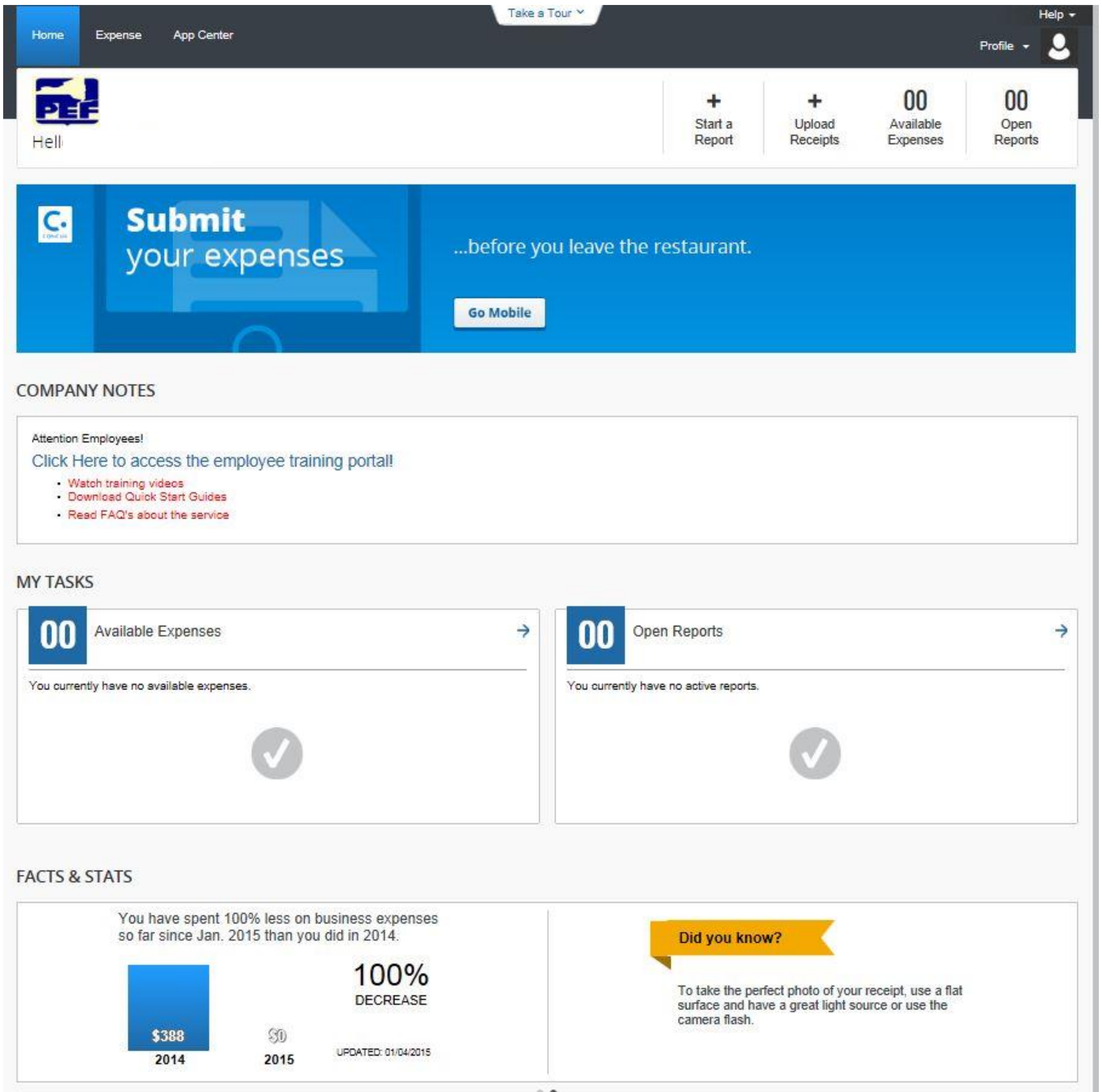
CONCUR / e-EXPENSE QUICK START USER GUIDE

Use the user name and password emailed to you and log in at www.concursolutions.com.

If you do not have a user name or password contact Meghan Allen at mallen@pef.org
or at the PEF headquarters number: 800-342-4306, ext. 208.

