SAP Concur is a comprehensive Web-based service that provides all of the tools you need to create and submit expense reports.

This document outlines what you need to do to get started with the Concur. Your training for Concur Expense involves reviewing this Getting Started guide AND the recommended training videos listed for your role on page 4.

LOG IN

To log in to Concur, start here.

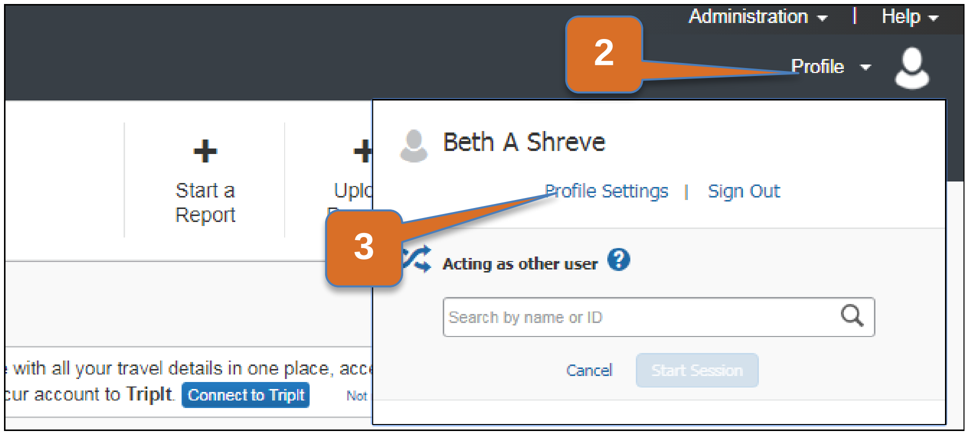
1. Click the Concur single sign-on link
2. Enter your network / active directory username and password.
3. Click **Sign In**.

BEFORE STARTING, MAKE SURE YOU HAVE ENOUGH TIME TO FILL IN ALL REQUIRED FIELDS. You cannot save unless all required fields are complete.

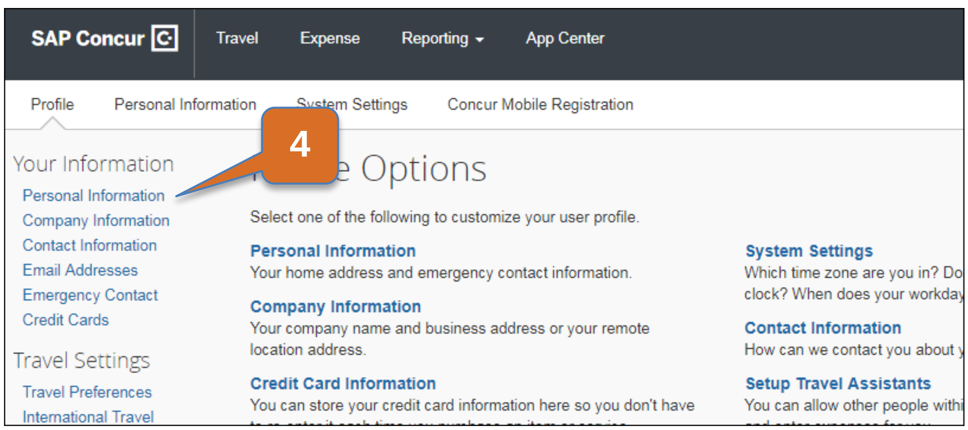
SET UP YOUR CONCUR PROFILE

Enter required information to complete your Concur profile. See Important Profile Tasks below.

1. Log in to Concur.
2. Click **Profile**.
3. Click **Profile Settings**.



4. Click the menu items on the left.
5. Verify / update your profile information as appropriate. Required fields are noted in red.
6. Click **Save**. You will be unable to save your changes unless ALL required fields have been completed.



IMPORTANT PROFILE TASKS

- Your Information > Email Addresses* – Verify all email addresses
- Credit Card Information > [edit icon] – Enter the exact billing address for your Travel Card. Verify on the Travel Card Payment Center website or call the number on the back of your card
- Expense Settings > Bank Information – Verify / enter your bank information is correct, so LSC can reimburse non-travel card expenses via direct deposit, check the “I authorize” box then click Save
- Expense Settings > Expense Delegates – Add employees who may complete expense tasks on your behalf.
- Other Settings > E-receipt activation* – Activate e-receipts to allow Concur to obtain e-receipts with participating suppliers
- Other Settings > Concur Mobile Registration – Complete mobile registration to receive an email allowing you to install the app on your iPhone or Android

* Delegates / admins cannot verify email addresses, activate e-receipts, or submit missing receipt affidavits.

REVIEW THE RECOMMENDED CONCUR LEARNING AIDS

To review the videos, click the links below or find them in Concur by clicking **Help > Training**. Most videos are 1 to 3 minutes long.

