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?
Training Toolkit

Visit: www.concurtraining.com to learn more and get started with Concur solutions.
Where do I start?

Learn the Basics
Quickly learn to use Concur products.
Learn the Basics

- Demonstration of Concur Travel and Expense
- Concur Travel and Expense Integration
- Getting Started Guide
- Icon Quick Reference Guide

Getting Started

- Exploring the Concur Home Page
- Logging on to Concur
- Updating Your Travel Profile

Using Concur Travel

- Booking a Car
- Booking a Flight
Standard Training Includes:

- **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.

www.concurtraining.com
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

Click on the icon for your smartphone to get started...

- iPhone
- Android
- Windows Phone
- BlackBerry

Click here for information and resources to help you communicate, promote, and train your organization to use Concur Mobile.

www.concurtraining.com
Concur Request

Concur Request automates the spend request and approval process for both travel and everyday expenses, giving you the data you need to accurately track and better control spending. By increasing visibility into planned expenses and up-to-date budget data, you can make strategic spending decisions before any spending actually occurs.

Guides
- Authorization Request: Overview
- Request FAQ
- Request Technical Toolkit

Creating a Request
- Manually Creating and Submitting a Request
- Request and Travel Integration - Booking a Trip prior to an Automatic Request Approval
- Request and Travel Integration - Requesting Approval prior to Booking a Trip
- Using Offline Booking to Request Travel

Using Special Features
- Adding Expenses to a Request
- Adding Fixed Allowances to a Request
- Closing a Request
- Requesting a Cash Advance

Approving a Request
- Approving Requests

Reconciling a Request to an Expense Report

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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

www.concurtraining.com
TripLink & TripIt Pro

TripLink, TripIt Pro, and My Travel Network

Follow the steps to get started with TripLink and promote TripIt Pro and Supplier Connections with your users. These items should be viewed and executed sequentially.

Step 1A – Getting Started - Understanding TripLink, TripIt Pro and Supplier Connections
- TripLink, TripIt Pro and Supplier Infographic
- How TripLink Works
- Debunking 7 myths and solving the challenges created by open booking
- TripLink and Travel Management Companies FAQ
- FAQ about Traveler Engagement Platform
- PDF

Step 1B – Getting Started - Deploying TripLink
- How to deploy TripLink
- TripLink Admin Guide
- Using TripLink - Setting up discount codes, audit rules and more
- Video

Step 2 – Enabling your end-users
- TripLink Promotion Guide
- PDF

www.concurtraining.com
Poll Question

• Did you know that Concur offers customized training? Yes/No
Customized Training Includes:

**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?

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

www.concurtraining.com
Reporting Training

Reporting resources including guides, online training videos and recorded training sessions for Concur Analysis and Business Intelligence.

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<th>Guides</th>
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<td>Analysis vs. Intelligence Comparison Guide</td>
<td>Analysis and Business Intelligence</td>
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<td>Concur Analysis Training Manual (Spanish)</td>
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<td>Concur Business Intelligence Training Manual</td>
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<td>Concur Optimization - Best Reports to Track Business Metrics</td>
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<td>Adding a Dynamic Date Range Prompt to a Report Studio Report</td>
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<td>Adding Expense Entry Comments to a Report</td>
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www.concurtraining.com
Reporting Resources

Concur training site for reporting is broken into three categories:

- Training Guides & Resources
- Quick Tutorial Videos
- In-depth Training Videos

www.concurtraining.com
Intelligence Reporting Guide

Find reports quickly and easily with the Intelligence reporting guide broken down by a simple list of categories.
Structured Learnings Includes:

**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:

**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.

<table>
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<th>Structured Class Type</th>
<th>Additional Permissions</th>
<th>User Roles</th>
<th>Configuration Restricted</th>
<th>Configuration Unrestricted</th>
<th>Analysis/Intelligence</th>
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<td>Boot Camp</td>
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<tr>
<td>Advanced Configuration</td>
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*** The Advanced Configuration class is taught Globally but only in English.***

www.concurtraining.com
Administrators:

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

Register for FREE instructor-led webinars on the Customer Learning Series registration page. These webinars are focused on Administration and Configuration topics.

You can access Travel Service Guides here.

Triplink, Triplink Pro and Supplier Connections

Use the links below to view demonstrations and guides to learn to administer Concur solutions.

Back Office Tools Training

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<th>Video</th>
<th>Guide</th>
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<tbody>
<tr>
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<td>Play (4 min)</td>
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<tr>
<td>Attendee Import</td>
<td>Play (5 min)</td>
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<tr>
<td>Budget Insight</td>
<td>Play (11 min)</td>
<td>Open</td>
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<tr>
<td>Cash Advance Administrator</td>
<td>Play (10 min)</td>
<td>Open</td>
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<tr>
<td>Company Admin</td>
<td>Play</td>
<td>Open</td>
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<tr>
<td>Company Billed Statement Reports</td>
<td>Play</td>
<td>Open</td>
</tr>
<tr>
<td>Company Card Administration</td>
<td>Play</td>
<td>Open</td>
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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:**

[Images of tutorials on Concur's website]

www.concurtraining.com
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.
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