



Eastern Washington University

SAP Concur – Travel Management System

Quick Guide - Introduction



Concur User's Guide

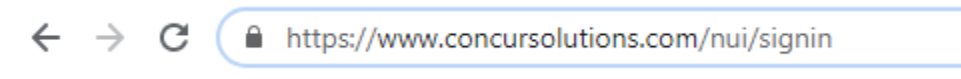
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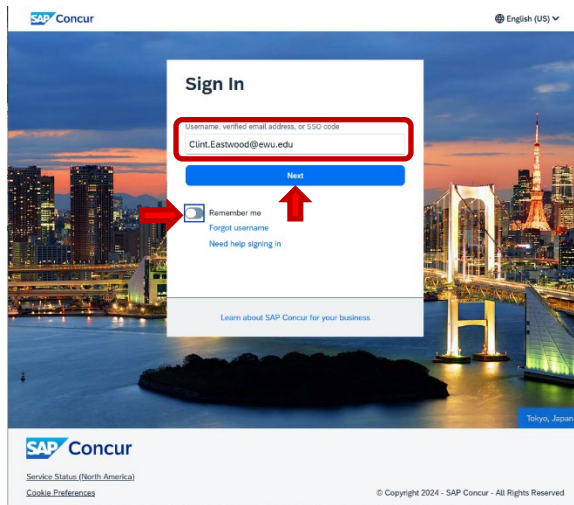
Signing into SAP Concur

There are multiple ways to access Concur:

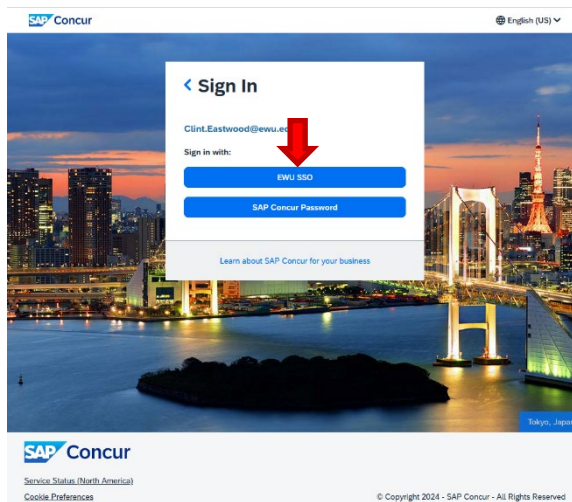
- To log into Concur directly with your SSO: <https://www.concursolutions.com/nui/signin>



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

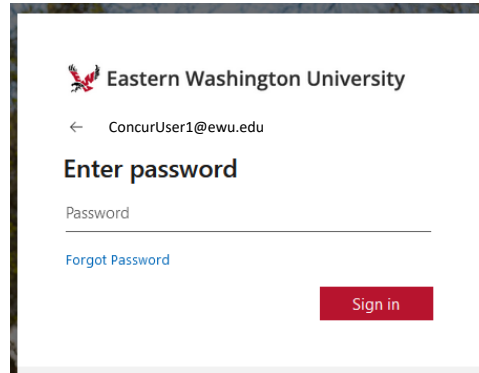
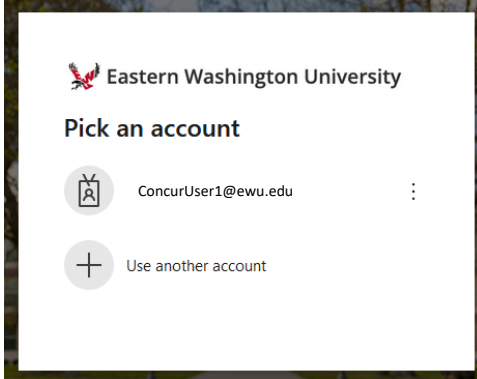


For the first screen, type in your full EWU email address and use the 'Remember Me' slide before clicking 'Next.' For the next screen, select the SSO option as shown.

