



Eastern Washington University
SAP Concur Expense Quick Guide



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SAP Concur Expense Quick Guide

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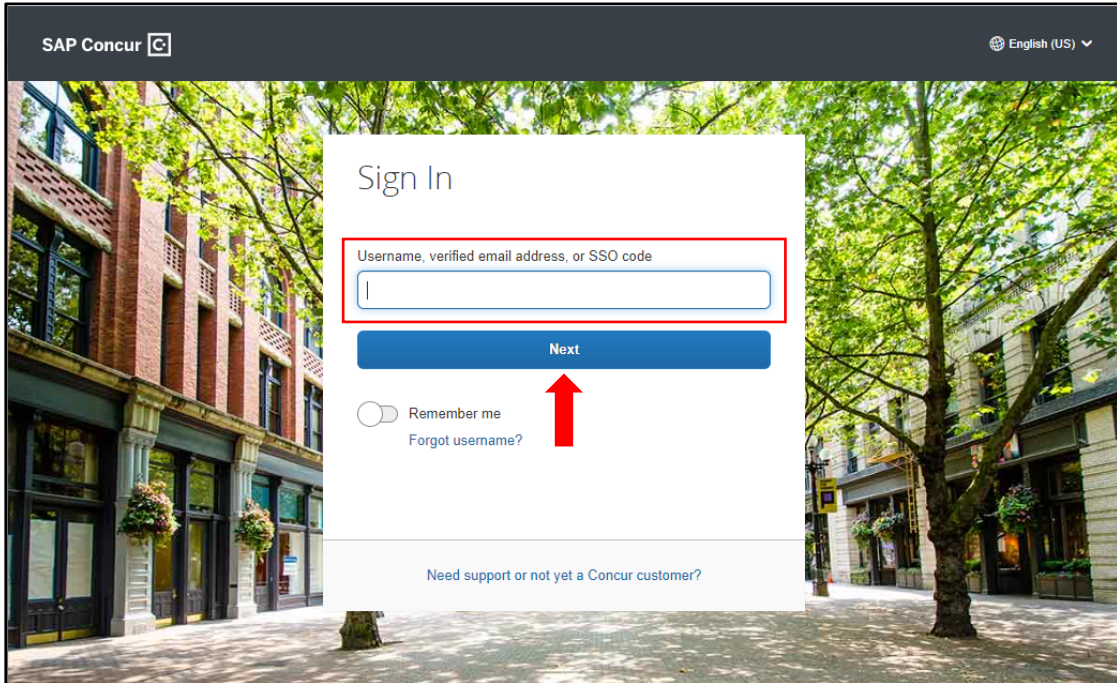
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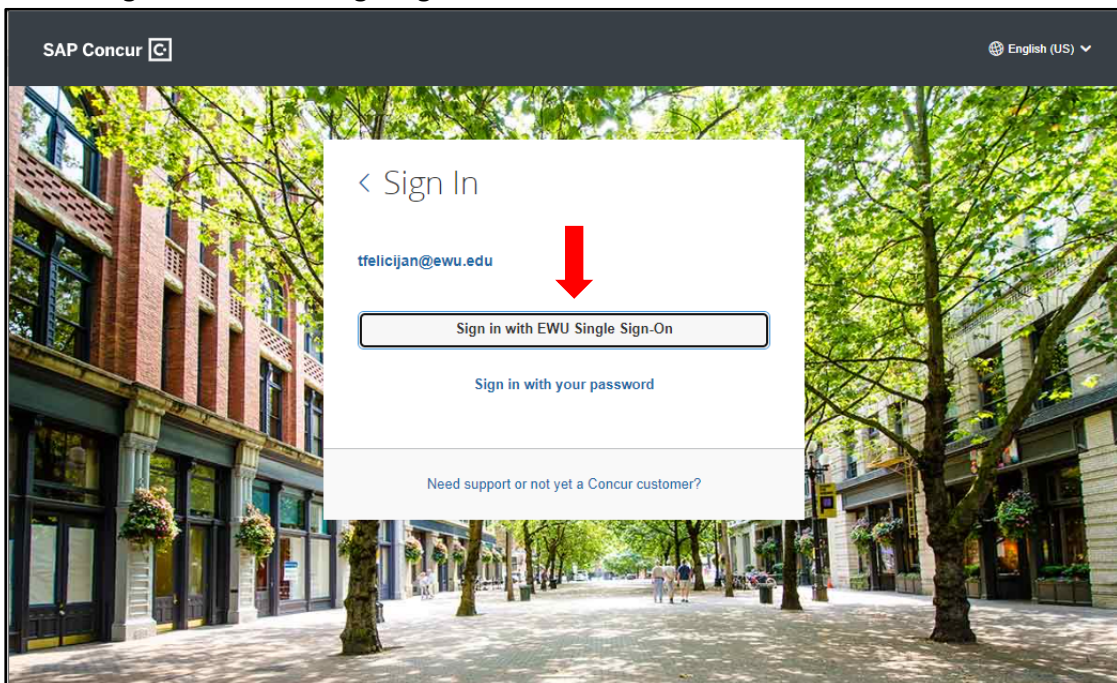
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Signing into SAP Concur

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



2. Click on **Sign in with EWU Single Sign-On**.





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3. Enter your EWU SSO credentials and click **Login**.

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NETID
Enter NetID

PASSWORD
Enter Password

Login

The SAP Concur Home Screen will open.

SAP Concur

Requests Expense Approvals Reporting App Center Administration Help

Profile

EASTERN WASHINGTON UNIVERSITY start something big

+ New

00 Required Approvals

00 Authorization Requests

00 Available Expenses

00 Open Reports

COMPANY NOTES

[EWU Travel Accounting Website](#)
Please visit the EWU Travel Accounting website for information on travel policies, procedures, and forms, as well as general travel information.

[Per Diem Rates](#)
To view per diem rates relevant to your place of travel, please visit the GSA website at www.gsa.gov.

[In-site Help](#)
Be sure to use the help link above to for assistance with forms and system functionality.

Read more

MY TASKS

00 Required Approvals →
Great! You currently have no approvals.

00 Available Expenses →
You currently have no available expenses.

00 Open Reports →
You currently have no open reports.



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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. At the top, there is a navigation bar with the SAP Concur logo and several menu items: Requests, Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Administration and Help, and a user profile icon. Below the navigation bar, the page is divided into several sections. The first section is the Quick Task Bar, which contains five buttons: a plus sign for 'New', and four buttons with '00' representing 'Required Approvals', 'Authorization Requests', 'Available Expenses', and 'Open Reports'. The second section is 'COMPANY NOTES', which includes links for 'EWU Travel Accounting Website', 'Per Diem Rates', and 'In-site Help'. The third section is 'MY TASKS', which displays three cards. Each card has a '00' icon and a title: 'Required Approvals', 'Available Expenses', and 'Open Reports'. Below each title is a message: 'Great! You currently have no approvals.', 'You currently have no available expenses.', and 'You currently have no open reports.' respectively. Each card also features a checkmark icon at the bottom.



