

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:

The screenshot shows the Concur e-Expense landing page. At the top is a navigation bar with links for Home, Expense, and App Center, along with a 'Take a Tour' button and a user profile icon. Below the navigation bar is a header section with the PEF logo, a greeting 'Hello', and four action buttons: 'Start a Report', 'Upload Receipts', 'Available Expenses', and 'Open Reports'. A large blue banner below the header says 'Submit your expenses ...before you leave the restaurant.' with a 'Go Mobile' button. The 'COMPANY NOTES' section contains a message for employees to access the training portal, with links to watch videos, download guides, and read FAQs. The 'MY TASKS' section features two cards: 'Available Expenses' and 'Open Reports', both showing '00' and indicating no current activity. The 'FACTS & STATS' section displays a bar chart comparing business expenses for 2014 (\$388) and 2015, showing a 100% decrease. A 'Did you know?' tip box provides advice on taking clear photos of receipts.

Home Expense App Center Take a Tour Help

PEF Hello

+ Start a Report + Upload Receipts 00 Available Expenses 00 Open Reports

Submit your expenses ...before you leave the restaurant. Go Mobile

COMPANY NOTES

Attention Employees!
Click Here to access the employee training portal!

- Watch training videos
- Download Quick Start Guides
- Read FAQ's about the service

MY TASKS

00 Available Expenses → You currently have no available expenses.

00 Open Reports → You currently have no active reports.

FACTS & STATS

You have spent 100% less on business expenses so far since Jan. 2015 than you did in 2014.

\$388 2014 **00** 2015 **100% DECREASE** UPDATED: 01/04/2015

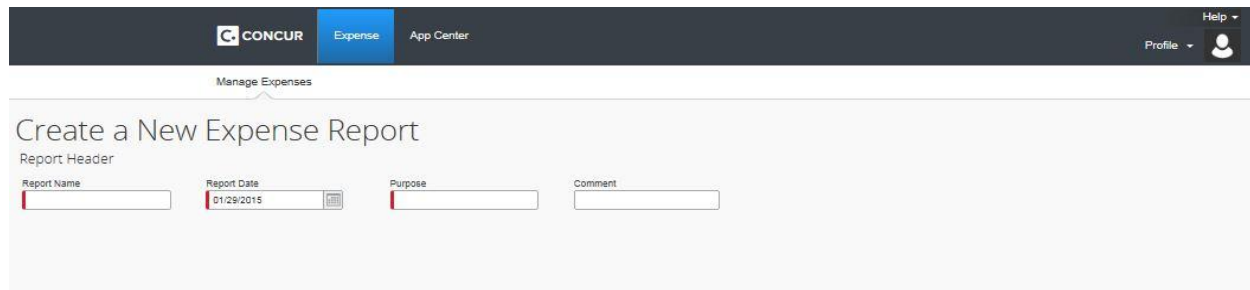
Did you know?

To take the perfect photo of your receipt, use a flat surface and have a great light source or use the camera flash.

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.

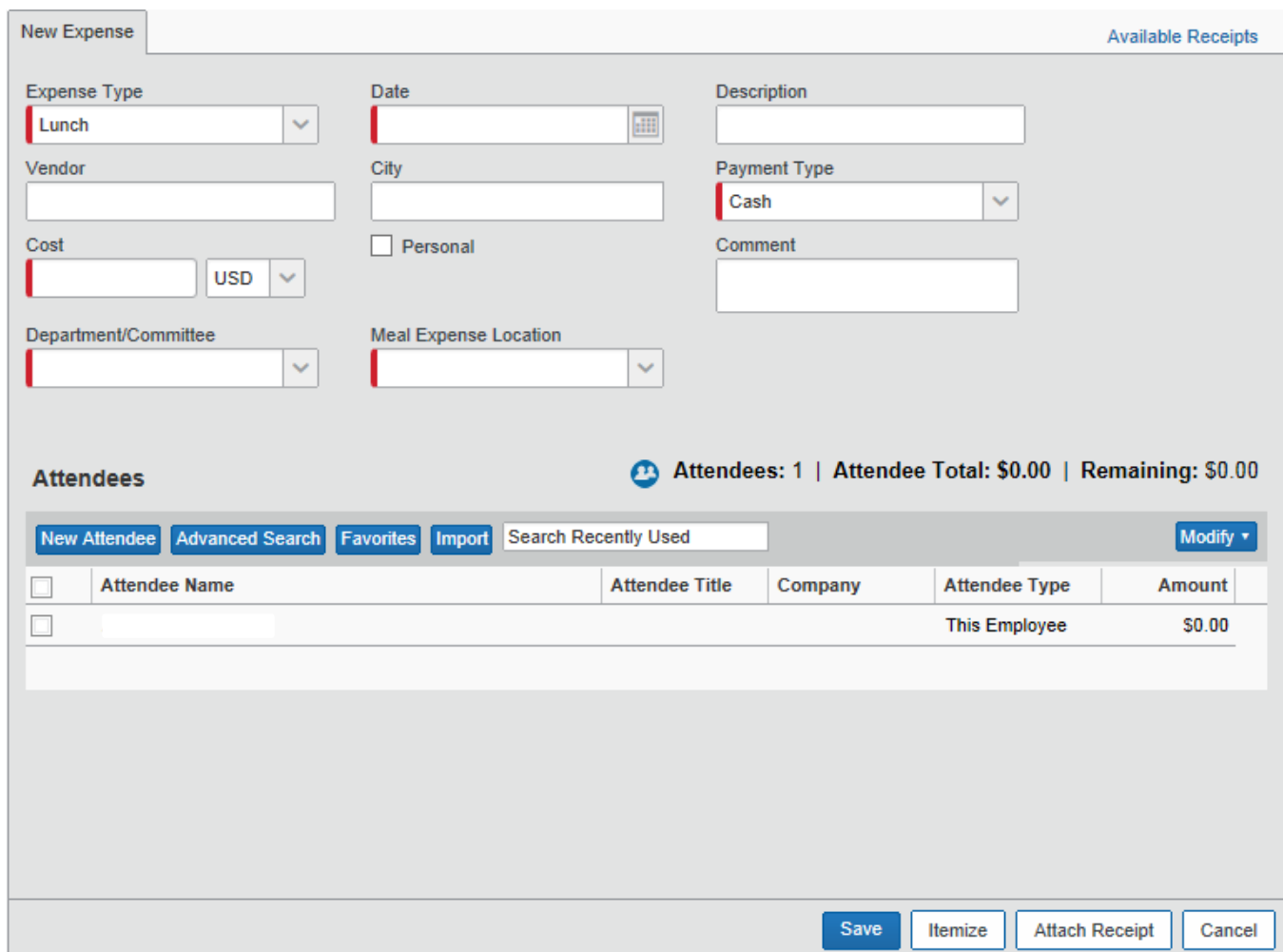
Once you click, your screen will look like this:



The screenshot shows the 'Manage Expenses' page with a 'Create a New Expense Report' form. The form has a 'Report Header' section with fields for 'Report Name', 'Report Date' (set to 01/29/2015), 'Purpose', and 'Comment'. The 'CONCUR' logo and 'Expense' tab are visible in the top navigation bar.

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 screenshot shows the 'New Expense' page. It features a 'New Expense' tab and an 'Available Receipts' link. The form includes fields for 'Expense Type' (set to 'Lunch'), 'Date', 'Description', 'Vendor', 'City', 'Payment Type' (set to 'Cash'), 'Cost' (with a 'USD' dropdown), 'Personal' checkbox, 'Comment', 'Department/Committee', and 'Meal Expense Location'. Below the form is an 'Attendees' section with a summary: 'Attendees: 1 | Attendee Total: \$0.00 | Remaining: \$0.00'. It includes buttons for 'New Attendee', 'Advanced Search', 'Favorites', 'Import', and a search bar. A table lists attendees with columns for 'Attendee Name', 'Attendee Title', 'Company', 'Attendee Type', and 'Amount'. The table shows one attendee: 'This Employee' with an amount of '\$0.00'. At the bottom are buttons for 'Save', 'Itemize', 'Attach Receipt', and 'Cancel'.

Attendee Name	Attendee Title	Company	Attendee Type	Amount
			This Employee	\$0.00

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 your Department ONLY, 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.

The screenshot displays the CONCUR Expense management interface. At the top, there is a navigation bar with the CONCUR logo, 'Expense' (highlighted in blue), and 'App Center'. On the right, there are links for 'Profile' and 'Help'. Below the navigation bar, the 'Manage Expenses' section is visible. The main content area is divided into three sections: 'Active Reports', 'Available Expenses', and 'Available Receipts'. The 'Active Reports' section shows a 'Create New Report' button (highlighted with a red dashed border) and a 'SUBMITTED' report for 'Test' dated 01/20/2015, with an amount of \$4.00. The 'Available Expenses' section shows a table with columns for 'Expense Detail', 'Expense', 'Source', 'Date', and 'Amount', but it is currently empty with the message 'No Transactions Available'. The 'Available Receipts' section shows an 'Upload New Receipt' button (highlighted with a red dashed border) and a preview of a receipt image labeled 'EZPassOct2013.pdf'.

CONCUR Expense App Center

Profile Help

Manage Expenses

Active Reports

Report Library →

SUBMITTED 01/20/2015

Test

\$4.00

Submitted & Pending Approval

Available Expenses

<input type="checkbox"/> Expense Detail	Expense	Source	Date	Amount
No Transactions Available				

Available Receipts

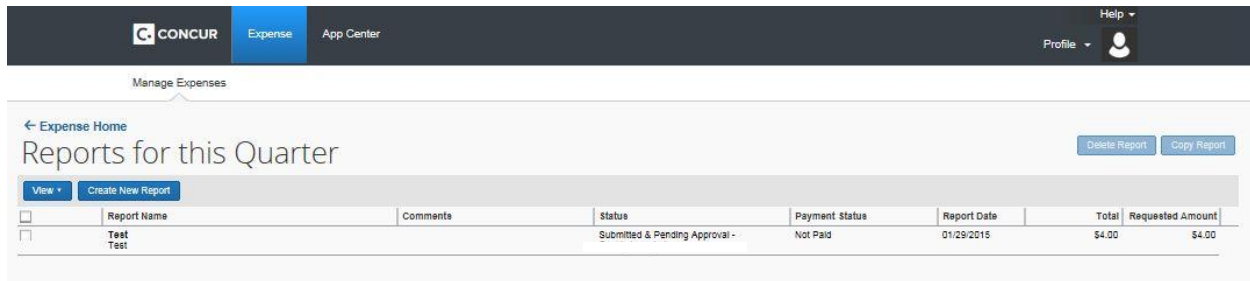
Click here or drag & drop files to upload new receipt images.

EZPassOct2013.pdf

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:

