



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 Haley McCarthy at hmccarthy@pef.org



Logging In

- Your username will be the first initial of your first name and your full last name followed by @pef.org
 - For example: Jsmith@pef.org
- You will be provided a temporary password by Haley McCarthy when your account is created



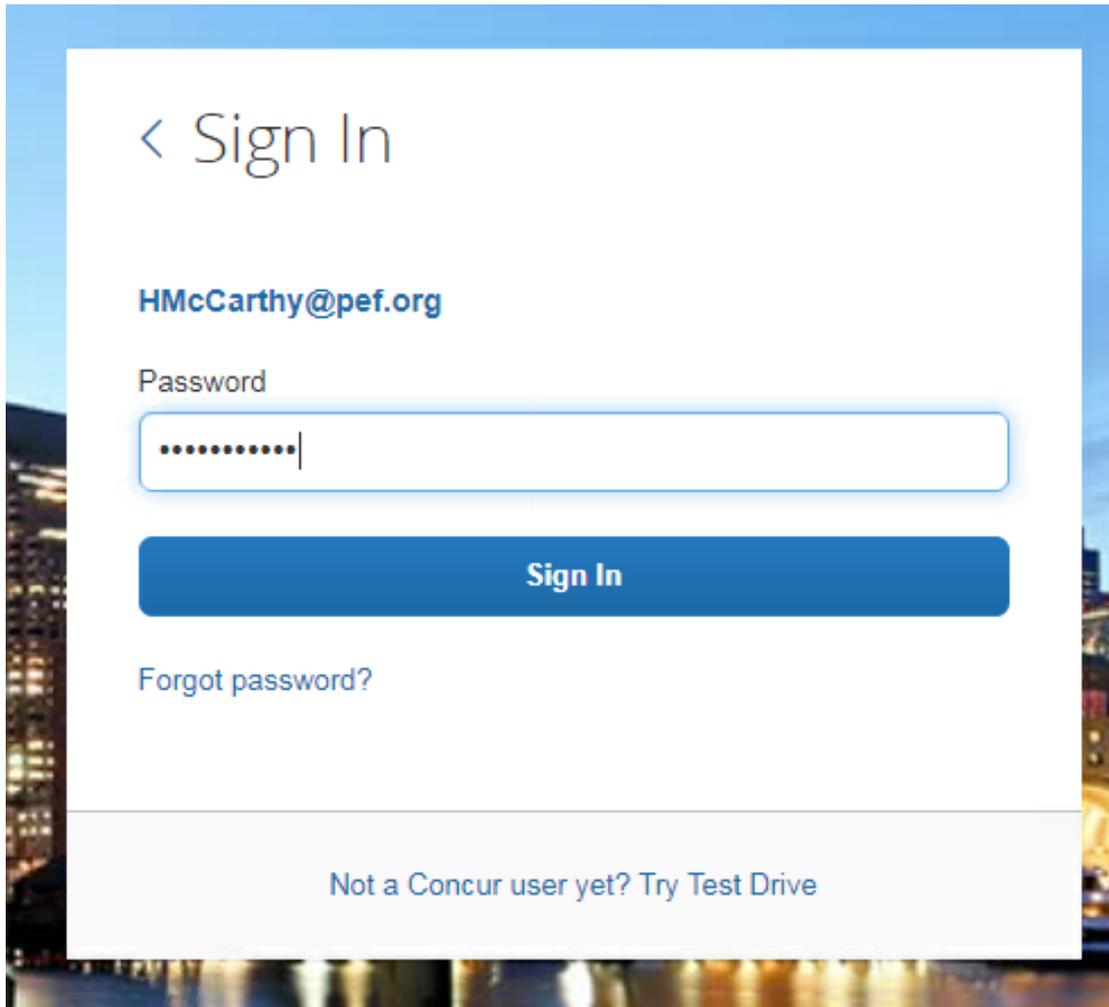
Logging In

- Fill in your username (explained on Slide 3)



A screenshot of the SAP Concur login interface. The page has a dark header with the "SAP Concur" logo on the left and "English (US)" on the right. The main content area features a "Sign In" form overlaid on a background image of a city waterfront at dusk. The form includes a text input field with the username "HMcCarthy@pef.org", a blue "Next" button, a "Remember me" checkbox, and a "Forgot username?" link. At the bottom of the form, there is a link that says "Not a Concur user yet? Try Test Drive". The background image shows a city skyline with illuminated buildings and a waterfront with a cobblestone path and a street lamp.