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Updating Your Expense 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:

- Personal Information
- Approvers
- Attendees
- Personal Car
- Delegates
- Expense Preferences:
 - Email notifications
 - Prompts

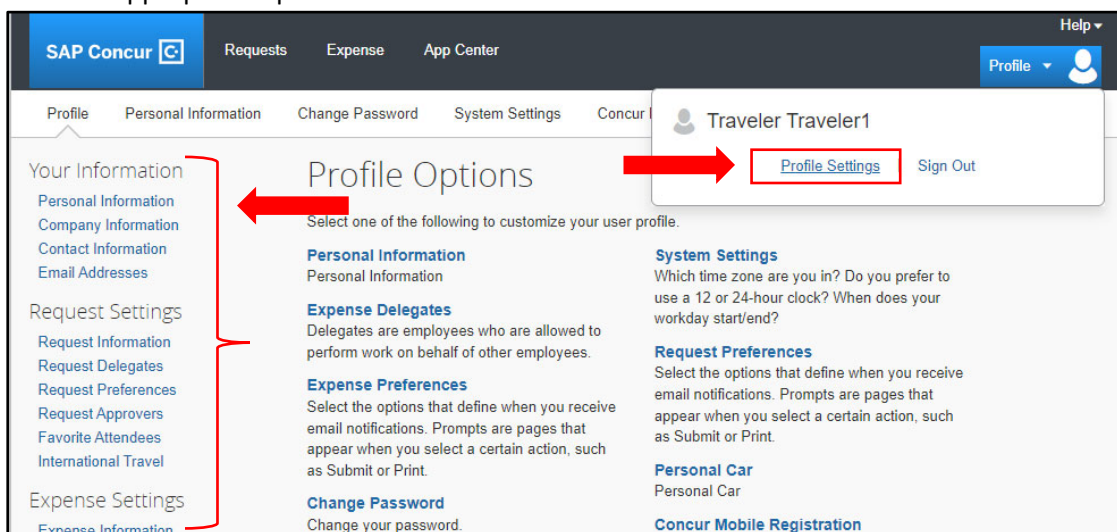
Delegates

If you are acting as an Expense 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.

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.





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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.

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

The **Standard** Vehicle ID is provided automatically and pays the current standard mileage rate.

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

Profile Personal Information 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



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4. Enter your **Vehicle ID**, which could be your license plate number or any identifier you need to distinguish it from the standard car.

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

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

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

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

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

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



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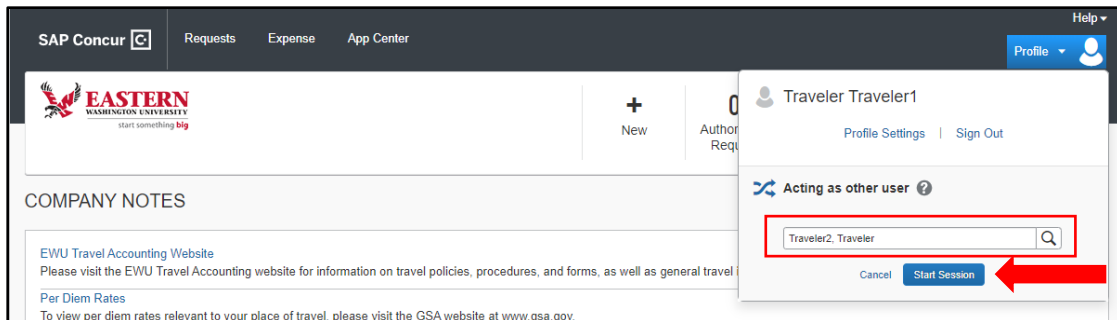
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Acting as a Delegate

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.

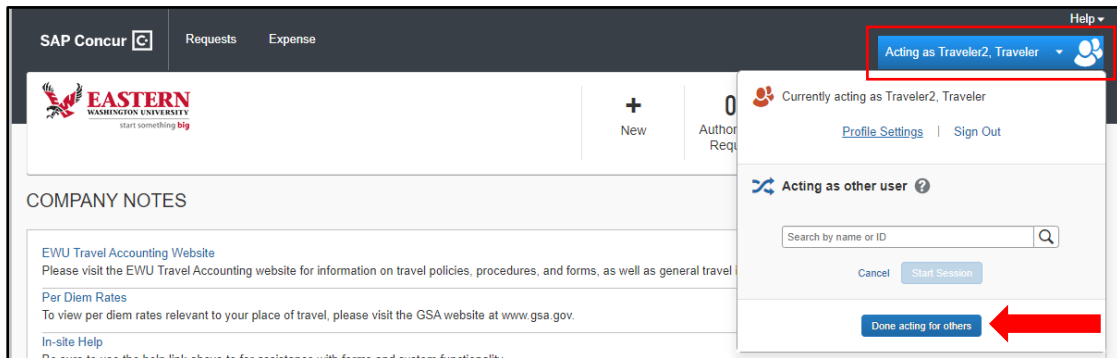
To work as a delegate

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.
To select a different user, follow the same steps but click a different name.
5. To return to your own tasks, click **Acting as**, and then select **Done acting for others**.



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



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Creating a New Expense Report

To create a new expense report from an existing request

1. From the SAP Concur home page, click the **Requests** menu.
2. Click the request that you want to create your expense report from.

The screenshot shows the SAP Concur interface. At the top, the 'Requests' menu is highlighted with a red box. Below the navigation bar, the 'Manage Requests' section is visible. A 'REQUEST LIBRARY' section shows a list of requests. One request card is highlighted with a red box and a red arrow pointing to it. The card displays 'APPROVED 06/01/2022', a warning icon, 'Traveler1 6/1/2022 Seattle', and an amount of '\$2,201.00'. To the left of the request card is a 'Create New Request' button.

3. To create the expense report with the attached request, click **Create Expense Report**.

The screenshot shows the details of a request titled 'Traveler1 6/1/2022 Seattle \$2,201.00'. The status is 'Approved' and the Request ID is '3HA4'. There are two buttons at the top right: 'More Actions' and 'Create Expense Report'. A red arrow points to the 'Create Expense Report' button. Below the buttons, there are sections for 'Request Details', 'Print/Share', and 'Attachments'. A 'CASH ADVANCES' section shows 1 advance with an amount of \$701.00. An 'EXPECTED EXPENSES' table is also visible.

Alerts	Expense type	Details	Date	Amount	Requested
	Seminar/Conference Registration Fees	WACUBO Conference Fee	06/01/2022	\$1,000.00	\$1,000.00



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The expense report automatically opens to the expense report page, and you can see that the request and any related cash advance is attached.

Traveler1 6/1/2022 Seattle \$0.00 [Submit Report](#)

Not Submitted

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

REQUEST Approved \$2,201.00	CASH ADVANCE: 1 Amount \$701.00 Remaining \$701.00
--	---

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

No Expenses
Add expenses to this report to submit for reimbursement.

The expense report header is automatically updated based on the request.

If you need to claim travel allowances, you must update the report header to create a travel itinerary. See the **Adding Travel Allowances and Itinerary** section below.

To create a new expense report without a request

1. On the SAP Concur home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.

The **Report Header** window will appear.



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2. Complete all required fields (marked with red asterisks) and the optional fields as needed.

Create New Report

Create From an Approved Request

* Required field

Policy *
*EWU-US Expense Policy

Report/Trip Name *
[Empty Field]

Report/Trip Start Date *
MM/DD/YYYY

Report/Trip End Date *
MM/DD/YYYY

Index *
Search by Code

Traveler Type *
None Selected

Trip Type *
None Selected


Report/Trip Purpose *
None Selected

Additional Information
[Empty Field]

Report Date
05/02/2022

Report Total
[Empty Field]

Comment
[Empty Field]

 **Create Report**

3. Click **Create Report**.
At this point, you will add expenses to your expense report.



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Adding Travel Allowances and Itinerary

An itinerary is required for meals and lodging expenses. These expenses are reimbursed based on the per diem rate for each destination. You will need to claim travel allowances and create an itinerary if your expense report includes these expense types.

To add travel allowances and itinerary

1. On the expense report page, click **Report Details** and click **Report Header**.

Traveler1 6/1/2022 Seattle \$0.00 Submit Report

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

Report

- Report Header
- Report Totals
- Report Timeline
- Audit Trail

CASH ADVANCE: 1

Amount	Remaining
\$701.00	\$701.00

2. Scroll to the bottom of the report header and click the **Yes, I want to claim Travel Allowance** radio button and click **Next**.

Report Header ×

Traveler1 6/1/2022 Seattle | \$0.00

Claim Travel Allowance

Does this trip include Per Diem expenses? If Group Travel, select "No" and use group-specific expense types.

