SAP Concur is a comprehensive Web-based service that provides all of the tools you need to create, submit, and approve P-card expense reports. This document outlines what you need to do to get started with the Concur Travel & Expense. Your training for Concur involves reviewing this Getting Started guide AND the recommended training videos listed for your role on page 3.

LOG IN

To log in to Concur, start here.

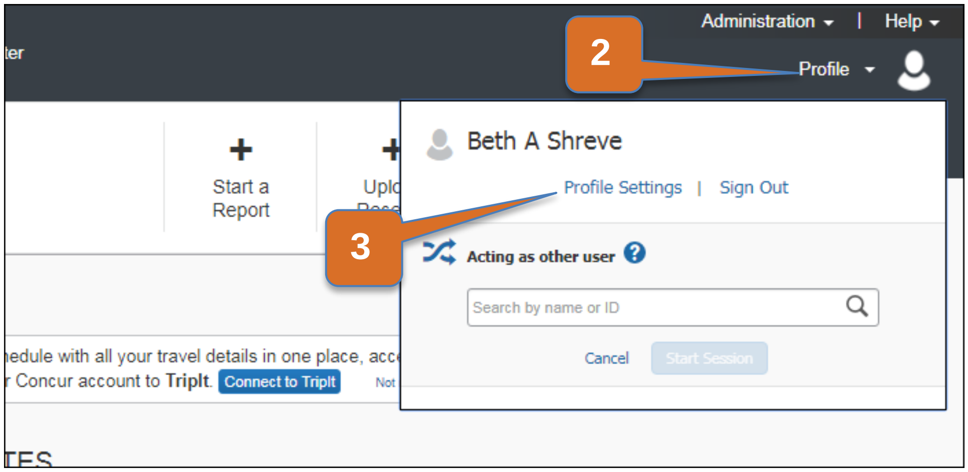
1. Click the Concur single sign-on link.
2. Enter your network / active directory username and password.
3. Click **Sign In**.

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

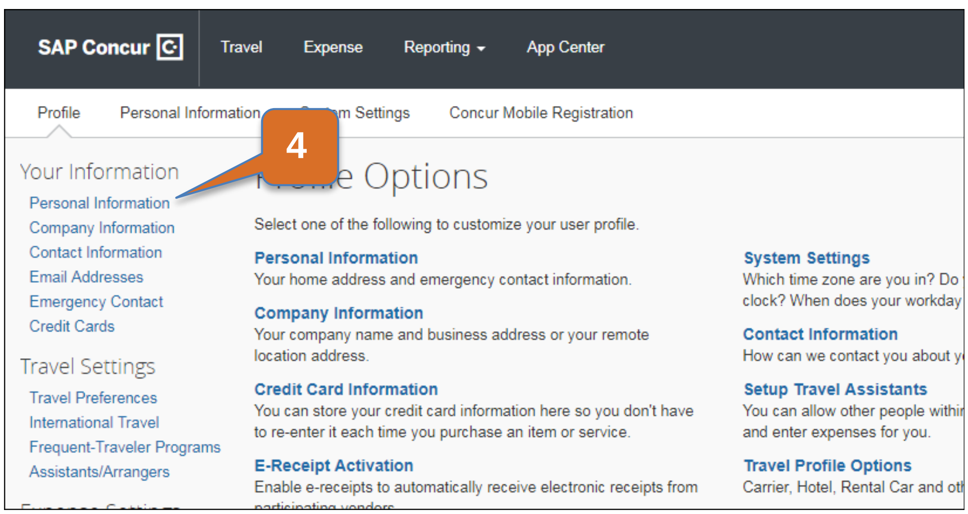
SET UP YOUR CONCUR PROFILE

If you had an LSC P-card previously, some information, like your Cost Center and P-Card information will be automatically imported into your Concur profile. Other information may need to be entered manually.