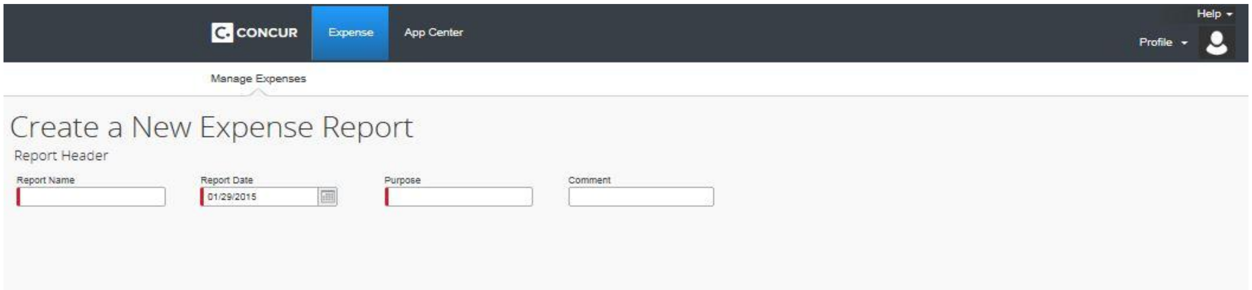
Your landing page will look like this:



If it is your first time using e-Expense please change your password from the one given to you for initial login. You can do this by clicking on the "Profile" drop down menu in the upper right hand corner of your screen. Click on "Profile Settings" and then under the "Profile Options" heading in the middle of your screen click on "Change Password". Enter your new password as well as a password hint which will be e-mailed to you if you request a forgotten password email.

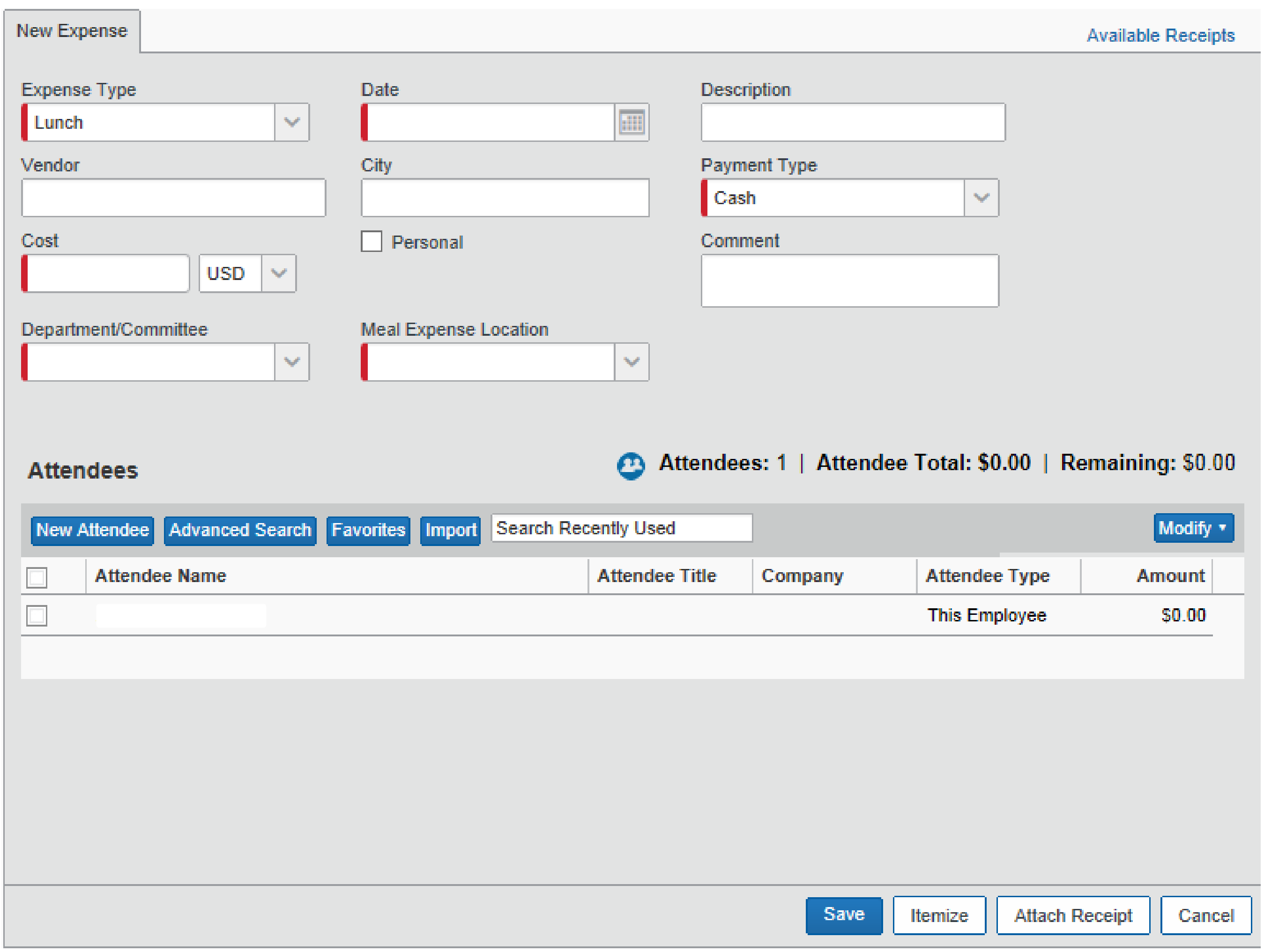
After changing your password return to the landing page. When you click on "Start a Report" (which is on the 2nd banner from the top), it will bring you to the "Manage Expenses" tab. You can also get to the "Manage Expenses" tab by clicking on "Expense" from the choices in the top banner.

