Shared: Overview

Setup Guide for Concur Standard Edition

Last Revised: December 19, 2019

Applies to these SAP Concur solutions:

- Expense
  - ☑ Professional/Premium edition
  - ☐ Standard edition

- Travel
  - ☐ Professional/Premium edition
  - ☑ Standard edition

- Invoice
  - ☑ Professional/Premium edition
  - ☐ Standard edition

- Request
  - ☑ Professional/Premium edition
  - ☐ Standard edition
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## Revision History

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<th>Date</th>
<th>Notes/Comments/Changes</th>
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<tr>
<td>April 27, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
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<tr>
<td>January 15, 2020</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
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<tr>
<td>December 19, 2019</td>
<td>Updated with new <strong>Sign In</strong> page images.</td>
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<tr>
<td>October 8, 2019</td>
<td>Update one instance of &quot;payment request&quot; to &quot;invoice&quot;.</td>
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<tr>
<td>June 8, 2019</td>
<td>Updated text and images throughout to reflect UI name change from &quot;Cost Tracking&quot; to &quot;Custom Fields&quot;.</td>
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<tr>
<td>May 13, 2019</td>
<td>Updated procedures in the Resetting Your Password section. Removed the password hint feature from this section as it is no longer available.</td>
</tr>
<tr>
<td>February 12, 2019</td>
<td>Updated the copyright; no other changes; cover date not updated</td>
</tr>
<tr>
<td>April 16, 2018</td>
<td>Changed the check boxes on the front cover; no other changes; cover date not updated</td>
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<td>Updated the copyright; no other changes; cover date not updated</td>
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<tr>
<td>November 4, 2017</td>
<td>Updated guide to include new <strong>Product Settings</strong> page, which replaces the Setup Wizard.</td>
</tr>
<tr>
<td>March 18, 2017</td>
<td>Updated with menu option name change to access Setup Wizard.</td>
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<tr>
<td>December 15, 2016</td>
<td>Changed copyright and cover; no other content changes.</td>
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<tr>
<td>November 20, 2015</td>
<td>Updated graphics to reflect updated step names and instructional text where applicable.</td>
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<tr>
<td>January 22, 2015</td>
<td>Removed information about two user interfaces; no other content changes.</td>
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<tr>
<td>January 16, 2015</td>
<td>Updated the screen shots to the enhanced UI; no other content changes.</td>
</tr>
<tr>
<td>September 16, 2014</td>
<td>Added information about two user interfaces; no other content changes.</td>
</tr>
<tr>
<td>May 16, 2014</td>
<td>New document. *(This content originated from the <em>Expense Setup Guide for Concur Standard.</em>)</td>
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*Shared: Overview Setup Guide for Concur Standard Edition*  
*Last Revised: December 19, 2019*  
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Setup for Concur Standard Edition

Section 1: Overview

Concur is a quick and easy expense reporting and invoice requesting tool. This guide helps you understand the options available in Product Settings. Some options are not available in all products, and some options require an additional purchase. It is impossible for one company to include all of the available features.
The following is an example of the full Product Settings that include pages of settings visible only when enabled by Concur:
The following pages can be part of Product Settings:

<table>
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<tr>
<th>Page</th>
<th>Description</th>
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<tr>
<td>Accounting</td>
<td>On the <strong>Accounting</strong> page, you enter information about your company, for example, what type of business you have and which accounting software you use. <strong>NOTE:</strong> This page must be completed first when configuring your product settings.</td>
</tr>
<tr>
<td>Policy Groups</td>
<td>On the <strong>Policy Groups</strong> page, you add policy groups to which you will assign users. Privileges are then granted or restricted to these policy groups.</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>On the <strong>Custom Fields</strong> page, you specify certain expense and invoice data that you would like to track, and how users can enter this data.</td>
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</tbody>
</table>
| Expense  
• Taxation  
• Approval Routing  
• Compliance Controls  
• Mileage Rates  
• Employee Reimbursements  
• Company Card  
• File Export Configuration | When you select **Expense** in the **Product** list, you gain access to the Expense-specific settings, such as the following:  
• Establishing how your organization accounts for expenses  
• Selecting the process that reports go through for approvals  
• Setting the system response when it detects that the user is attempting to submit a request that is not in compliance with the set rules  
• Setting differing reimbursement rates for personal and company car mileage  
• Establishing how your organization reimburses employees for expenses  
• Managing the user’s company card programs and their associated data imports  
• Customizing the format of the export file that administrators receive when they close batches in Payment Manager |
# Invoice
- Expense Types
- Approval Routing
- Compliance Control
- Policy Group Configuration
- Capture Processing
- File Export Configuration
- Purchase Order Matching

