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

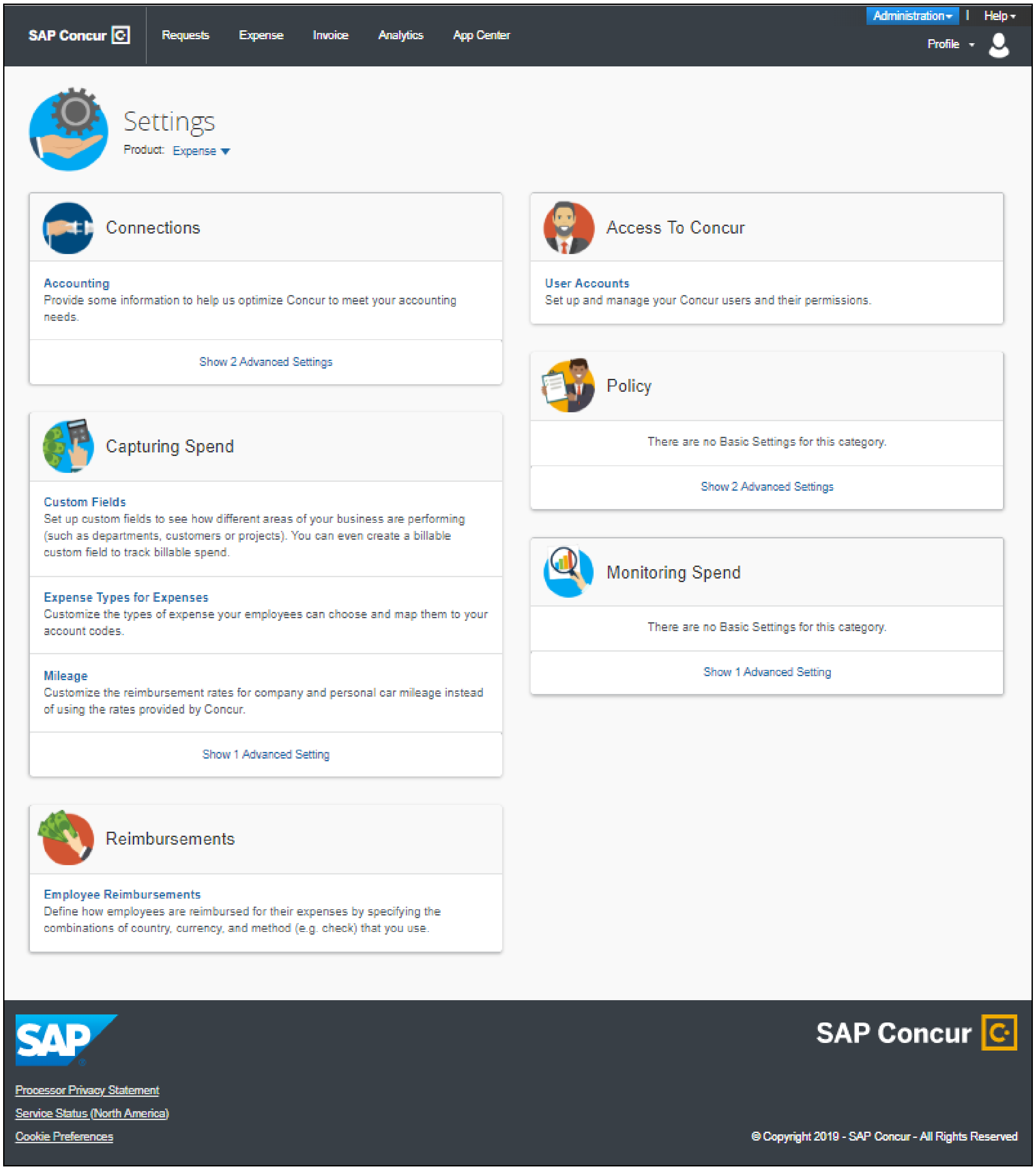
Date	Notes/Comments/Changes
April 27, 2020	Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
December 19, 2019	Updated with new **Sign In** page images.
October 8, 2019	Update one instance of "payment request" to "invoice".
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
May 13, 2019	Updated procedures in the Resetting Your Password section. Removed the password hint feature from this section as it is no longer available.
February 12, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 14 2018	Updated the copyright; no other changes; cover date not updated
November 4 2017	Updated guide to include new **Product Settings** page, which replaces the Setup Wizard.
March 18 2017	Updated with menu option name change to access Setup Wizard.
December 15 2016	Changed copyright and cover; no other content changes.
November 20 2015	Updated graphics to reflect updated step names and instructional text where applicable.
October 16 2015	Added information about the Simple Setup Wizard. Removed Default Settings section because it duplicated information in the *Expense: Default Settings Setup Guide*. Updated graphics to reflect newly styled step numbers.
January 22 2015	Removed information about two user interfaces; no other content changes.
January 16 2015	Updated the screen shots to the enhanced UI; no other content changes.
September 16 2014	Added information about two user interfaces; no other content changes.
May 16 2014	New document. (This content originated from the *Expense Setup Guide for Concur Standard*.)