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

Next

The Itinerary Info window will appear.



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- To **Create a New Itinerary**, enter **Departure City** and **Arrival City** details for the first stop and click **Save**.

Travel Allowances For Report: Traveler1 6/1/2022 Seattle

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Traveler1 6/1/2022 Seattle Selection: EWU FEED

Add Stop Delete Rows

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Departure City: Spokane, Washington

Date: 06/01/2022 Time: 8:00 AM

Arrival City: Seattle, Washington

Date: 06/01/2022 Time: 7:00 AM

Save

- Continue to add stops as needed.
As you add additional stops, the details will appear in the left-side window.

Travel Allowances For Report: Traveler1 6/1/2022 Seattle

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Traveler1 6/1/2022 Seattle Selection: EWU FEED

Add Stop Delete Rows

Departure City	Arrival City	Arrival Rate Location
Spokane, Washington 06/01/2022 06:00 AM	Seattle, Washington 06/01/2022 07:00 AM	KING COUNTY, US-WA, US
Seattle, Washington 06/03/2022 10:00 AM	Spokane, Washington 06/03/2022 11:00 AM	SPOKANE COUNTY, US-WA, US

New Itinerary Stop

Departure City: Spokane, Washington

Date: Time:

Arrival City:

Date: Time:



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5. When all stops are entered, click **Next**.

Travel Allowances For Report: Traveler1 6/1/2022 Seattle

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Traveler1 6/1/2022 Seattle Selection: EWM FEED

Departure City	Arrival City	Arrival Rate Location
Spokane, Washington 06/01/2022 06:00 AM	Seattle, Washington 06/01/2022 07:00 AM	KING COUNTY, US-WA, US
Seattle, Washington 06/03/2022 10:00 AM	Spokane, Washington 06/03/2022 11:00 AM	SPOKANE COUNTY, US-WA, US

New Itinerary Stop

Departure City: Spokane, Washington

Date: [] Time: []

Arrival City: []

Date: [] Time: []

Save

Go to Single Day Itineraries Next >> Cancel

Your newly created itinerary is displayed as **Available Itineraries**.

6. Click **Next**.

Travel Allowances For Report: Traveler1 6/1/2022 Seattle

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Traveler1 6/1/2022 Seattle				
Spokane, Washington	06/01/2022 06:00 AM	Seattle, Washington	06/01/2022 07:00 AM	KING COUNTY, US-WA, US
Seattle, Washington	06/03/2022 10:00 AM	Spokane, Washington	06/03/2022 11:00 AM	SPOKANE COUNTY, US-WA, US

<< Previous Next >>



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You must be in travel status to be eligible for meals. Only out of pocket meals are reimbursed.

- Click the **checkbox** for any meal that you are not in travel status, or that is otherwise provided. The Allowance amount will reduce for meals checked.
- Click **Create Expenses**.

Exclude	Date/Location	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	06/01/2022 Seattle, Washington	\$79.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$79.00
<input type="checkbox"/>	06/02/2022 Seattle, Washington	\$79.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$55.00
<input type="checkbox"/>	06/03/2022 Seattle, Washington	\$79.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$44.00

Daily Meal Allowances will be added to your expense report at the per diem rate for your locations.

Traveler1 6/1/2022 Seattle \$178.00

Not Submitted

REQUEST Approved \$2,201.00

CASH ADVANCE: 1
Amount \$701.00 Remaining \$523.00

Expense Type	Vendor Details	Date	Requested
Daily Meal Allowance	Seattle, Washington	06/03/2022	\$44.00
Daily Meal Allowance	Seattle, Washington	06/02/2022	\$55.00
Daily Meal Allowance	Seattle, Washington	06/01/2022	\$79.00
			\$178.00

- To view any alerts related to the expenses, click on the **Alerts** drop down arrow at the top

Alerts: 3

EXPENSE | Daily Meal Allowance | 06/03/2022 | \$44.00

Travelers must be in travel status during the entire meal period to be eligible for reimbursement (SAAM 10.40). If you are not in travel status during the meal period, please select from the menu above Details > Travel Allowances > Expenses & Adjustments and check meals that do not meet this criteria. Breakfast: 7 to 8am, Lunch: 12 to 1pm, Dinner: 6 to 7pm. Please visit www.gsa.gov for per diem rates. [View](#)

EXPENSE | Daily Meal Allowance | 06/02/2022 | \$55.00

Travelers must be in travel status during the entire meal period to be eligible for reimbursement (SAAM 10.40). If you are not in travel status during the meal period, please select from the menu above Details > Travel Allowances > Expenses & Adjustments and check meals that do not meet this criteria. Breakfast: 7 to 8am, Lunch: 12 to 1pm, Dinner: 6 to 7pm. Please visit www.gsa.gov for per diem rates. [View](#)

EXPENSE | Daily Meal Allowance | 06/01/2022 | \$79.00

Traveler1 6/1/2022 Seattle \$178.00

Not Submitted

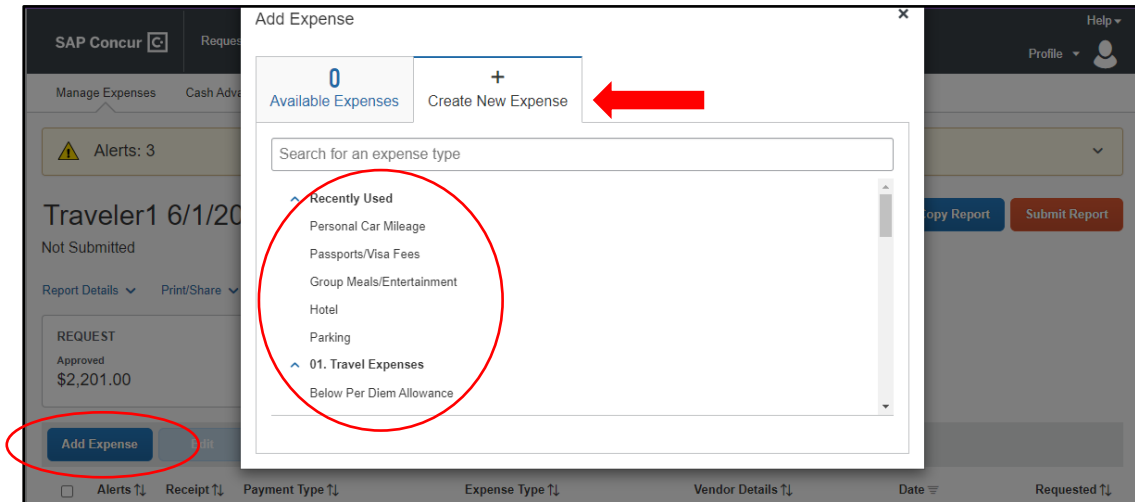


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Adding Expenses to an Expense Report

To add an expense to a report

1. From the open report, click **Add**, and then click the **Create New Expense** tab.
2. Search for or select the appropriate expense type from the list.



The page refreshes, displaying the required and optional fields for the selected expense type.

3. Complete the required and optional fields.
4. Choose the correct **Payment Type**; either **Cash**, **CTA**, **Pcard**, or **Third Party**.