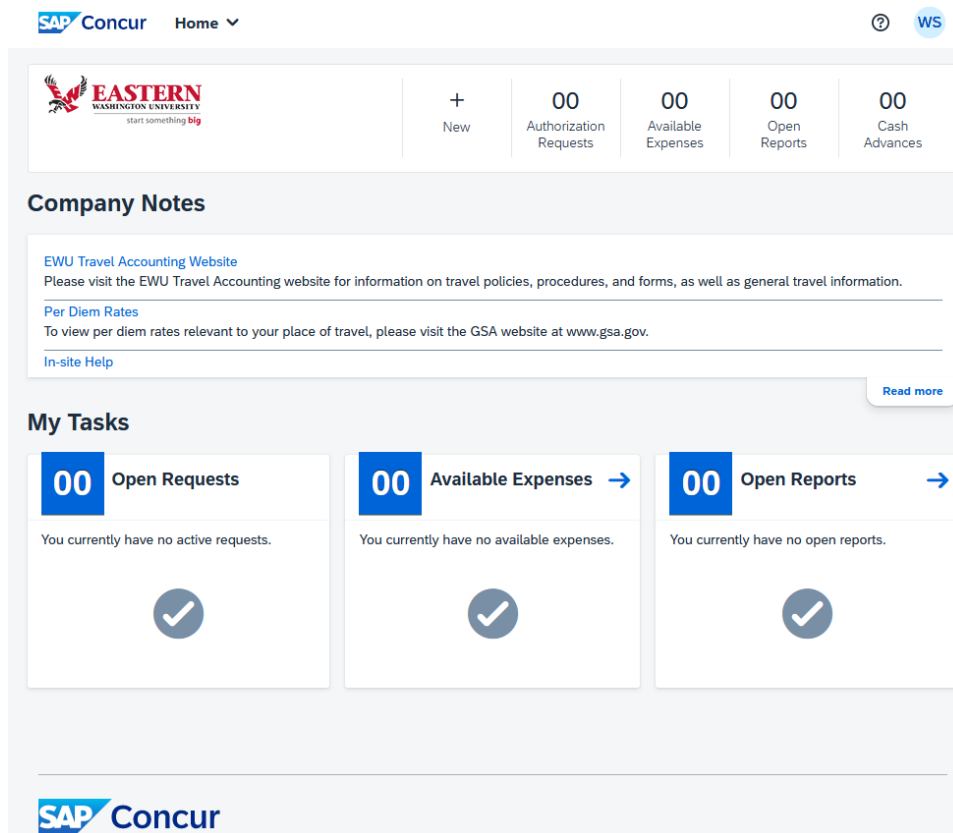


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2. Select your EWU SSO credentials, enter your passcode, and click **Sign In**.



The SAP Concur Home Screen will open.