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:

Page	Description
Accounting	On the **Accounting** page, you enter information about your company, for example, what type of business you have and which accounting software you use. **NOTE**: This page must be completed first when configuring your product settings.
Policy Groups	On the **Policy Groups** page, you add policy groups to which you will assign users. Privileges are then granted or restricted to these policy groups.
Custom Fields	On the **Custom Fields** page, you specify certain expense and invoice data that you would like to track, and how users can enter this data.
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

<table>
<tr><th>Page</th><th>Description</th></tr>
<tr><td>Invoice
Expense Types
Approval Routing
Compliance Control
Policy Group Configuration
Capture Processing
File Export Configuration
Purchase Order Matching
Purchase Request
Approval Routing
Compliance Control
PO Configuration
Units Of Measure</td><td>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 up units of measure</td></tr>
<tr><td>Request
Segment Types
Compliance Controls
Site Settings</td><td>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.</td></tr>
<tr><td>Users</td><td>On the Users page, you add, search for, and update user information.</td></tr>
<tr><td>Report Configuration</td><td>On the Report Configuration page, you define the fiscal calendar settings that are used by the reporting tools.</td></tr>
</table>

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.

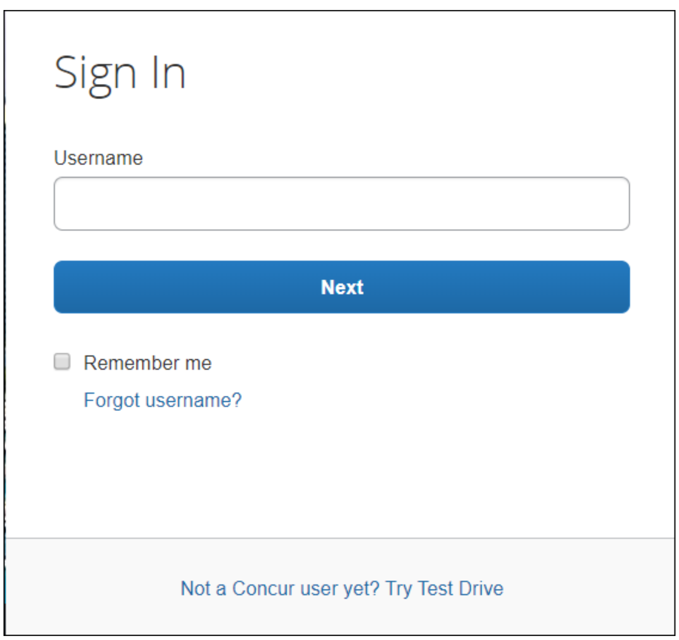
Section 3: Log in and Access Product Settings

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:

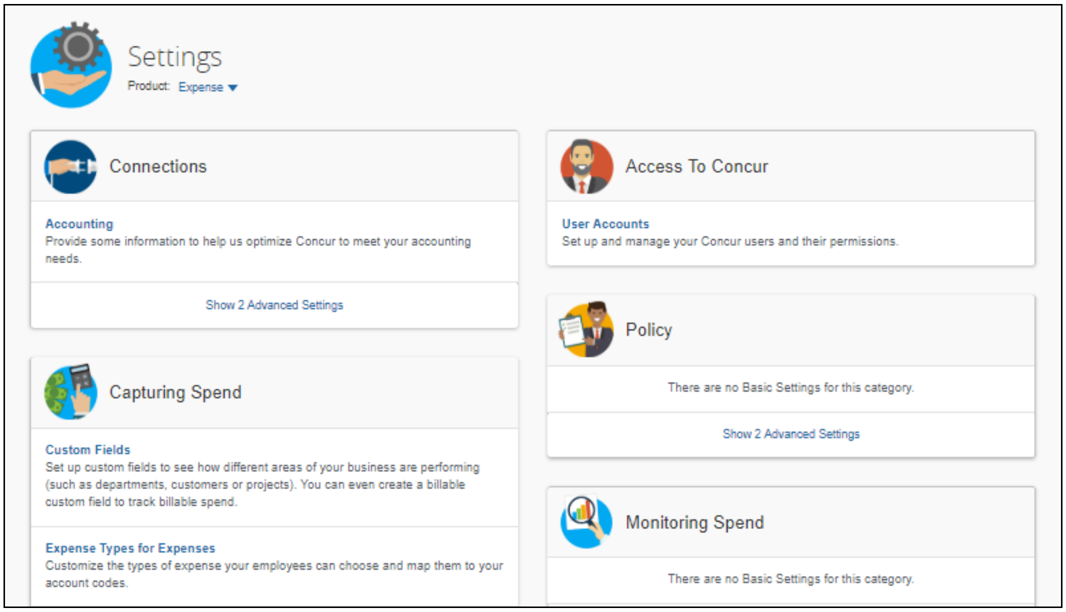
1. Go to www.concursolutions.com.
2. In the **Username** field, type your login ID.



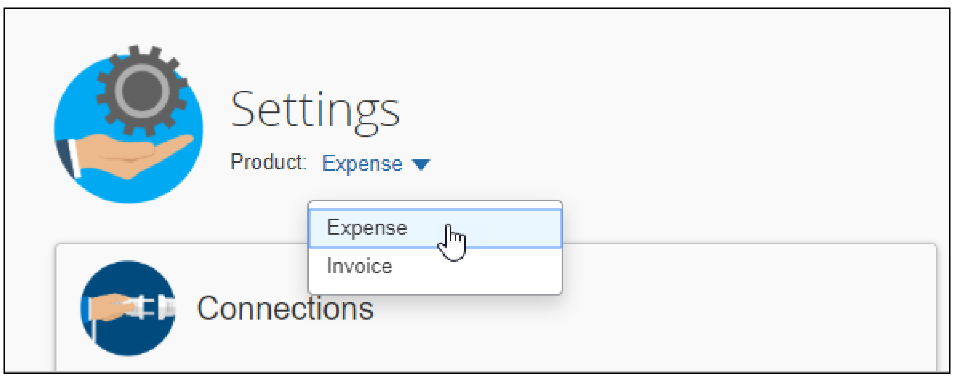
3. Click **Next**.
4. In the **Password** field, type your password.

NOTE: Remember the password is case sensitive.

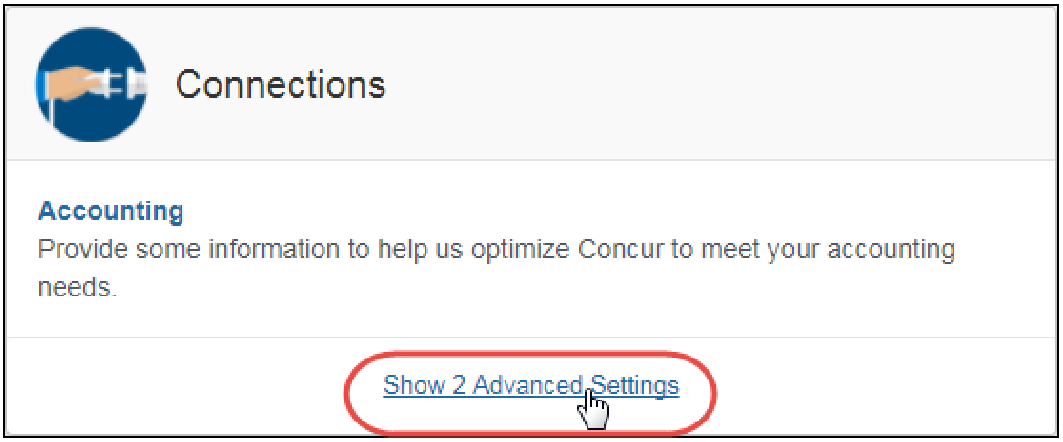
5. Click **Sign in**.
6. Click **Administration** > **Expense Settings** or **Expense & Invoice Settings** or **Invoice Settings**. The Product Settings page appears.