5. Click one of the following:
 - **Upload Receipt Image** – To upload and attach receipt images
 - **Itemizations tab** – To itemize the expense
 - **Save Expense** – To save the expense
 - **Cancel** – To exit without saving this expense



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Itemizing Nightly Lodging (Hotel) Expenses

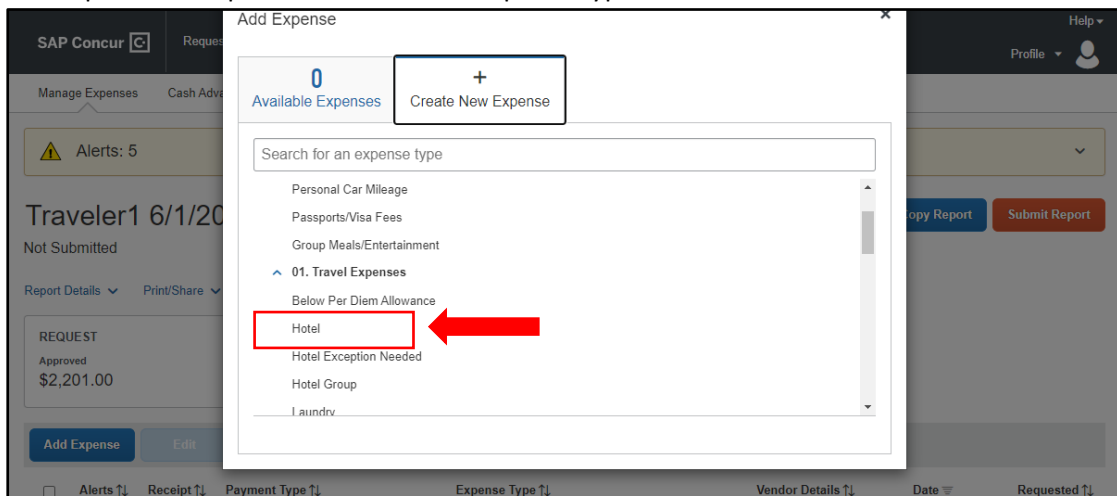
A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Lodging Itemization allows you to quickly itemize recurring room rates and taxes. You can then itemize the remaining charges on your hotel bill and adjust for any rate changes during your stay.

Hotel costs are subject to per diem rates and must include an itinerary. Refer to the **Adding Travel Allowances and Itinerary** section above.

If your hotel costs, excluding tax, exceed per diem, you must include a **Hotel Exception Needed** expense type in your itemization. The **Request** field shows the per diem allowed for the hotel. When itemizing, choose **Hotel** and enter the per diem rate. Choose **Hotel Exception Needed** and enter the amount above per diem. Detailed instructions are below.

To create a lodging expense

1. With the expense report open, click **Add**, and then select **Hotel**. The page refreshes, displaying the required and optional fields for the expense type.





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2. Complete the fields.

Note: if your hotel costs, excluding tax, exceed per diem, you must include an exception from the **Hotel Exception** dropdown list.

New Expense Cancel Save Expense

Details **Itemizations** Hide Receipt

Allocate * Required field

Expense Type *
Hotel

Check-in Date *
06/01/2022

Check-out Date *
06/03/2022

Nights:
2

Transaction Date *
06/01/2022

Additional Information

Hotel Exception *
None Selected

Vendor *
Hotels

Receipt Type *
Receipt (reimbursable)

Unit *
Dollar

Amount *
1/2022, \$464.00 - Traveler1 6...

Upload Receipt Image

3. Click the **Itemizations** tab, click **Create Itemization**.

Hotel \$510.00 Cancel Save Expense

06/01/2022 | DoubleTree Hotels Hide Receipt

Details **Itemizations**

Amount	Itemized	Remaining
\$510.00	\$0.00	\$510.00

Create Itemization

No Itemizations.
Create itemizations for the items on your receipt.



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4. Select the **Hotel** expense type. You can then select if this is a **Recurring** or **Single Itemization**.
5. Select whether your hotel room rate was **The Same Every Night**, or **Not the Same**.
6. Enter the **per diem** amount in **Room Rate (per night)** and **Room Tax (per night)**, as applicable.
Note: You can use the **Additional Taxes** link to enter additional taxes from your hotel bill.
7. Click **Save Itemization**.

Hotel \$510.00

06/01/2022 | DoubleTree Hotels

Details | Itemizations | Hide Receipt

Amount	Itemized	Remaining
\$510.00	\$0.00	\$510.00

New Itemization

Expense Type *
Hotel

Entry Type: Recurring Itemization | 06/01/2022 - 06/03/2022 (Nights: 2)

Your hotel room rate was:
The Same Every Night | Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
232.00	8.00		

Upload Receipt Image

Hotel Tax may reduce reimbursement when tied to a travel allowance.

8. To disconnect **Hotel Tax** from travel allowance, click Itemizations and click on **Hotel Tax**.

Hotel \$510.00

06/01/2022 | DoubleTree Hotels

Details | Itemizations | Hide Receipt

Amount	Itemized	Remaining
\$510.00	\$510.00	\$0.00

Create Itemization | More Actions

Date	Expense Type	Requested
06/01/2022	Hotel	\$232.00
06/01/2022	Hotel Tax	\$8.00
06/01/2022	Hotel Exception Needed	\$15.00
06/02/2022	Hotel	\$232.00
06/02/2022	Hotel Tax	\$8.00
06/02/2022	Hotel Exception Needed	\$15.00

Upload Receipt Image



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9. Click off the **Travel Allowance** checkbox and click **Save Itemization**.

Hotel Tax \$8.00

Allocate * Required field

Expense Type *
Hotel Tax

Transaction Date * 06/01/2022 Additional Information

Hotel Exception ? 4 - Lodging where a mee... Enter Vendor Name DoubleTree Hotels

City of Purchase Seattle, Washington

Amount * 8.00 Currency US, Dollar

Travel Allowance

Comment

Save Itemization

Upload Receipt Image

10. If your hotel costs, excluding tax, exceed per diem, select the **Hotel Exception Needed** expense type and enter the **amount above per diem (per night)**.

Hotel \$510.00 **Save Itemization**

06/01/2022 DoubleTree Hotels

Details Itemizations Hide Receipt

Amount	Itemized	Remaining
\$510.00	\$480.00	\$30.00

New Itemization

Expense Type *
Hotel Exception Needed

Entry Type: Recurring Itemization 06/01/2022 - 06/03/2022 (Nights: 2)

Your hotel room rate was:
The Same Every Night Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
15.00			

Upload Receipt Image

11. Add any additional itemizations and click **Save Expense**.



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Allocating Expenses

You can allocate expenses to various funding sources (indexes), which will be charged for those expenses. You can allocate a single expense or multiple expenses.

To allocate your expenses

1. With the expense open, to create or edit a *single* expense, click **Allocate**.

Airfare \$500.00

06/01/2022 | American Airlines

Details | Itemizations

Allocate

Expense Type *
Airfare

Transaction Date *
06/01/2022

Additional Information

2. With the report open, to allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then click **Allocate**.

Traveler1 6/1/2022 Seattle \$2,172.00

Not Submitted

REQUEST
Approved
\$2,201.00

CASH ADVANCE: 1
Amount \$701.00
Remaining \$13.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>		Cash (reimbursable)	Daily Meal Allowance	Seattle, Washington	06/03/2022	\$44.00	\$44.00
<input type="checkbox"/>		Cash (reimbursable)	Daily Meal Allowance	Seattle, Washington	06/02/2022	\$55.00	\$55.00
<input checked="" type="checkbox"/>		Pcard	Seminar/Conference Registration Fees	NACUBO Seattle, Washington	06/01/2022	\$1,000.00	\$1,000.00
<input checked="" type="checkbox"/>		Cash (reimbursable)	Hotel	DoubleTree Hotels Seattle, Washington	06/01/2022	\$510.00	\$494.00 Itemized
<input checked="" type="checkbox"/>		CTA (Central Travel Account)	Airfare	American Airlines Seattle, Washington	06/01/2022	\$500.00	\$500.00
<input type="checkbox"/>		Cash (reimbursable)	Daily Meal Allowance	Seattle, Washington	06/01/2022	\$79.00	\$79.00
						\$2,188.00	\$2,172.00

The **Allocate** window appears. The total expense **Amount**, the amount **Allocated**, and the amount **Remaining** are listed.



Eastern Washington University SAP Concur Expense Quick Guide

3. Select **Percent** or **Amount** and click **Add**.

Select from the lists or type the appropriate information in the fields.

