

**TOASTMASTERS**  
INTERNATIONAL®

---

# Concur Training

Finance Manager,  
Randy Moore, DTM



# Training Video

---

<https://www.youtube.com/watch?v=FWbq4bMX1ml>



# What is Concur?

## Reimbursements

Mileage

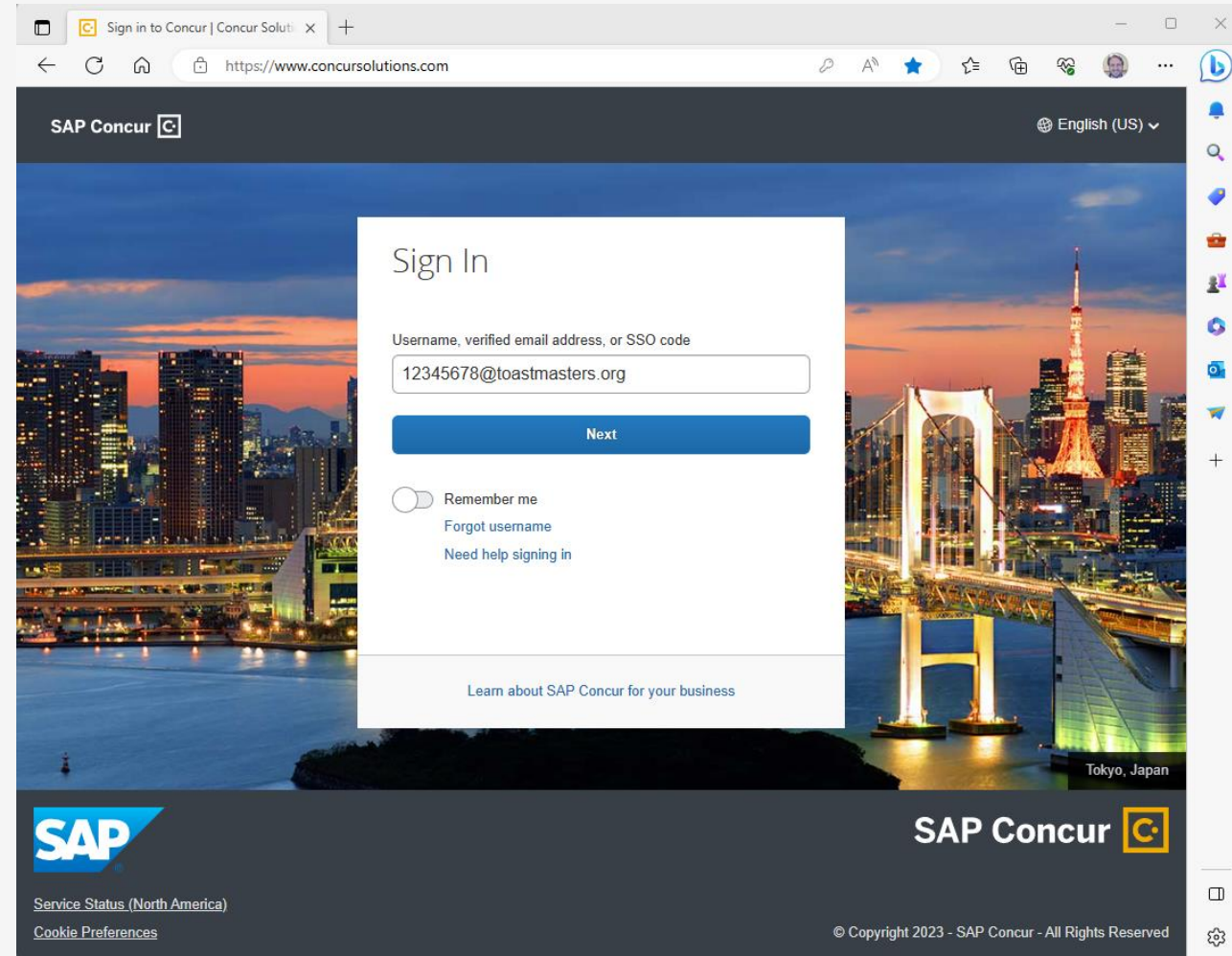
Budgeted District Expenses

## Who uses Concur?

Area Directors

Division Directors

Executive Committee



# Concur Access

Concur

<http://www.concursolutions.com>

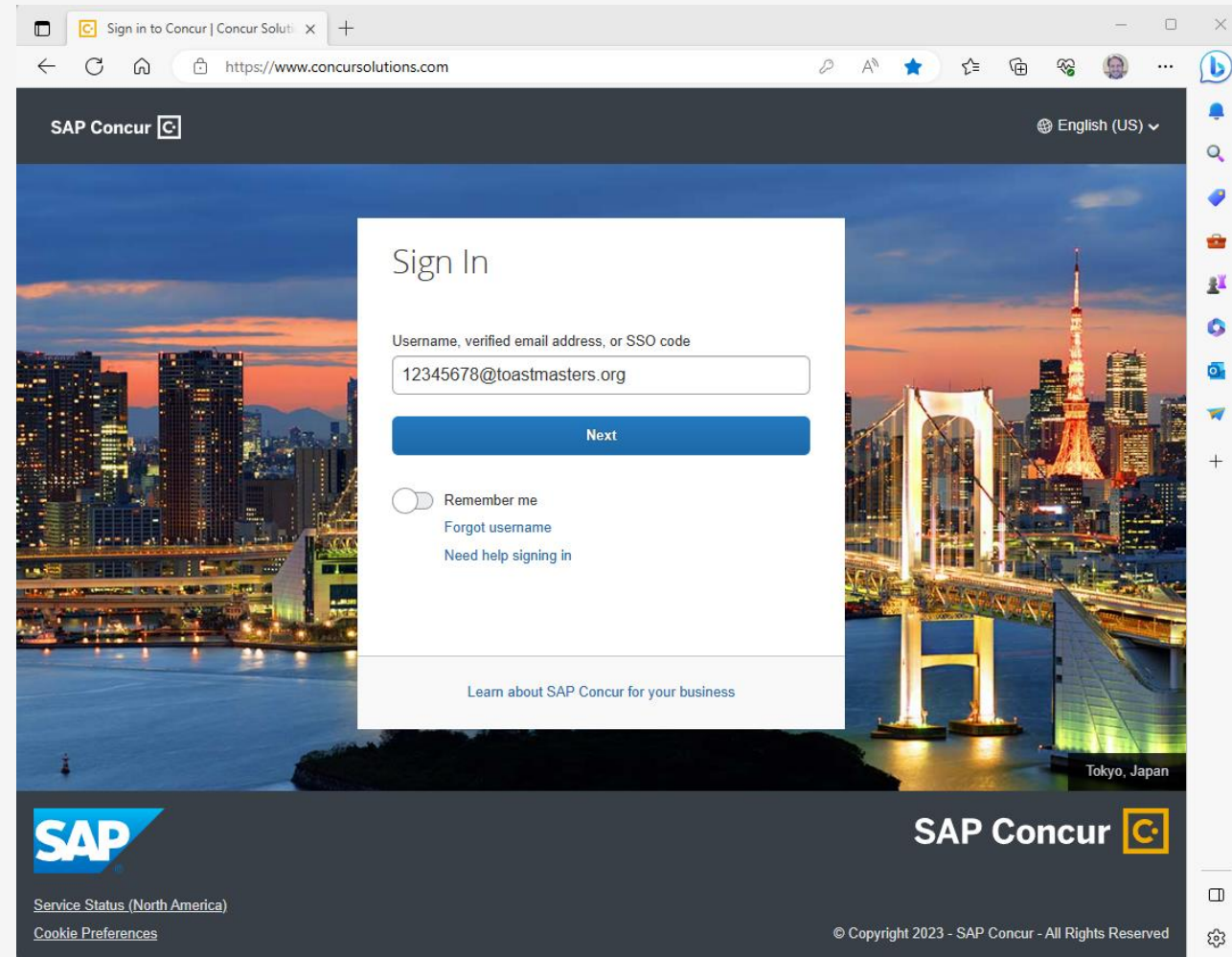
Log in using your Membership

<#####@toastmasters.org>

Add 0's if not 8 digits long

Click Forgot Username

No PN before the Number



# Concur Setup

Click Profile

The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and menu items: Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Support and Help, and a user profile dropdown menu. The profile dropdown menu is open, showing the user's name, Randy Moore, and options for Profile Settings and Sign Out. Two large numbers, 1 and 2, are overlaid on the image with arrows pointing to the profile dropdown menu and the Profile Settings link, respectively. Below the navigation bar, there is a section for TOASTMASTERS INTERNATIONAL with a Start a Report button and an Upload Receipts button. Below this, there is a section for MY TASKS with three task cards: Required Approvals (00), Available Expenses (00), and Open Reports (01). Each task card has a status message and a checkmark icon.

SAP Concur Expense Approvals Reporting App Center Support Help

TOASTMASTERS INTERNATIONAL

+ Start a Report

Upl Rec

Randy Moore

