

# **Shared: Training Administration**

## **Setup Guide**

**Last Revised: February 22 2013**

Applies to these SAP Concur solutions:

- Expense
  - Professional/Premium edition
  - Standard edition
  
- Travel
  - Professional/Premium edition
  - Standard edition
  
- Invoice
  - Professional/Premium edition
  - Standard edition
  
- Authorization Request
  - Professional/Premium edition
  - Standard edition



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## Revision History

Date	Notes/Comments/Changes
February 11, 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
January 29 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
October 10 2014	Added information about the two user interfaces; no other content changes
January 23 2014	Cover and copyright changes; no other content changes
February 27 2013	Name change from "Travel Request" to "Request" – <b><i>no other content changes</i></b>
February 22 2013	The link may now be redirected to a custom site of your choosing
December 28 2012	Made rebranding and/or copyright changes; no content changes
May 18 2012	New Setup Guide.

# Training Administration

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## Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (view but not create or edit).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client Support.

## Section 2: Overview

A company uses the Training Administration tool to create and manage their own Training site's landing page for their users (the Training page). When they do this, they can draw on current Concur training collateral and add their own content as well, without need to contact Concur to perform these tasks. The *Training Administrator* role is used to do this, and this role can be provided to multiple users within different departments as required.

The Training Administration tool allows a company to:

- Choose to post any of Concur's current default training materials, including simulations and Quickstart guides - content is always updated and available real-time through the product
- Create a new training resource and add it to the Training page
- Select to view only those documents that display and use a preferred language
- Create one or more contacts for users to refer to for help or support
- Choose instead to direct the URL link to a site of your own choosing

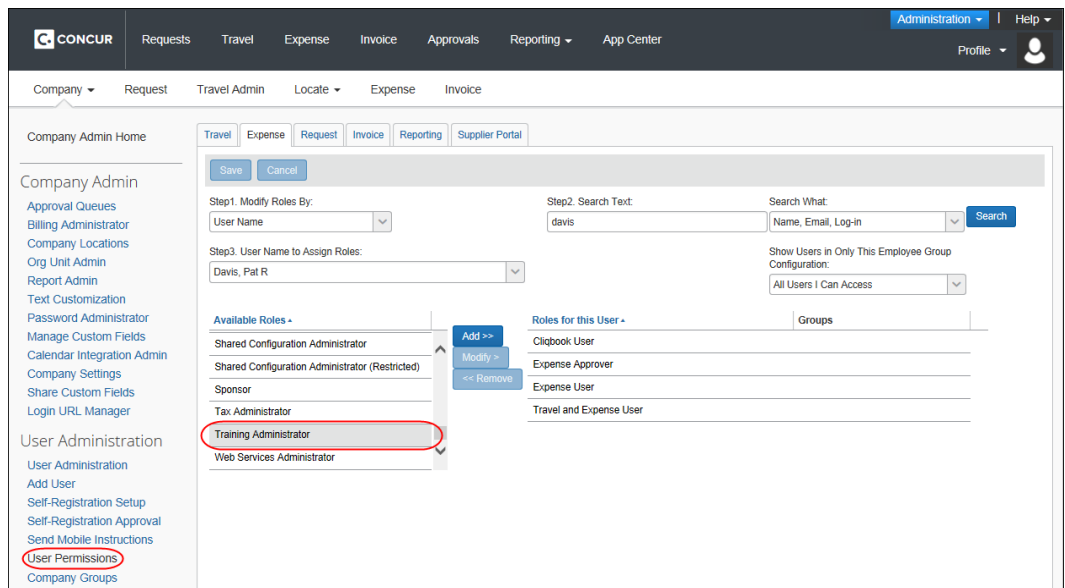
## Required Roles

To use the Training Administration tool, the company must assign the *Training Administrator* role to one or more users from either the **Expense, Request** (formerly Travel Request), or **Invoice** tabs of User Permissions. Once assigned within any *single* tab, the role is active for *all* products used by the company to which the feature applies.

**NOTE:** The Travel product does not include this functionality, so the Travel-only user will never see the Training command on the Help menu or the associated administration link (however, Travel-specific material is available to post).

► **To assign the Training Administrator role:**

1. Click **Administration > Company > Company Admin**.
2. In the **User Administration** section of the left menu, click **User Permissions**.
3. Select either the **Expense, Request, or Invoice** tab.
4. Search for the user who will be granted the role.
5. Scroll down under **Available Roles** and select *Training Administrator*.