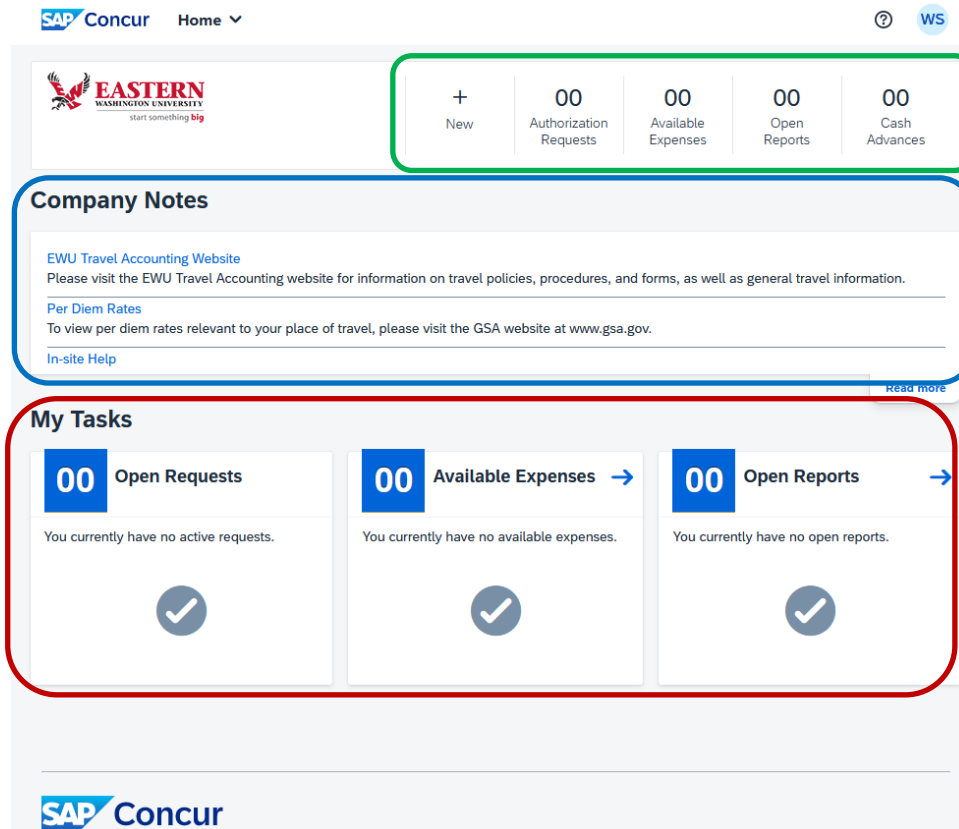


Exploring the SAP Concur Home Page

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

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none"> • Start a new report, request, upload receipts, etc. • Open reports and requests • Manage available expenses
Company Notes	This section lists any news or other details specific to EWU.
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.

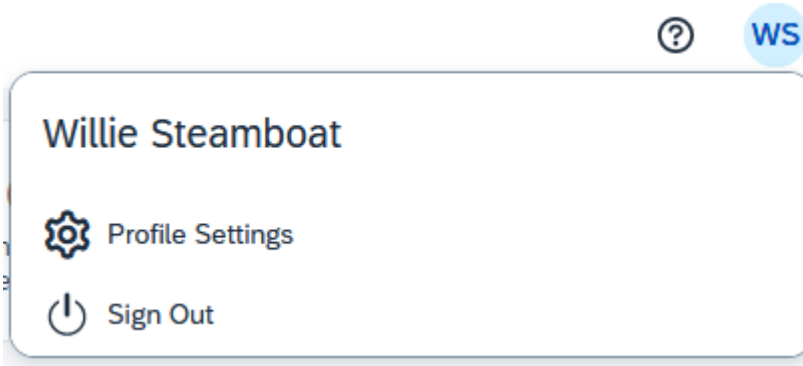


The screenshot shows the SAP Concur Home Page interface. At the top left, the SAP Concur logo and 'Home' dropdown are visible. The main content area is divided into three sections:

- Quick Task Bar (Green Box):** A horizontal bar containing five cards: '+ New', '00 Authorization Requests', '00 Available Expenses', '00 Open Reports', and '00 Cash Advances'.
- Company Notes (Blue Box):** A section titled 'Company Notes' containing links for 'EWU Travel Accounting Website', 'Per Diem Rates', and 'In-site Help'.
- My Tasks (Red Box):** A section titled 'My Tasks' containing three cards: '00 Open Requests' (with text 'You currently have no active requests.'), '00 Available Expenses' (with text 'You currently have no available expenses.'), and '00 Open Reports' (with text 'You currently have no open reports.'). Each card features a checkmark icon.

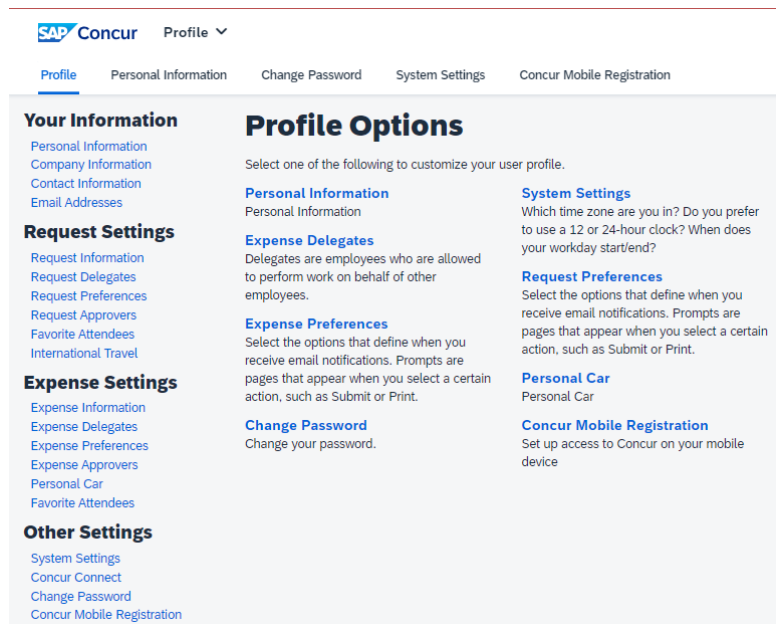
The SAP Concur logo is visible at the bottom left of the page.