Logging In

A screenshot of a mobile application's sign-in screen. The screen has a white background with a blue border. At the top left, there is a back arrow and the text "Sign In". Below that, the email address "HMcCarthy@pef.org" is displayed in blue. Underneath, the word "Password" is shown above a text input field containing several dots and a cursor. A blue "Sign In" button is positioned below the password field. At the bottom left, there is a link for "Forgot password?". At the bottom center, there is a link for "Not a Concur user yet? Try Test Drive".

< Sign In

HMcCarthy@pef.org

Password

.....|

Sign In

[Forgot password?](#)

[Not a Concur user yet? Try Test Drive](#)



- Fill in your password

Starting a New Report



The screenshot shows the SAP Concur Expense App Center interface. At the top, the navigation bar includes 'SAP Concur', 'Expense', and 'App Center'. A user profile is visible in the top right corner. Below the navigation bar, a dashboard displays a 'Hello,' greeting, a blue arrow pointing to the right, and four main action buttons: '+ Start a Report', '+ Upload Receipts', '00 Available Expenses', and '00 Open Reports'. The 'MY TASKS' section contains two task cards: '00 Available Expenses' and '00 Open Reports', both indicating 'You currently have no available expenses' and 'You currently have no open reports' respectively, with a checkmark icon at the bottom of each card. The SAP logo is in the bottom left corner, and the SAP Concur logo is in the bottom right corner.

Click on
+ Start a Report

Creating the Report Title

- Fill in boxes marked with a red line
- Report date can be the day you are entering the report



Manage Expenses

Create a New Expense Report

Report Header

Report Name

Executive Board Reimbursement

Report Date

01/03/2021



Purpose

January EBoard

Comment

- Click Next button on the bottom right of the screen once you have filled in the required information

Next >>

Cancel

Entering Expenses

- Select appropriate expense type
- You will be able to enter several different expense types, just choose one at a time



Executive Board Reimbursement Delete Report [Submit Report](#)

[+ New Expense](#) [+ Quick Expenses](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print](#)

Expenses Available Receipts

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
Adding New Expense				

New Expense

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

Other	Postage/Freight
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All Expense Types

Auto Club Expense	Dinner	Lunch	Office Supplies	Public Transportation	Toilets
Baggage Fees	Dues/Subscriptions	Meeting Supplies	Other	Subway	Training
Breakfast	Food for Large Group Meeting	Mileage - Personal Car	Parking	Telephone - Cellular	Tuition Reimbursement
Conference/Seminar	Gasoline (car rentals only)	Mileage - With Auto Allowance	Postage/Freight	Tips	

TOTAL AMOUNT **\$0.00** TOTAL REQUESTED **\$0.00**

Entering Expenses

- Only fill in the cells marked with a red line
- 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 in the bottom right hand corner of the expense – from there you can choose a new expense type



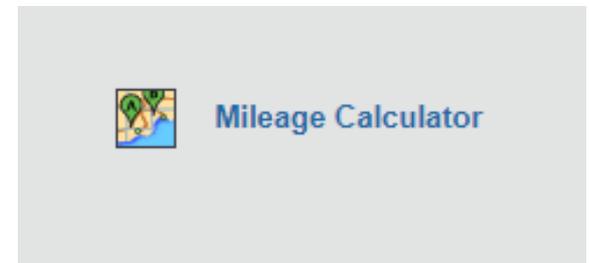
Mileage vs. Gasoline

- 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 bottom right side of the screen



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

Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

A 20 W 34th St, New York, NY 10118, US B 1168 Troy Schenectady Rd, Latham, NY C |

158.3 MI
 Personal

Calculate Route Make Round Trip

Directions

Suggested routes:

- I-87 N 159 mi. About 2 hours 39 mins
- I-87 163 mi. About 2 hours 50 mins
- Taconic State Parkway 167 mi. About 2 hours 58 mins

A 20 W 34th St, New York, NY 10118, USA

159 mi. About 2 hours 39 mins

1. Head northwest on W 34th St toward 6th Ave 0.7 mi
2. Turn right onto Dyer Ave 0.1 mi

TOTAL PERSONAL 0.0 MI TOTAL BUSINESS 158.3 MI

Map

Map data ©2021 Google Terms of Use Report a map error

Add Mileage to Expense Cancel

Expense Type: Mileage



- A fully completed Mileage expense entry will look as follows:

[View Reimbursement Rates](#)

Expense Type Mileage - Personal Car	Date 01/01/2021	Description Mileage from Home to Eboard
From Location 20 W 34th St, New York, NY 10118,	To Location 1168 Troy Schenectady Rd, Latham	Distance : Amount 158 : 90.85 USD
Comment <input type="text"/>	<input type="checkbox"/> Personal	Department/Committee Executive Board
Meal Expense Location <input type="text"/>		

 [Mileage Calculator](#)

Expense Type: Meals

- Meals are reimbursed at the following rates for PEF Members:



Meal	Regions 1-9	Regions 10-12
Breakfast	\$10.00	\$12.00
Lunch	\$15.00	\$18.00
Dinner	\$35.00	\$40.00

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)



Expense Type: Meals

- A fully completed Meal expense entry will look as follows:



Expense Receipt Image Available Receipts

Expense Type: Lunch
Date: 01/01/2021
Description: Mileage from Home to Eboard
Vendor:
City:
Payment Type: Cash
Cost: 14.75 USD
 Personal
Comment:
Department/Committee: Executive Board
Meal Expense Location: . Regions 10 thru 12

Attendees Attendees: 1 | Attendee Total: \$14.75 | Remaining: \$0.00

New Attendee Advanced Search Favorites Import Remove Create Group

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Amount
<input type="checkbox"/>				This Employee	\$14.75

Save Itemize Attach Receipt Cancel

Attaching Receipts

- Where applicable, attach receipts
 - Meals, gasoline, etc.

- Click on Attach Receipt at the bottom of the expense entry



Attaching Receipts



- Click on Browse to choose the receipt that you have saved to your computer

Attach Receipt ×

Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

File Selected for uploading: Browse... Attach

No file selected

Or choose an image from your Available Receipts.

Available Receipts Attach

You have no available receipts



Cancel

Attaching Receipts

Attach Receipt ×

Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.

File Selected for uploading: Browse... Attach

Concur 1.PNG

Or choose an image from your Available Receipts.

Available Receipts Attach

Cancel



- Once you have browsed for and selected the proper receipt, click the attach button

Attaching Receipts

- To confirm that you have successfully attached your receipt to the expense check that you see "Receipt Image" above where you entered the expense information



Submitting Report

- You will see all of the expenses that you have entered for your report on the left hand side of the screen



Executive Board Reimbursement

[+ New Expense](#) [+ Quick Expenses](#) [Import Expenses](#) [Details ▾](#) [Receipts ▾](#) [Pr](#)

Expenses Move ▾ Delete Copy View ▾ <<

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	01/01/2021	Mileage - Personal Car	\$90.85	\$90.85
<input type="checkbox"/>	01/01/2021	Lunch	\$14.75	\$14.75

TOTAL AMOUNT **\$105.60** TOTAL REQUESTED **\$105.60**

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



Delete Report

Submit Report

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.

Submitting Report

- The following box will pop up when the report has been successfully submitted:



Report Successfully Submitted ✕

Executive Board Reimbursement
Approver: Brown, Raymond

[Expense Report](#)

Report Total :	\$105.60
Less Personal Amount :	\$0.00
<hr/>	
Amount Claimed :	\$105.60
Amount Rejected :	\$0.00

[Company Disbursements](#)

Amount Due Employee :	\$105.60
Total Paid By Company :	\$105.60

[Employee Disbursements](#)

Amount Owed Company :	\$0.00
Total Owed By Employee :	\$0.00

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