Profile Settings | Sign Out

MY TASKS

00 Required Approvals →

Great! You currently have no approvals.

00 Available Expenses →

You currently have no available expenses.

01 Open Reports →

14/07 OOP-D86-RMoore-GRM-07-01-2023

# Concur Setup

## Set up Profile

## Set up Banking

The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo and menu items: Expense, Approvals, Reporting, and App Center. Below this is a secondary navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Profile Options' and contains a list of settings categories on the left and their descriptions on the right. Two large black arrows originate from the top right of the image, labeled '1' and '2'. Arrow '1' points to the 'Personal Information' section, and arrow '2' points to the 'Bank Information' section.

**SAP Concur** Expense Approvals Reporting App Center

Profile Personal Information Change Password System Settings Concur Mobile Registration

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses

**Expense Settings**

- Expense Information
- Bank Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

**Other Settings**

- System Settings
- Concur Connect
- Change Password
- Concur Mobile Registration

### Profile Options

Select one of the following to customize your user profile.

**Personal Information**  
Personal Information

**Bank Information**  
Bank Information

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Concur Mobile Registration**  
Set up access to Concur on your mobile device.

**System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

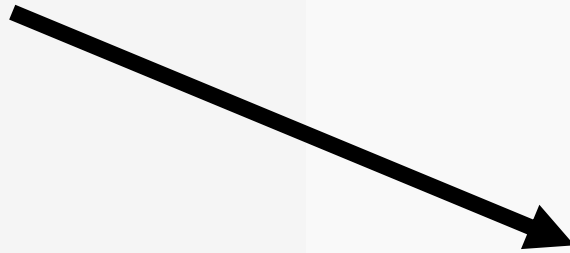
**Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.

**Change Password**  
Change your password.

# Concur Setup

## Set up Banking

Don't forget to have a cheque ready or have your info available



SAP Concur Expense Approvals Reporting App Center Profile Personal Information Change Password System Settings Concur Mobile Registration

Your Information  
Personal Information  
Company Information  
Contact Information  
Email Addresses

Expense Settings  
Expense Information  
Bank Information  
Expense Delegates  
Expense Preferences  
Expense Approvers  
Favorite Attendees

Other Settings  
System Settings  
Concur Connect  
Change Password  
Concur Mobile Registration

### Bank Information

Bank Country/Region: CANADA Bank Currency: Canada, Dollar

Branch Number: Institution Number: Bank Account Number:

Re-Type Bank Account Number:

Bank Name: Branch Location: Status:

Active: Yes

Personal Address Line 1: Personal Address Line 2:

City: Province: Postal Code:

I authorize the use requirement below

You hereby (1) authorize direct deposit into your bank account for funds due to you from your employer using electronic funds transfer (EFT) payment services provided by Worldline or any of its affiliates ([Privacy Statement](#)), (2) represent that the information that you enter is accurate and complete in all respects, and (3) agree that you are solely responsible for ensuring that all such information remains accurate and complete in all respects.