Once you click, your screen will look like this:



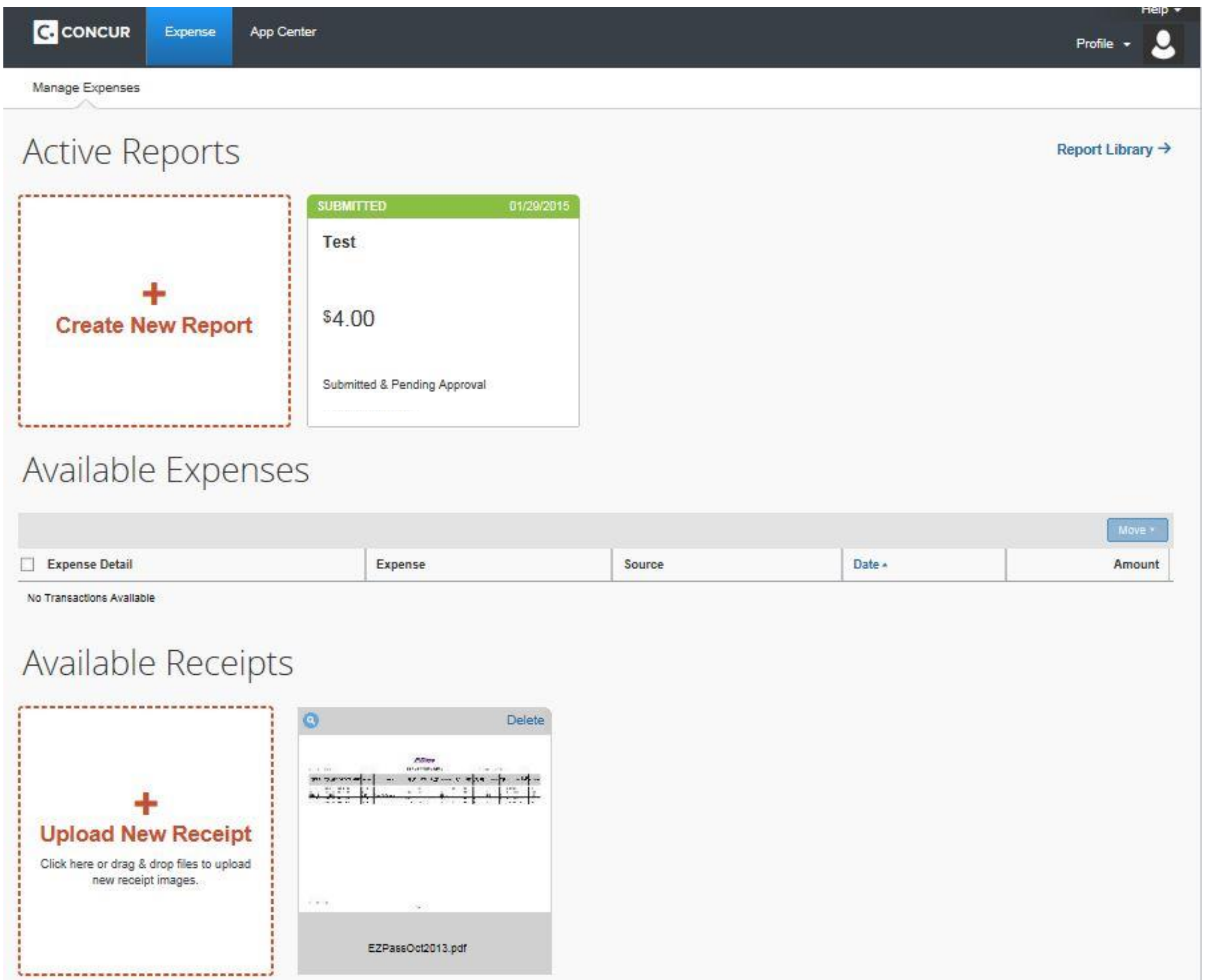
To create a new report go to the "Report Name" field and put in a title such as "Travel to Albany 3/15-3/17/15". Then enter the date and purpose of the travel (such as "DOCCS LM Meeting").