Updating Your Concur Profile





Use the **Profile Options** page to set or change your personal preferences. To avoid reentering 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. Your profile options include:

- Your Information - Personal Information
- Request Information – Index
- Approvers (Request or Expense)
- Delegates (Request or Expense)
- Expense Settings
 - Personal Car
 - Favorite Attendees
 - Expense Preferences:
 - Email notifications.
 - Prompts



To access your profile information

1. Click  **Profile** >  **Profile Settings**. The **Profile Options** page appears.
2. Click the appropriate option from the left-side menu.

Delegates

If you are acting as a delegate for another employee (delegator):

- Any changes you make on this page affect only the delegator and do not change your personal information.
- You cannot access all profile options for your delegator.

Registering a Personal Car in Your Profile

You must register a personal car to claim mileage reimbursements. EWU uses two mileage rates – the standard mileage rate and the Idaho Contract mileage rate.

To register your personal car

1. Click **Profile > Profile Settings**.
2. Click on **Personal Car** from the left-side menu under Expense Settings.

- Click **New** to start setting up a personal car profile.

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
 Reimbursement Method: Personal Car - Variable Rates

[New](#) [Remove](#)

Vehicle ID Vehicle Type

No cars found for this configuration

- Vehicle ID – A generic ID, like Standard, is sufficient.

Vehicle ID

Preferred Car

Vehicle Type

[Save](#) [Cancel](#)

Vehicle ID

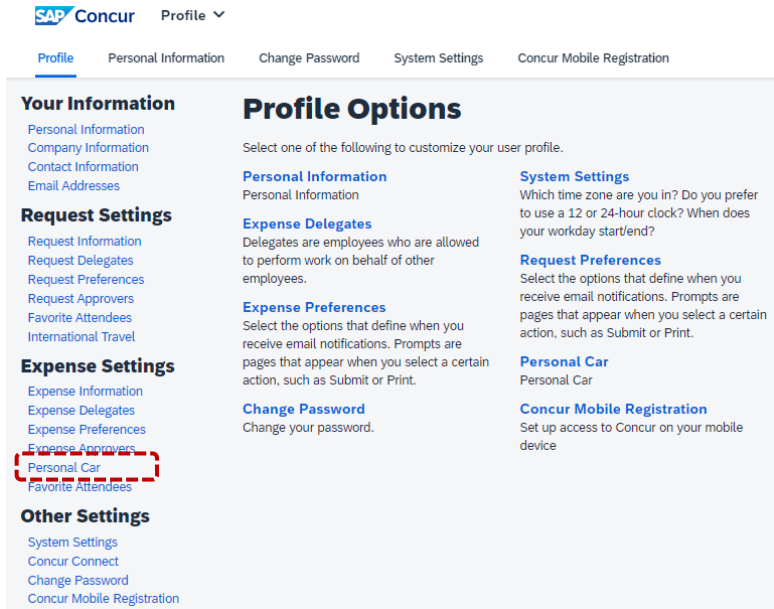
No cars found for this configuration

- Preferred Car – Check the box to assign the profile that will be used most often.
- Vehicle Type – From the dropdown, select the Standard Rate. The Standard Rate pays the current standard mileage rate authorized by Washington State.

Vehicle Type

ID Contract Rate

Standard Rate



SAP Concur Profile

Profile Personal Information Change Password System Settings Concur Mobile Registration

Your Information
 Personal Information
 Company Information
 Contact Information
 Email Addresses

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

Expense Settings
 Expense Information
 Expense Delegates
 Expense Preferences
 Expense Approvers
 Personal Car
 Favorite Attendees

Profile Options
 Select one of the following to customize your user profile.

Personal Information
 Personal Information

Expense Delegates
 Delegates are employees who are allowed to perform work on behalf of other employees.

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.

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?

Request 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.

Personal Car
 Personal Car

Concur Mobile Registration
 Set up access to Concur on your mobile device

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- To add a car for the **Idaho Contract** mileage rate, click **New**.

Change Password System Settings Concur Mobile Registration

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
 Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID	Vehicle Type	Active
<input type="checkbox"/> Standard	Standard Rate	Yes

- Enter your **Vehicle ID**, which could be your license plate number or a generic identifier (Personal_2) to distinguish it from the standard car.

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
 Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID

Preferred Car

Vehicle Type

Save Cancel

Vehicle ID	Vehicle Type
<input type="checkbox"/> Standard	Standard Rate

- Click the **Vehicle Type** dropdown arrow and choose **ID Contract Rate** and click **Save**.

Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.
 Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID

Preferred Car

Vehicle Type

Save Cancel

Vehicle ID	Vehicle Type
<input type="checkbox"/> Standard	Standard Rate

You now have two cars registered, one for each rate.

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

Personal Car Registration

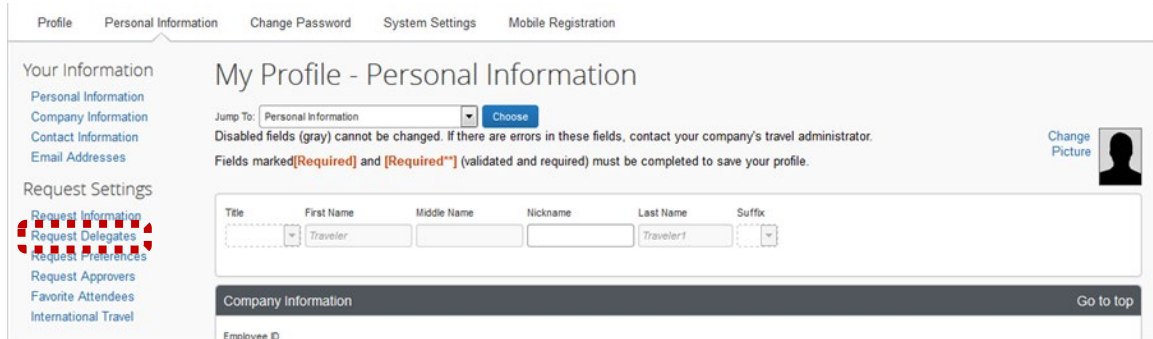
This page displays all the personal cars that have been registered. Click **New** to register another car.
 Reimbursement Method: Personal Car - Variable Rates

New Remove

Vehicle ID	Vehicle Type	Active
<input type="checkbox"/> Standard	Standard Rate	Yes
<input type="checkbox"/> 123XYZ	ID Contract Rate	Yes

Assign a Delegate

1. Click **Request Delegates** in the left-hand column to select a Delegate(s):



Profile Personal Information Change Password System Settings Mobile Registration


Your Information
 Personal Information
 Company Information
 Contact Information
 Email Addresses

Request Settings
Request Delegates
 Request Preferences
 Request Approvers
 Favorite Attendees
 International Travel

My Profile - Personal Information

Jump To: Personal Information Choose

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.
 Fields marked [Required] and [Required*] (validated and required) must be completed to save your profile.

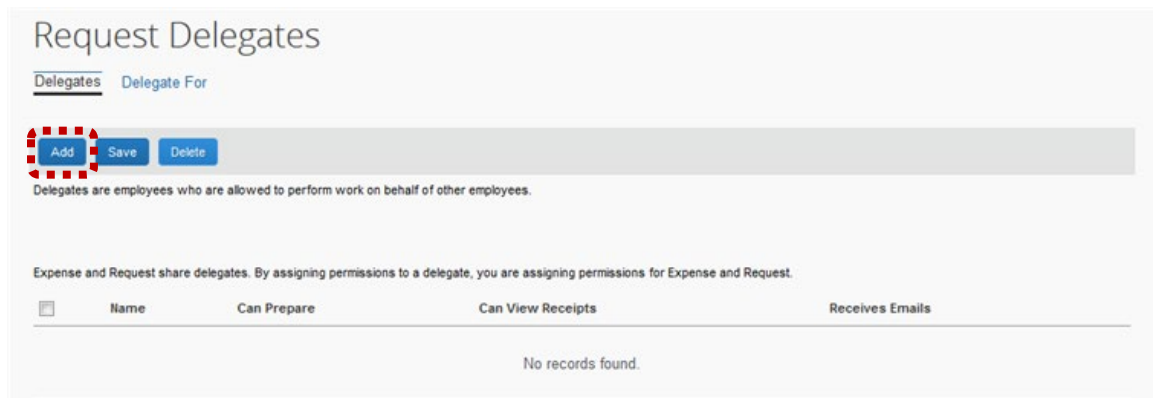
Change Picture 

Title	First Name	Middle Name	Nickname	Last Name	Suffix
	Traveler			Traveler1	

Company Information Go to top

Employee ID

2. The **Request Delegates** page displays.
3. Click **Add**.



Request Delegates

Delegates Delegate For

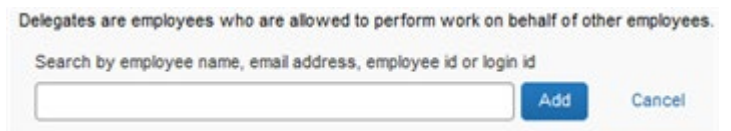
Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
No records found.				

