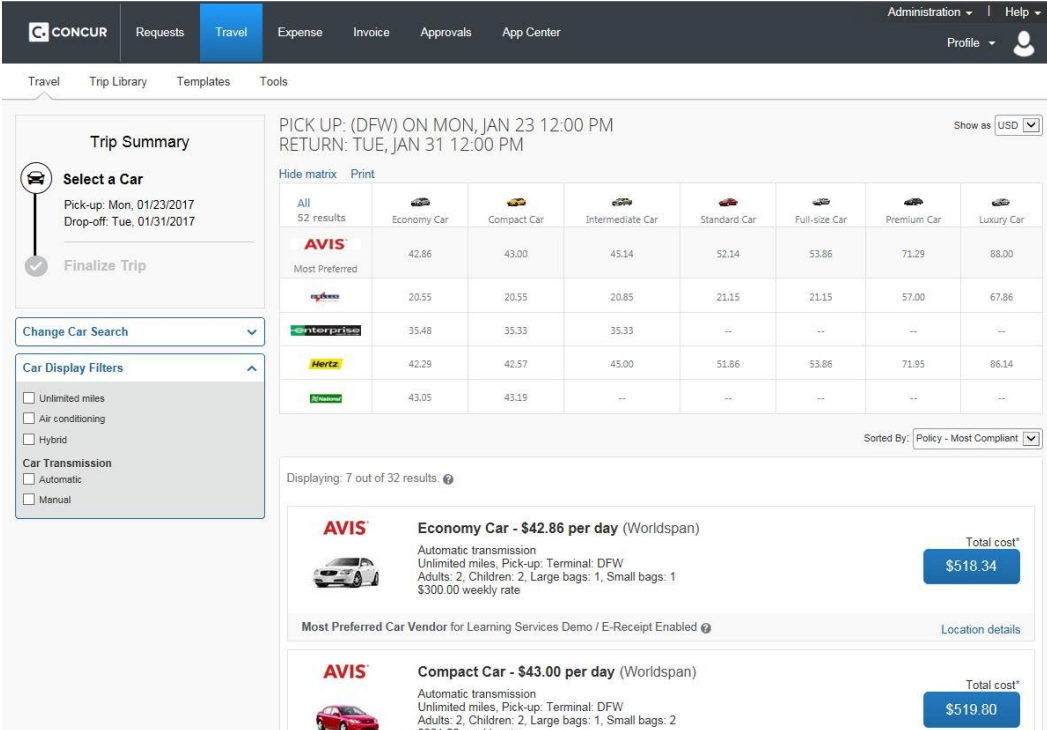
If you requested a car on the **Flight** tab (or **Air / Rail**) **Search**, the rental car search results appear.

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**.
- The Collision Damage Waiver insurance needs to be waved on the website because PCI already has insurance that covers this.

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 displays the SAP Concur Travel interface. The top navigation bar includes 'CONCUR', 'Requests', 'Travel' (selected), 'Expense', 'Invoice', 'Approvals', and 'App Center'. The right side shows '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 details. A 'Change Car Search' button is visible. On the left, there are 'Car Display Filters' for 'Unlimited miles', 'Air conditioning', 'Hybrid', and 'Car Transmission' (Automatic/Manual). The main table shows search results for 'Economy Car', 'Compact Car', 'Intermediate Car', 'Standard Car', 'Full-size Car', 'Premium Car', and 'Luxury Car'. The table lists various car rental companies and their rates. Below the table, there are two detailed car rental options from AVIS, each showing the car type, daily rate, transmission, and total cost.

All	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car
52 results							
AVIS	42.86	43.00	45.14	52.14	53.86	71.29	88.00
Most Preferred							
Enterprise	20.55	20.55	20.85	21.15	21.15	57.00	67.86
Enterprise	35.48	35.33	35.33	---	---	---	---
Hertz	42.29	42.57	45.00	51.86	53.86	71.95	86.14
Enterprise	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

Most Preferred Car Vendor for Learning Services Demo / E-Receipt Enabled

Location details

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**.

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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
Dallas, TX
Check-in: Mon, 07/24/2017
Check-out: Fri, 07/28/2017
- Finalize Trip**

Total Estimated Cost

	USD
Air	504.40
Car	507.59
Total	1,011.99

Hotel Search Results:

- 1. Fairfield Inn by Marriott**
4800 W John Carpenter Fwy, Irving, TX 75063 | Map it | \$149
2 miles | ★★★★★
Most Preferred Hotel Chain for Learning Services Demo E-Receipt Enabled | Hotel details
- 2. Courtyard by Marriott**
1151 W Walnut Hill Lane, Irving, TX 75038 | Map it | \$161
4.23 miles | ★★★★★
Most Preferred Hotel Chain for Learning Services Demo E-Receipt Enabled | Hotel details
- 3. Residence Inn Dallas DFW Airport South**
2200 Valley View Lane, Irving, TX 75062 | Map it | \$169
4.17 miles | ★★★★★
Most Preferred Hotel Chain for Learning Services Demo E-Receipt Enabled | Hotel details
- 4. SpringHill Suites by Marriott**
5800 High Point, Irving, TX 75038 | Map it | \$179
3.9 miles | ★★★★★
Most Preferred Hotel Chain for Learning Services Demo E-Receipt Enabled | Hotel details

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.

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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.
 - a. If you have an Unused Ticket please select here that you need to use the credit for your unused ticket.
5. On the **Pre-populating Your Expense Report** page, you can add transportation and parking expenses, and then click **Finish**.



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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**.

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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 **Expense** page select **Create New Report**. Select **Create From an Approved Request** and select approved request for the report you are working on. All expense reports must be attached to an Approved request.

****If you miss this step you will get an error and will not be able to submit the expense report until it is cleared.**

3. Creating from an approved request also saves time of filling out required fields on this screen because most is automatically filled out when you do this step.

Create New Report

Create From an Approved Request

Report Name *
Report Date: 06/27/2022
Employee Type *
None Selected

Trip Type *
None Selected
Program
None Selected
Department *
Search by Text
Fund Source *

Does this trip require a Travel Summary? *
No

Comment

Claim Travel Allowance
Will this trip include per diem?
☒ Yes, I want to claim Travel Allowance
☐ No, I do not want to claim Travel Allowance

Next: Create report and add itinerary details for your travel allowances

Cancel Next

4. Click **Create Report** to create a new expense Report
5. Select **Add Expense** to select the **Expense Type**.
6. After you select the expense type, the **Expense Type** fields automatically populate.
7. 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**.
8. Click **Import Expenses**, and then select **Available Expenses**.
9. Select the check box(es) for the expense you want for add to this report, and then click **Move**.
10. From the **Expense** tab, complete the required and optional fields, as needed (required fields are indicated with a red asterisk).
11. Click **Attach Receipt** to upload any required receipts for this expense.

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New Expense

Cancel Save Expense

Hide Receipt

Details Itemizations

* 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

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

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

The screenshot shows the SAP Concur Expense page. At the top, there's a navigation bar with 'SAP Concur' and tabs for 'Requests', 'Travel', 'Expense' (selected), 'Invoice', 'Approvals', and 'App Center'. Below this, there's a sub-header with 'Manage Expenses' and 'View Transactions'. A green alert box states: 'Success! You have cleared all alerts on this expense.' Below the alert, the main heading is 'Computer Hardware \$349.00' with a trash icon and the date '04/18/2018'. There are 'Cancel' and 'Save Expense' buttons. The page is divided into 'Details' and 'Itemizations' tabs. The 'Itemizations' tab is active, showing a table with columns: 'Amount', 'Itemized', and 'Remaining'. The 'Amount' is \$349.00, 'Itemized' is \$349.00, and 'Remaining' is \$0.00. Below the table, there are buttons for 'Create Itemization', 'Edit', 'Delete', and 'Copy'. A table below shows itemized expenses:

Date	Expense Type	Amount
04/18/2018	Trade Shows	\$300.00
04/18/2018	Meetings	\$49.00

16. Click **Save Expense**.

****It is important to note the **Payment Type**, if you have used your Travel Card the payment type should be **Regions Bank**.**** It may take 3-5 business days for credit card charges to appear in Concur. Don't make the mistake of selecting **Cash** as the payment type because the charge hasn't come thru.

The screenshot shows the 'Details' tab of the SAP Concur Expense page. The 'Expense Type' is 'Professional Subscriptions/Dues'. The 'Transaction Date' is '05/31/2022'. The 'Business Purpose' is empty. The 'Enter Vendor Name' is 'THEIIA'. The 'City of Purchase' is empty. The 'Payment Type' is 'Regions Bank'. The 'Amount' is '175.00'. The 'Currency' is 'US, Dollar'. The 'Approved Amount' is '175.00'. There is a checkbox for 'Personal Expense (do not reimburse)' which is unchecked. A 'Comment' field is at the bottom.

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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.

Using Email

If your email address has been verified on your Concur profile – Personal Information then you can email receipt to receipts@concur.com and it will automatically upload into the Available Receipts section of your Expense tab in Concur.

Using Concur App

While logged into the app take a picture and it will automatically upload into the Available Receipts section of your Expense tab in Concur.

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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.

A screenshot of an expense report interface. At the top, it says "Business Trip \$138.00" and "Not Submitted". There are two buttons: "More Actions" (blue) and "Submit Report" (red). Below these are three tabs: "Report Details", "Print/Share", and "Manage Receipts". The "Print/Share" tab is active, showing a dropdown menu with options: "Fax Receipt Cover Page", "Detailed Report", "Receipt Report", and "Copy of Detailed Report". Below the menu is a table with columns: "Expense Type", "Vendor Details", "Date", and "Requested". The table contains two rows: "Car Rental" from "Avis Chicago, Illinois" on "11/19/2017" for "\$103.00 Allocated", and "Dinner" from "Pacific Beach Ale House Chicago, Illinois" on "11/18/2017" for "\$35.00 Allocated". The total at the bottom is "\$138.00".

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
			\$138.00

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**.

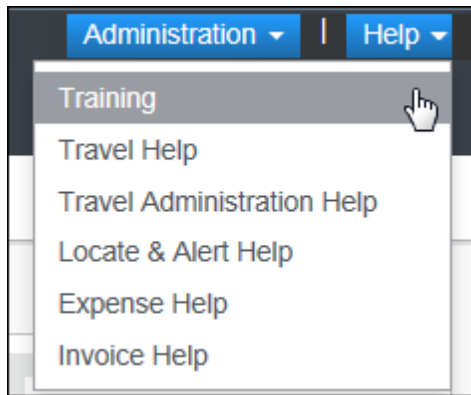
If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.



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Training command on the Help menu

All users have access to the Training command on the Help menu.



The user clicks Training to open the Concur Training Site page in a separate window. This allows the user to continue working with the product as they work with the training materials.