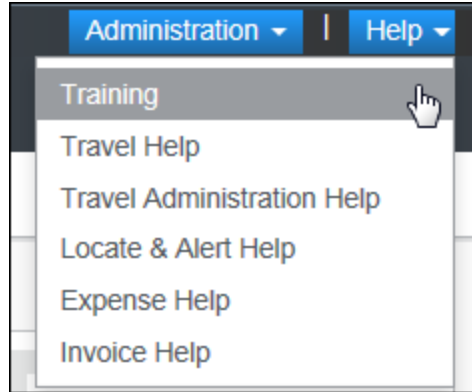
6. Click **Add**.
7. Click **Save**.
8. *Optional:* Repeat for each user who will be assigned this role.



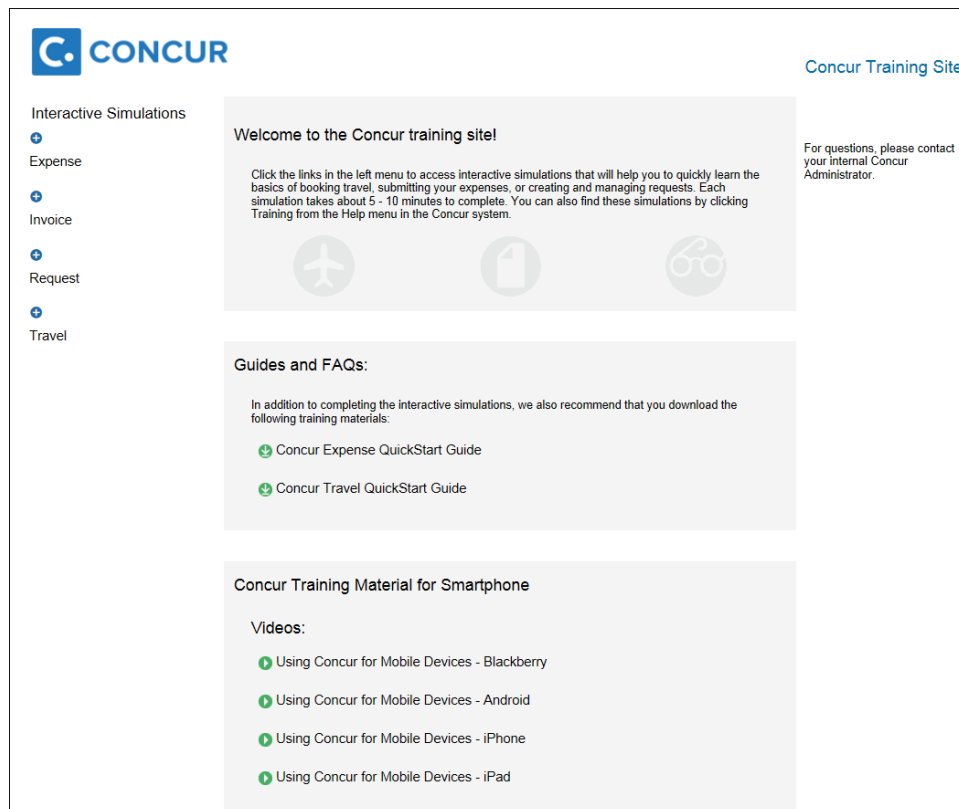
Refer to *Shared: User Administration User Guide* for more information.

## What the User Sees

All users have access to the Training command on the **Help** menu. No role is required other than a product "user" role, such as *Expense User* or *Invoice User*, in order to view the Training page.



The user clicks **Training** to open the **Concur Training Site** page in a separate window. This allows the user to continue working with the product as they work with the training materials.



## What the Administrator Sees

The user assigned the Training Administrator role is granted access to the **Training Administration** link under Expense/Invoice/Request Admin. Clicking this link opens the **Training Configuration** page.

The screenshot shows the 'Training Configuration' page with several tabs: Simulation Resources, Document Resources, Mobile Resources, Contacts, and Alternate URL. The 'Simulation Resources' tab is active, displaying a table with columns for Display Order, Type, Name, Area, and Active. The table lists 14 simulation resources, all of which are active and categorized under either 'Travel' or 'Expense Report'.

