



CONCUR[®]

Customer Learning: Using Tools and Training to Get the Most Out of your Concur Solutions

Duwana Jones

Training Consultant – Learning Services

Introduction



Duwana Jones

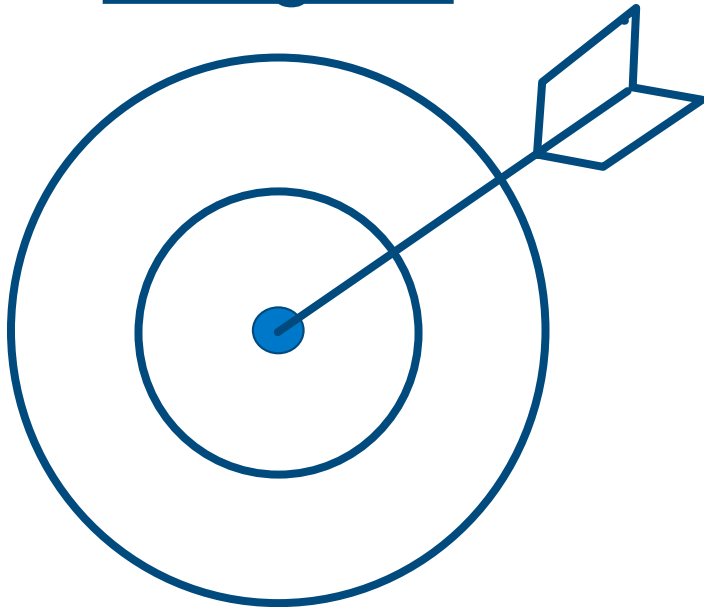
Training Consultant
Concur Learning Services

- **Concur Administrator for a Global Company (Rolled out Globally to Over 30K Employees)**
- **Concur Functional Consultant**
- **Project Manager (Consultant)**
- **Concur Training Consultant**

Did you know?

- Concur offers comprehensive basic and customized training options for all products

Our goal:



- Provide the best tools and training in the most efficient way to fit your needs
- Ensure you are equipped to utilize and administer our solutions effectively
- Deliver the right training no matter how familiar you are with the solutions
- Give you flexibility: various types of training from instructor led to pre-recorded sessions

Learning Objectives



Finding the Tools

Identify the tools and training's available to you and your team



Learning How

Attain the knowledge to quickly learn how to use Concur solutions



Improving Satisfaction

Enhance your experience with Concur through knowledge & efficiency

What is available?

We have several types of trainings to best fit your needs:

Standard
(basic)
Training

Customized
Training
Services

Online
Reporting
Tutorials

Structured
Learning
Courses

Poll Question

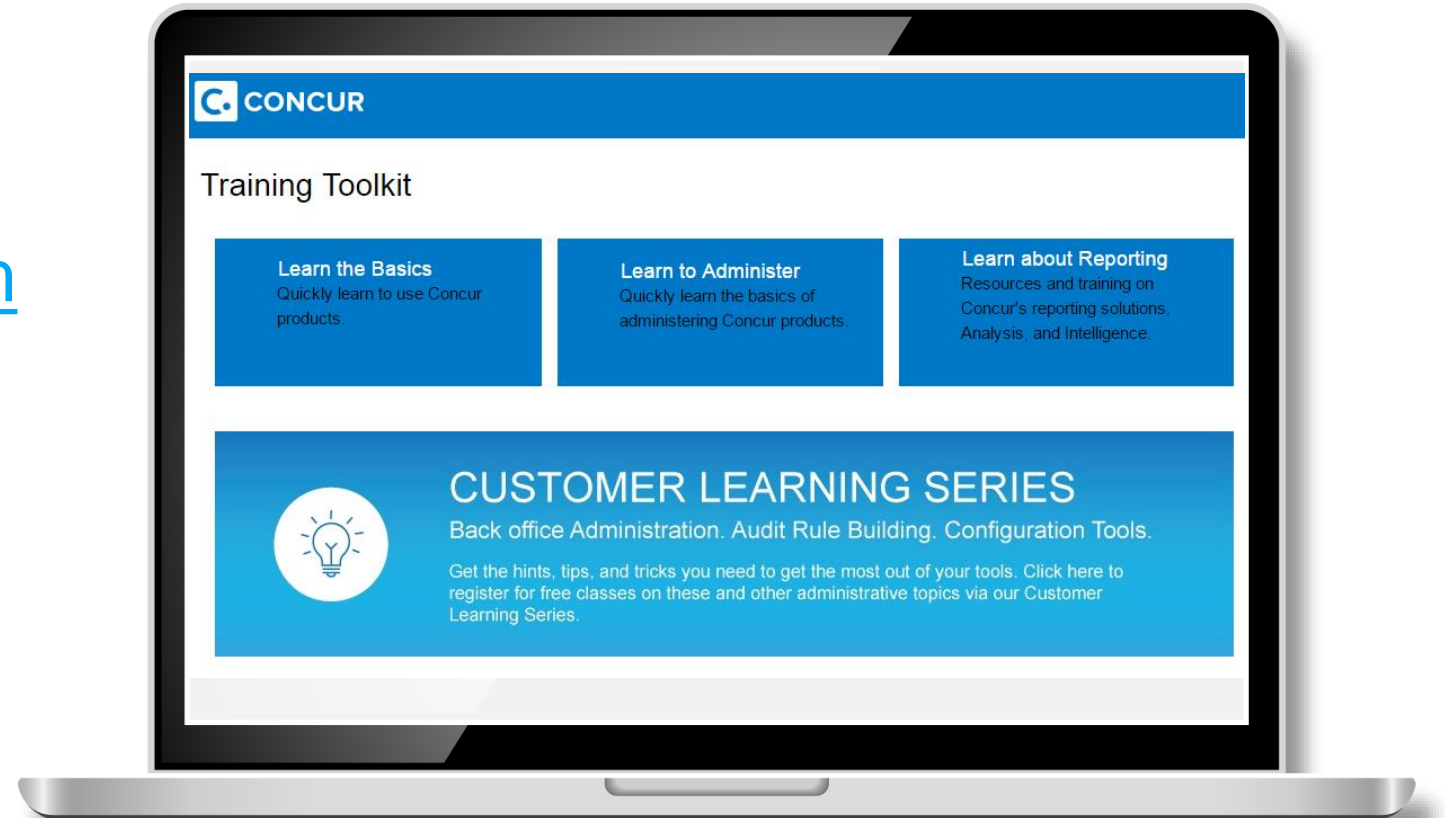
Are you aware of the free training toolkit on [Concurtraining.com](https://concurtraining.com)?

Training Toolkit

Visit:

www.concurtraining.com

to learn more and get started with Concur solutions.



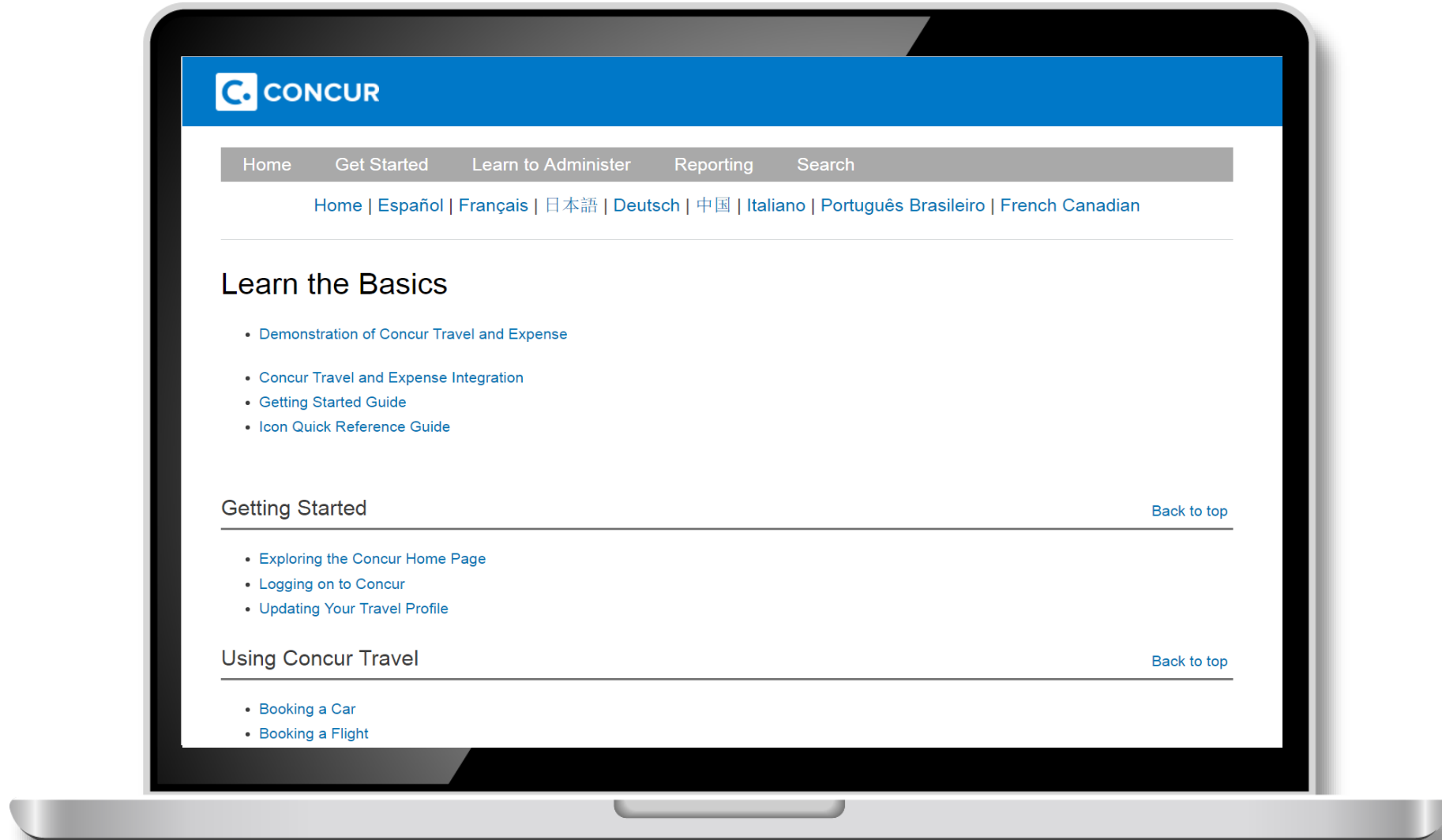
Where do I start?

Standard
(basic)
Training



Learn the Basics

Standard
(basic)
Training



Standard Training Includes:

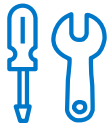
Standard
(basic)
Training



Implementation and Conversion Toolkits: provide details on how to implement all products and conversion projects



Online End-User Training Materials: quick start and reference guides, FAQ's and interactive simulations and demos



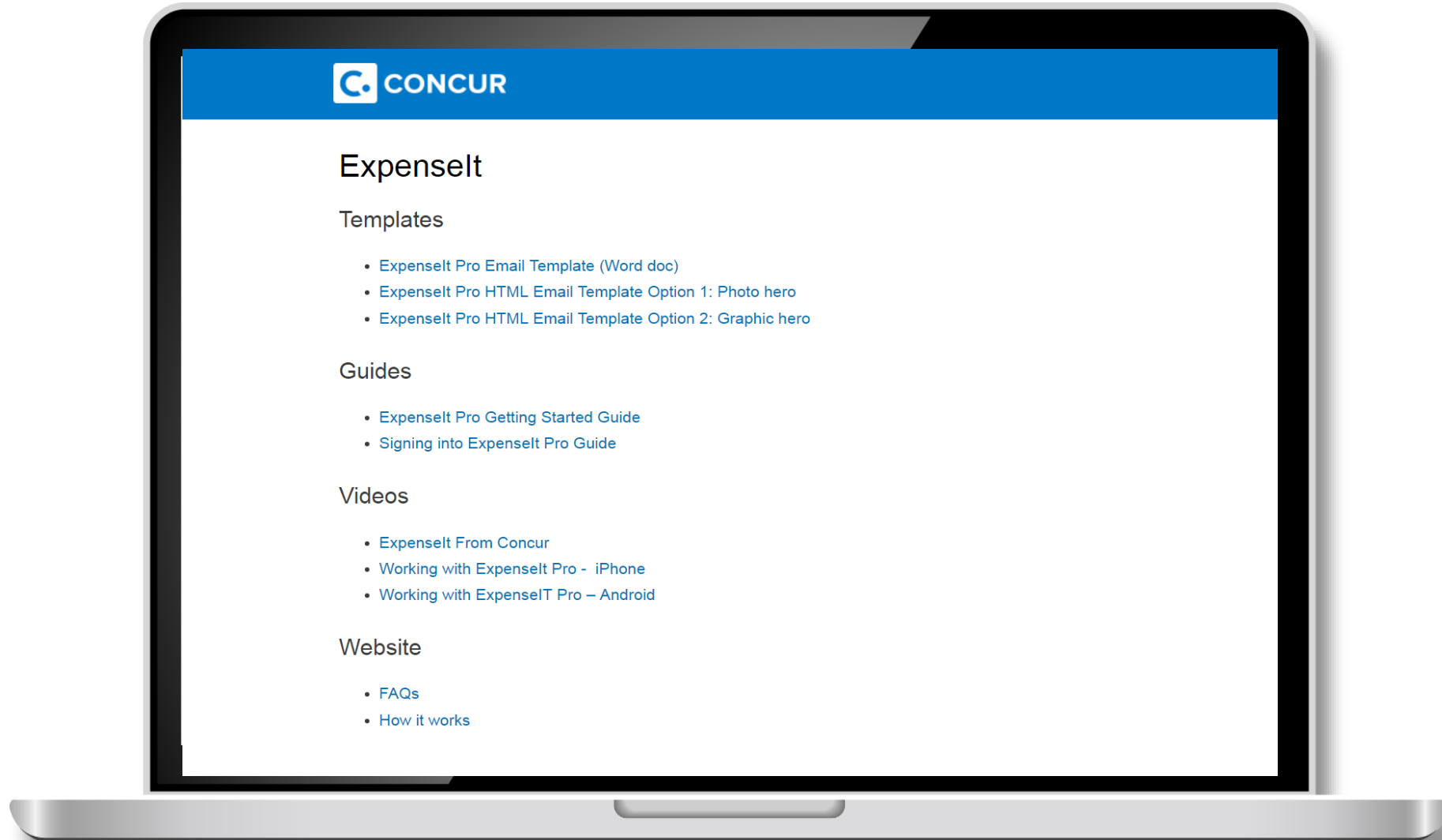
Training Toolkit: located on the product help tab, this toolkit provides additional information on all product solutions



Customer Learning Series: get the hints, tips and tricks you need to get the most out of your tools.

Expenselt

Standard
(basic)
Training



Expenselt

Templates

- [Expenselt Pro Email Template \(Word doc\)](#)
- [Expenselt Pro HTML Email Template Option 1: Photo hero](#)
- [Expenselt Pro HTML Email Template Option 2: Graphic hero](#)

Guides

- [Expenselt Pro Getting Started Guide](#)
- [Signing into Expenselt Pro Guide](#)

Videos

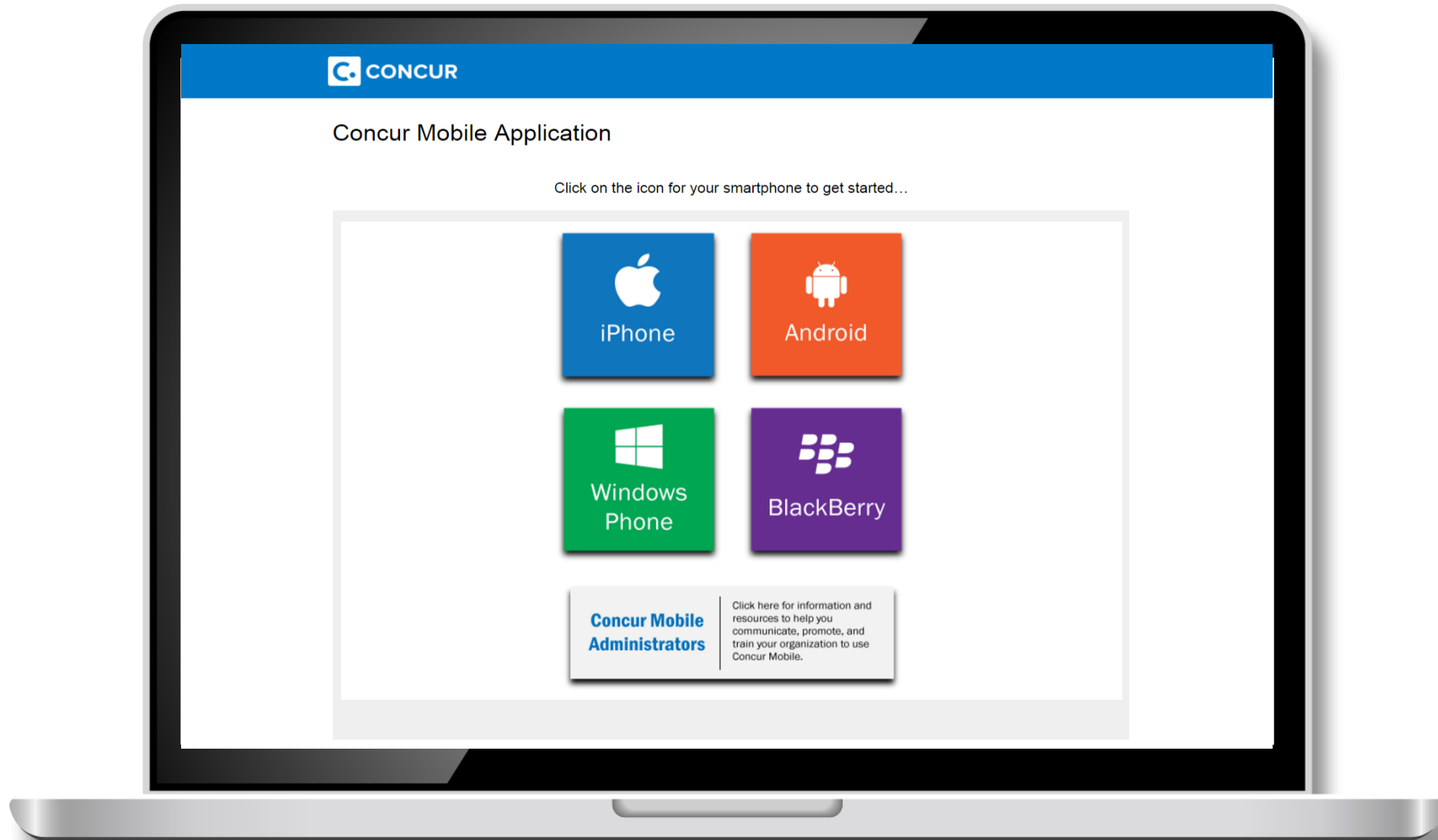
- [Expenselt From Concur](#)
- [Working with Expenselt Pro - iPhone](#)
- [Working with Expenselt Pro - Android](#)

Website

- [FAQs](#)
- [How it works](#)

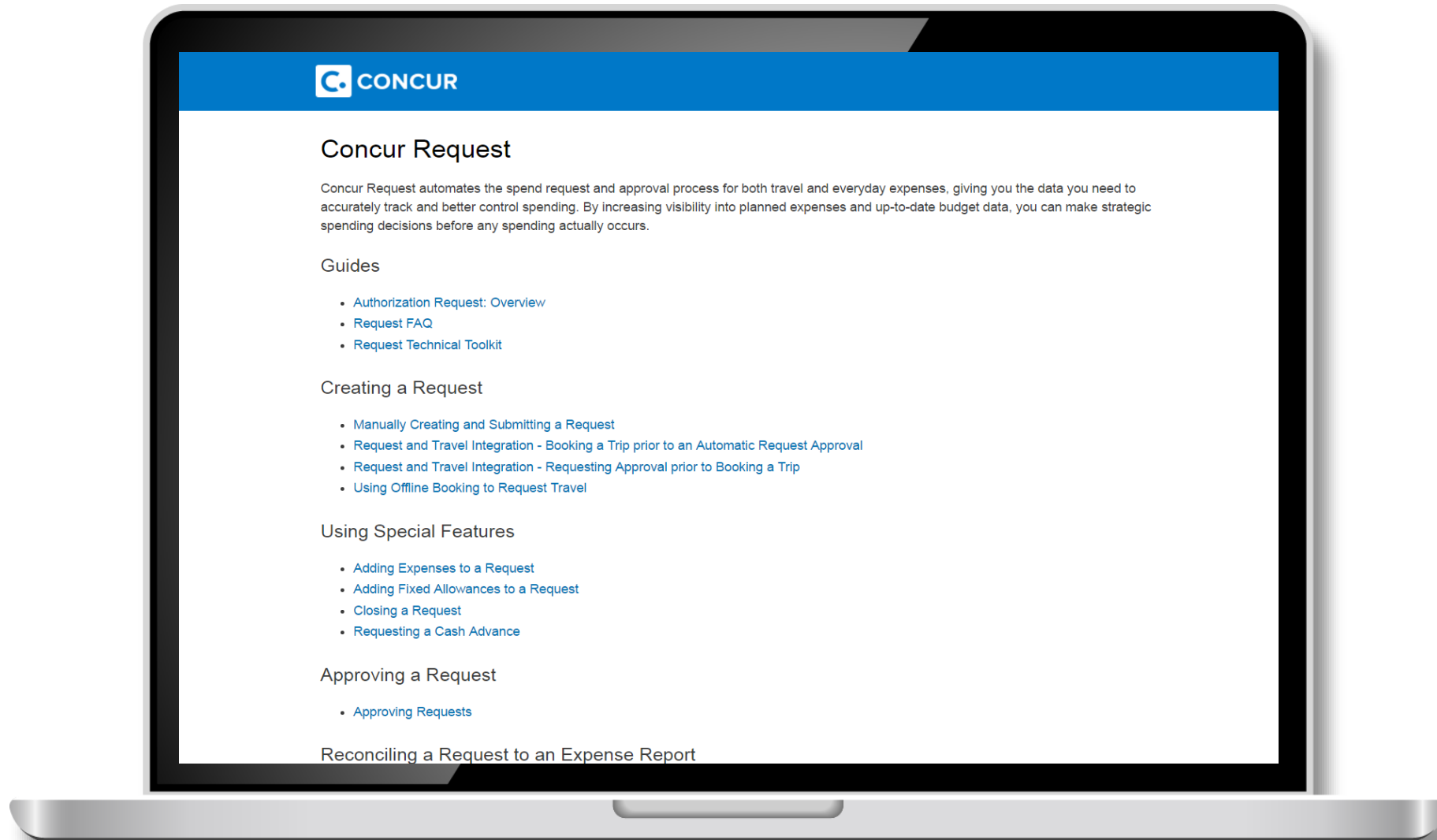
Concur Mobile

Standard
(basic)
Training



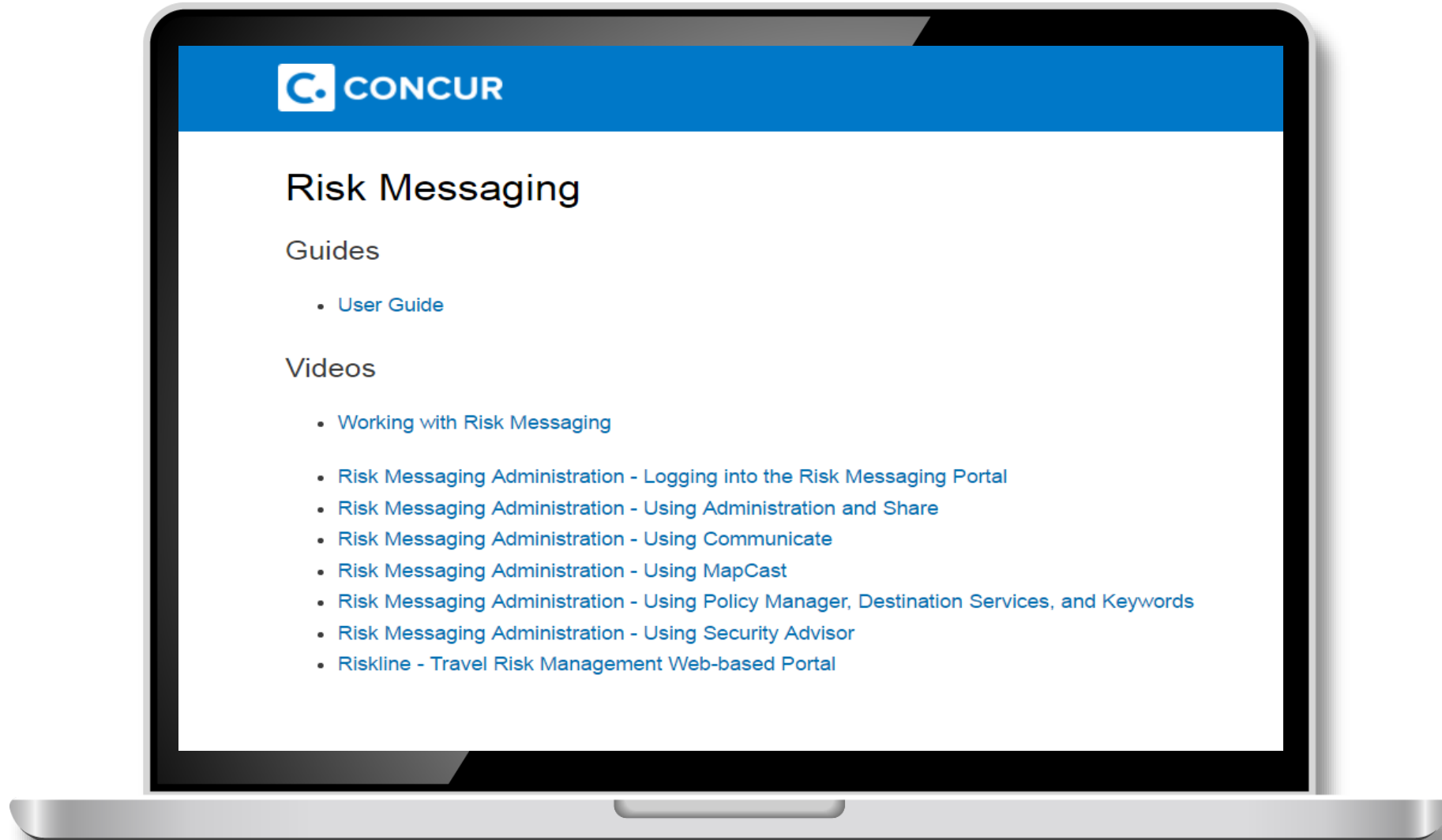
Concur Request

Standard
(basic)
Training



Risk Messaging

Standard
(basic)
Training



Risk Messaging

Guides

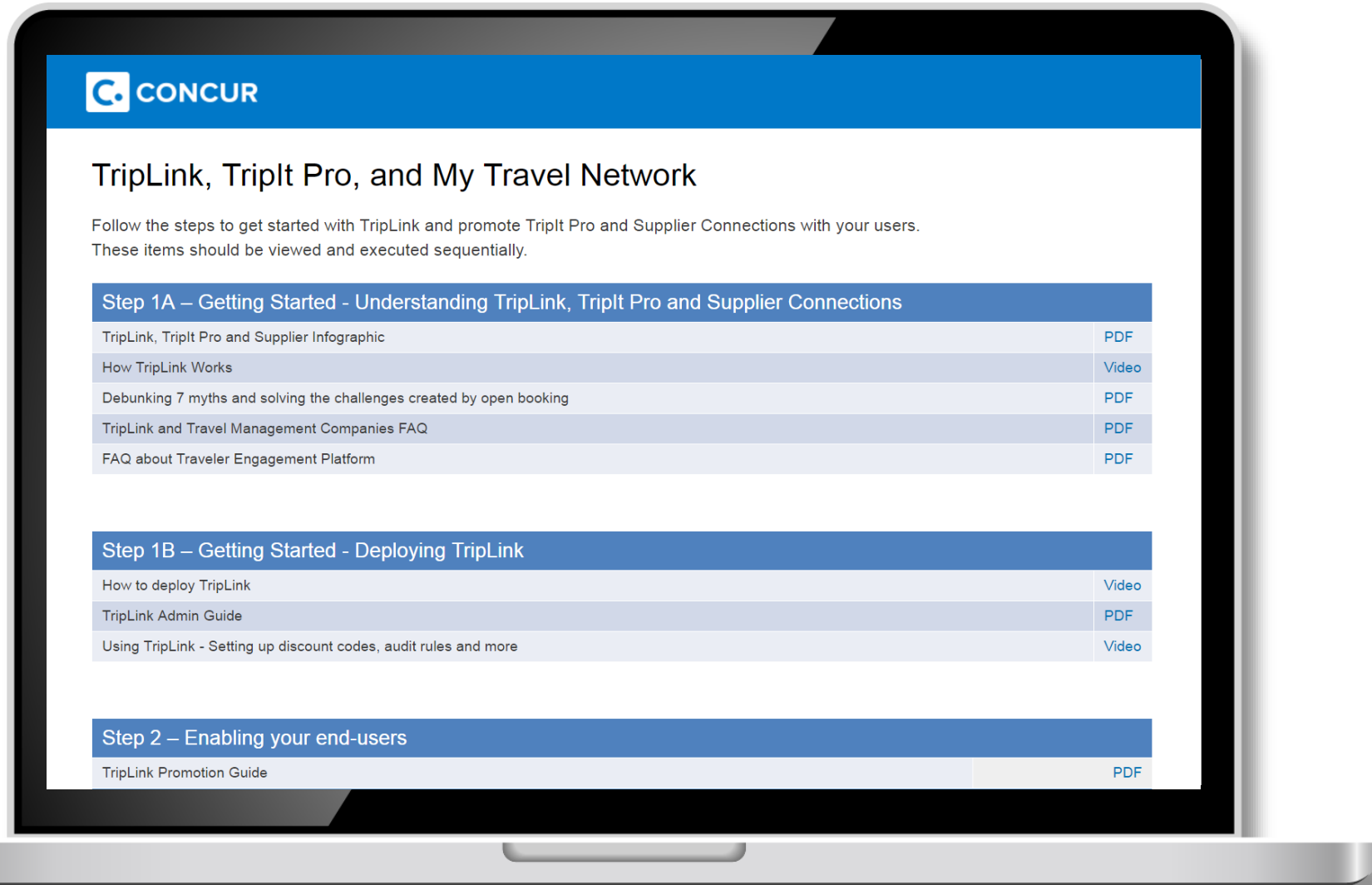
- [User Guide](#)

Videos

- [Working with Risk Messaging](#)
- [Risk Messaging Administration - Logging into the Risk Messaging Portal](#)
- [Risk Messaging Administration - Using Administration and Share](#)
- [Risk Messaging Administration - Using Communicate](#)
- [Risk Messaging Administration - Using MapCast](#)
- [Risk Messaging Administration - Using Policy Manager, Destination Services, and Keywords](#)
- [Risk Messaging Administration - Using Security Advisor](#)
- [Riskline - Travel Risk Management Web-based Portal](#)

TripLink & Triplt Pro

Standard
(basic)
Training



Poll Question

- Did you know that Concur offers customized training? Yes/No

Customized Training Includes:

Customized
Training
Services



Instructor Led Training Options: receive tailored training through virtual, onsite or custom structured courses



Personalized Training Materials: tailor-made quick start and reference guides, as well as localized materials



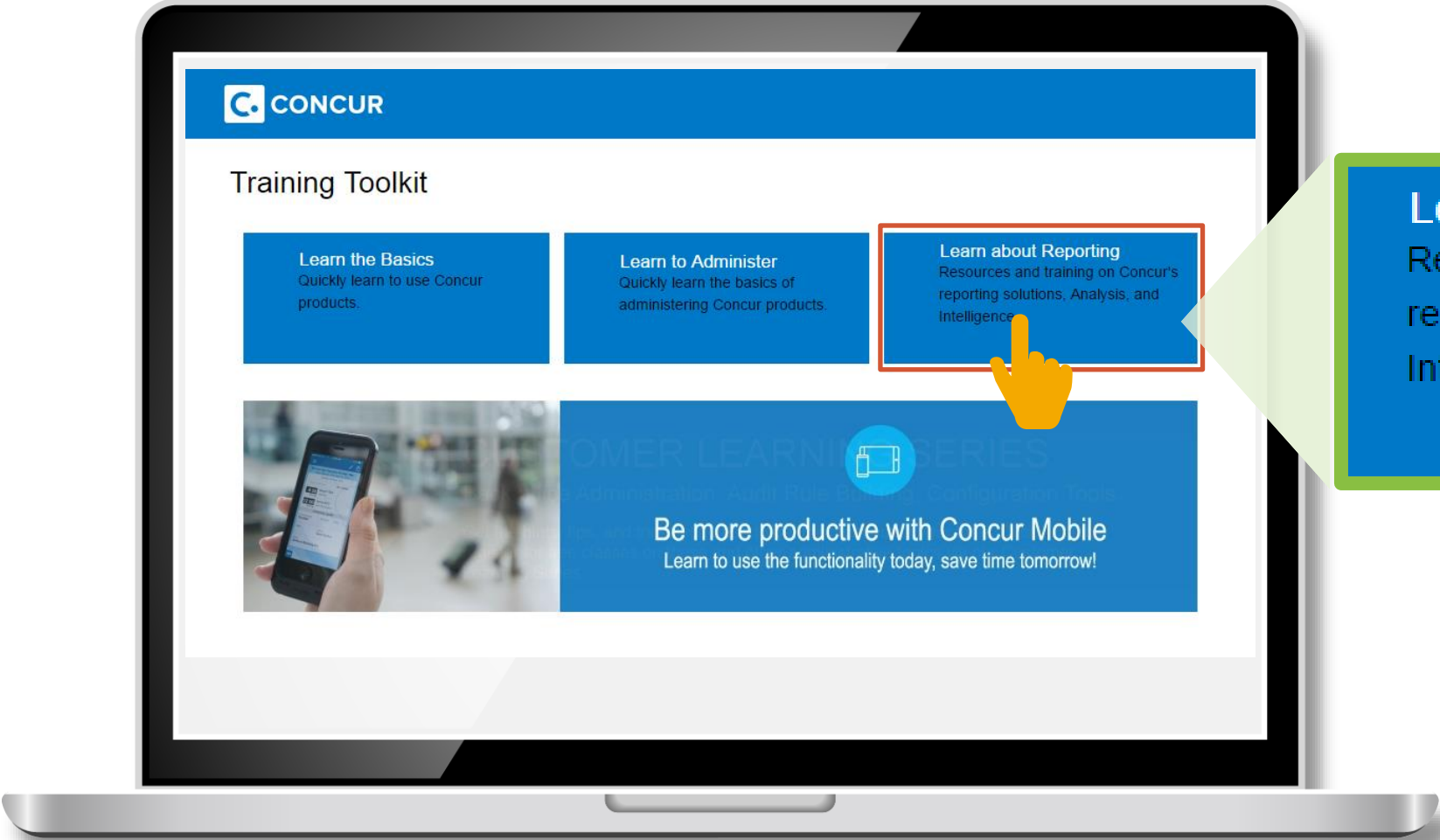
Unique Interactive Simulations: engage in live simulations demonstrating how to get the most out of Concur solutions

Benefits of Customized Training:

- Increase adoption
- Reduce the dependence on administrators and staff for training and ongoing support
- Meet your personal needs and schedule
- Greater interaction in a safe environment
- Available in all languages where the product is supported
- Tailored for familiar workforce scenarios

Need Help with Reporting?

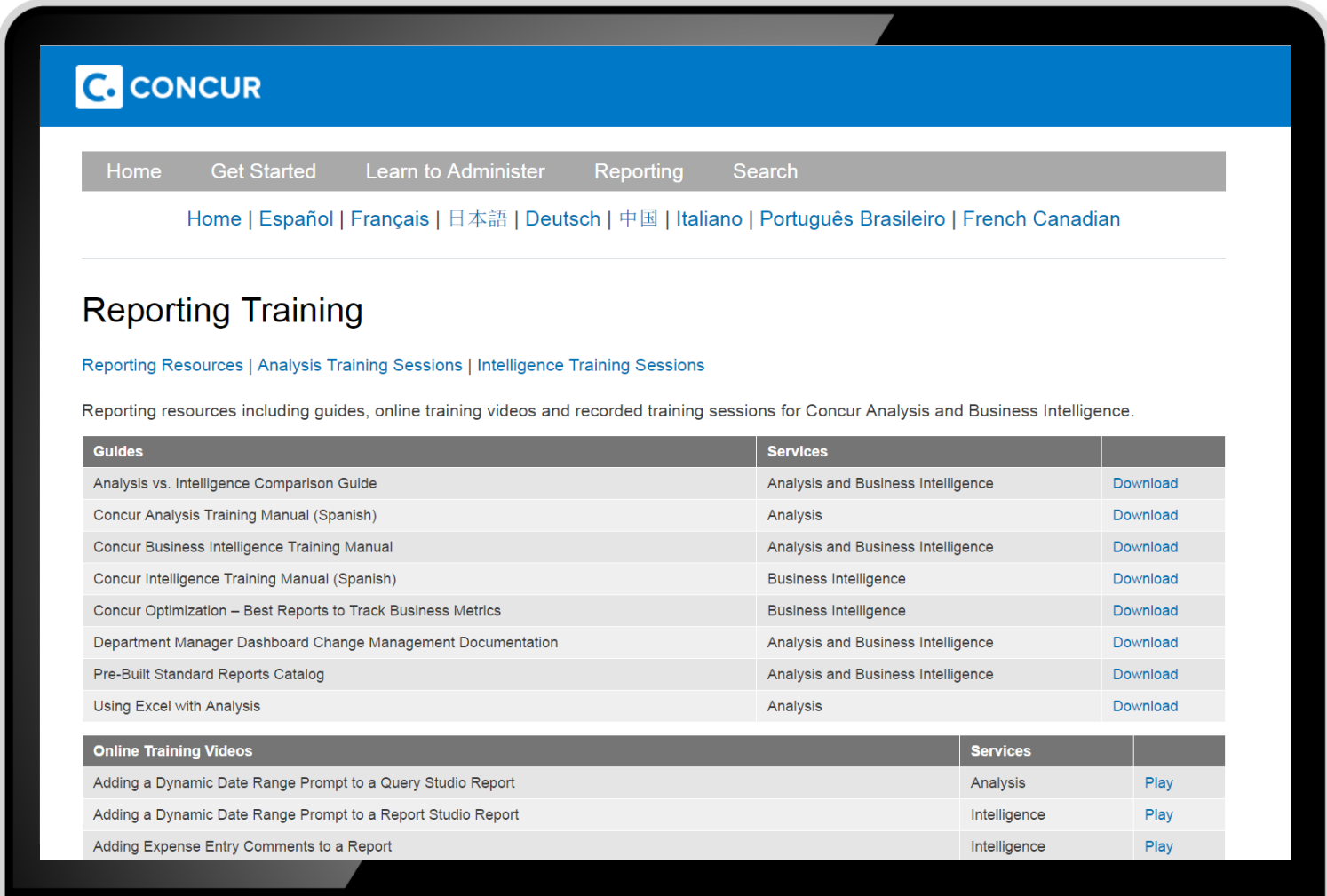
Online Reporting Tutorials



Learn about Reporting Resources and training on Concur's reporting solutions, Analysis, and Intelligence.

Reporting Training

Online Reporting Tutorials



Reporting Resources

Online
Reporting
Tutorials

Concur training site for reporting is broken into three categories:

Training
Guides &
Resources

Quick
Tutorial
Videos

In-depth
Training
Videos

Intelligence Reporting Guide

Online
Reporting
Tutorials

Find reports quickly and easily with the Intelligence reporting guide broken down by a simple list of categories

CONCUR.

Intelligence and reporting are exclusively available for...

CONCUR.

Drill down into trends, before they become trends.

CONCUR.

Report guide overview.

See the full report index and catalog of Concur's reporting offerings. Click a subject to go to a page.

- ▶ Accrual
- ▶ Administration
- ▶ Audit
- ▶ Carbon Footprint
- ▶ Company Billed Cards (Professional edition only)
- ▶ Compliance
- ▶ E-receipts
- ▶ Expense Processing
- ▶ Finance
- ▶ Fraud
- ▶ Invoice
- ▶ Market Specific
- ▶ Meetings
- ▶ Mobile Usage
- ▶ Open Booking
- ▶ Persona Dashboards
- ▶ Premium Dashboards
- ▶ Spending
- ▶ Tax
- ▶ Request
- ▶ TripLink
- ▶ Trips
- ▶ Vendor

Quick key
★
QS = Query Studio
RS = Report Studio
WSA = Workspace Advanced

Click "Return to report catalog overview" to return to this page.

Return to report catalog overview ▶

action.

full control of your spending and delivers data insights to the right people, organize and sort what you spend with each of your vendors so you can get a effectively and gain accountability that ensures you are getting the contractual board folder.

Finance Executive Overview

Travel Program Overview

©2016 Concur Technologies, Inc. All rights reserved.

Structured Learnings Includes:

Structured
Learning
Courses



Expense Type Admin: ability to control change/modify your own expense types



Introduction to Intelligence: instructor-led training and hands-on practice using Concur Intelligence at our training facilities in Bellevue, WA



Hands-on Report Authoring: work closely with Concur experts to get a 360-degree view of your travel and expense data and create the custom reports you need. Onsite email advantage@concur.com

Additional Structured Learning Includes:

Structured Learning Courses



Bootcamp: multi-day training providing the tools and experience to get started in getting the most out of your Concur solutions

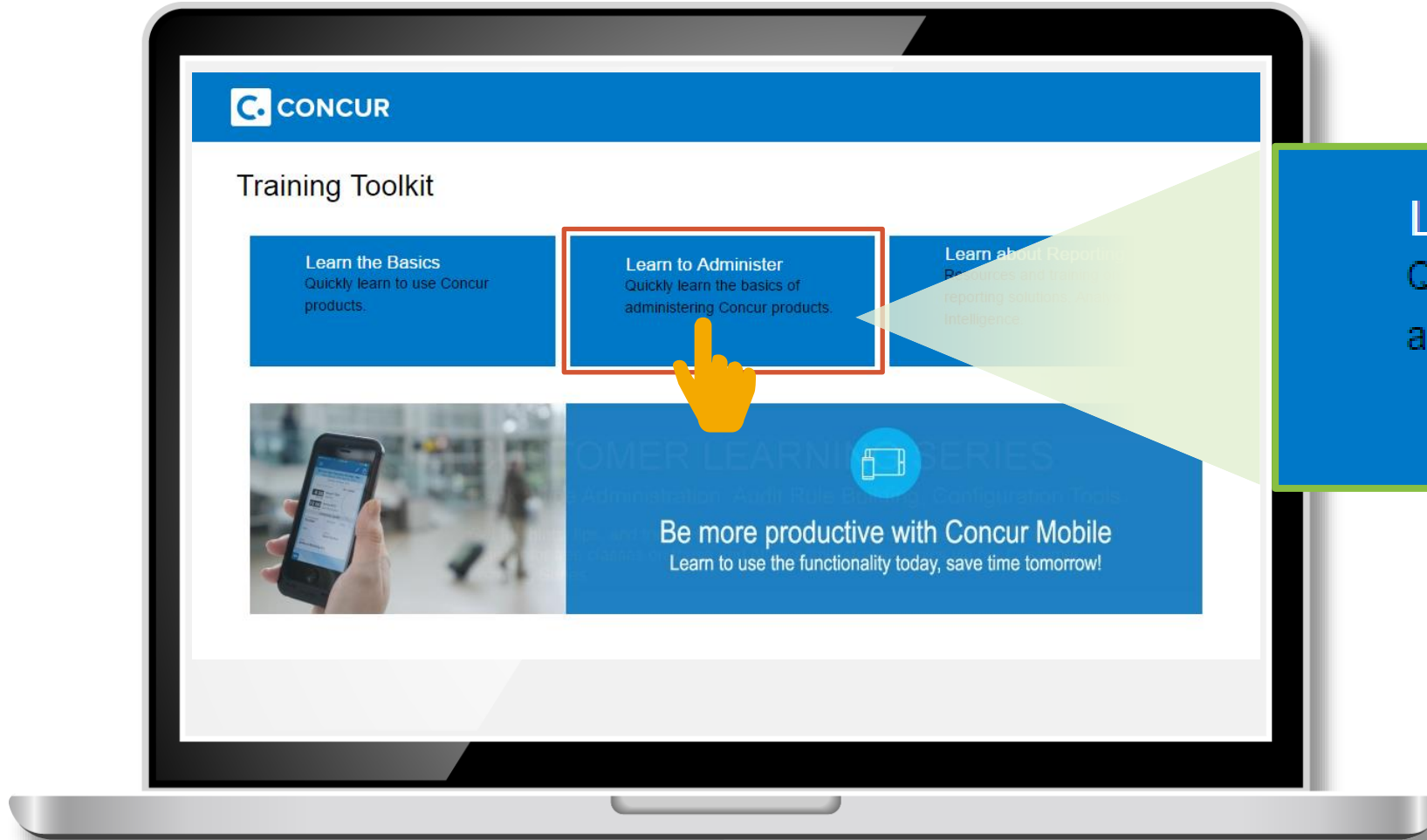


Advanced Configuration: after 30 days+ of implementation users travel to a Concur office for hands-on training – Class sizes may vary based on location

<u>Structured Class Type</u>	Additional Permissions	User Roles	Configuration Restricted	Configuration Unrestricted	Analysis/ Intelligence
Boot Camp		√	√		√
Advanced Configuration	√	√	√	√	√

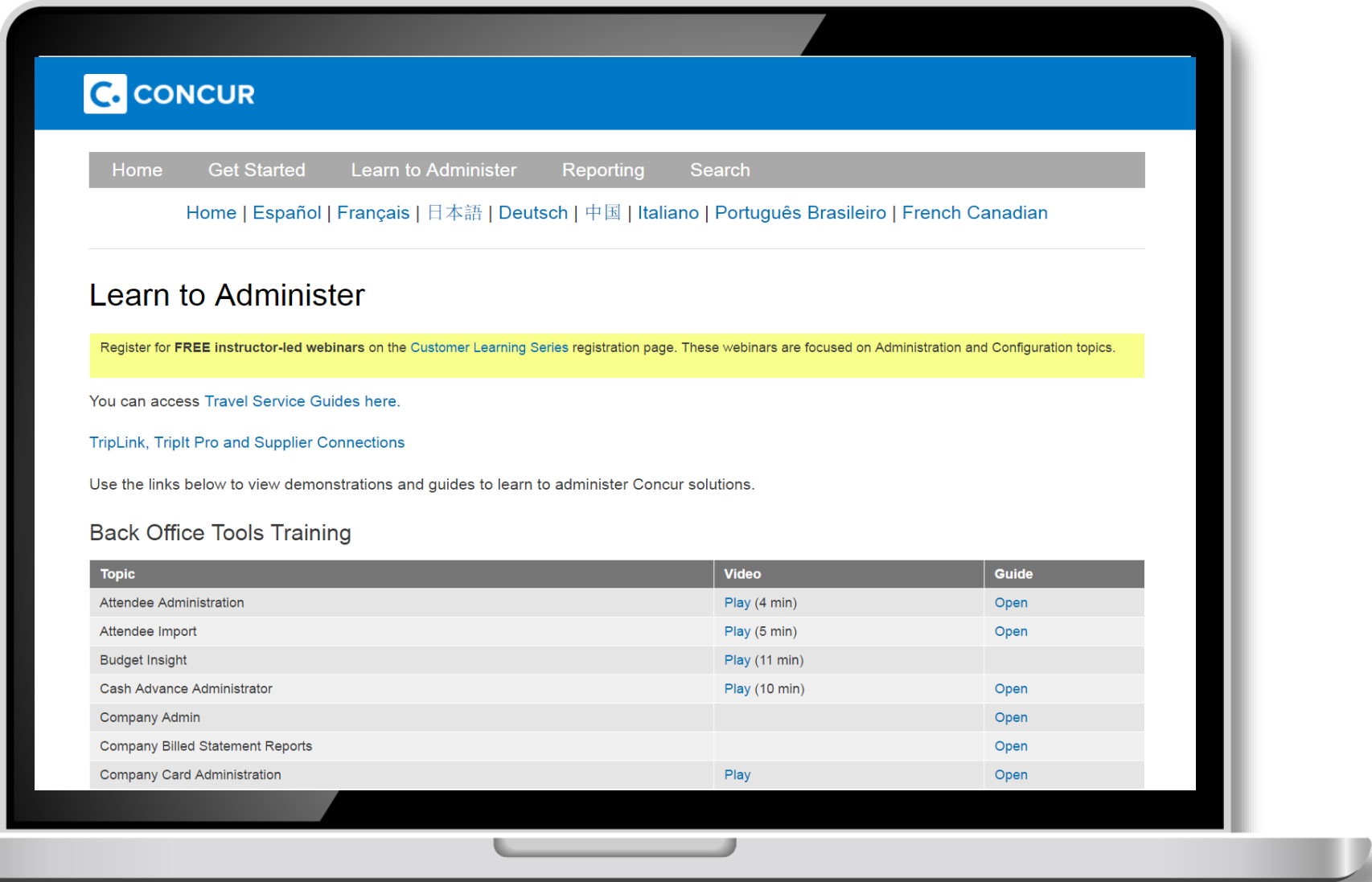
*** The Advanced Configuration class is taught Globally but only in English.

Administrators:



Learn to Administer
Quickly learn the basics of administering Concur products.

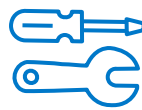
Learn to Administer



Administrators:



Tutorials: over 50 quick and easy to follow videos and documents for products offered by Concur

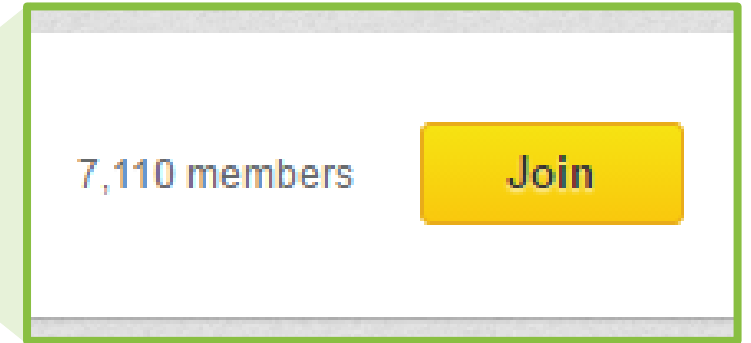
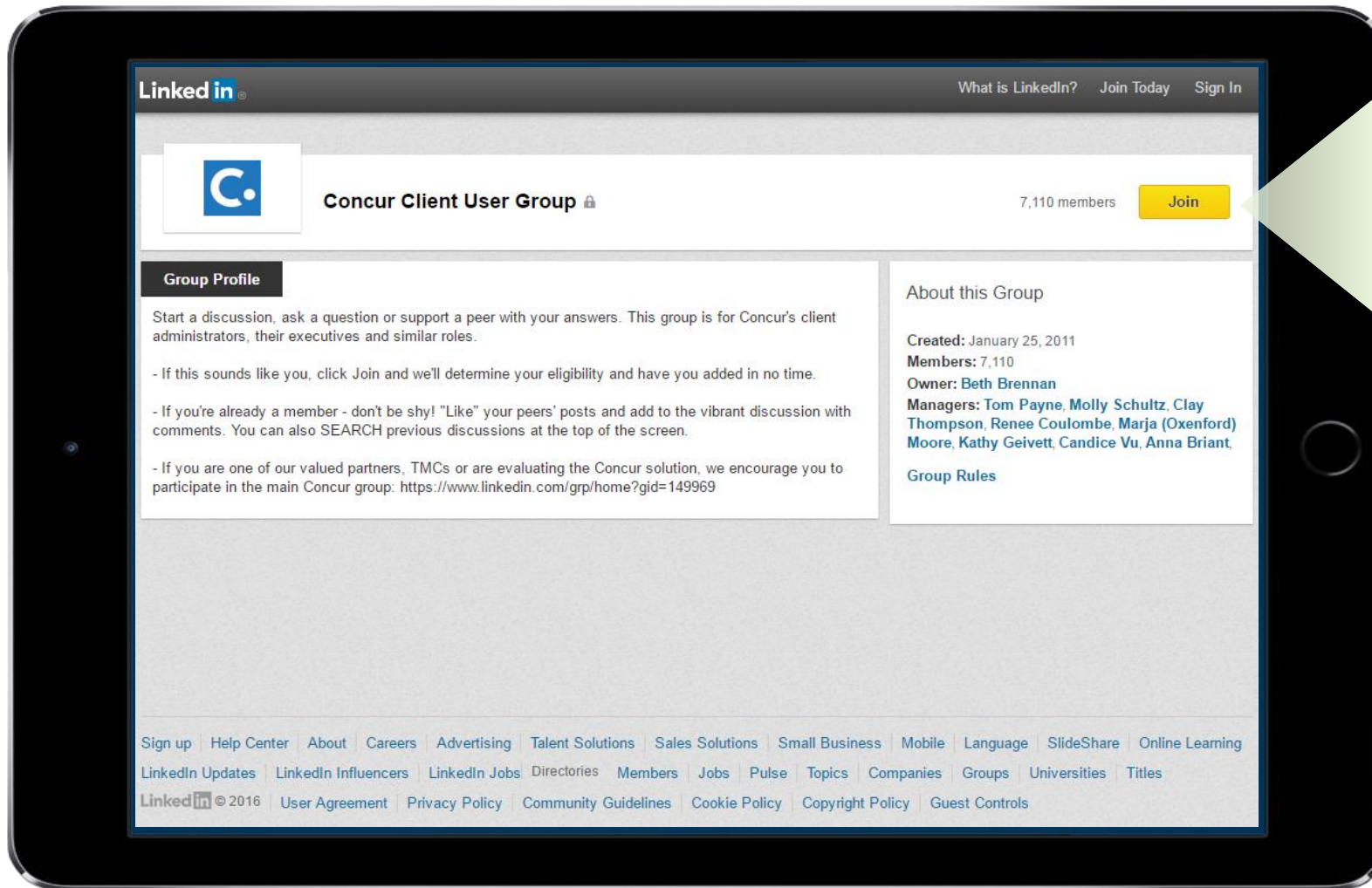


Multiple Learning Tools: whether you are configuring the system or learning back office tools, tutorials are available in this tab

Examples:



Additional Resources



Connect with your peers:
Join the LinkedIn Concur Client User Group and share best practices and learn from other users
(See resource slide for link to join)

Additional Learning Opportunities



Join us at Concur's Fusion Exchange—our premier one-day training, educational, and networking event.

At this complimentary event you will connect with your peers, Concur executives, and travel, expense, and invoice experts and partners. Demo the latest Concur products and learn how to get the most out of the ones you have. Explore trends and new solutions in travel, expense and vendor invoice management along with tips and best practices that will optimize your program today and in the future.

Scheduled events

<p>Chicago July 14, 2016</p> <p>Event details</p> <p>Register now</p>	A photograph of the Chicago skyline at dusk, featuring the Willis Tower.	<p>Houston Aug 11, 2016</p> <p>Event details</p> <p>Register Now</p>	A photograph of the Houston skyline at dusk, featuring several skyscrapers.
<p>Toronto Summer 2016</p>	A photograph of the Toronto skyline at night, featuring the CN Tower and the Rogers Centre.	<p>Tokyo September 8, 2016</p>	A photograph of the Tokyo skyline at night, featuring a bridge with blue lights.
<p>Paris October 3-4, 2016</p>	A photograph of the Paris skyline at dusk, featuring the Eiffel Tower.	<p>San Francisco Fall 2016</p>	A photograph of the San Francisco skyline at dusk, featuring the Golden Gate Bridge.
<p>London October 5, 2016</p>	A photograph of the London skyline at dusk, featuring Big Ben.		

Contacting Learning Services

If interested in training, send an email to training@concur.com

Please include:

- A description of your training need (live training for end user, admin, reporting, or advanced configuration, custom training materials, virtual or onsite, etc.)
- The service type (Standard, Professional or Premium)
- Any other notes that might be helpful (targeted go-live date, number of employees needing training, etc.)

Additional details:

- All client training's will begin after implementation of Concur is complete
- Your Client Executive can assist you on deciding which training would be right for you and your organization
- There are continuously new updated trainings being added to the training website – check it out if you have not been back in a while!
- We prefer a 10 day notice for all customized trainings

Questions

Resources

- **Access the Concur Training site:** www.concurtraining.com
- **Join the LinkedIn Concur Client User Group:**
<https://www.linkedin.com/grps/Concur-Client-User-Group-3760755/about?>
- **Contact Concur Learning Services:** training@concur.com

