



Concur

Expense Reimbursement Guide



Concur Accounts

- If you have already been set up with a Concur account, you will log in at:
 - www.concursolutions.com
- If you have not yet been set up with a Concur account, please contact:
 - Danielle Gregoire at dgregoire@pef.org



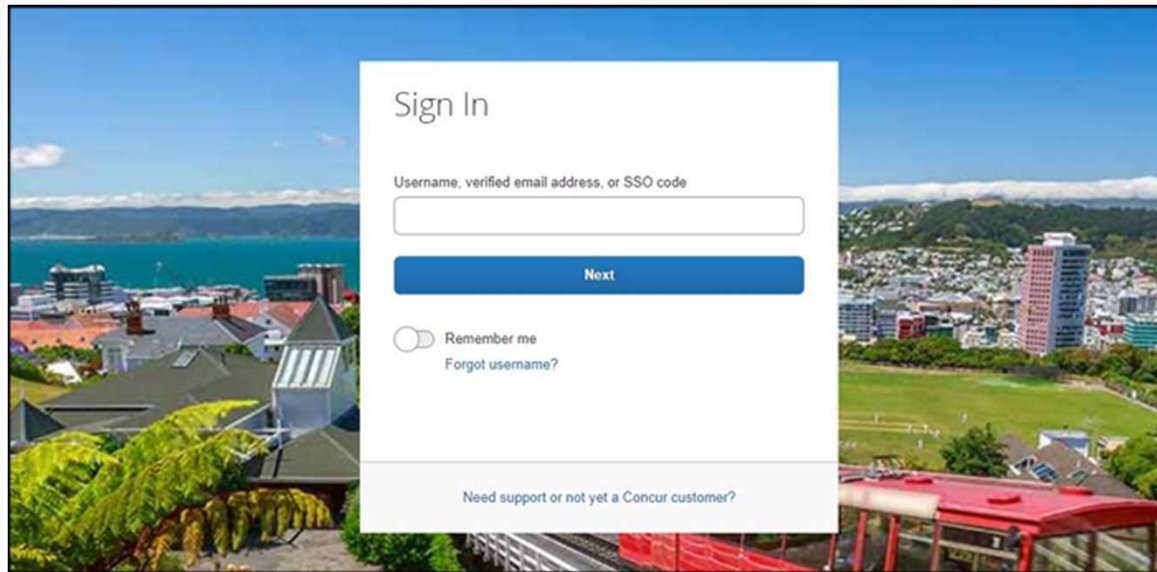
Logging In

- Your username will be provided to you in an email.
- You will be provided a temporary password when your account is initially created
- Once you log in you can change your password by clicking on the Profile in the upper right corner of the screen >Profile Settings> Change Password.
- Once you enter your password you will be prompted to do a 2 step authentication process. See slide 8 for details.

Logging In



- Fill in your username as explained on Slide 3



Logging In



Fill in your password

< Sign In

neverbooking_ls_en@p00103105exu

Password

Sign In

Forgot password?

Need support or not yet a Concur customer?

If you forgot your password, see the next slide.

Logging In – Password Reset



Retrieving and Changing your Password

You can reset your password if you forget it. To Retrieve Your Password: 1. On the Sign In screen, enter your username, and then select the Forgot password? link.

A screenshot of the 'Sign In' screen. At the top left is a back arrow and the text '< Sign In'. Below this is the username 'neverbooking_ls_en@p00103105exu'. Underneath is a 'Password' label and an empty password input field. Below the input field is a blue 'Sign In' button. At the bottom left of the main content area is a link labeled 'Forgot password?'. At the very bottom of the screen is a footer link: 'Need support or not yet a Concur customer?'.

2. Enter the username associated with your account, and then select Send.

A screenshot of the 'Forgot Password' screen. At the top left is a back arrow and the text '< Forgot Password'. Below this is the instruction: 'Enter the username associated with your account. We will send an email with a link to reset your password.' Underneath is a 'Username' label and an input field containing the username 'neverbooking_ls_en@p00103105exu'. Below the input field is a blue 'Send' button. At the very bottom of the screen is a footer link: 'Need support or not yet a Concur customer?'.