## Description
When you select *Invoice* in the **Product** list, you gain access to the Invoice-specific settings, such as the following:
- Establishing how your organization accounts for expenses
- Selecting the process that invoices go through for approvals
- Setting the system response when it detects that the user is attempting to submit a request that is not in compliance with the set rules
- Configuring options that apply to a specific policy group
- Defining how capture and verification will be managed
- Customizing the format of the export file that administrators receive when they close batches in Payment Manager
- Configuring purchase order matching rules

You also gain access to these **Purchase Request** settings:
- Selecting the process that purchase requests go through for approvals
- Setting the system response when it detects that the user is attempting to submit a purchase request that is not in compliance with the set rules
- Setting up generation of purchase order numbers and define information to transmit with purchase orders
- Setting units of measure

# Purchase Request
- Approval Routing
- Compliance Control
- PO Configuration
- Units Of Measure

# Request
- Segment Types
- Compliance Controls
- Site Settings

## Description
When you select *Request* in the **Product** list, you gain access to the Request-specific settings, such as the following:
- Establishing which segment types users can select in their requests
- Setting whether users are required to enter segments or expected expenses in their requests.
- Setting to allow users to create new requests using Concur’s mobile app.

# Users
On the **Users** page, you add, search for, and update user information.

# Report Configuration
On the **Report Configuration** page, you define the fiscal calendar settings that are used by the reporting tools.
Section 2: Setup Process

Concur Product Settings provides best practice default settings, and allows you to customize them to meet your company's needs. Administrators must complete the fields on the Accounting page before completing any other pages. Some fields only appear in certain circumstances, such as if you use QuickBooks. These fields are indicated in the guide, with information on which configuration makes them appear.

After the initial configuration is completed, the administrator may return for additional configuration tasks by clicking Administration > Expense Settings or Expense & Invoice Settings or Invoice Settings. Each setting is available as a link on the Product Settings page.

Section 3: Log in and Access Product Settings

This section describes how to log in to the product and how to access Product Settings.

Accessing Product Settings

To log in and access Product Settings:

2. In the Username field, type your login ID.
3. Click Next.
4. In the Password field, type your password.
Section 3: Log in and Access Product Settings

NOTE: Remember the password is case sensitive.

5. Click **Sign in**.

6. Click **Administration > Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**. The Product Settings page appears.

![Product Settings Page](image)

7. Select your desired product in the **Product** list.
8. To view the advanced product settings, click **Show <number> Advanced Setting(s)**.

9. Click the link for the desired setting to go to the setting page.

The setting page appears.
10. To return to Product Settings, click the Expense Settings or Expense & Invoice Settings or Invoice Settings link at the top of the page.

Resetting Your Password

If you forget your password, you can have a reset password email sent to your associated email address. This email includes a one-time reset password link that is valid for 24 hours.

To reset your password:

1. On the login screen, click Forgot your password?.
2. On the Forgot Username page, type your username, then click Send.
3. In the reset password email, click the **Reset Your Password** icon (or link provided). The **Password Reset** page opens in your browser.

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**SAP Concur**

Hello John Smith,

To reset the password associated with Login ID `jsmith`, please click on the following button:

[Reset Your Password]

If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser:

https://www.concursolutions.com/nui/signin/reset/password?lang=en&email=encryptedEmail&token=uuid-123

This link will expire in 24 hours.

If you are experiencing difficulty with this link and require assistance, please contact your program administrator at your company.

Kind Regards, Customer Support Concur Technologies, Inc.
4. On the **Password Reset** page, enter a new password in the **New Password** and **Re-enter New Password** fields.

![Password Reset screenshot](image)

**NOTE:** If the passwords do not match, an on-page message alerts you. You can also click Password Help Info icon to view a hint to make passwords stronger.

5. Click **Submit** to create the new password.