YOUR NAME  
123 ANY STREET  
YOUR TOWN, PROVINCE M4P 1V5

DATE: Y Y Y M M D D

PAY TO THE ORDER OF: \$ 100 DOLLARS

YOUR FINANCIAL INSTITUTION  
456 MAIN STREET  
WWW.FINANCIALINSTITUTION.COM

**Branch Number** : Enter the five-digit Branch Number (shown as 12345 in the illustration).

**Institution Number** : Enter the three-digit Institution Number (shown as 678 in the illustration).

**Account Number** is usually located before the **||** symbol on your cheque and is 3-12 numbers or letters.

# Concur Expenses

## Submitting Expenses

Click here  
(Kinda Intuitive)

SAP Concur Expense Approvals Reporting App Center Support Help

Profile

**TOASTMASTERS**  
INTERNATIONAL

+ Start a Report + Upload Receipts 00 Required Approvals 00 Available Expenses 01 Open Reports

MY TASKS

00 Required Approvals →  
Great! You currently have no approvals.

00 Available Expenses →  
You currently have no available expenses.

01 Open Reports →  
14/07 OOP-D86-RMoore-GRM-07-01-2023



# Concur Expenses

## Submitting Expenses

## Create New Report

The screenshot shows the SAP Concur Expense Management interface. The top navigation bar includes 'SAP Concur', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main content area is titled 'Manage Expenses' and contains three sections: 'REPORT LIBRARY', 'AVAILABLE EXPENSES', and 'AVAILABLE RECEIPTS'. The 'REPORT LIBRARY' section shows 'No Reports' and a '+ Create New Report' button. The 'AVAILABLE EXPENSES' section shows 'No Expenses' and buttons for 'Delete', 'Combine Expenses', and 'Move to'. The 'AVAILABLE RECEIPTS' section shows 'You have no available receipts' and an '+ Upload New Receipt' button. A large black arrow points from the 'Create New Report' text on the left to the '+ Create New Report' button in the 'REPORT LIBRARY' section.

SAP Concur Expense Approvals Reporting App Center Support Help Profile

Manage Expenses

Manage Expenses

REPORT LIBRARY View: Active Reports + Create New Report

No Reports

AVAILABLE EXPENSES View: All Expenses

Delete Combine Expenses Move to

No Expenses  
When expenses come in, they will be added to this list.

Enable Expense Assistant and these expenses will be placed in a report for you. Learn More

AVAILABLE RECEIPTS + Upload New Receipt

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

You have no available receipts

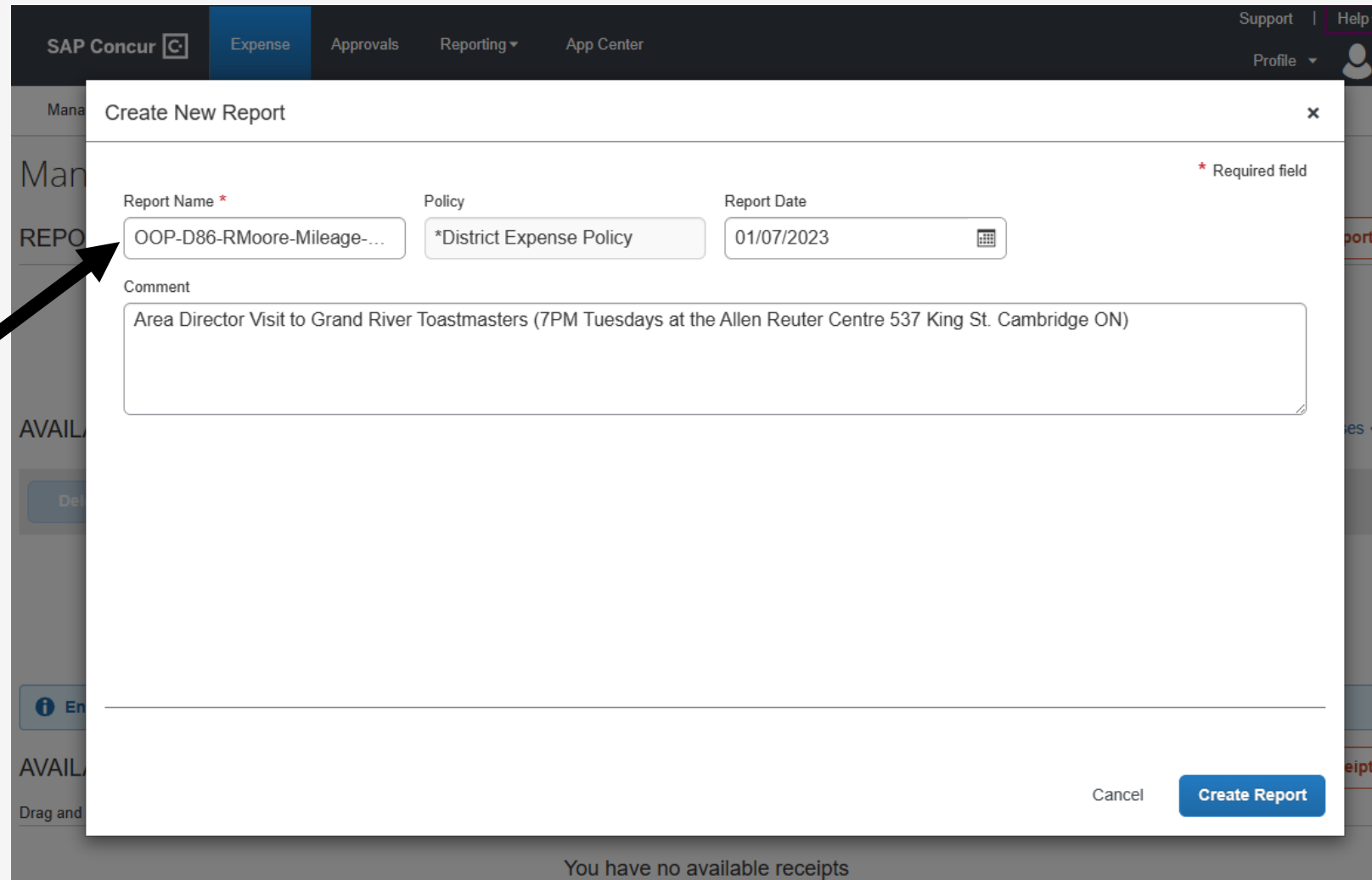
# Concur Expenses

Report Name:

## Coding Process

OOP-D86-Name-Event-Date

OOP – “Out of Pocket”



The screenshot shows the SAP Concur 'Create New Report' interface. The top navigation bar includes 'SAP Concur', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main form contains the following fields:

- Report Name \***: A text input field containing 'OOP-D86-RMoore-Mileage-...'. An arrow points to this field from the text 'Coding Process' on the left.
- Policy**: A dropdown menu showing '\*District Expense Policy'.
- Report Date**: A date input field showing '01/07/2023' with a calendar icon.
- Comment**: A text area containing 'Area Director Visit to Grand River Toastmasters (7PM Tuesdays at the Allen Reuter Centre 537 King St. Cambridge ON)'.

At the bottom right of the form are 'Cancel' and 'Create Report' buttons. A status message at the bottom of the page reads 'You have no available receipts'.