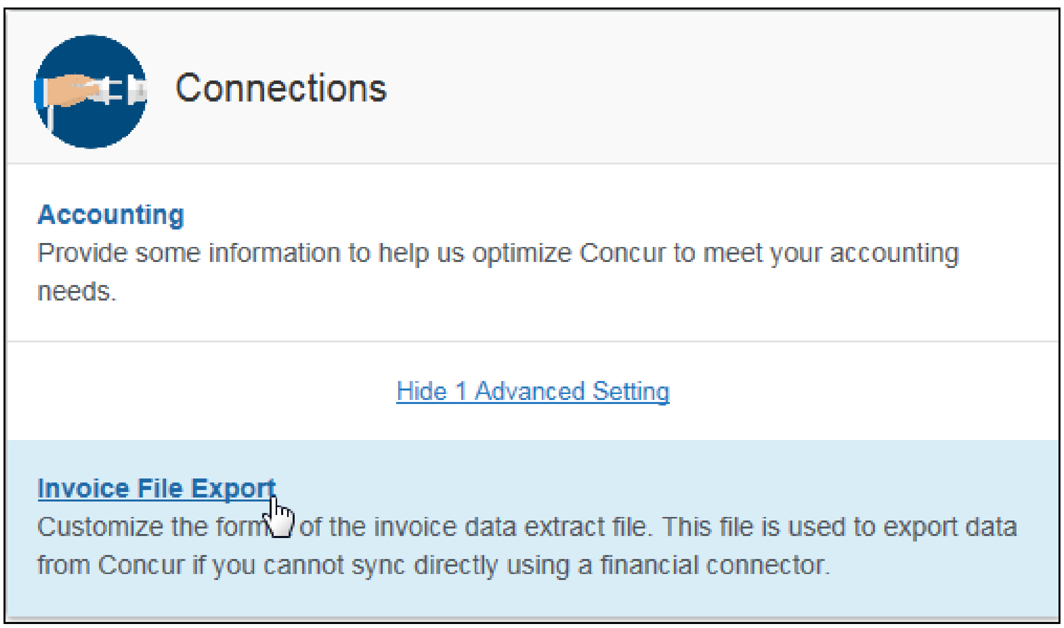
7. Select your desired product in the **Product** list.



8. To view the advanced product settings, click **Show <number> Advanced Setting(s)**.

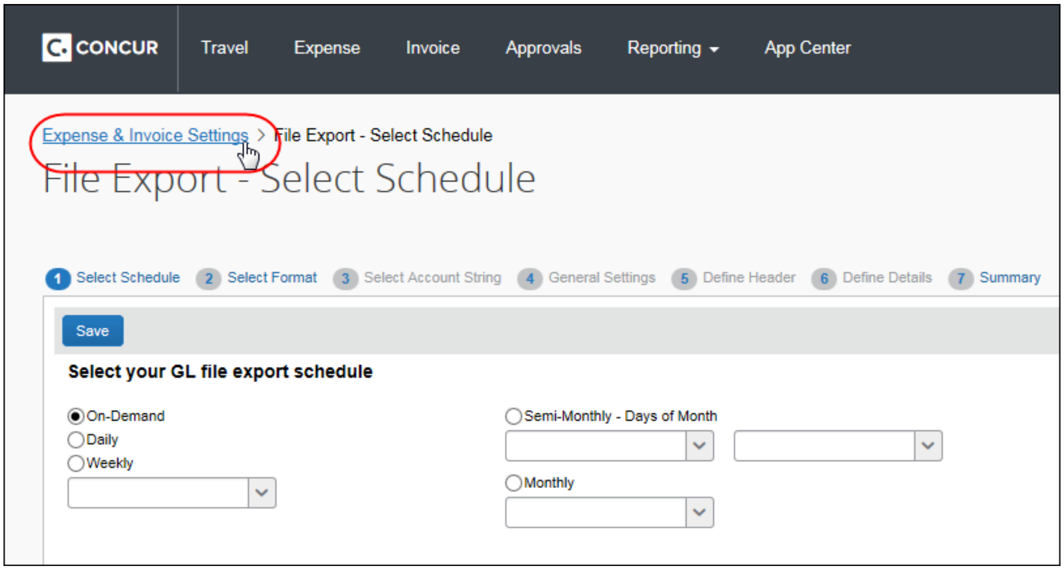


9. Click the link for the desired setting to go to the setting page.



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.