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
- 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

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

REVIEW THE RECOMMENDED CONCUR LEARNING AIDS

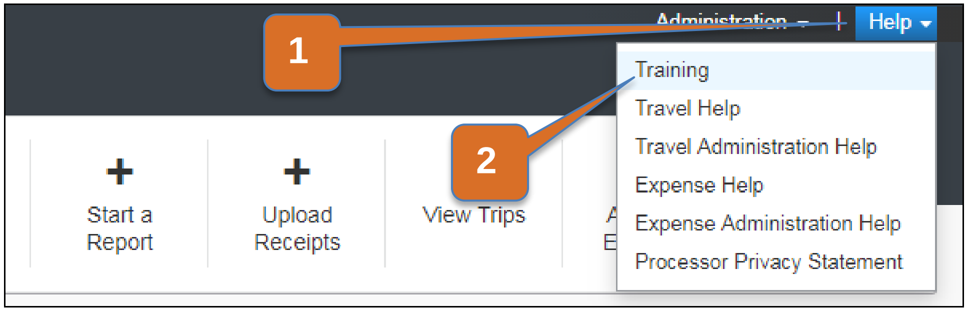
To review the videos, click the links below or find them in Concur by clicking **Help > Training** and looking in the left menu. Most videos are 1 to 3 minutes long.

WEBSITE TRAINING: RECOMMENDED LEARNING AIDS BY ROLE	
P-CARD HOLDER	APPROVER
Guides and FAQs Section • RBE Training Highlights - P-Card • RBE and P-Card Payment Schedule - 2019 Expense Left Menu • Exploring the Concur Home Page • Creating a Company Billed Statement Report • Allocating Expenses • Itemizing Expenses • Converting Foreign Currency Transactions • Printing and Submitting an Expense Report • Correcting and Resubmitting an Expense Report	Guides and FAQs Section • RBE Training Highlights - P-Card • RBE and P-Card Payment Schedule - 2019 Expense Left Menu • Exploring the Concur 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	

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.
4. NOTE: Most training videos are between one and three minutes long.
5. To download training guides for the Expense app, click the download icons under Guides and FAQs.

TIPS FOR SUCCESSFUL P-CARD SUBMISSIONS

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

Transactions that Don't Populate into an Expense Report

Some P-Card transactions may not automatically populate into an expense reports because the Merchant Category Codes (MCCs) are not initially mapped to an expense type.

To Resolve:

1. Move the transaction into the appropriate expense report based on post date. The post date is visible by hovering over the transaction.
2. Assign the transaction to the appropriate expense type, entering a "Business Reason", and complete any other required fields.

> Concur will start to populate similar spend to the same expense types based on your previous expense reports.

Transactions Pre-Mapped to the Wrong Expense Type

Some transactions automatically added to a report may be pre-mapped to an expense type that isn't appropriate for the spend.

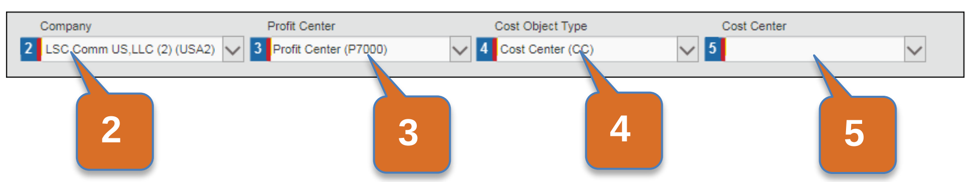
To Resolve:

1. Select a different expense type from the Expense Type drop-down. [Click here to display a list of P-Card expense types].

Reallocating Transactions

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

To Resolve:



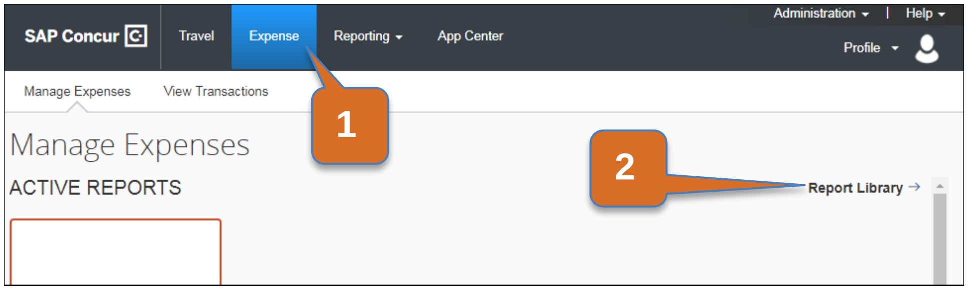
2. Select the transaction.
3. In the Company field, type the correct Company code (e.g., USA2) and select it. You must do this first.
4. In the Profit Center field, type and select the correct profit center number.
5. Click in the Cost Object Type field. If it goes blank, select Cost Center CC from the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