4. Add as many allocations as necessary, from the **New Allocation** or **Favorite Allocations** tabs, and then click **Save**.

You can adjust the amounts and percentages. The total amount must be allocated 100%, otherwise an audit rule is flagged, and you will not be able to submit the report.

5. Click **Save**.



Eastern Washington University

SAP Concur Expense Quick Guide

Converting Foreign Currency Transactions

When your travel takes you to different countries, you will need to convert foreign currency transactions to your standard reimbursement currency.

To account for an expense incurred in another currency

1. With the report open, click **Add**, and then **Create New Expense**.
2. Search for or enter an expense type.
3. Enter the appropriate information in the required and optional fields (required fields are indicated with an asterisk).

Note the following:

- Select the "spend" **Currency** from the list to the right of the **Transaction Amount** field. The **Conversion Rate** field appears.
- The **Conversion Rate** is automatically populated according to the **Transaction Date** and **Currency** entries. Expense calculates the **Amount** in your reimbursement currency.
- Currency can be converted by multiplying by a particular rate or dividing by a different rate. To switch between multiplication of the rate to division of the rate, click **Reverse** next to the **Conversion Rate** field.

4. Complete the remaining fields as appropriate, and then click **Save Expense**.

The screenshot shows the SAP Concur Expense form for an Airfare transaction. The form is titled "Airfare \$500.00" and includes a "Cancel" button and a "Save Expense" button. The transaction details are as follows:

- Expense Type ***: Airfare
- Transaction Date ***: 06/01/2022
- Vendor ***: American Airlines
- City of Purchase**: Seattle, Washington
- Payment Type ***: CTA (Central Travel Account)
- Amount ***: 500.00
- Currency ***: Euro
- Conversion Rate ***: 1 EUR = 1.05498644972778 (Reverse button next to it)
- Amount in USD ***: 527.49
- Request ***: 06/01/2022, \$500.00 - Traveler1 6...

The "Currency" and "Conversion Rate" fields are highlighted with a red box. A large red box on the right side of the form contains the text "Upload Receipt Image".



Eastern Washington University

SAP Concur Expense Quick Guide

Entering Personal Car Mileage

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. Refer to the **Registering a Personal Car in Your Profile** section above.

To create a car mileage expense

1. With the expense report open, click **Add**, and then select **Personal Car Mileage**.
2. Click on the **Mileage Calculator**.

New Expense Cancel Save Expense

Details Itemizations Show Receipt

Mileage Calculator ←

Expense Type * Transaction Date * Additional Information

From Location * To Location * Payment Type

Comment

Vehicle ID * Distance to Date Distance * Number of Passengers

Amount Currency Reimbursement Rates [View all reimbursement rates](#)

3. Enter the beginning and ending destinations and click **Add Mileage to Expense**.

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

16.0 MI Personal

Directions

A 1300 1st St, Cheney, WA 99004, USA

16.0 mi. About 21 mins

1. Head northeast on 1st St/Lt. Col. Michael P. Anderson Memorial Hwy toward Fern St Continue to follow Lt. Col. Michael P. Anderson Memorial Hwy Pass by NAPA Auto Parts - Genuine Parts Company (on the left in 0.7 mi) 5.3 mi
2. Keep right at the fork, follow signs for I-90 E/ Spokane and merge onto I-90 E 9.5 mi
3. Take exit 280 toward Lincoln St 0.2 mi

Deduct Commute **TOTAL PERSONAL 0.0 MI** **TOTAL BUSINESS 16.0 MI**



Eastern Washington University

SAP Concur Expense Quick Guide

4. Enter any required and optional fields.
5. Select a **Vehicle ID** based on the required reimbursement rate.
When done, Expense calculates the reimbursement amount based on the miles and the mileage reimbursement rate.
6. Click **Save Expense**.

New Expense Save Expense

Details | Itemizations Show Receipt

Mileage Calculator | Allocate

* Required field

Expense Type * Transaction Date * Additional Information

From Location * To Location * Payment Type

Comment

Vehicle ID * Distance to Date Distance * Number of Passengers

ID Rate

Currency Reimbursement Rates



Eastern Washington University

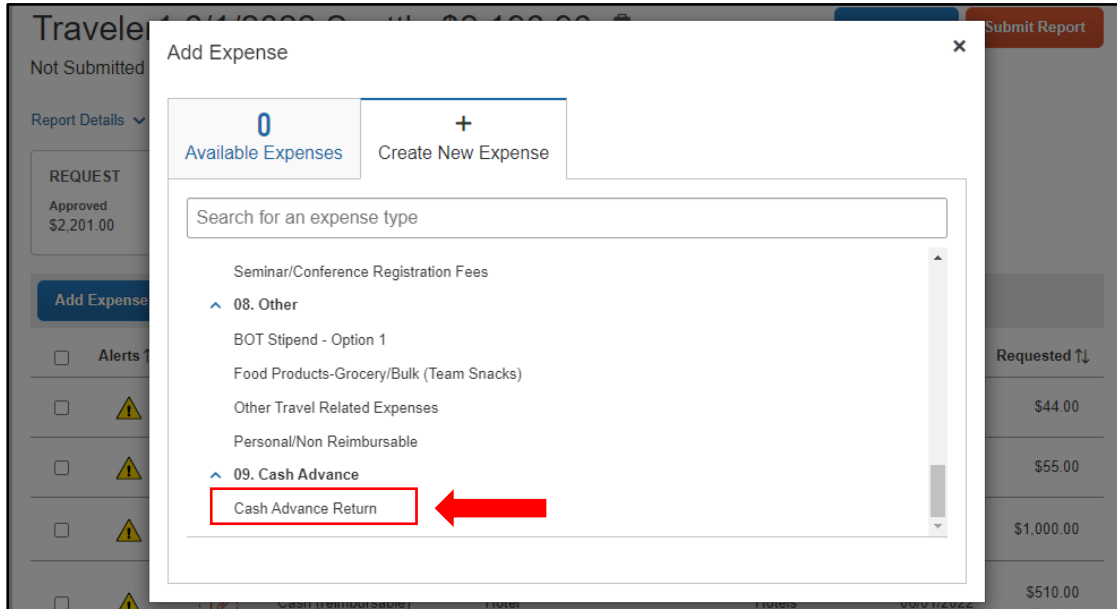
SAP Concur Expense Quick Guide

Returning Remaining Cash Advances

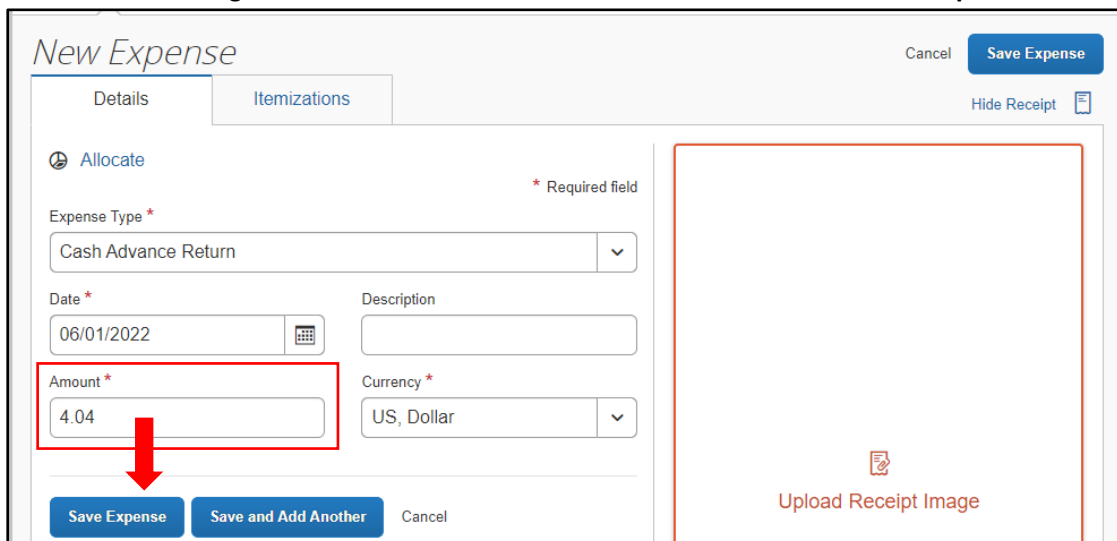
If your expense report includes a cash advance, the cash advance must be completely accounted for before you can submit your report. You will need to add an expense type to return remaining funds.

