

Logging on, Exploring Home Page, and Updating Your Profile

A. Logging on to Concur

- 1. Access the Concur Global Expense Management System at <u>www.Concursolutions.com</u>
- 2. Enter your User Name (pmfkey@ca.com; not pmfkey@contractor.ca.com).

Note: The Concur system always uses <u>pmfkey@ca.com</u> as the login ID both for initial setup and afterwards.

3. First time users, select **Forgot your password.**

User Name	
Password	
Remember user name on this com	puter
	Sign In
Frend warman 2	

4. Then select **Send me an email with link to reset my password**.

Forgot Passwo	ord	
Enter your User Name		
CRAKE02@ca.com		
 Send me an email with my passwork Send me an email with a link to rese 	d hint t my password	Yak
	Cancel	Submit

5. Reset your password per the instructions in the email. You will then use this password going forward.



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B. Exploring the Home Page

C. CONCUR Expense Approvals Reporting -	App Center					Help - Profile - 😞			
C. CONCUR Hello, Kenneth		+ Start a Report	↓ Upload Receipts	03 Required Approvals	10 Available Expenses	O gen Reports			
COMPANY NOTES	7								
T&E Policy T&E Country Charts Concur Training Toolkit This link will provide information to utilise the Concur Expense System.			Q	uick Task	Bar				
NY TASKS									
03 Required Approvals →	10 Available Expen	ses	÷	03 Open R	eports	→			
Janaki G. Email1 Test \$12.00 — Expense	09/21 AMERICAN EXPRESS T \$20.00	09/21 AMERICAN EXPRESS TKT FEE \$20.00			09/27 NA bus exp issue \$150.00				
Yogesh P. YCP - 9/26/16 Test \$203.67 — Expense	09/21 EMIRATES AIRLINES \$5,729.76		09	/13 Ken Test Dome \$975.00	estic				
						Help 🗸			
NOTE: To return to the home	page from any o	ther page	e,			Profile -			
click the Concur logo on the t	op left of the scre	en.	Mitter	tal Shah		To Sign Out			

C. Updating Your Expense Profile

- 1. The first time you access the Concur system you will have to provide certain information and apply settings.
- 2. Click on the dropdown arrow next to **Profile** and select **Profile Settings**.



 Under Your Information / Personal Information, you are only required to provide and "verify" Email Addresses to take advantage of the mobile capabilities, and, update your Expense Preferences under Expense Settings. Refer to the mobile app QRG for set-up of your mobile device.





Note: *in addition, you can do optional updates to your contact information, including adding an expense delegate if you have an administrator doing expenses for you, and under system settings you can update language settings, date format, time zone, etc. There is also an option to change your password should you choose to do so.*

D. Verify email address

- a. When you verify your email address you can:
 - i. associate information forwarded from that email address to your account.
 - ii. forward your receipt images to receipts@concur.com to have your receipts uploaded into your Available Receipts.
 - iii. Receive email notification messages for CA PM expense approval and status change notification emails from Concur
- b. How to verify my email address:
 - i. By default, the email address will be in the format of PMFKEY@ca.com which doesn't work for the receipt verification functionality. So pls. follow the next steps provided to add an email address for the receipt verification.
 - ii. Click On "Add an Email address" on the right corner (highlighted in yellow in screenshot below)

Email Addresses			Go to top
Please add at least one email address.			
How do I add an email address?			
Travel Arrangers / Delegates			
Why should I verify my email address?			
How do I verify my email address?			
			[+] Add an email address
Email Address	Verify	Contact?	Actions

- iii. Add your email address you use for general communications with CA, either your personal email address used or your CA email *firstname.lastname@contractor.ca.com*.
- iv. Once you have saved an email address, click the Verify link.
- v. Check your email for a verification message from Concur.
- vi. Copy the code from the email message into the **Enter Code** box next to the Email address below.



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C. CONCUR Expension	se App Center	numeri Sustam Sattinga Makin	Designation			Profile -
Profile Personal Inform	lation Change Pas	sword System Settings Mobile	Registration			
our Information	My Profi	e - Personal Infor	mation			
Personal Information	iviy i i Off		mation			
Company Information	Disabled fields (gra	y) cannot be changed. If there are errors	in these fields, contact your company's tra	vel administrator.		Change
Contact Information	Fields marked[Req	uired] and [Required**] (validated and re	equired) must be completed to save your pr	ofile.		r lettire
Email Addresses						
xpense Settings	Title Firs	t Name Middle Name N	ickname Last Name Suff	ix		
Expense Information	The International Internationa	equired	[Required]	•		
Expense Delegates			Unan			
Expense Preferences						
Favorite Attendees	Company Inform	ation				Go to to
)ther Cotting	Employee ID					
niner settings	SHAMI10					
System Settings Connected Apps						
Concur Connect			Save			
Change Password	Contact Informa	lion				Go to to
Mobile Registration						
	Mobile Phone	-				
		•				
			Save			
(Email Addresses					Go to to
	Please add at lea	st one email address.				
	How do I add a	n email address?				
	Travel Arrange	<u>s / Delegates</u>				
	 Wny should i v How do I verify 	my email address?				
						[+] Add an email addres
		Email Address		Verify	Contact?	Actions
	Email 1	shami10@testcatest.com	😋 Check email for code	Resend Cancel	Yes	L
			Enter Code			
				OK		

vii. Click **OK** to submit the code and complete verification.

Email Addre	SSES						Go to top
Please add a	t least one email address.						
 How do I a Travel Arra Why shoul How do I y 	add an email address? Ingers / Delegates d I verify my email address? erify my email address? Email Address		Verify	Contact?	[+] Action	Add an	email address
Email 1	govja01@ca.com	Not Verified	Verify	Yes	Ø		
Email 2	janaki.govindarajan@ca.com	S Verified	Disable Verification	No	Ľ	Ē	
Emergency (Contact						Go to top

viii. Once you see the Green Verified ^{Verified} check, you are finished.



For any technical issues or assistance with the Concur system, contact the GIS Service desk via any of the channels as mentioned below:

PHONE SUPPORT

The GIS Service Desk can be reached on the below listed contact numbers. We operate 24x7.

Region	Telephone Numbers
North America / Latin America	Toll: +1-631-342-3955
	Toll Free: +1-877-742-2435
EMEA	Toll: +44 1753 242223
АРЈ	Toll: +61 2 8898 2510
India	Toll Free: 0008004402472