Concur P-Card Holder & Delegate Training Class

- Introduction, Changes to P-Card Processes, & Roles
- Getting Started & P-Card Expense Reports Demo
- Using Mobile Devices with Concur
Introduction, Changes to P-Card Processes, & Roles

- Introduction
- Types of Cards
- Changes to P-Card Process with Concur
- P-Card-related Roles in Concur
Why am I here?

Why Training is Important

- Every p-card holder must electronically “sign” their reports by submitting them.
- Concur won’t allow you to submit reports that violate certain policies.
- Your department/division may decide to change their processes and have *you* create and submit all travel requests/reports.
- Knowing the system can make your work life easier, especially with regards to receipts!
- Some policies have changed.
### Types of Procurement Cards

#### Commonly Used Cards

**One Card**
- Each month, amount you can spend refreshes
  - Individual Card
    - Has Cardholder’s Name
    - E.g. Tuffy Titan
  - Department Card
    - Has Department’s Name
    - E.g. Dept of English

**Declining Balance Card**
- You are given a set amount each fiscal year which does not refresh

For both types of cards, departments can request an increase in available funds.
Changes to P-Card Process with Concur

Current Process

• Submit P-Card Packet by 10th of month with signed Approval of Procurement Card Transactions form, a signed US Bank Cardholder Activity report, receipts, and documentation

• Packet includes all p-card transactions: travel and goods & services

Concur

• Submit a P-Card Expense Report by 10th of month with receipt attached to each expense item and documentation attached to report.

• Expense Report is electronically signed by p-card holder and their direct MPP

• Expense Report is only considered “received” when approved by MPP

• Transactions must be at least added to report by 10th and received by Procurement by end of next billing cycle or card will be shut off

• P-Card Expense Report is ONLY goods & services. Travel-related p-card expenses should be put on a Travel Expense Report.
Roles in Concur: P-Card

**P-Card Holder**
- Individual whose name is on the p-card
- Or individual responsible for a department p-card

**Delegate/Preparer**
- Individual who prepares p-card expense report on behalf of an individual
- Can create reports but cannot submit

**Approver**
- Individual who is authorized to approve a user’s p-card expense report
- This is now your direct MPP
• Accessing Concur
• Filling out Concur profile
• Setting up Delegates
• Creating a monthly p-card expense report for goods & services
• Viewing status of your expense reports

http://finance.fullerton.edu/concur
Using Mobile Devices with Concur

- Concur Mobile app overview
- ExpenseIt Pro app overview
Concur Mobile App

What can I do with this app?
• book or view trips
• view expenses
• create & submit expense reports
• view status or submit existing travel requests
• take picture of receipts
• add mileage expense to a report
• approve expense reports

http://concur.com/mobile
Or App Center in Concur
Highly recommend setting up **Automatic export** expenses to Concur, as well as **Email** or **Push** notifications to stay aware of what’s happening with your expenses.
Delegates in Concur Demonstration
Approval in Concur Demonstration
Questions?

Concur Support

concur@fullerton.edu or 657-278-7777
http://finance.fullerton.edu/concur