Display Order	Type	Name	Area	Active
↓	Simulation	Logging on to Concur	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Travel Profile	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Exploring the Concur Home Page	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Booking a Flight	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Changing a Trip (After Purchase)	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Introduction to Travel & Expense	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Working with Receipt Store	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Activating E-Receipts	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Expense Profile	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Creating a New Expense Report	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Itemizing Nightly Lodging Expenses	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Adding Attendees to a Business Meal	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Allocating Expenses	Expense Report	<input checked="" type="checkbox"/>

There are several tabs that allow the administrator access to different areas within the page, including:

- **Simulation Resources:** A list of available Concur and client-created training material that you can display or hide, arrange in specific order, select a preferred language for, and add, modify, or remove the material as required.
- **Document Resources:** Quickstart guides and similar collateral are available here, and can be customized for display just as under Simulation Resources.
- **Mobile Resources:** Mobile-specific user guides and FAQs are available here.
- **Contacts:** Create a company-specific contact name, number, and email your users will see and use for training or desktop questions.
- **Alternate URL:** Type a different URL into the box provided on this tab to direct the user to a custom site of your choosing instead of the default.



## Accessing the Training Administration Page

The Training Administrator role has access to the **Training Administration** link and page.

► **To access the Training Administration page:**

1. Click **Administration > Expense (or Invoice or Requests) > Training Administration** (left menu).

Printed Reports	<b>Receipt Handling</b> Manage Receipt Limits, Payment Hold Configurations, Scan Configurations and Receipt Imaging Configurations	<b>Reporting Configuration</b> Manage settings specific to Concur Insight
Receipt Handling		
Reporting Configuration		
Site Settings	<b>Site Settings</b> Update settings for this entity	<b>Tax Administration</b> Manage Tax Authorities, Tax Rates and Reclamation
Tax Administration		
Test User Admin	<b>Test User Admin</b> Enable the Test User feature.	<b>Training Administration</b> Training simulation configuration
<b>Training Administration</b>	<b>Travel Allowance</b> Travel allowance configuration	<b>Workflows</b> Manage authorization request, cash advance, and expense report workflows
Travel Allowance		
Workflows		

2. The **Training Configuration** page appears.

## Section 3: Training Administration Procedures

The procedures in this section outline how the administrator can display both Concur and client-generated content, set the order of display, and select a preferred language for their training materials. Additionally, this administrator can set one or more contacts, each tailored to a product area, and an IT or HelpDesk contact should issues arise in attempting to access or run any of the training collateral.

### Selecting a Language for Your Resource

It is important to note that not all Concur training content is available in all supported languages. This means that, if you elect to present the material in a non-English language, only the training materials defined for that language will be presented (more on this below). This filter may prevent some training resource material from appearing, so consider that in your decision.

#### **Mixing Languages on the Page**

Client-generated content can be defined by language when added to the training page. This attribute is used when defining what should be presented if a non-English language is chosen. This means that, if the client wishes to present Concur material in English, and supplement that with Spanish language training material they create, they can define the Spanish material as *English* when adding it, and select English as the preferred language in order to post both languages for their company.

### Adding Training Simulations and Documents to the Training Page

You may activate or inactivate any of the default Concur simulations or documents using options on the associated tab. The latest Concur training material is always available for the administrator to choose from, but they cannot remove the material

from the tab rows, only inactivate the row to remove the material from appearing on the Training page.

Custom training material created by the client's Training department may also be added and worked with just as with any Concur training material. Since this is created by the site, the administrator can add, modify, or remove it entirely as required.

▶ **To add training resources to the Training Site page:**

1. Click the tab associated with the material you will add (reference the tab descriptions under *What the Administrator Sees* in this document for more information).
2. Perform one of the following actions:
  - ◆ **Concur Training Material:** Choose to display a Concur resource by selecting (enabling) the check box for the resource under **Active**; prevent display by clearing (disabling) the check box. The disabled help topics will automatically move to the bottom of the topic list.

The screenshot shows a web interface for managing training resources. At the top, there are tabs for 'Simulation Resources', 'Document Resources', 'Mobile Resources', 'Contacts', and 'Alternate URL'. Below the tabs is a language dropdown set to 'English' and three buttons: 'New', 'Modify', and 'Remove'. The main content is a table with the following columns: 'Display Order', 'Type', 'Name', 'Area', and 'Active'. The 'Active' column contains checkboxes, all of which are checked. A red circle highlights the 'Active' column. The table lists ten simulation resources, each with a 'Display Order' column containing up/down arrows.

Display Order	Type	Name	Area	Active
↓	Simulation	Logging on to Concur	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Travel Profile	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Exploring the Concur Home Page	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Booking a Flight	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Changing a Trip (After Purchase)	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Introduction to Travel & Expense	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Working with Receipt Store	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Activating E-Receipts	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Expense Profile	Expense Report	<input checked="" type="checkbox"/>

- ◆ **Client-generated Training Material:** Click **New** to open the **Training Resource** dialog box:

The screenshot shows a dialog box titled "Training Resource" with a close button (X) in the top right corner. The dialog contains the following fields:

- Language:** A dropdown menu with "English" selected.
- Type:** A dropdown menu with "Simulation" selected.
- Area:** A dropdown menu.
- Name:** A text input field.
- Description:** A text input field.
- Resource URL:** A text input field.

At the bottom right of the dialog, there are two buttons: "Save" and "Cancel".

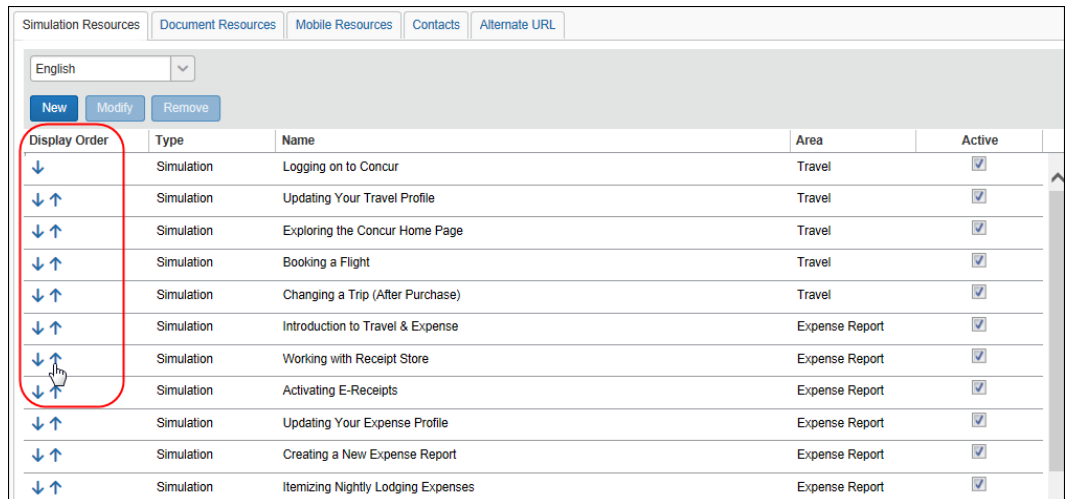
Fill in the fields as required, selecting an area under which the material will display on the page (Expense Report, Invoice, etc.) and a name, description, and valid URL (<http://www.example.com>) for the material, then click **Save**.



Refer to the section *Selecting a Language for Your Resource* for information about populating the Training page with different language material and filtering the overall presentation to a single supported language.

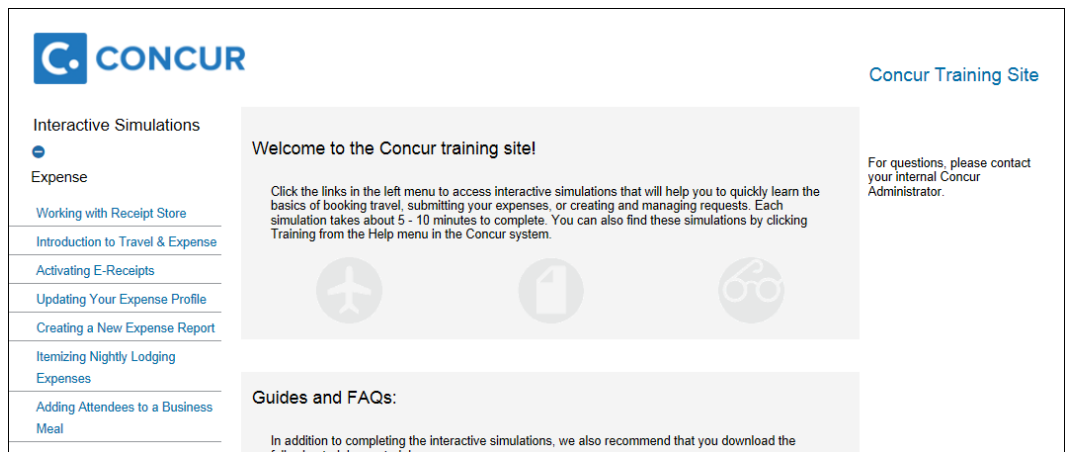
3. *Optional:* Sort the rows by selecting an arrow next to the item, then clicking it to move the row up or down - this order will be reflected on the **Training** page the next time you open it. The simulations appear on the **Training** page in the sections specified in the **Area** column.

## Section 3: Training Administration Procedures



Display Order	Type	Name	Area	Active
↓	Simulation	Logging on to Concur	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Travel Profile	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Exploring the Concur Home Page	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Booking a Flight	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Changing a Trip (After Purchase)	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Introduction to Travel & Expense	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Working with Receipt Store	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Activating E-Receipts	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Updating Your Expense Profile	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Creating a New Expense Report	Expense Report	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Itemizing Nightly Lodging Expenses	Expense Report	<input checked="" type="checkbox"/>

4. Click **Training** on the **Help** menu to verify that the material and the presentation order appears as intended.



**CONCUR** Concur Training Site

Interactive Simulations

- Expense
  - Working with Receipt Store
  - Introduction to Travel & Expense
  - Activating E-Receipts
  - Updating Your Expense Profile
  - Creating a New Expense Report
  - Itemizing Nightly Lodging Expenses
  - Adding Attendees to a Business Meal

Welcome to the Concur training site!

Click the links in the left menu to access interactive simulations that will help you to quickly learn the basics of booking travel, submitting your expenses, or creating and managing requests. Each simulation takes about 5 - 10 minutes to complete. You can also find these simulations by clicking Training from the Help menu in the Concur system.

For questions, please contact your internal Concur Administrator.

Guides and FAQs:

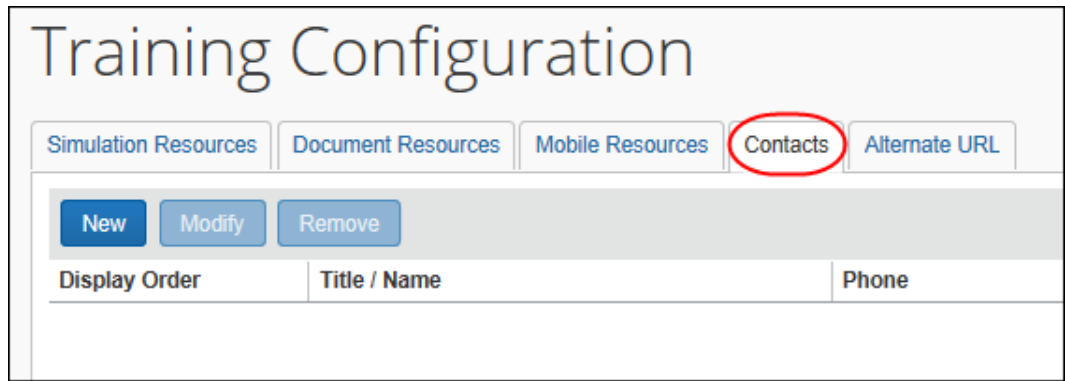
In addition to completing the interactive simulations, we also recommend that you download the following training materials:

## Adding Contacts to the Training Page

You can post multiple contacts with clear descriptions of their area of expertise, which allows your users to quickly access the correct resource when they cannot access or view a presentation, or do not see the resource they expected.

### ► **To add a contact to the Training page:**

1. Click the **Contacts** tab.



2. Click **New** - the **Training Contact** dialog box appears.



3. Fill in the fields as required:

Field	Description
Title / Name	The title or name that the contact is best known as within the company, for quick identification. For example, <i>Technical Support</i> or <i>Betty - Expense SME</i> .
Phone	The phone number the user should call to reach the primary contact for the related issue type.
Email Address	The email the user should use to reach the primary contact for the related issue type.

4. Click **Save**.
5. Click Training on the **Help** menu to verify the contact appears as intended.

## Modifying Contacts in the Training Page

The administrator can modify any contact they have added to the Training page.

▶ **To modify a contact:**

1. Click the **Contacts** tab.
2. Select the desired contact.
3. Click **Modify**. The **Training Contact** window appears.
4. Edit the fields as needed.
5. Click **Save**.

## Modifying Training Simulations and Documents in the Training Page

Concur training material cannot be modified by the administrator at their company. Only client-generated custom training material can be modified. Modification within Training Administration is restricted to the visual presentation of the link on the Training page: its name, description, and presentation order on the page.

▶ **To modify client-generated content:**

1. Click the tab associated with the material you will modify (reference the tab descriptions under *What the Administrator Sees* in this document for more information).
2. Select the desired content.
3. Click **Modify**. The **Training Resource** window appears.
4. Edit the fields as needed.
5. Click **Save**.

