

SAP Concur Navigating

[Exploring the SAP Concur Home Page](#) links to a short video.

Home Page

The home page provides quick access to the tools and information that you need to begin a Request (travel authorization), begin an Expense report (travel expense report) or to reconcile your p-card transactions.

From anywhere in SAP Concur, click on the “SAP Concur” in the upper left corner to return to the Home page.

The screenshot shows the SAP Concur Home Page interface. At the top left, the SAP Concur logo and a 'Home' dropdown menu are visible. Below the logo is a 'Quick Task Bar' with buttons for 'Start a Request', 'Start a Report', 'Required Approvals', 'Authorization Requests', 'Available Expenses', and 'Open Reports'. The main content area is divided into three sections: 'Company Notes', 'My Tasks', and 'My Tasks'. The 'Company Notes' section contains links for 'Deployment Toolkit' and 'Concur Training Toolkit'. The 'My Tasks' section displays three task cards: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (01). The 'Open Reports' card shows a specific report: '06/20 NACUBO Annual Conference 2024 \$154.50 Returned'. A 'Profile Icon' is located in the top right corner. Red arrows point from callout boxes to these various elements.

Quick Task Bar – to quickly view and act on tasks.

Product Resources including training.

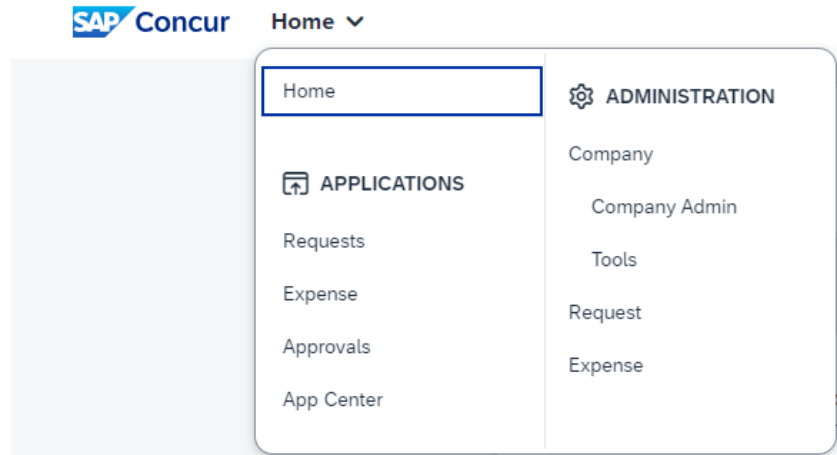
Profile Icon – to customize your user profile.

Company Notes and Training – Contains important information, videos and guides.

My Tasks –

- to view open reports and to create new reports
- to view available expenses
- to approval requests and expenses

The Home menu allows you to access your available applications and administration tools. Please note each user will see only what they have access to view.



Requests – to view travel requests or authorizations, create a new request, and to request cash advances.

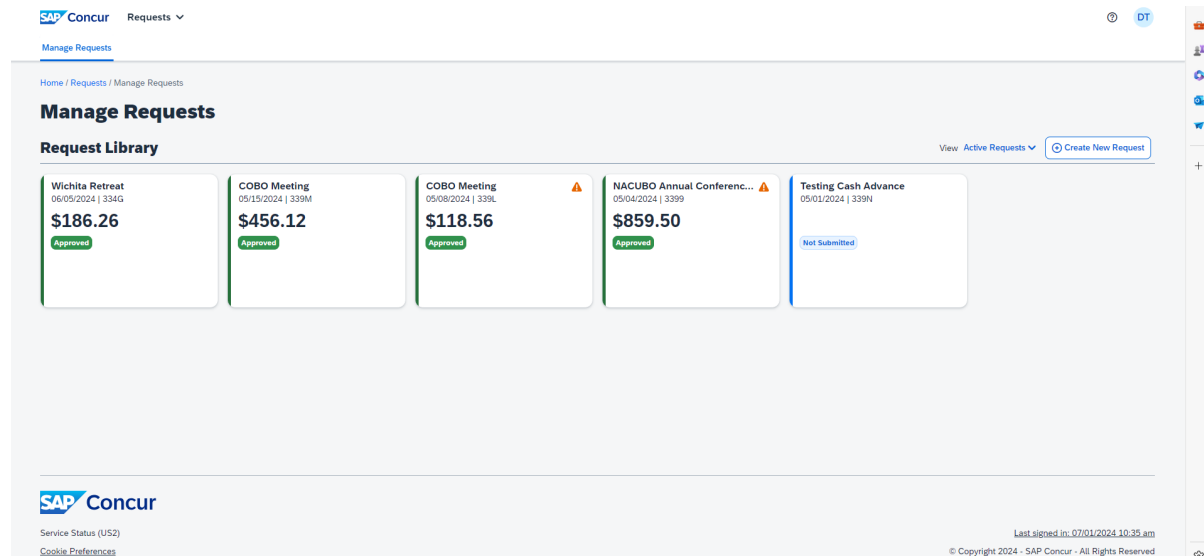
Expense – to view expense reports or create a new expense report.

Approvals - to review and approve or send back travel requests and expense reports.

App Center - to download the mobile Concur app or other popular travel apps.

Report Library

Both Request and Expense have a report library showing all active items. You can see the status of each item in the library. Clicking on any tile will allow you to view and/or edit any not submitted reports.

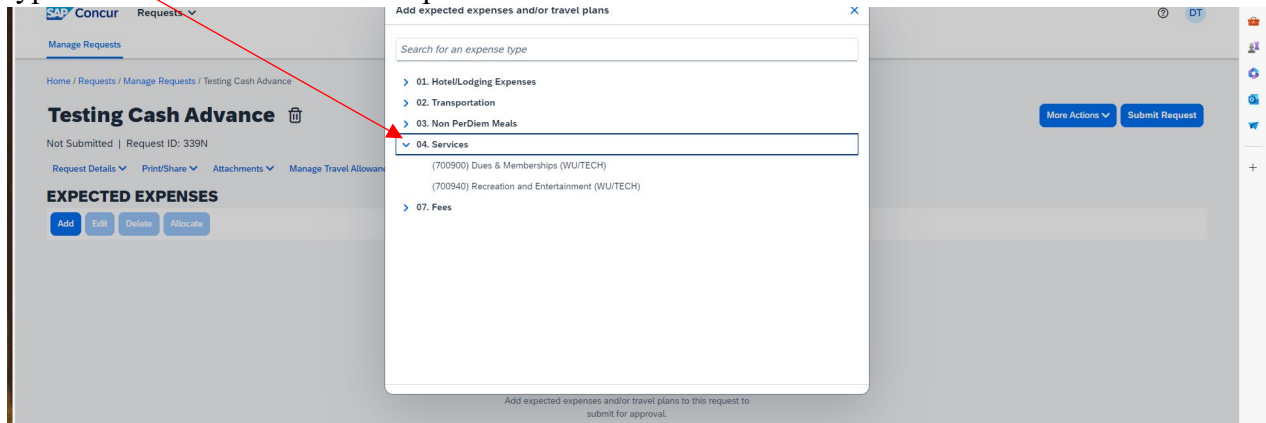


Search Function

Different search fields within the system will default to “Code” which refers to the numerical code (known as our “Account” in the FOAPAL), but you can change to “Text” to search by typing the verbiage you are looking to find. The “*” is the wildcard if searching for a partial name. This is true for all components of the FOAPAL, not just the account.

Minimizing/Maximizing Expense Types

Expense types automatically come up showing all values (maximized). You may click on the “carrot” to minimize/maximize the selections for the expense type. In this example all expense types have been minimized except for the 04. Services.



Request or Expense

Within both Request and Expense there are similar dropdown menus. Utilize the dropdowns to edit the header, see the timeline of document, and the document audit trail.

Only the Request module allows you to “add cash advance.”