To account for a remaining cash advance balance

1. With the expense report open, click **Add**, and then select **Cash Advance Return**.



2. Enter the remaining cash advance balance in the **Amount** field and click **Save Expense**.



You must provide proof of repayment of the cash advance.

3. Return the funds to Student Financial Services and get a receipt.
4. Upload your receipt to the **Cash Advance Return** expense.



Eastern Washington University

SAP Concur Expense Quick Guide

Creating a Group Travel Expense Report

Group Travel has more than one person traveling on the same trip with one request and expense report. It requires the use of a separate travel policy called ***EWU-US Group Expense Policy**. It also includes a few unique expense types specifically created for a group situation. These include:

- Hotel Group
- Group Meals/Entertainment
- Food Products-Grocery/Bulk (Team Snacks)

All other expense types are the same.

Group travel does not use the **Travel Allowance** and **Itinerary** function as individual travel does. It is important to select the appropriate travel policy to provide for these unique situations for group travel.

Visit the Travel Accounting site to familiarize yourself with **Travel Requirements for Groups**.

<https://inside.ewu.edu/financialservices/office-of-controller/travel-accounting/travel-requirements-for-groups/>.

To create a new expense report from an existing request

1. From the SAP Concur home page, click the **Requests** menu.
2. Click the request that you want to create your expense report from.

The screenshot displays the SAP Concur 'Manage Requests' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'App Center'. The main content area is titled 'Manage Requests' and features a 'REQUEST LIBRARY' section with a 'View' dropdown menu set to 'Active Requests'. A red box highlights a 'Create New Request' button. A red arrow points to a request card titled 'TRAVELER1 6/1/2022 Seattle' with an amount of '\$2,201.00' and a status of 'APPROVED' dated '06/01/2022'.



Eastern Washington University SAP Concur Expense Quick Guide

3. To create the expense report with the attached request, click **Create Expense Report**.

Traveler1 6/1/2022 Seattle \$2,201.00
Approved | Request ID: 3HA4

More Actions **Create Expense Report**

Request Details Print/Share Attachments

CASH ADVANCES: 1
Amount
\$701.00

EXPECTED EXPENSES

Alerts	Expense type	Details	Date	Amount	Requested
	Seminar/Conference Registration Fees	WACUBO Conference Fee	06/01/2022	\$1,000.00	\$1,000.00

The expense report automatically opens to the expense report page, and you can see that the request and any related cash advance is attached.

Traveler1 6/1/2022 Seattle \$0.00

Not Submitted **Submit Report**

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST
Approved
\$2,201.00

CASH ADVANCE: 1
Amount \$701.00 | Remaining \$701.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

No Expenses
Add expenses to this report to submit for reimbursement.

The expense report header must be updated to the ***EWU-US Group Expense Policy**.

4. On the expense report page, click **Report Details** and click **Report Header**.

Traveler1 6/1/2022 Seattle \$0.00

Not Submitted **Submit Report**

Report Details Print/Share Manage Receipts Travel Allowance

Report
Report Header
Report Totals
Report Timeline
Audit Trail

CASH ADVANCE: 1
Amount \$701.00 | Remaining \$701.00



Eastern Washington University SAP Concur Expense Quick Guide

- Click the dropdown arrow for **Policy** and select ***EWU-US Group Expense Policy** and enter the **Number of People Traveling**.

Create New Report

Create From an Approved Request

Policy *
*EWU-US Group Expense Policy

Report/Trip Name *
Traveler1 6/1/2022 Seattle

Report/Trip Start Date *
06/01/2022

Report/Trip End Date *
06/03/2022

Number of People Traveling *
3

- Change **Traveler Type** to **Team/Group Travel**, fill out the remaining required and optional fields and click **Create Report**.

Index *
100194-Office of Controller (100194)

Traveler Type *
Team/Group Travel

Trip Type *
In-State

Report/Trip Purpose *
Other

Additional Information

Report Date
05/02/2022

Report Total

Comment

Create Report

To create a new expense report without a request

- On the SAP Concur home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.

SAP Concur

Requests Expense App Center

Help

Profile

New 01 Authorization Requests 00 Available Expenses 01 Open Reports 03 Cash Advances

Start a Request
Start a Report
New Cash Advance
Upload Receipts

COMPANY NOTES

EWU Travel Accounting Website
Please visit the EWU Travel Accounting website for information on travel policies, procedures, and for
Per Diem Rates
To view per diem rates relevant to your place of travel, please visit the GSA website at www.gsa.gov.

The **Report Header** window will appear.



Eastern Washington University SAP Concur Expense Quick Guide

2. Click the dropdown arrow for **Policy** and select ***EWU-US Group Expense Policy** and enter the **Number of People Traveling**.

Create New Report

Create From an Approved Request

* Required field

Policy *
*EWU-US Group Expense Policy

Report/Trip Name *
Traveler1 6/1/2022 Seattle

Report/Trip Start Date *
06/01/2022

Report/Trip End Date *
06/03/2022

Number of People Traveling *
3

3. Change **Traveler Type** to **Team/Group Travel**, fill out the remaining required and optional fields.

Index *
100194-Office of Controller (100194)

Traveler Type *
Team/Group Travel

Trip Type *
In-State

Report/Trip Purpose *
Other

Additional Information

Report Date
05/02/2022

Report Total

Comment

Create Report

4. Click **Create Report**.
5. Add any additional expenses to your expense report.
Refer to the **Adding Expenses to an Expense Report** section, and any other needed sections above.
For **Group Meals/Entertainment** expenses, see the section below.



Eastern Washington University SAP Concur Expense Quick Guide

Adding Group Meals/Entertainment with Attendees

Some expenses, such as **Group Meals/Entertainment**, require you to add attendees to the expense.

To add attendees to Group Meals/Entertainment

1. With the expense report open, click **Add**, and then select **Group Meals/Entertainment**.

The screenshot shows the 'Add Expense' dialog box in SAP Concur. At the top, there is a '0 Available Expenses' indicator and a '+ Create New Expense' button. Below this is a search bar labeled 'Search for an expense type'. A list of expense types is displayed, including 'Other Ground Transportation', 'Parking', 'Personal Car Mileage', '04. Meals & Entertainment', '05. Office Expenses', 'Office Supplies - Under \$50', and 'Postage'. The '04. Meals & Entertainment' category is expanded, and 'Group Meals/Entertainment' is selected and highlighted with a red box. A red arrow points to this selection from the right.

2. Complete the required and optional fields.
3. Choose the correct **Payment Type**; either **Cash**, **CTA**, **Pcard**, or **Third Party**.
4. From the expense type screen, click **Attendees**.

The screenshot shows the 'New Expense' form. At the top right, there are 'Cancel' and 'Save Expense' buttons. Below the form title, there are tabs for 'Details' and 'Itemizations'. The 'Attendees (1)' field is highlighted with a red box and a red arrow pointing to it from the right. Below this, the 'Expense Type' dropdown is set to 'Group Meals/Entertainment'. Other fields include 'Transaction Date' (with a calendar icon) and 'Additional Information' (with a text input field). At the bottom, there are fields for 'Enter Vendor Name' and 'City of Purchase'.

