



# 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](http://www.concursolutions.com)
- If you have not yet been set up with a Concur account please contact Haley McCarthy at [hmccarthy@pef.org](mailto: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](mailto: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)



SAP Concur  English (US) ▼

## Sign In

Username, email address, or SSO code

[Forgot username?](#)

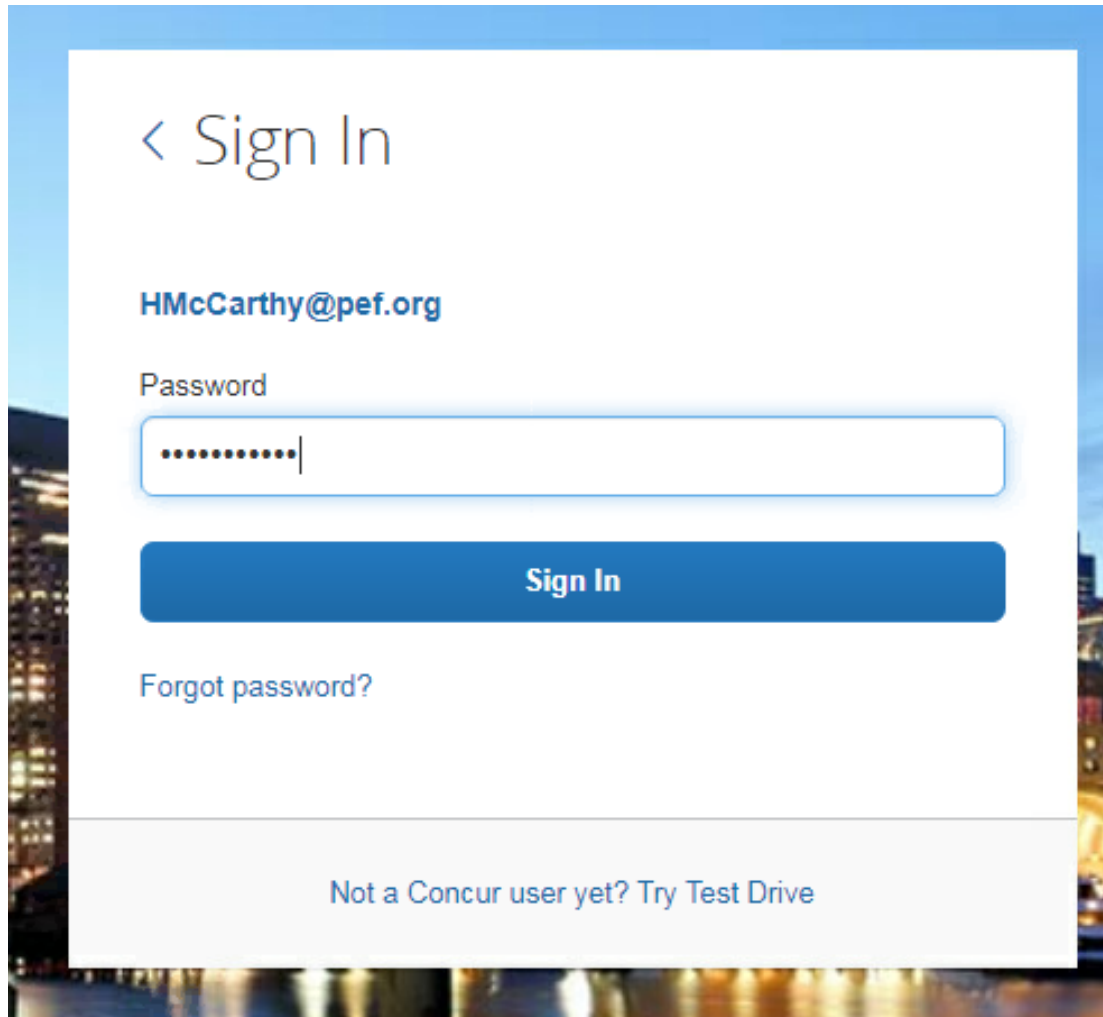
☐ Remember me

[Next](#)

Not a Concur user yet? Try Test Drive

Boston, United States of America

# Logging In

A screenshot of a web application's sign-in page. The page has a white background with a blue border. At the top left, there is a back arrow icon followed by the text "Sign In". Below this, the email address "HMcCarthy@pef.org" is displayed in blue. Underneath the email, the word "Password" is shown in a smaller font. A password input field with a blue border contains ten dots and a cursor. Below the password field is a large blue button with the text "Sign In" in white. Under the button, the text "Forgot password?" is displayed in blue. At the bottom of the page, there is a light gray footer area with the text "Not a Concur user yet? Try Test Drive" in blue. The background of the page shows a city skyline at night.

< 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

SAP Concur Expense App Center

Hello, [redacted]

+ Start a Report

+ Upload Receipts

00 Available Expenses

00 Open Reports

MY TASKS

00 Available Expenses →

You currently have no available expenses.

00 Open Reports →

You currently have no open reports.

SAP Concur



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

☐ [Date ▾](#) [Expense Type](#) [Amount](#) [Requested](#)

[Adding New Expense](#)

### New Expense

[Available Receipts](#)

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

### All Expense Types

Auto Club Expense	Dinner	Lunch	Office Supplies	Public Transportation	Tolls
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



Mileage Calculator

# 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

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

Google

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

 [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:  Date:  Description:

Vendor:  City:  Payment Type:

Cost:   ☐ Personal Comment:

Department/Committee:  Meal Expense Location:

**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

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



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

# 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

Expense	Receipt Image
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# 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
Adding New Expense				
<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.

Accept & Submit

Cancel

# 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
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

Close





# 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