# Concur Expenses

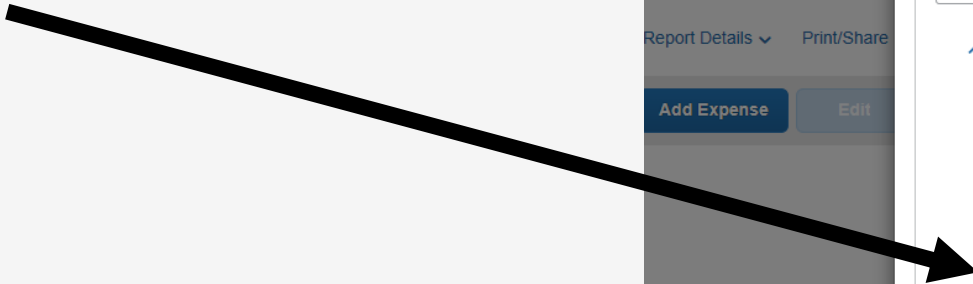
Add Expenses



The screenshot shows the SAP Concur interface for managing an expense report. At the top, there is a dark navigation bar with the SAP Concur logo and menu items: Expense, Approvals, Reporting, and App Center. On the right side of the navigation bar, there are links for Support and Help, and a user profile icon. Below the navigation bar, the page title is 'Manage Expenses'. The main content area displays the report title 'OOP-D86-RMoore-Mileage-7-1-2023 \$0.00' and its status 'Not Submitted | Report Number: C4V07V'. There are two buttons: 'Delete Report' (blue) and 'Submit Report' (orange). Below the report title, there are three dropdown menus: 'Report Details', 'Print/Share', and 'Manage Receipts'. On the right, there is a link 'View Available Receipts'. At the bottom of the report details, there is a row of action buttons: 'Add Expense' (blue), 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move to'. The main content area below the buttons is empty, with the text 'No Expenses' and a subtext 'Add expenses to this report to submit for reimbursement.'

# Concur Expenses

Expense Code



The screenshot shows the SAP Concur 'Add Expense' modal. At the top, there are two tabs: '0 Available Expenses' and '+ Create New Expense'. Below the tabs is a search bar with the placeholder text 'Search for an expense type'. Underneath the search bar, a list of expense types is displayed under the heading '01. Travel'. The list includes: Airfare (7060), Convention Registration Fees (7056), Food (7078), Lodging (7058), Mileage (7062), Other (7068), and Rail (7066). The 'Mileage (7062)' option is highlighted with a blue background. The background of the screenshot shows a blurred view of the SAP Concur interface with various buttons and text.

# Concur Expenses

Fill in details



Add pictures or scans of receipts



SAP Concur Expense Approvals Reporting App Center Support Help Profile

Manage Expenses

## New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

\* Required field

Expense Type \* Mileage (7062)