5. In the **Attendees** window, click **Add**.

The screenshot shows the 'Attendees' window. At the top, it displays 'Group Meals/Entertainment | \$100.00'. Below this, there is a table with one attendee listed. The 'Add' button is highlighted with a red box and a red arrow pointing to it from the left. Below the table, there are columns for 'Attendee Name', 'Attendee Title', 'Institution/Company', 'Attendee Type', 'Attendee Count', and 'Amount'.

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Traveler1, Traveler			Faculty/Staff	1	\$100.00



Eastern Washington University

SAP Concur Expense Quick Guide

The **Add Attendees** window appears.

You can add attendees in several ways:

- **Recent Attendees** – Select the check box next to the appropriate attendee and click **Add to List**.
- **Attendees** – Search for the **attendee**. If you need to create a new attendee, click **Create New Attendee**, complete the required fields, and then click **Create Attendee**.
- **Attendee Groups** – Select from your **Favorites** or **My Team** (these are configured in your Profile settings).

Add Attendees

Recent Attendees Attendees Attendee Groups

Attendee Type: Other

Attendee Name: Search by first or last name

More Search Options

Can't find an attendee? [Create New Attendee](#)

Close

6. Click **Save**.
7. Upload a **Group Travel Roster** form as a receipt for each day of **Group Meals/Entertainment**. The **Group Travel Roster** form can be found on the Travel Accounting website.



Eastern Washington University SAP Concur Expense Quick Guide

Printing and Submitting an Expense Report

When you complete your expense report, you can print it to save a hard copy for your records.

To preview and print the expense report

1. On the expense report page, click **Print/Share**, and then select **EWU-Detailed Report with Summary Data**.

Traveler1 6/1/2022 Seattle \$2,196.96

Not Submitted

Copy Report Submit Report

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST Approved \$2,201.00

*EWU-Detailed Report with Summary Data

AS, ADVANCE. 1

Amount \$701.00 Remaining \$0.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Cash (reimbursable)	Daily Meal Allowance	Seattle, Washington	06/03/2022	\$44.00	\$44.00
<input type="checkbox"/>			Cash (reimbursable)	Daily Meal Allowance	Seattle, Washington	06/02/2022	\$55.00	\$55.00

2. On the **Detailed Report** screen, review the details, and then click **Print**, **Save as PDF**, or **Email**.

SAP Concur

Manage Expense

Alerts

Traveler1

Not Submitted

Report Details

REQUEST Approved \$2,201.00

Add Expense

Alerts

Alerts

Alerts

*EWU-Detailed Report with Summary Data

Show Expenses Show Itemizations

Expense Report

*Report/Trip Name : Traveler1 6/1/2022 Seattle

Authorization Request

Request ID : 3HA4

Cash Advance

Cash Advance Name : Traveler1 6/1/2022 Seattle-USD

User Name : Traveler1, Traveler

User ID : traveler1

Report Header

Policy : *EWU-Test US Expense Policy

*Index : 100194-Office of Controller

*Report/Trip Name : Traveler1 6/1/2022 Seattle

*Report/Trip Start Date : 06/01/2022

*Report/Trip End Date : 06/03/2022

Print Save as PDF Email



Eastern Washington University SAP Concur Expense Quick Guide

To submit your expense report

1. On the expense report page, click **Submit Report**.

Traveler1 6/1/2022 Seattle \$2,196.96

Copy Report Submit Report

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

REQUEST
Approved
\$2,201.00

CASH ADVANCE: 1
Amount \$701.00 Remaining \$0.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Alerts Receipt Payment Type Expense Type Vendor Details Date Amount Requested

Cash (reimbursable) Daily Meal Allowance Seattle, Washington 06/03/2022 \$44.00 \$44.00

A **Certification** window appears, which requires you to attest that the expense report complies with EWU policy.

2. Review the statement and then click **Accept & Continue**.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for Eastern Washington University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying Eastern Washington University in full for those expenses.

Accept & Continue

The **Report Totals** window appears.



Eastern Washington University SAP Concur Expense Quick Guide

3. Review the information for accuracy, and then click **Submit Report**.

The screenshot shows the 'Report Totals' dialog box in SAP Concur. At the top, there is a yellow alert banner that says 'Alerts: 3'. Below this, the report is divided into several sections:

Company Pays \$0.00 Employee	Company Pays \$1,500.00 Cards	Employee Pays \$4.04 Company
---	--	---

Amount Total: \$2,201.00	Due Employee: \$0.00	Owed Company: \$4.04
Less Cash Advance Returns: \$4.04	Amount Due (CTA (Central Travel Account)): \$500.00	
	Amount Due (Pcard): \$1,000.00	
	Cash Advance Utilized: \$696.96	

Requested Amount: \$2,196.96	Total Paid By Company: \$2,196.96	Total Owed By Employee: \$4.04
--	---	--

A red arrow points to the 'Submit Report' button at the bottom right of the dialog box.

4. Click **Close**.

The screenshot shows the 'Report Status' dialog box in SAP Concur. It features a green checkmark icon and the text 'Report Submitted'. Below this, it displays the report details: 'Traveler1 6/1/2022 Seattle | \$2,196.96'. At the bottom right, there is a blue 'Close' button, which is highlighted by a red arrow.

Your request is submitted and waiting for approval.

The screenshot shows the 'Manage Requests' page in SAP Concur. The page has a dark header with 'SAP Concur' and navigation tabs for 'Requests', 'Expense', and 'App Center'. Below the header, there is a 'Manage Requests' section with a 'REQUEST LIBRARY' and a 'View' dropdown set to 'Active Requests'. On the left, there is a red-bordered box with a plus sign and the text 'Create New Request'. On the right, there is a green-bordered box representing an approved request:

APPROVED 06/01/2022
Traveler1 6/1/2022 Seattle
\$2,201.00
Approved

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 Travel Accounting.



Eastern Washington University

SAP Concur Expense Quick Guide

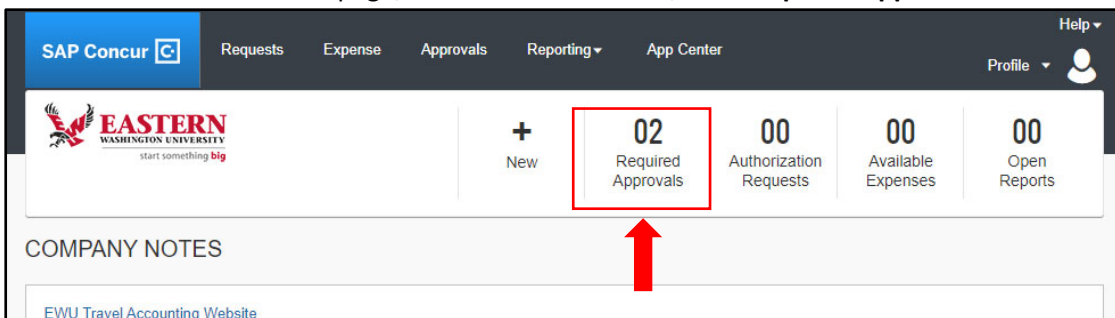
Reviewing and Approving an Expense Report

As an approver, you will need to review submitted expense reports and approve them for reimbursement. All the report's expenses appear in the Expenses list. If the report contains any exceptions, they will display in the Exceptions section of the report.