To change your password

1. After you log in, in the upper right corner of the page, select Profile, and then select Profile Settings.

2. On the Profile Options page, select Change Password.

William Never

[Profile Settings](#) | [Sign Out](#)

Acting as other user ?

☒ Act on behalf of another user

☐ Act as user in assigned group (Proxy)

Search by name or ID

[Cancel](#) [Start Session](#)

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Request Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Company Car
Company Car

Concur Mobile Registration
Set up access to Concur on your mobile device.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

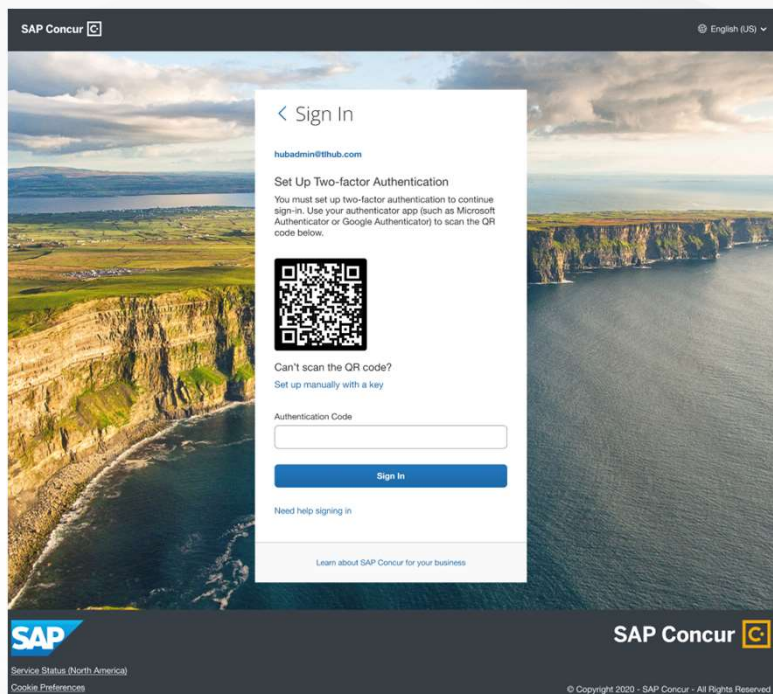
Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password
Change your password.

Two step Authentication



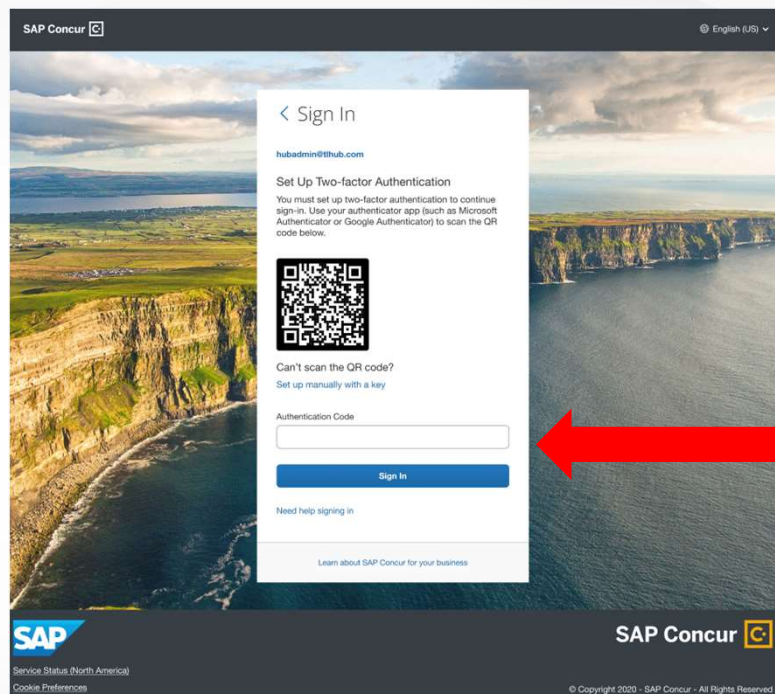
After you enter your password, you will get a new screen with a QR code presented



Download an authenticator app of your choice on your mobile phone. You are free to use any authenticator app- like Microsoft , Google, etc. Eg : <https://support.microsoft.com/en-us/account-billing/add-non-microsoft-accounts-to-the-microsoft-authenticator-app-7a92b5d4-d6e5-4474-9ac6-be0b6773f574>, <https://apps.apple.com/us/app/google-authenticator/id388497605>, https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en_US&gl=US. You generally go into the App Store or Play Store and search/download the authenticator app you wish to use. Or, you can choose from the following list: [Twilio Authy Authenticator](#), [Duo Mobile](#), [Microsoft Authenticator](#), [Google Authenticator](#)

If you do not have a phone or do not want to download an authenticator app to your mobile phone, you can also use authenticator apps on your browser. For example: For Google Chrome, <https://chrome.google.com/webstore/detail/authenticator/bhghoamapcdpbohphigoooaddinpkbai>. For Microsoft Edge, <https://microsoftedge.microsoft.com/addons/detail/authenticator-2fa-client/ocglkepbibnalbgmbachknglpdipecio>

Two step Authentication

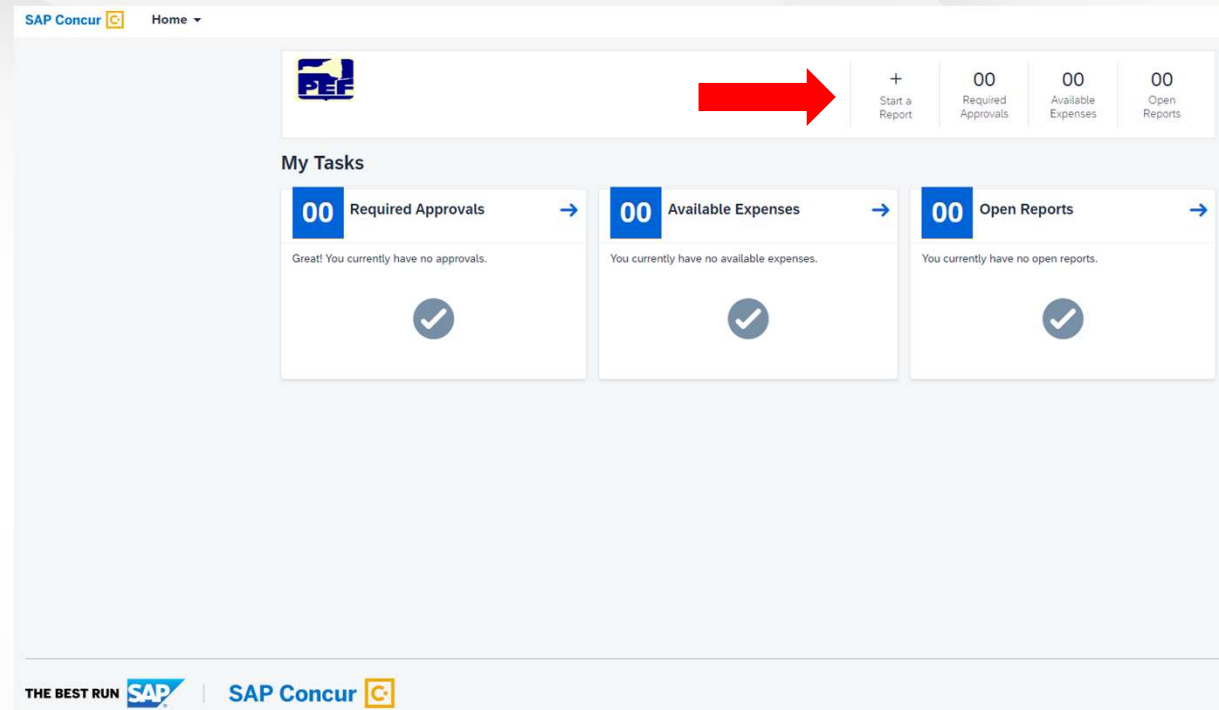


1. Click on ' Add account' or '+' sign or whatever button is available in the authenticator app for you to add a new account
2. Once the QR code scanner starts on the app, scan the QR code shown on the Concur sign in page. This will add your Concur account to the authenticator app.
3. Once this is done, For example purpose- if your account username is admin@pef.org right below this account on the authenticator app- a 6-digit code will be generated
4. Before the 6-digit code expires- please copy that code into the ' Authentication Code' field on the Concur sign in page and hit Sign In
5. You are now successfully logged in.

Starting a New Report



- Click on
+
**Start a
Report**



Creating the Report Title



- Fill in the boxes marked with a red asterix
- Report date can be the day you are entering the report
- Purpose is the reason you were traveling
- Click on create report when done

A screenshot of the SAP Concur 'Create New Report' form. The form has a header bar with 'SAP Concur' and 'Expense' dropdowns. The main form area is titled 'Create New Report' and contains three required fields: 'Report Name *', 'Report Date *', and 'Purpose *'. The 'Report Date' field is pre-filled with '10/20/2023'. Below these fields is a large text area for 'Comment'. At the bottom right, there are two buttons: 'Cancel' and 'Create Report'. A large red arrow points down to the 'Create Report' button. A small asterisk and the text '* Required field' are located at the top right of the form area.

Adding the Expense



Click on **SAP Concur**  in the top left corner

This will bring you back to your home screen.

Next, click on your open report

SAP Concur  Home ▾



+
Start a
Report

00
Required
Approvals

00
Available
Expenses

01
Open
Reports

My Tasks

00 Required Approvals →

Great! You currently have no approvals.



00 Available Expenses →

You currently have no available expenses.



01 Open Reports →


10/20 Test



Entering Expenses




- Click Add expense

SAP Concur  Expense ▾


[Manage Expenses](#) Processor ▾

Test \$0.00 Delete Report Submit Report

Not Submitted | [Report Number: I4X09R](#)

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾ [View Available Receipts](#) 

Add Expense Edit Delete Copy Combine Expenses Move to ▾



No Expenses

Add expenses to this report to submit for reimbursement.

Expense Type: Meals



- Fill in the required information:
 - Date of Meal
 - Cost of Meal (if over the maximum reimbursement rate, please lower to the proper amount)
 - Department/Committee you were traveling for
 - Meal Expense Location (location the meal was purchased ex: if purchased in Region 7, choose Regions 1-9; if purchased in Region 11, choose Regions 10-12)

Meal	Regions 1-9	Regions 10-12
Breakfast	\$12.00	\$15.00
Lunch	\$20.00	\$23.00
Dinner	\$45.00	\$50.00

Entering Expenses



- Choose the type of expense you want to enter. Scroll thru the list until you find the expense you want.

A screenshot of the SAP Concur 'Add Expense' dialog box. The dialog box is titled 'Add Expense' and has a close button (X) in the top right corner. It shows '0 Available Expenses' and a '+ Create New Expense' button. Below this is a search bar labeled 'Search for an expense type'. The list of expense types is divided into two sections: 'Recently Used' and 'Uncategorized'. Under 'Recently Used', there are two items: 'Lunch' and 'Breakfast'. Under 'Uncategorized', there are three items: 'Auto Club Expense', 'Baggage Fees', and 'Breakfast'. The background shows the SAP Concur 'Manage Expenses' page with a 'Test \$0.00' report and various buttons like 'Add Expense', 'Edit', 'Delete', 'Copy', and 'View Available Receipts'.

Entering Expenses



- Only fill in the cells marked with a red asterisk.
- Be sure to always select the appropriate Department/Committee that you were traveling for
- Never select the Personal box, as you will not receive reimbursement if you select that box
- After you fill in the required information be sure to select Save at the top right-hand corner of the expense – from there you can upload the receipt.

A screenshot of the SAP Concur 'New Expense' form. The form is titled 'New Expense' and has tabs for 'Details' and 'Itemizations'. It includes fields for 'Expense Type' (set to 'Lunch'), 'Date' (placeholder 'MM/DD/YYYY'), 'Description', 'Vendor', 'City', 'Payment Type' (set to 'Cash'), 'Cost', 'Currency' (set to 'US, Dollar'), 'Department/Committee', 'Meal Expense Location' (set to 'None Selected'), and a 'Comment' field. There is a 'Personal' checkbox which is unchecked. On the right side, there is a large box for uploading a receipt, with an 'Add Receipt' button and instructions: 'Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.' At the top right, there are 'Cancel' and 'Save Expense' buttons. The top navigation bar shows 'SAP Concur', 'Expense', 'Manage Expenses', and 'Processor'.

Mileage vs. Gasoline



- Use the Mileage – Personal Car expense type when you drove your personal car to the meeting
- Use the Gasoline expense type when you drove a rental car to the meeting

Expense Type: Mileage



- Select the date you traveled
- For Description list where you traveled to and from (ex: home to eboard)
- To fill in the exact addresses of travel, click on [Mileage Calculator](#) on the top left side of the screen. This will automatically calculate your mileage and fill in your to and from locations. (See next slide)
- Do NOT check the Personal box!
- Save Expense



New Expense

Cancel Save Expense

Show Receipt

Details Itemizations

[Mileage Calculator](#)

Expense Type * Mileage - Personal Car

Date * 10/20/2023

Description *

From Location * To Location *

Meal Expense Location None Selected

Comment

Personal

Department/Committee * (060-000) Executive Board

Distance * 0

Cost 0.00

Currency US, Dollar

Reimbursement Rates USD 0.655 per mile

Save Expense Save and Add Another Cancel

Expense Type: Mileage



- Fill in where you traveled to and from in the mileage calculator to get an accurate calculation
- Next click on Add Mileage to Expense

The screenshot shows the 'Mileage Calculator' interface. On the left, there's a sidebar with 'Waypoints' and 'Directions'. The 'Waypoints' section shows two points: '20 W 34th St, New York, NY 10118, US' (marked A) and '1168 Troy Schenectady Rd, Latham, NY' (marked B). The distance between them is 158.3 MI. The 'Directions' section shows suggested routes: 'I-87 N 159 mi. About 2 hours 39 mins', 'I-87 163 mi. About 2 hours 50 mins', and 'Taconic State Parkway 167 mi. About 2 hours 58 mins'. Below this, a table shows 'TOTAL PERSONAL 0.0 MI' and 'TOTAL BUSINESS 158.3 MI'. On the right, a map shows the route from New York City to Latham, NY. At the bottom right, there's a red arrow pointing to a blue button labeled 'Add Mileage to Expense' and a 'Cancel' link.

Submitting Report



- Once you have entered all expenses for that specific meeting, you may click the Submit Report button on the upper right-hand side of the screen

Test \$99.08

Delete ReportCopy ReportSubmit Report

Not Submitted | Report Number: I4X09R

Report Details ▼Print/Share ▼Manage Receipts ▼View Available Receipts

Add ExpenseEditDeleteCopyCombine ExpensesMove to ▼

<input type="checkbox"/>	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Requested↓↑
<input type="checkbox"/>		Cash	Mileage - Personal Car		10/20/2023	\$89.08
<input type="checkbox"/>		Cash	Lunch Attendees (1)		10/20/2023	\$10.00
						\$99.08

Submitting Report



- Verify that you have provided proper documentation for each of the expenses (ex: receipts and/or attendance lists) before clicking on the Accept & Submit button

Final Review

User Submit

By clicking on the 'Accept & Submit' button, I certify that: (1) This is a true and accurate accounting of expenses incurred to accomplish official business. (2) There are no expenses claimed as reimbursable which are personal or unjustifiable. (3) All required receipt images have been attached to this report. (4) I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed. (5) In the event of overpayment or if payment is received from another source for any portion of the expenses claimed, I assume responsibility for repaying in full those expenses.

Accept & Submit

Cancel

Submitting Report



- Once the report is submitted, it will automatically be sent to the proper individual for approval
- Once the report has received proper approval, the Finance Department will send a check to your home address on file
- If you prefer direct deposit, please give Danielle a call at 518-785-1900x257 to set it up.