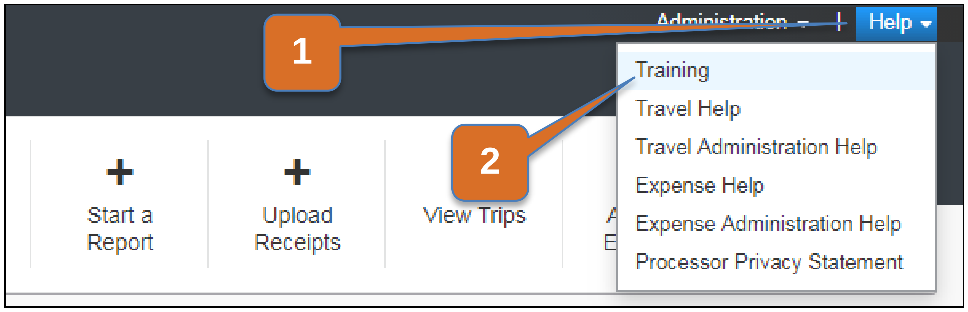
WEBSITE TRAINING: RECOMMENDED LEARNING AIDS BY ROLE	
TRAVEL CARD HOLDER	**APPROVER**
Guides and FAQs Section • RBE Training Highlights – Canada • RBE and P-Card Payment Schedule - 2019 Expense Left Menu • Exploring the Concur Home Page • Acting as a Delegate • Creating a New Expense Report • Adding Card Transactions to an Expense Report • Itemizing Nightly Lodging Expenses • Itemizing Nightly Lodging With Different Room Rates • Adding Attendees to a Business Meal • Itemizing Expenses • Entering Personal Car Mileage • Allocating Expenses • Adding an Out-of-Pocket Expense to an Expense Report • Working with Missing Receipt Affidavits • Converting Foreign Currency Transactions • Printing and Submitting an Expense Report • Correcting and Resubmitting an Expense Report	Guides and FAQs Section • RBE Training Highlights – Canada • RBE and P-Card Payment Schedule - 2019 Expense Left Menu • Exploring the Home Page • Reviewing and Approving an Expense Report • Sending Back an Expense Report
MORE LEARNING AIDS CAN BE FOUND HERE: https://www.concurtraining.com/en-us/pr/get-started	

To view the learning aids for the mobile app, click the appropriate device link: iPhone, Android then find the recommended videos.

MOBILE APP TRAINING: RECOMMENDED VIDEOS BY ROLE	
TRAVEL CARD HOLDER	**APPROVER**
Get Started • Getting Started with Concur Mobile – Pin set up (for personal cell) • Getting Started with Concur Mobile – for SSO (for LSC cell) Expense Functions on the Concur App • Creating an Expense Report • Working with Company Card Charges • Working with Car Mileage • Adding Attendees to an Expense • Adding Out-of-Pocket Expenses • Itemizing Nightly Lodging Expenses • Working with Foreign Currency • Working with Exceptions • Attaching Receipts and Submitting a Report	Expense Functions on the Concur App • Approving an Expense Report (also shows how to send back an expense report)

LOCATE ADDITIONAL LEARNING AIDS IN CONCUR

Concur has training videos and guides to help you learn to use the app.

1. In the upper right corner, click **Help**. 2. Click **Training**.	
3. Click **Expense** in the left menu to view a list of training videos for the Expense app. NOTE: Most training videos are between one and three minutes long. 4. To download a training guide, click the download icon next to the Concur Expense QuickStart guide under Guides and FAQs. 5. To view videos, guides and tip sheets for the mobile app, click the **Android** or **iPhone** links under Concur Mobile Travel and Expense App. NOTE: Blackberry and Windows Phones are not supported.	

TIPS FOR SUCCESSFUL EXPENSE REPORT SUBMISSIONS

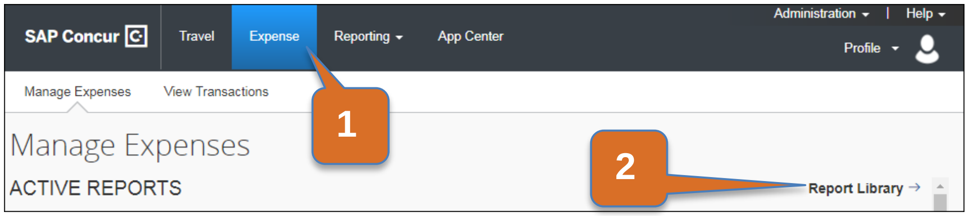
How to handle common situations you may encounter as you reconcile P-Card reports in Concur.