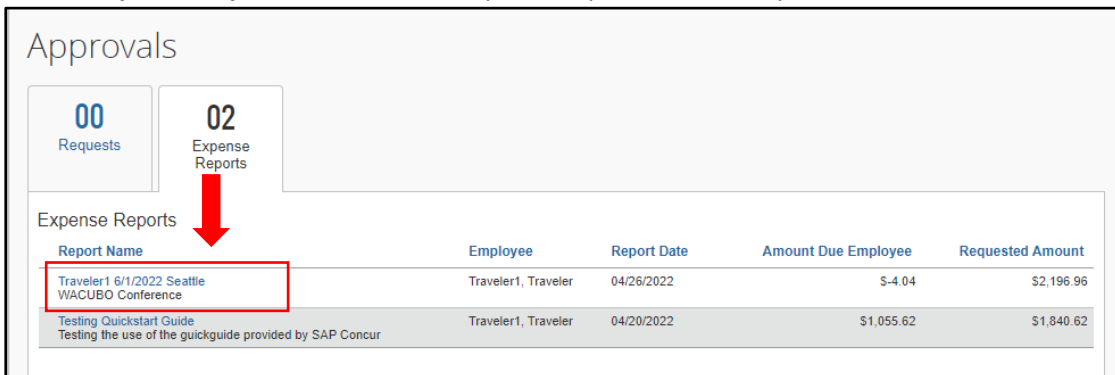
On the SAP Concur home page, in the My Tasks section, you can view a list of any report waiting your approval.

To review and approve an expense report

1. From the SAP Concur home page, on the **Quick Task** bar, click **Required Approvals**.



2. On the **Expense Reports** tab, click the expense report name that you want to review.



As an approver you review the details of the expenses and any attached documents before you approve the expense report.



Eastern Washington University SAP Concur Expense Quick Guide

3. Click the **Details** dropdown menu to review the **Report Header, Totals, Timeline, Audit Trail, and Allocation Summary** details.
4. Click **Receipts** to review receipt detail.

Traveler1 6/1/2022 Seattle [Traveler1, Traveler]

Buttons: Send Back to User, Approve, Approve & Forward

Menu: Summary, Details, Receipts, Print / Email

Exception: Daily Meal Allo... 06/01/2022 \$79.00

Vendor N...	Additional Info...	City of Purchase	Payment Type	Amou
		Seattle, Washin...	Cash (reimburs...	\$44
		Seattle, Washin...	Cash (reimburs...	\$55
		Seattle, Washin...	Cash (reimburs...	\$79
		Seattle, Washin...	CTA (Central Tr...	\$500
		Seattle, Washin...	Pcard	\$1,000
		Seattle, Washin...	Cash (reimburs...	\$510
			Cash (reimburs...	\$8
			Cash Advance ...	\$4

Summary: Report Summary, Report Totals, Amount Due Com..., Amount Due Empl...

5. Review the report details, and then click **Approve**.
A **Final Confirmation** box will appear.
6. Click **Accept** to agree to compliance with the EWU travel policy.

Final Confirmation

Approver Electronic Agreement

By clicking 'Accept' I certify that the expense report and its accompanying receipts have been reviewed and are in compliance with Eastern Washington University policy.

Buttons: Accept, Decline

To send an expense report back to a user

In the following example, you will see how to send the expense report back to the employee.

1. Click **Send Back to Employee**.

Traveler1 6/1/2022 Seattle [Traveler1, Traveler]

Buttons: Send Back to User, Approve, Approve & Forward

Menu: Summary, Details, Receipts, Print / Email

Exception: Daily Meal Allo... 06/01/2022 \$79.00

Transaction Da...	Expense Type	Enter Vendor N...	Additional Info...	City of Purchase	Payment Type	Amou
06/03/2022	Daily Meal Allow...			Seattle, Washin...	Cash (reimburs...	\$44
06/02/2022	Daily Meal Allow...			Seattle, Washin...	Cash (reimburs...	\$55
06/01/2022	Daily Meal Allow...			Seattle, Washin...	Cash (reimburs...	\$79

Summary: Report Summary, Report Totals, Amount Due Com..., Amount Due Empl...

The **Send Back Report** window appears.



Eastern Washington University SAP Concur Expense Quick Guide

When sending an expense report back to an employee, you are required to enter a comment, which explains the reason for returning the report.

2. In the **Send Back to Employee** window, enter the **Comment**, and then click **OK**.

Date	Type	Amount
06/02/2022	Daily Meal	\$4.04
06/01/2022	Daily Meal	\$0.00
06/01/2022	Airfare	
06/01/2022	Seminar	
06/01/2022	Hotel	
06/01/2022	Personal Car Mileage	
06/01/2022	Cash Advance	

To add an additional approver

As an approver, you can add additional review steps for an expense report. For example, you might need to forward the report to additional approvers if the request contains allocations to an index that is not within your approval authorization.

7. Click **Approve & Forward**.

Expense Type	Date	Amount	Exception
N/A			This report has allocations to multiple funding sources. Please forward to all necessary approvers.
Daily Meal Allo...	06/01/2022	\$79.00	Travelers must be in travel status during the entire meal period to be eligible for reimbursement (SAAM 10.40). If you are not in travel status during the meal period, please select from the menu above Details > Travel Allowances > Expenses & Adjustments and check meals that do not meet this criteria. Breakfast: 7 to

The Approve & Forward window will appear.

8. In the **User-Added Approver** field, search for and select the approver that you want to add to the workflow.

Transaction Date	Expense Type	City of Purc
06/03/2022	Daily Meal Allowance	Seattle, Wash
06/02/2022	Daily Meal Allowance	Seattle, Wash
06/01/2022	Daily Meal Allowance	Seattle, Wash
06/01/2022	Airfare	American Airlines
06/01/2022	Seminar/Conference	NACUBO
06/01/2022	Hotel	DoubleTree Hotels
06/01/2022	Personal Car Mileage	
06/01/2022	Cash Advance	

9. When you are done adding your approval steps, click **Approve & Forward**.

A **Final Confirmation** box will appear.

10. Click **Accept** to agree to compliance with the EWU travel policy.



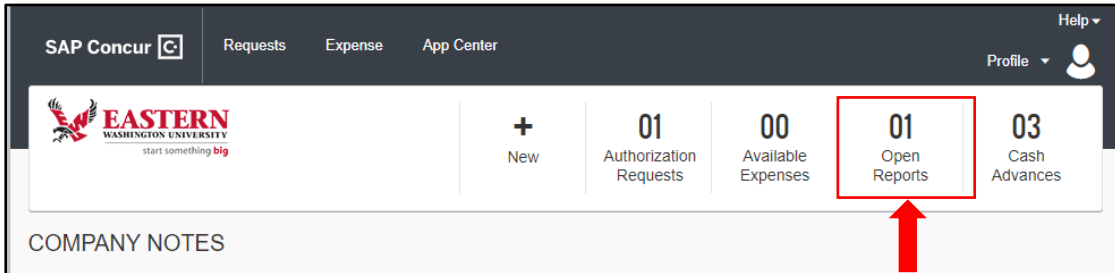
Eastern Washington University SAP Concur Expense Quick Guide

Correcting and Resubmitting an Expense Report

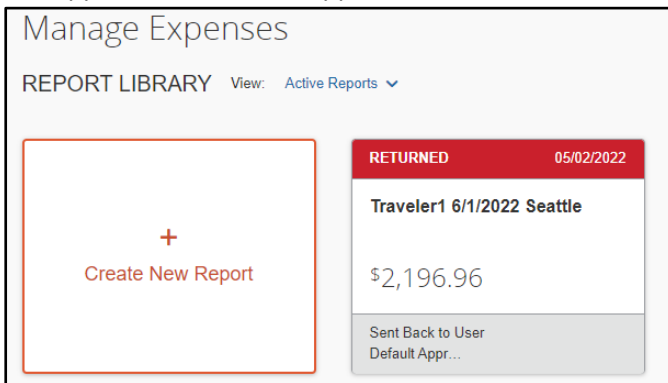
Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

To correct and resubmit an expense report

1. To open the report, on the SAP Concur home page, on the Quick Task Bar, click the **Open Reports** task.



In the **Active Reports** section of the page, the report appears with Returned on the report tile. The approver's comment appears below the amount.



2. Click the returned report tile to open the report.
3. Make the requested changes, and then click **Submit Report**.