Viewing / Printing Report History

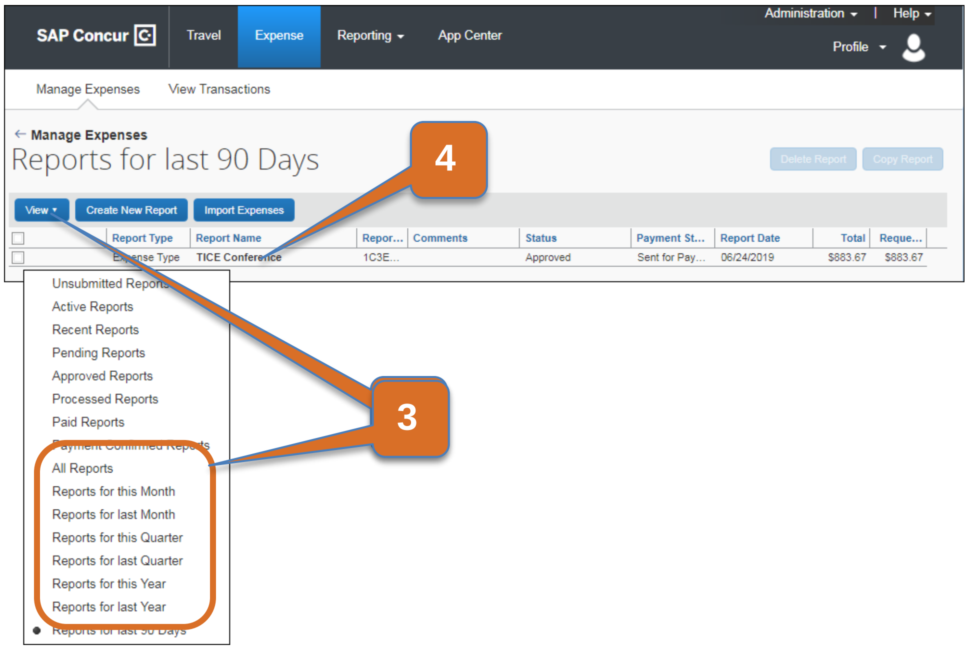
You can review or print reports that you submitted in the past from the Report Library.

To Resolve:

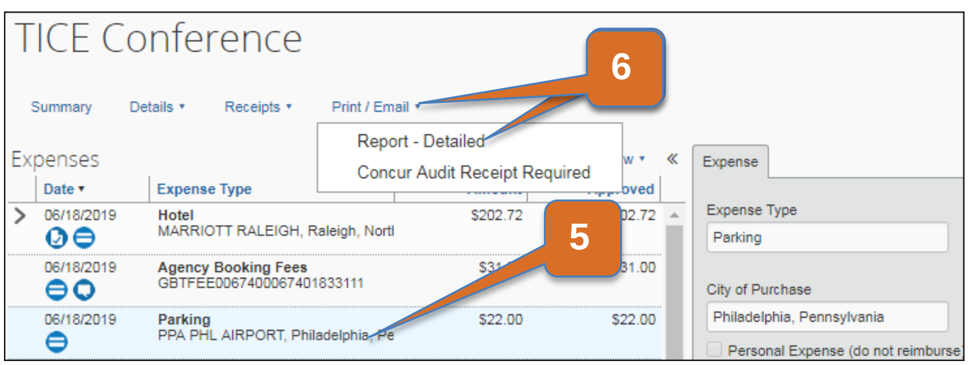
1. Click **Expense**.
2. Click **Report Library**. This will display your reports for the last 90 days.



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.