Transaction Date \* 01/07/2023 Business Purpose \* GRTM Club Visit

Enter Vendor Name Randy Moore City of Purchase \* Cambridge (Ex Galt), Ontario

Payment Type \* Cash/Out of Pocket

Amount \* 10.75 Currency \* Canada, Dollar

Tax Posted Amount From Location Kitchener

To Location 437 King St. Number of Miles \* 25.6

Reporting Code \* (958) Travel - Area Director Event Period \* N/A

District Subsidiary \*

**Add Receipt**

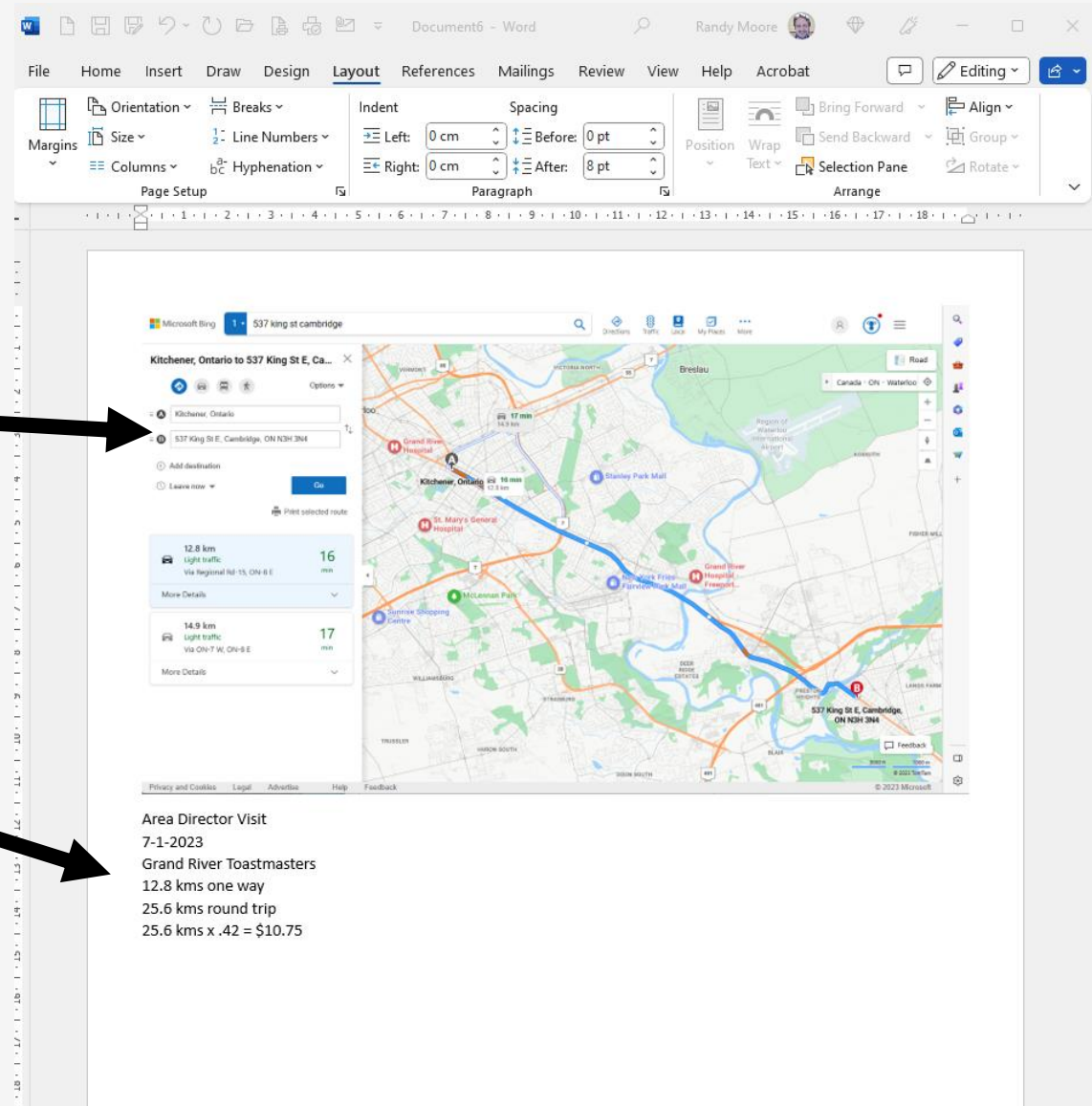
Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

# Mileage Sample

Clip Maps Screen  
from Internet

Provide calculations

Save as PDF and submit



The image shows a Microsoft Word document with a Bing map and a list of calculations. The map displays a route from Kitchener, Ontario to 537 King St E, Cambridge, Ontario. The route is 12.8 km long, taking 16 minutes via Regional Rd-15, ON-8 E. An alternative route is 14.9 km long, taking 17 minutes via ON-7 W, ON-8 E. The calculations are as follows:

- Area Director Visit
- 7-1-2023
- Grand River Toastmasters
- 12.8 kms one way
- 25.6 kms round trip
- 25.6 kms x .42 = \$10.75

# Concur Expenses

Save or Save and Add More Expenses



Cash/Out of Pocket

Amount \*

Currency \*

Tax Posted Amount

From Location

To Location

Number of Miles \*

Reporting Code \*  (1)

Event Period \*  (2)

District  (1)

Subsidiary \*  (2)