Choose "New Expense" and then select an Expense Type (such as mileage, tolls, lunch, etc.). Choosing the Expense Type will automatically redirect you to a page that will look like this:



The red highlighted cells are required entries. Indicate the meeting you attended by clicking the drop down menu under Department/Committee. If you're a PEF *member* choose the Committee you belong to/meeting you attended. If you are a PEF *staff person* you choose <u>your Department ONLY</u>, regardless of what meeting you attended.

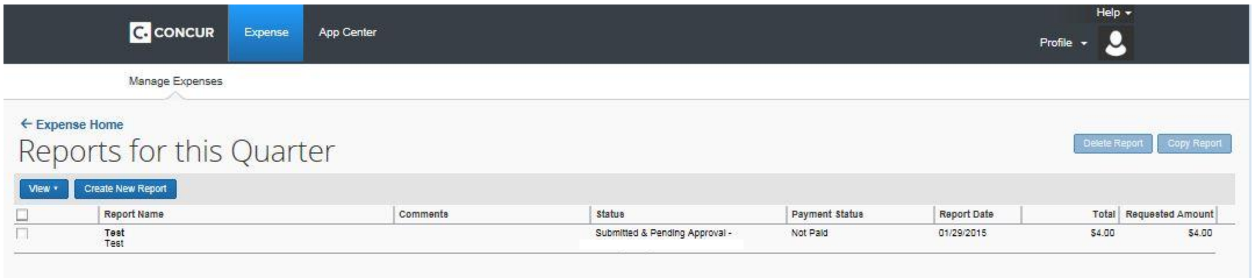
If you want to view the main expense page without creating a new expense simply click on that same "Expense" tab in the top banner. This screen will display your active reports and available receipts (see the screen shot below). On this page you can easily drag and drop saved receipts right onto the screen. You can also still choose "upload new receipt" and search for the saved document in your files.



If you want to view previously submitted reports click on the "Report Library" option (looking at the screen shot above it's in the upper right hand corner).

The "Report Library" will take you to the screen shown below which automatically displays all your reports for the current quarter as a default (which Concur does by calendar year, not PEF's fiscal year).

Go to the "View" drop down menu (directly under the "Reports for this Quarter" heading) and select the time period you're looking for.



To log out just click on "Profile" and then click on "Sign out".

If you have any questions please contact Meghan Allen at mallen@pef.org or at the PEF headquarters number: 800-342-4306, ext. 208.

*Please note: If you want to use the Concur app on your phone you can search for it in your applicable App store (Google Play on Android phones and iTunes for iPhones) and then download it. It will be the app called Concur and the icon should look like this: