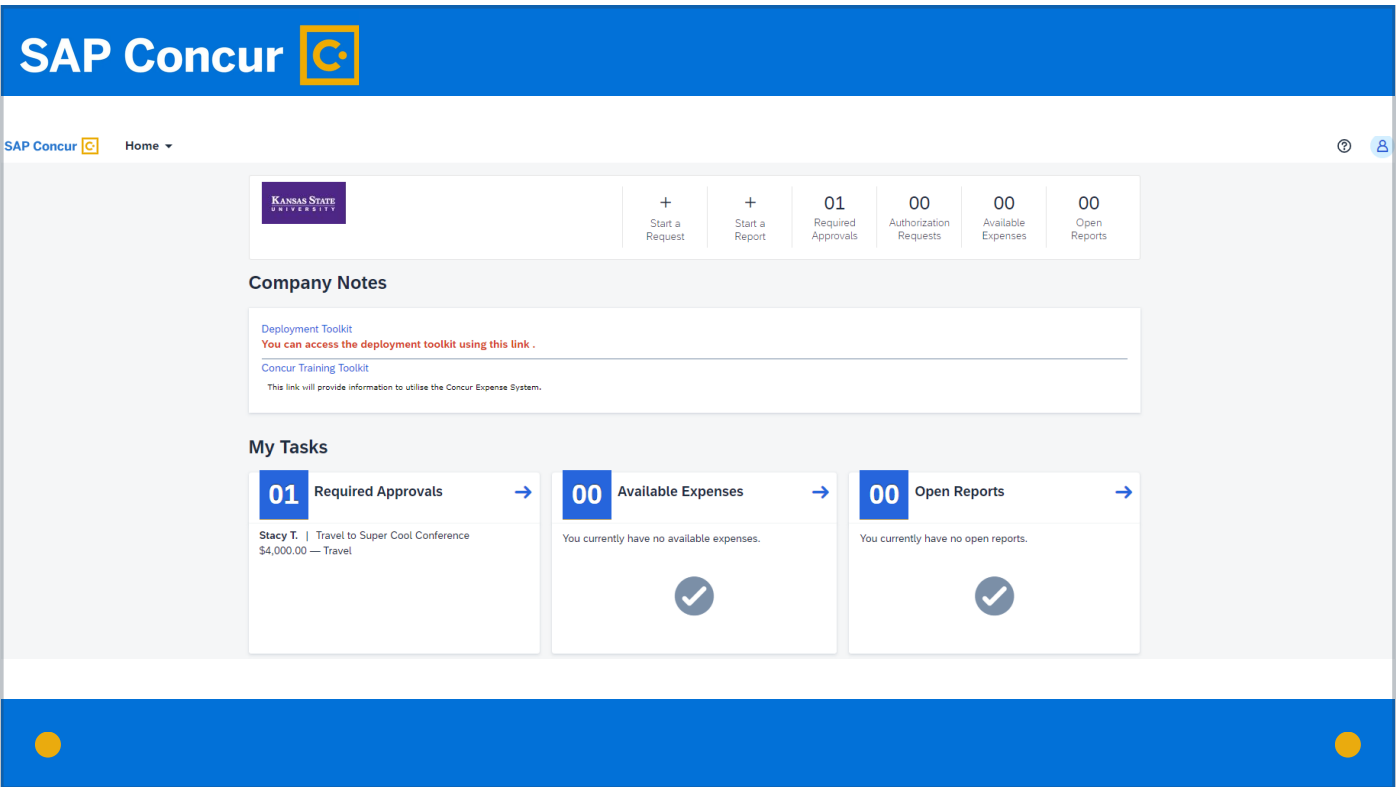
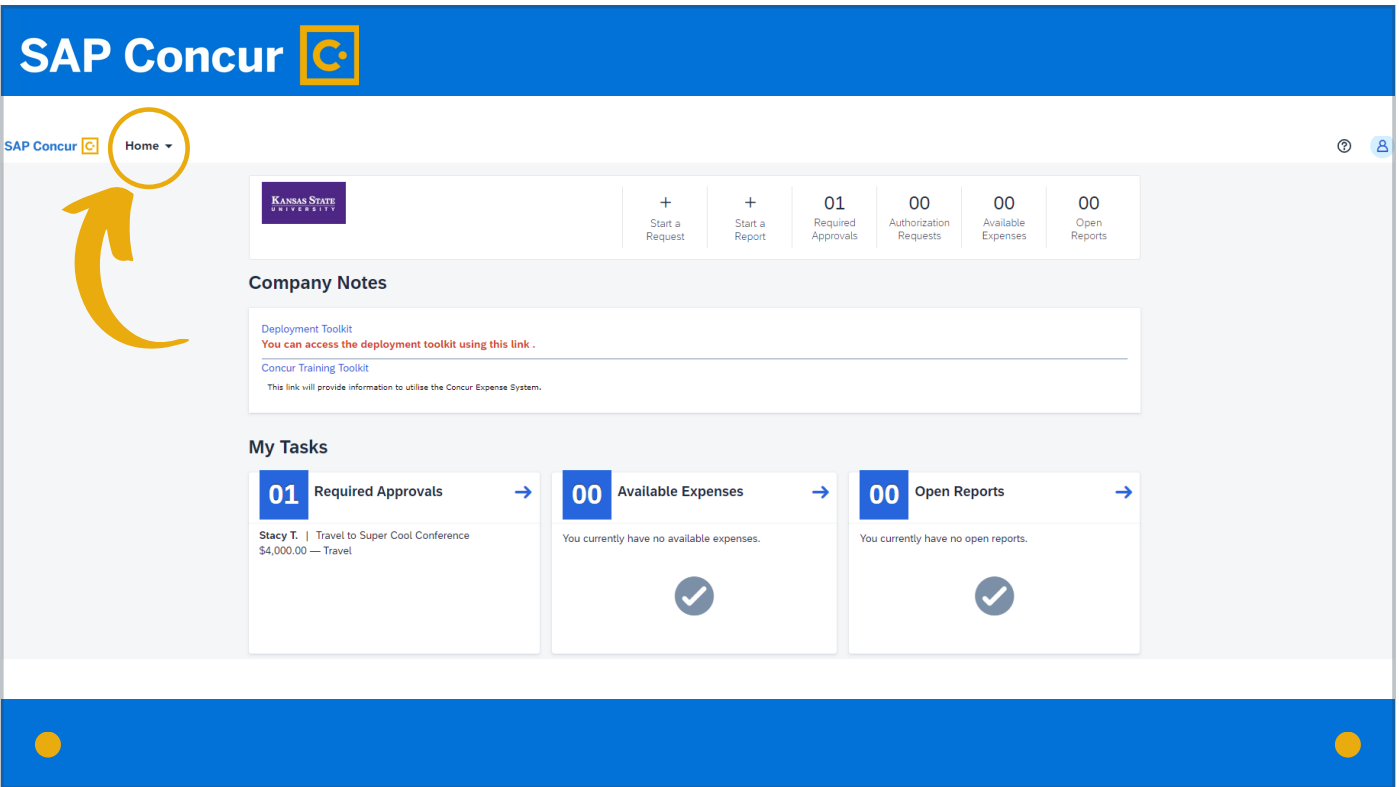


Concur Expense Management: **The Dashboard**

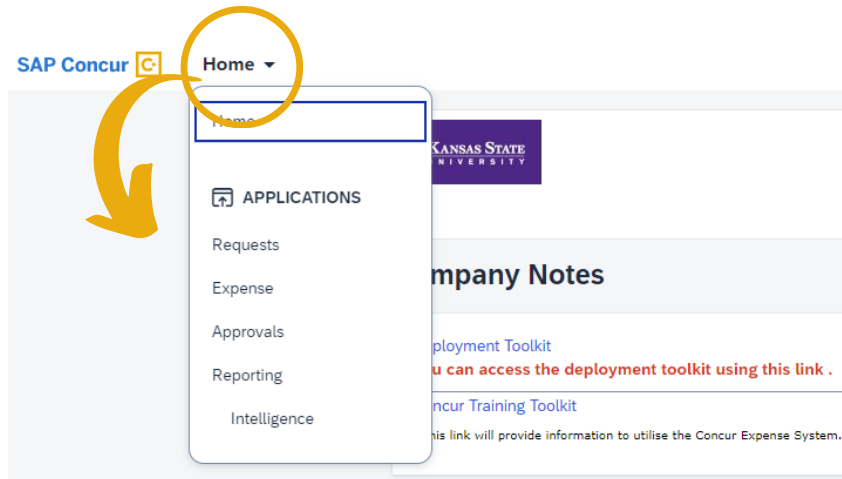
Welcome to our training on the Concur Dashboard.



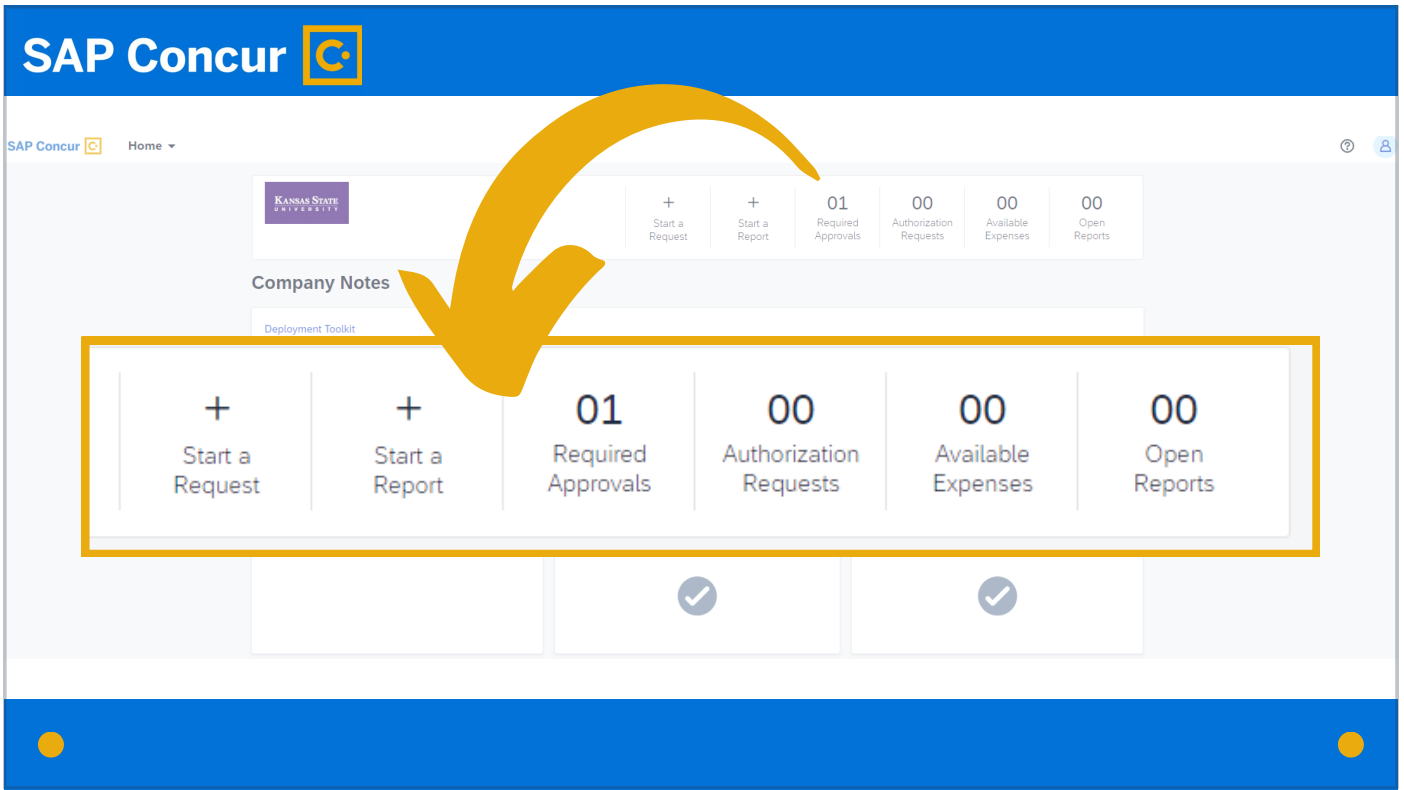
When you log in to Concur, the dashboard is the first screen that opens.



Also called the home page, it provides several ways to access all Concur requests and expense reports.





The recommended way to access these requests and reports is to click on the Home dropdown menu and select the page you wish to navigate to next. Clicking on any of these dropdown options takes you to the page that shows you all your open requests or reports or all approvals requiring your attention.



You can also access these items by clicking on the options across the top menu bar.





My Tasks

02 Required Approvals → Stacy T. Travel to Super Cool Conference \$4,000.00 — Travel Stacy T. Red Stapler \$15.00 — Expense	00 Available Expenses → You currently have no available expenses. 	00 Open Reports → You currently have no open reports. 
--	--	--

or by clicking on the arrow in the right corner of any of the My Tasks links.





My Tasks

02 Required Approvals → Stacy T. Travel to Super Cool Conference \$4,000.00 — Travel Stacy T. Red Stapler \$15.00 — Expense	00 Available Expenses → You currently have no available expenses. 	00 Open Reports → You currently have no open reports. 
--	--	--

Training tip! The blue box in the top left corner of these My Tasks boxes shows you how many items of that type are open or pending. Only the first 5 of those items will show on the dashboard itself,

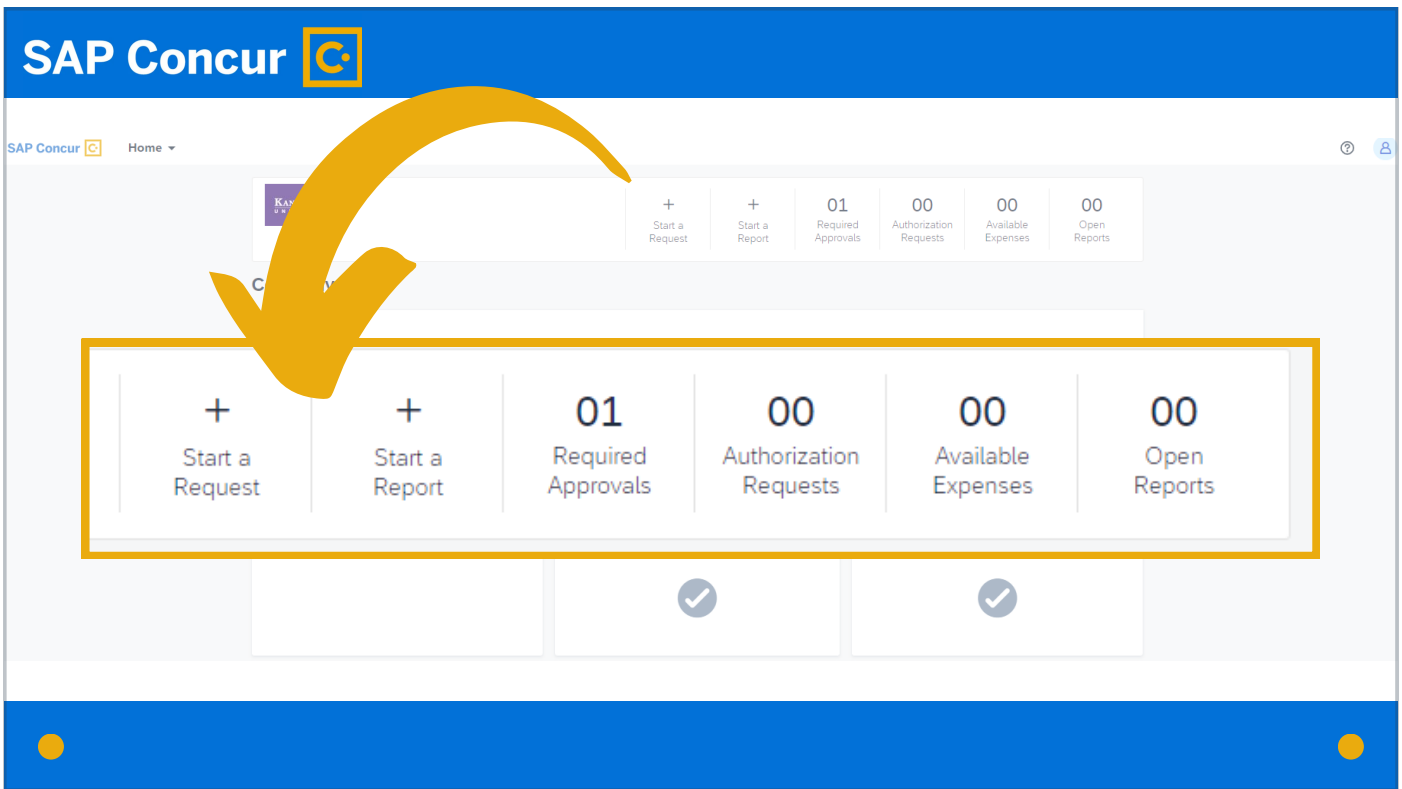


My Tasks

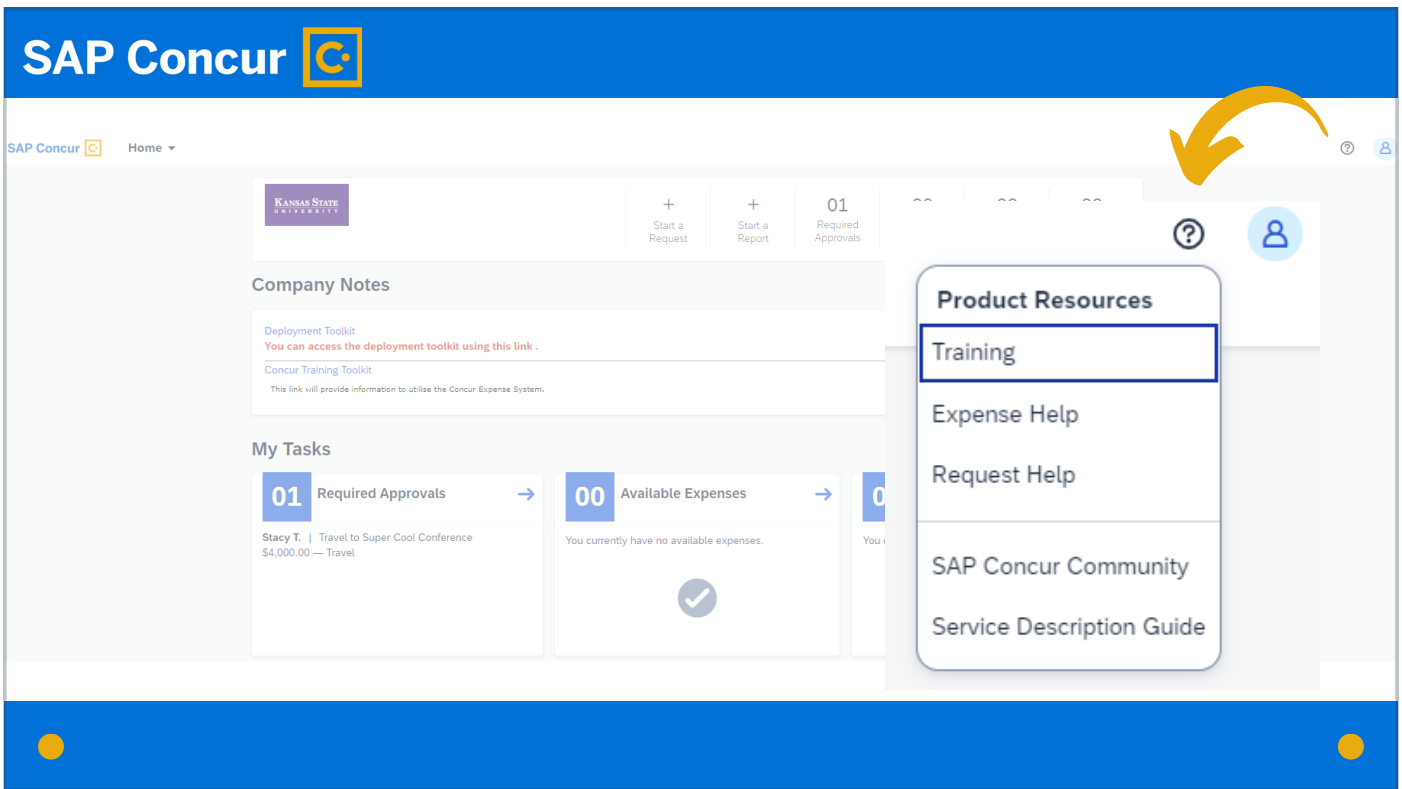
02 Required Approvals → Stacy T. Travel to Super Cool Conference \$4,000.00 — Travel Stacy T. Red Stapler \$15.00 — Expense	00 Available Expenses → You currently have no available expenses. 	00 Open Reports → You currently have no open reports. 
--	--	--

Note: A large yellow arrow points from the 'Required Approvals' card to the 'Available Expenses' card.

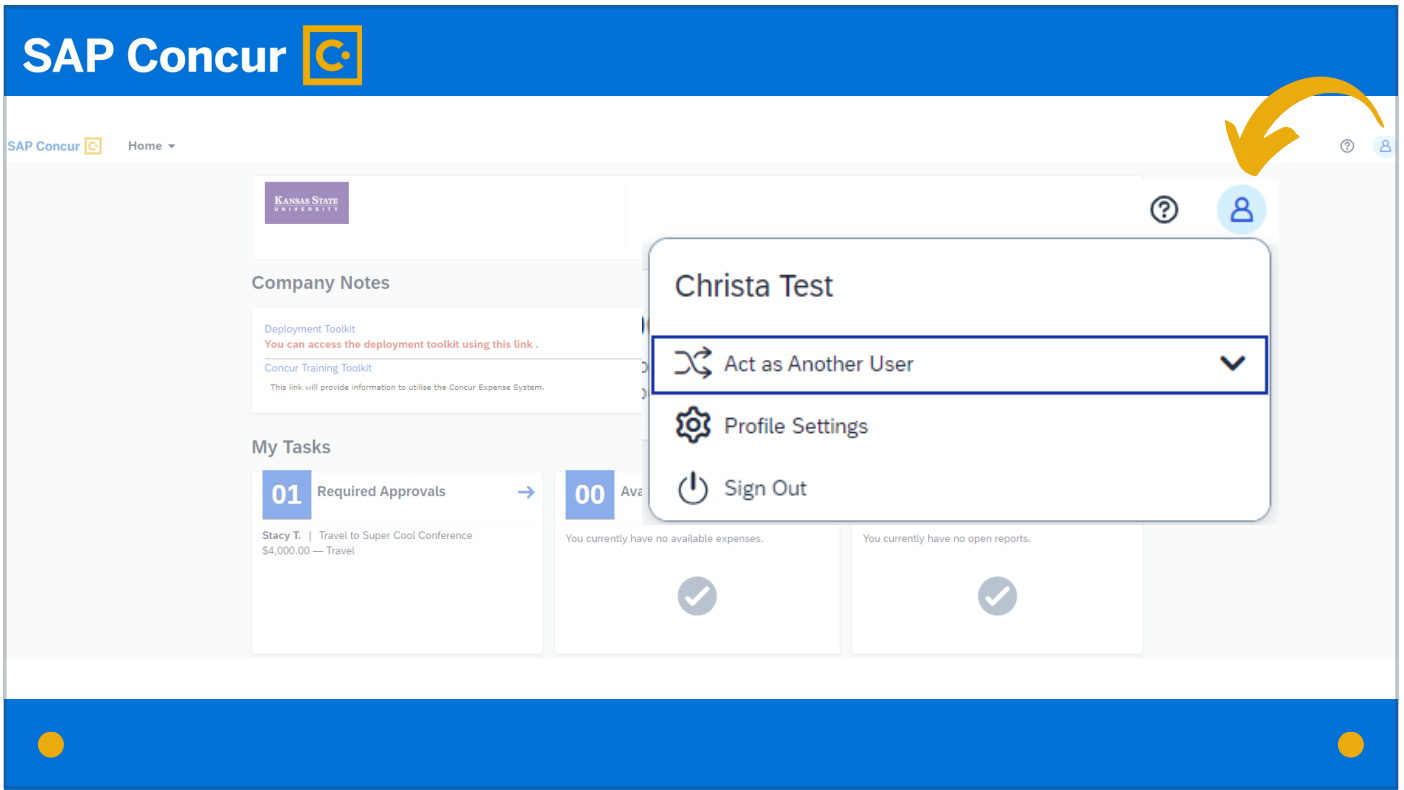
but the others are accessible by clicking on the top right arrow.



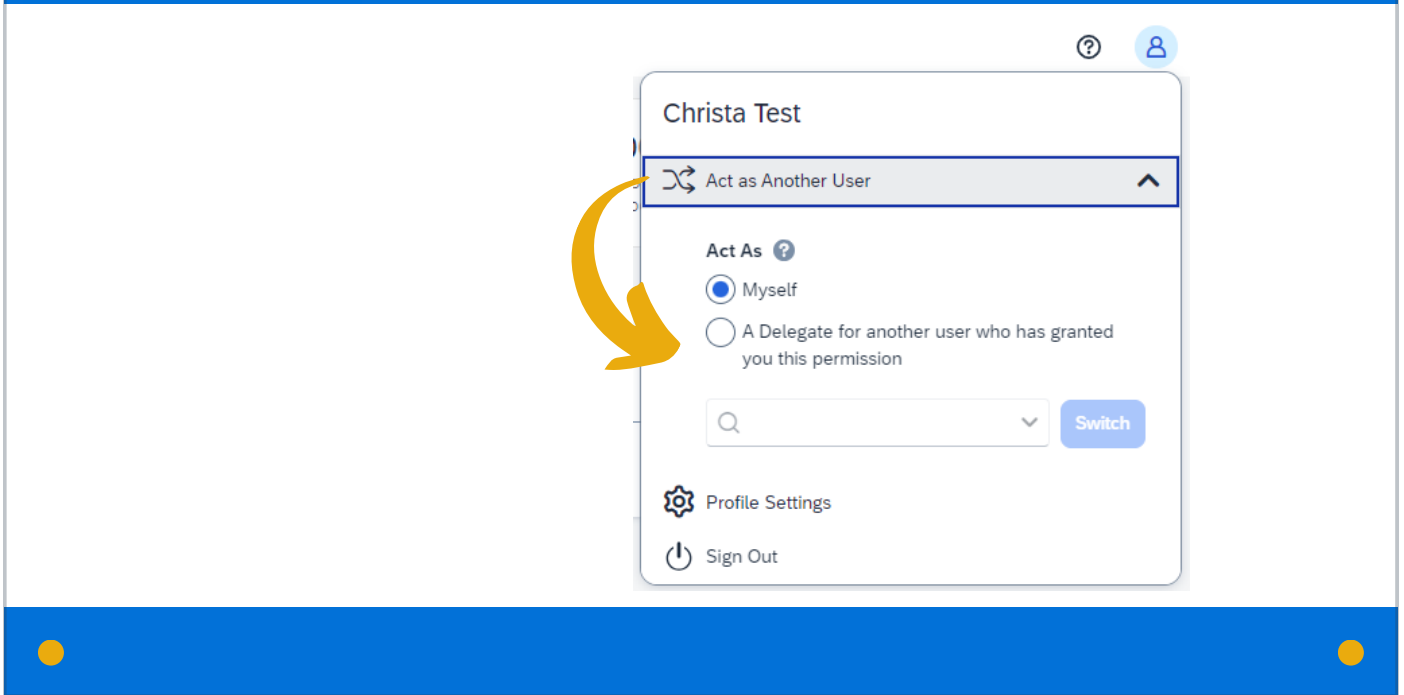
The top menu bar also gives you quick access to start a request or an expense report. We provide specific instructions on creating requests and reports in several of our Concur training videos.



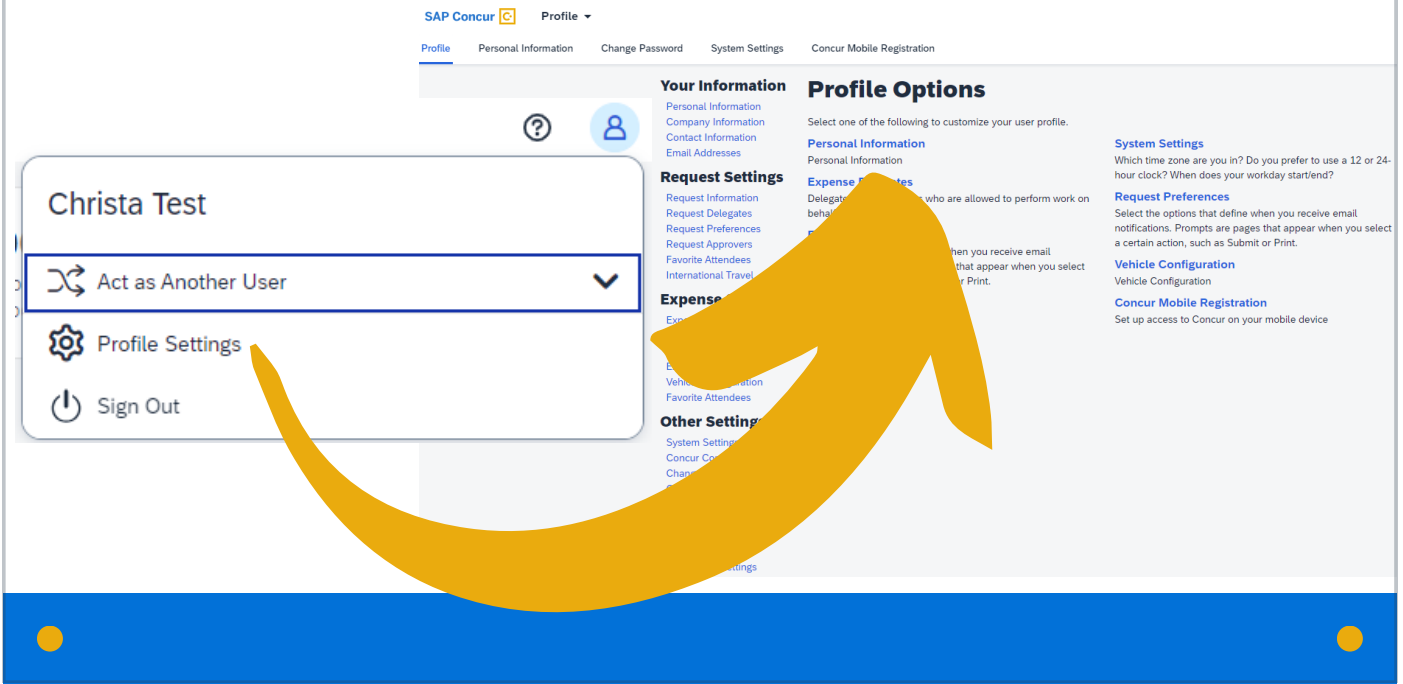
Another item on the dashboard is Concur help. The Training option under this menu takes you directly to the KSU Concur Training page, where you can access all Concur training content, answers to frequently asked questions, and a link to submit questions on Concur processes and functions to the KSU Concur administrative team.



The profile icon is also available on the dashboard.



Under your profile, you can act as another user if you are set up in your department to be a delegate either to create requests or reports on behalf of faculty/staff or to approve requests or reports on behalf of department approvers. More details on the topic of acting as another user are available in our delegate training video.



Additionally under your profile, you can access your profile settings. Further instruction on these settings is available in our profile settings training video.

SAP Concur

SAP Concur Profile ▾

Profile Personal Information Change Password System Settings Concur Mobile Registration

Training Tip!

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
 Vehicle Configuration
 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.


Vehicle Configuration
 Vehicle Configuration

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

Training tip! You'll notice the page ID has now changed to Profile. This page ID allows you to easily identify where you are in the Concur website.

Christa Test

-  Act as Another User 
-  Profile Settings
-  Sign Out



The sign out link is also available under the profile icon.