Comment

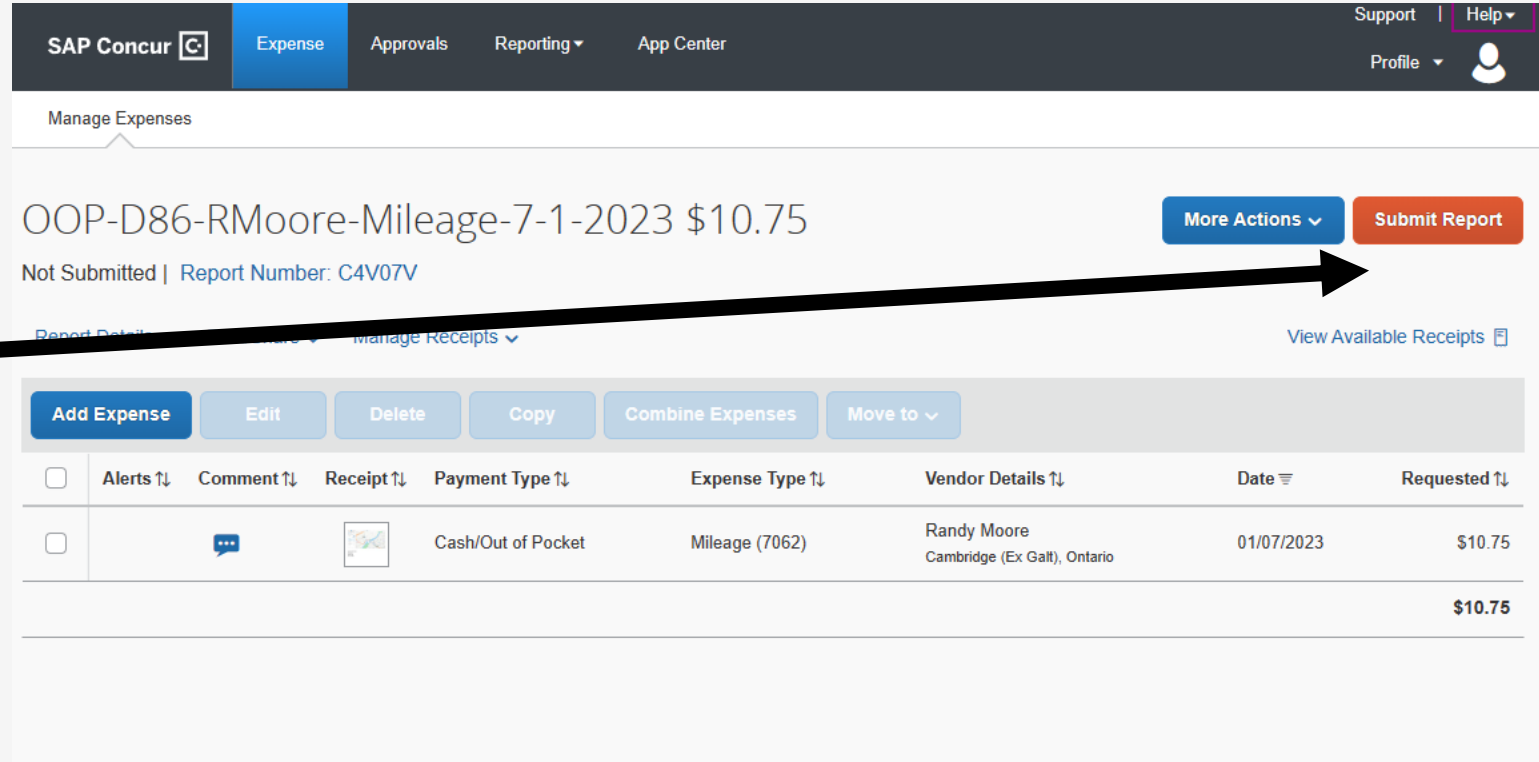
Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.



# Concur Expenses

Submit Report

Doesn't hurt to contact D86FM to confirm approval.



The screenshot shows the SAP Concur interface for managing expenses. At the top, there is a navigation bar with 'SAP Concur' logo, 'Expense' (active), 'Approvals', 'Reporting', and 'App Center'. On the right, there are links for 'Support', 'Help', and 'Profile'. Below the navigation bar, the page title is 'Manage Expenses'. The main content area displays an expense entry: 'OOP-D86-RMoore-Mileage-7-1-2023 \$10.75'. Below this, it says 'Not Submitted | Report Number: C4V07V'. There are two buttons: 'More Actions' (blue) and 'Submit Report' (orange). A large black arrow points from the 'Submit Report' button to the text 'Submit Report' on the left. Below the expense entry, there are links for 'Report Details', 'Manage Receipts', and 'View Available Receipts'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move to'. Below the toolbar is a table with columns: Alerts, Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table has one row of data for the expense.

<input type="checkbox"/>	Alerts ↑↓	Comment ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
<input type="checkbox"/>				Cash/Out of Pocket	Mileage (7062)	Randy Moore Cambridge (Ex Galt), Ontario	01/07/2023	\$10.75
								<b>\$10.75</b>



# Training Video

---

<https://www.youtube.com/watch?v=FWbq4bMX1ml>



# Questions?

FinanceManager@toastmasters86.org