Concur Expense Startup Guide - MEMBERS

Logging on to SAP Concur:

Website Address: www.concursolutions.com

User Name: Follows the format **member#@pipsc** (e.g 2347654@pipsc).

Look up your member# here: https://www.pipsc.ca/member-tools/find-your-membership-number

Password: On your first log in session, click on "**Forgot your password**". This will generate an email to your preferred email address with instructions to update your password. This initial password reset must be completed via the web-based version of Concur and NOT via the mobile app.

Using the mobile app:

The Concur mobile app may be downloaded from your app store; only IOS and Android are supported. The app is very intuitive. It offers full functionality including the ability to quickly photograph receipts on the go and attach them to expense claims immediately or later. Note: prior to using the Concur Mobile app, you must register at https://www.concursolutions.com/profile/Profile_Mobile.asp?origin=menu.

A few notes to help you get the most out of Concur expense:

● Please *discontinue* filling in paper expense claims.
● Accurate entry of expense claims data is important. Finance cannot make corrections for you. Errors will cause the report to be returned to you for update and will delay processing.
● To start an expense claim, click "Expense" on the menu bar and then click on "Create New Claim" – OR - click "+ Start a Claim".
● System notifications and communications for Concur Expense are by email, using the preferred email address we have on file for you.
● If you want to email expense images to attach to your expense report in Concur, you will first need to verify your email address. The email address must not be associated with another account in Concur. Use this link for a very short training video on setting it up: https://www.concurtraining.com/resources/receipt_store.htm
● Declaration (affidavit) for a missing receipt can be found by clicking on the "Attach Receipt" button in any expense item.
● Any compensatory salary expense entered in Concur is in gross dollars. Statutory deductions will be applied at the time of disbursement.

Training and help:

Once you are logged in, click on **Help** at the top right of your screen and then select:

Training:

- at the top, on the far left, open "**+ Expense**" training videos for short videos on a wide range of expense topics.
- See Guides and FAQs section for the Concur expense quick start guide.

☺**there is also a link to the "PIPSC Travel Policy" and reimbursements "Schedule A"**
☺*there is a link to a custom PIPSC training video on using Concur expense*

- See Concur Mobile Travel and Expense App section for help on using the mobile app.

Expense Help:

- at the top, on the far left, open **Expense User** for detailed Expense help topics.

Support contacts:

If you need additional help or would like to provide feedback (good or bad), please contact either:

Shani Gaspard, sgaspard@pipsc.ca , direct line: 613-691-4824

Sherri Theoret, stheoret@pipsc.ca, direct line: 613-691-4822

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