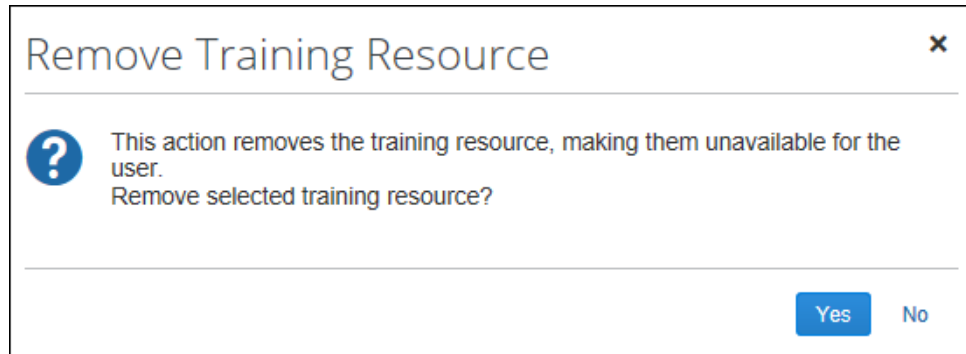
## Removing Training Material from the Training Page

Only client-generated material may be removed from the display of content in the Training Administration tabs. Concur default training material is deactivated to remove it from the user's view.

▶ **To remove training material from display in the Training page:**

1. Click the tab associated with the material you will remove.

2. Select the desired item.
3. Perform one of the following actions:
  - ◆ **Client-Generated Material:** Click **Remove** - a confirmation dialog appears; click **Yes**.



- ◆ **Concur Default Material:** Clear (disable) the check box to inactivate the row and remove it from display.

↓ ↑	Simulation	Creating an Expense Report Based on a Completed Trip	Travel	<input checked="" type="checkbox"/>
↓ ↑	Simulation	Working with Request	Request	<input checked="" type="checkbox"/>
↑	Simulation	Selecting the Right Project Number	Expense Report	<input checked="" type="checkbox"/>
	Simulation	Creating a Company-billed Statement Report	Expense Report	<input type="checkbox"/>
	Simulation	Using Budget Insight	Expense Report	<input type="checkbox"/>

## Redirecting the Link to a URL of Your Choosing

Clients who use alternate training sites may use the **Alternate URL** page to direct their users to a landing page of their own choice, instead of the Concur landing page.

### ▶ **To specify a custom landing page:**

1. Click **Administration > Expense** (or **Invoice** or **Requests**) > **Training Administration** (left menu).
2. In **Training Configuration**, click the **Alternate URL** tab.

Training Configuration

Simulation Resources Document Resources Mobile Resources Contacts **Alternate URL**

Save Cancel

By default, when a user clicks Training on the Help menu, the Concur training site displays. If you want your users to access your company's training site instead, enter your URL in the field below.

Example: <http://training.YourSite.com/training.htm>

If you want to resume using the Concur training site, clear this field and save.

3. Using standard URL syntax (Expense will prompt if errors), type the link address.
4. Click **Save**.
5. Log out, then back in to reset your browser session to use the new information, then test the link.

## Introducing the Training Page to your Employees

It may benefit the company to place information about the Training page in the Company Notes section of the home page, so that the employees see it when they log in. To do this, configure **Company Info** to display information about this new Training page, the Help link, and a link using the Info title to help them find this page.



The screenshot shows the 'Company Info' configuration page. On the left is a sidebar with a list of administrative tasks, where 'Company Info' is highlighted with a red circle. The main area contains the following fields and controls:

- Language:** A dropdown menu set to 'English'.
- Headline:** A text field containing 'New Training Page Available'.
- Company Info:** A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, indent, outdent, font family, font size) and a text area containing the message: 'We have posted a new training page that provides detailed training on how to use Concur. Click Help > Training to view the new training materials. Thanks!'.
- Path:** A text field containing 'p' with a 'Reset' button below it.
- URL:** An empty text field.
- Start Date:** A date picker set to '05/06/2015'.
- End Date:** A date picker set to '05/07/2015'.
- Buttons:** 'Cancel', 'Save And Back To List', 'Save And New', and 'Save' buttons at the bottom right.

When configuring a link within the body text, be sure to select the page option to display in a separate window so that the user does not lose their Concur session.



Refer to *Shared: Company Info User Guide* for more information.