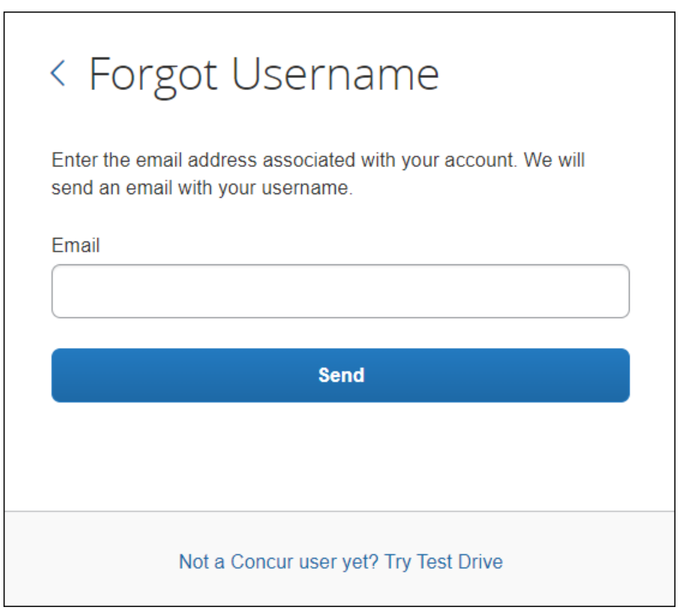


Resetting Your Password

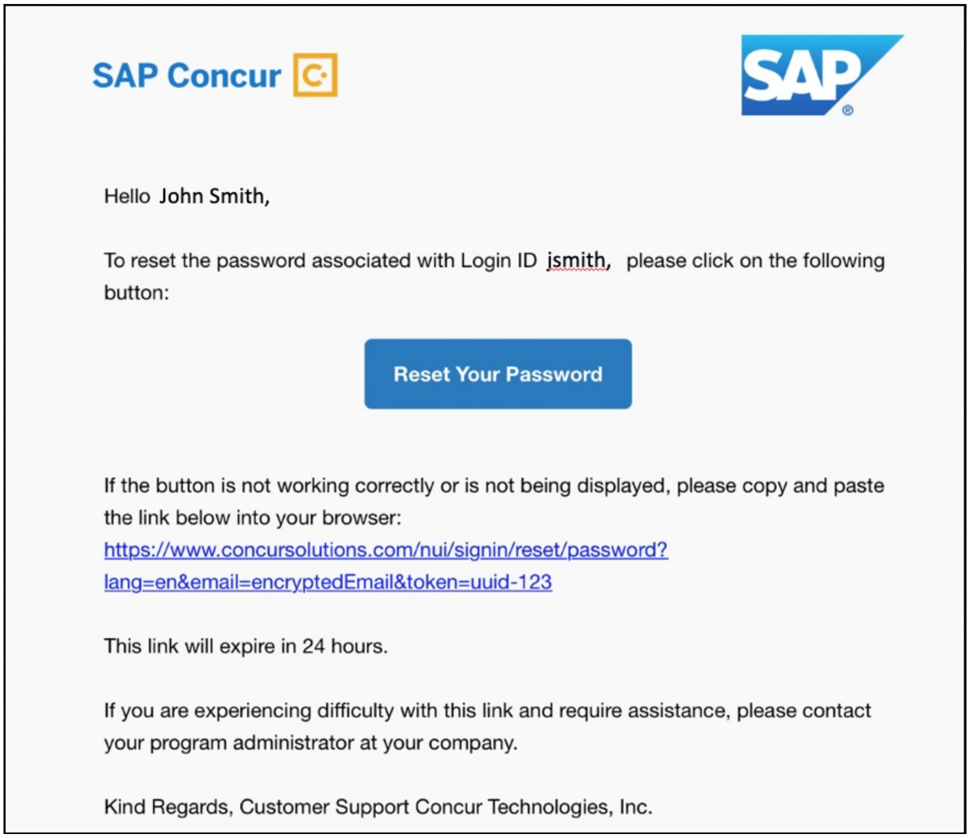
If you forget your password, you can have a reset password email sent to your associated email address. This email includes a one-time reset password link that is valid for 24 hours.