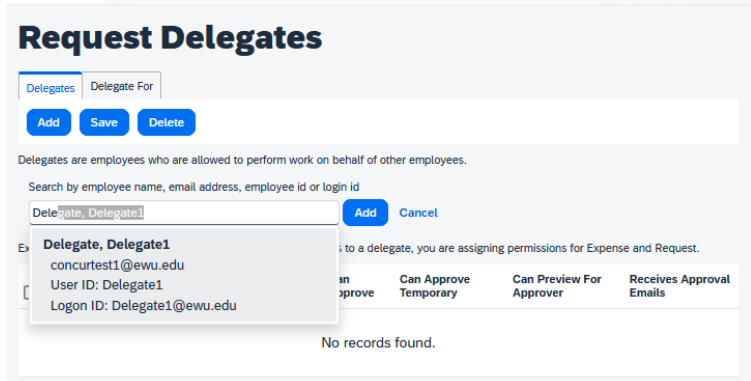
4. Enter the delegate's last name in the employee name field:
5. Select the delegate from the drop-



Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel



Request Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

Delegate, Delegate1				
concurtest1@ewu.edu				
User ID: Delegate1				
Logon ID: Delegate1@ewu.edu				

No records found.

down list.

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6. Select the delegate and select the following checkboxes: **Can Prepare**, **Can View Receipts**, and **Receives Emails**. Click **Save**.

Delegates
Delegate For

Add
Save
Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Delegate, Delegate1 concurtest1@ewu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

Important Note: If all three boxes are not checked, the delegate will not be able to prepare travel or receive processing email notifications

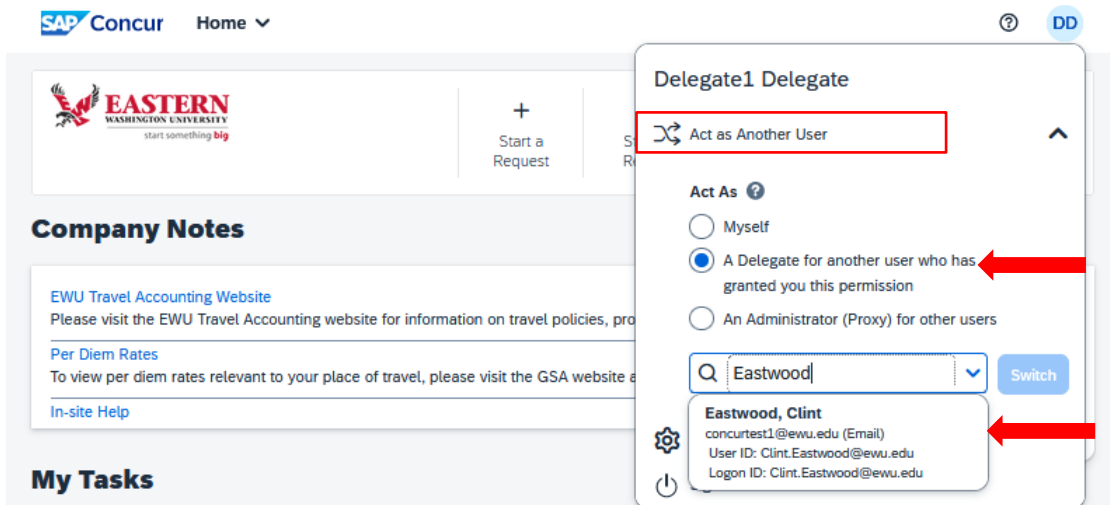
7. If applicable, add additional delegates.
 - Delegates apply to both requests and expense reports. You do not need to set up your delegates for each one. Once a delegate is set-up, they can prepare either request or expense reports.

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 reports, submitting reports, etc.

To work as a delegate

1. Click **Profile > Act on behalf of another user**.
2. Select the appropriate delegator's name.
3. Click **Start Session**.



NOTE: Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.

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

NOTE: To select a different user, follow the same steps but click a different name.

5. To return to your tasks, click **Acting as**, and then select **Act as... Myself**.

NOTE: Notice that the **Profile** menu now appears.