Viewing / Printing Report History

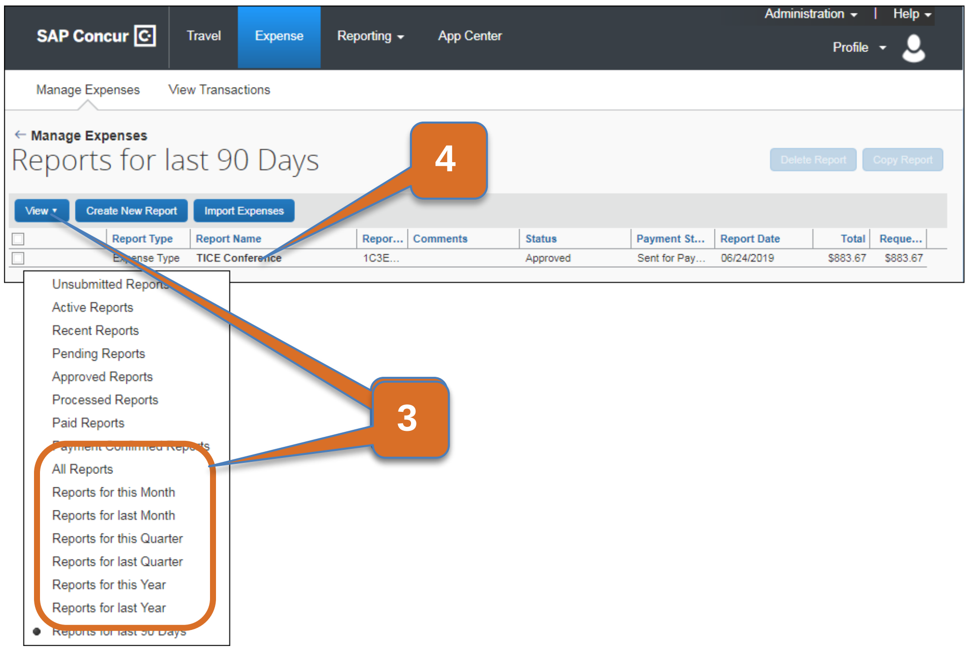
You can review or print reports that you submitted in the past from the Report Library.

To Resolve:

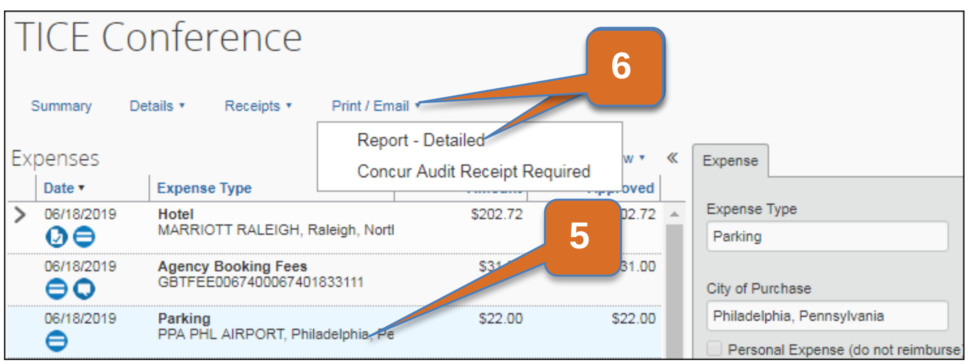
1. Click **Expense**.
2. Click **Report Library**. This will display your reports for the last 90 days.



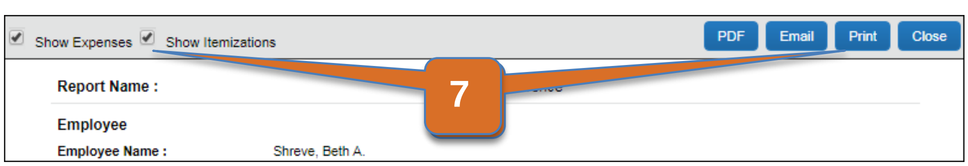
3. To view reports older than 90 days, click **View** then select the timeframe option you need.
4. To view the report, click the report row.



5. To view expense details, click the expense line. The details appear in the Expense tab.
6. To print the report, click **Print / Email** then select **Report – Detailed**. The Print window appears.

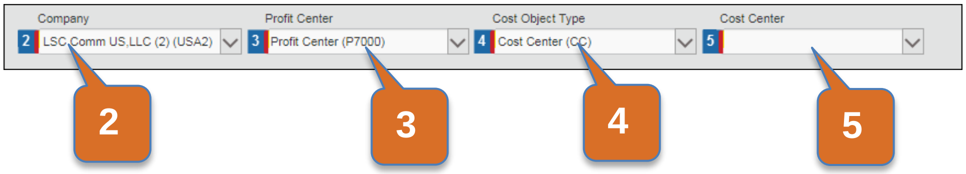


7. To display expense itemizations, check the **Show Itemizations** box the click **Print** at the top of the Print window.



Reallocating Transactions

All users have the ability to reallocate transactions across the company if there is a business need.



To Resolve:

1. Select the transaction.
2. In the Company field, type the correct Company code (e.g., USA2) and select it. You must do this first.
3. In the Profit Center field, type and select the correct profit center number.
4. Click in the Cost Object Type field. If it goes blank, select Cost Center CC from the drop down list.
5. Select the correct cost center from the Cost Center drop down or type and select it.