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.



SAP Concur

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Hello John Smith,

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

Reset Your Password

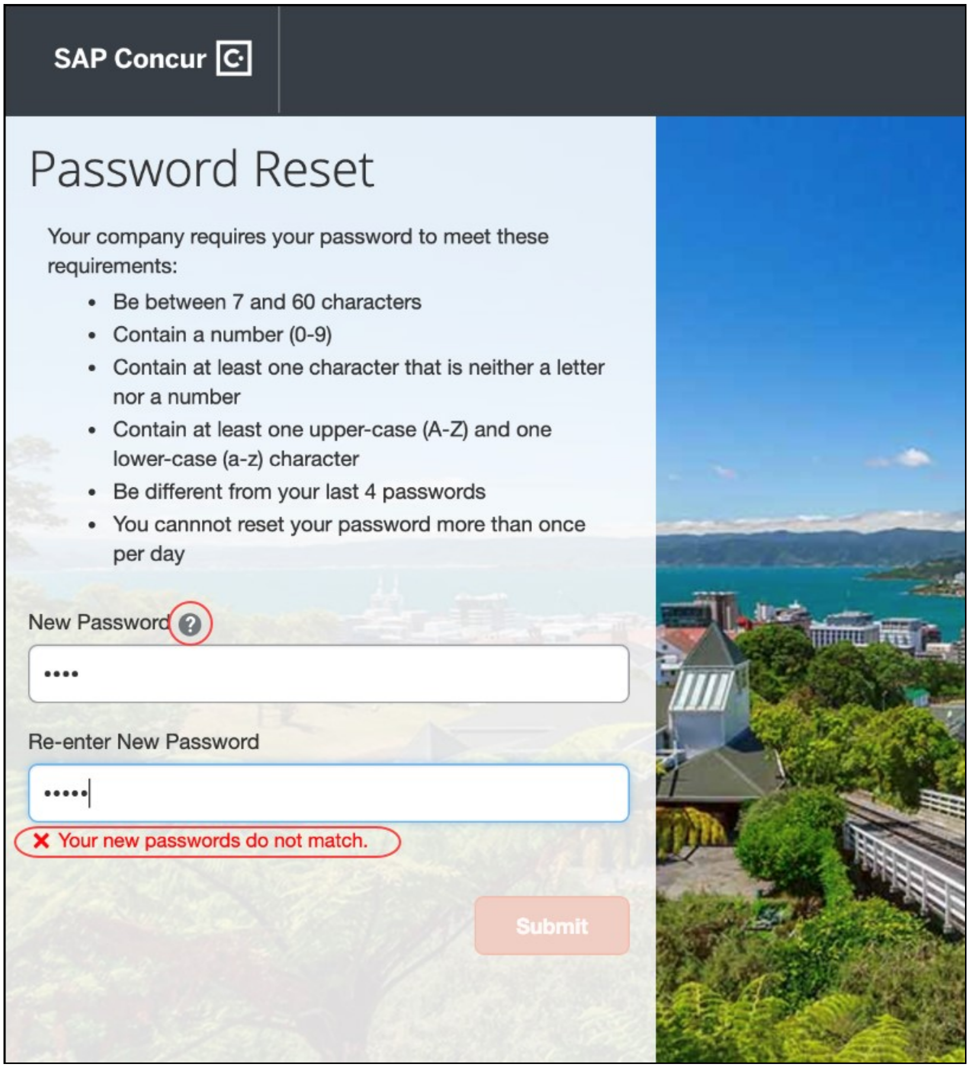
If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser:
https://www.concursolutions.com/nui/signin/reset/password?lang=en&email=encryptedEmail&token=uuid-123

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.



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.