



# 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:
  - Danielle Gregoire at [dgregoire@pef.org](mailto:dgregoire@pef.org)



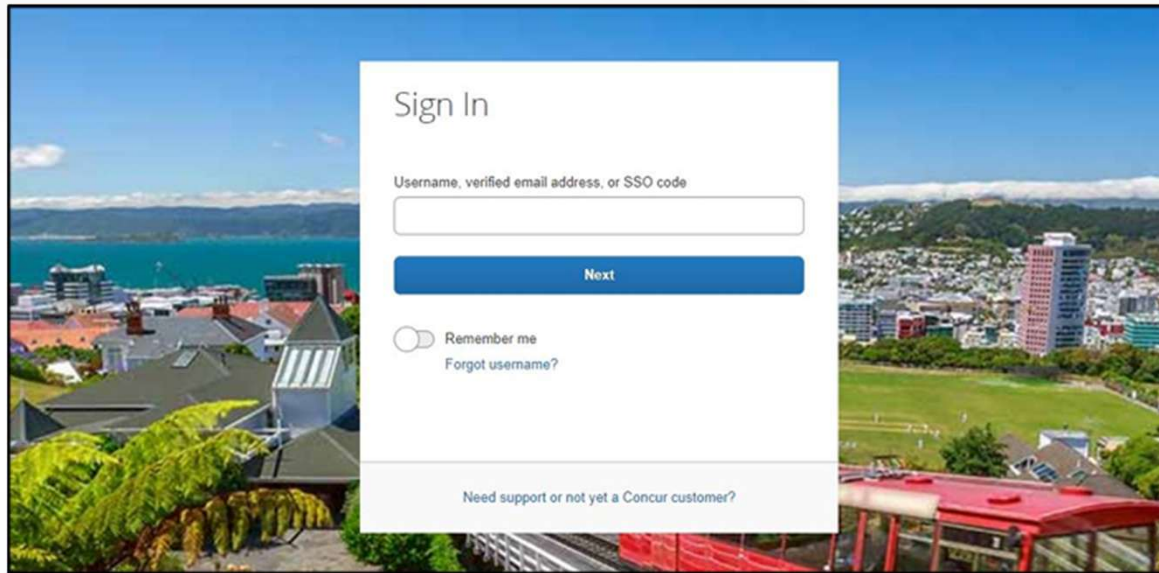
# Logging In

- 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

A screenshot of the SAP Concur Sign In page. At the top left is a back arrow and the text '< Sign In'. Below that is the email address 'dgregoire@pef.org'. Underneath is the text 'Sign in with:'. There are two blue buttons: 'SAP Concur Password' and 'Sign in with an email link'. Between the buttons is a horizontal line with the word 'OR' in the center. At the bottom of the form is a link that says 'Learn about SAP Concur for your business'.

You can sign in with your password or have a link sent to your email on file. Please note that your username is not your email unless you have a PEF email.

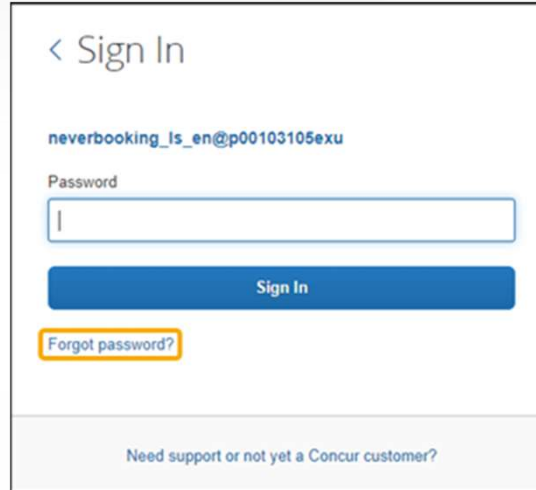
If you sign in with a link to your email you will not have to do the two-step authentication process.

# Logging In – Password Reset

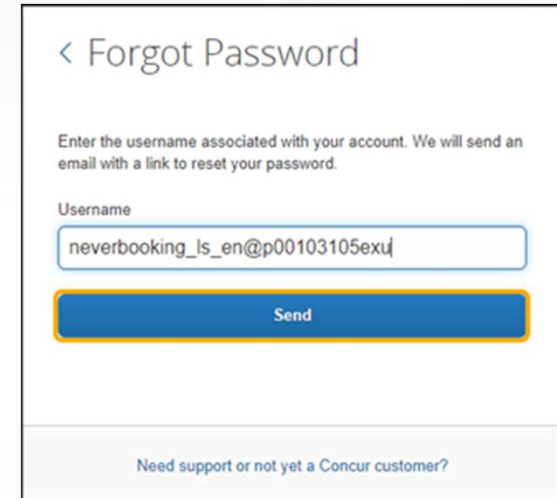


## Retrieving and Changing your Password

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' web form. At the top left is a back arrow and the text '< Sign In'. Below this is the username 'neverbooking\_ls\_en@p00103105exu'. A 'Password' label is above an empty text input field. Below the input field is a blue button with the text 'Sign In'. Underneath the button is a link labeled 'Forgot password?' which is highlighted with a yellow border. At the bottom of the form is a link that says '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' web form. 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.' A 'Username' label is above a text input field containing the username 'neverbooking\_ls\_en@p00103105exu'. Below the input field is a blue button with the text 'Send' and a yellow border. At the bottom of the form is a link that says '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.

A screenshot of a user profile settings menu. At the top, it says 'William Never' with a user icon. Below that are links for 'Profile Settings' and 'Sign Out'. A section titled 'Acting as other user' with a question mark icon contains two radio button options: 'Act on behalf of another user' (which is selected) and 'Act as user in assigned group (Proxy)'. Below the options is a search bar with the placeholder text 'Search by name or ID' and a magnifying glass icon. At the bottom are 'Cancel' and 'Start Session' buttons.

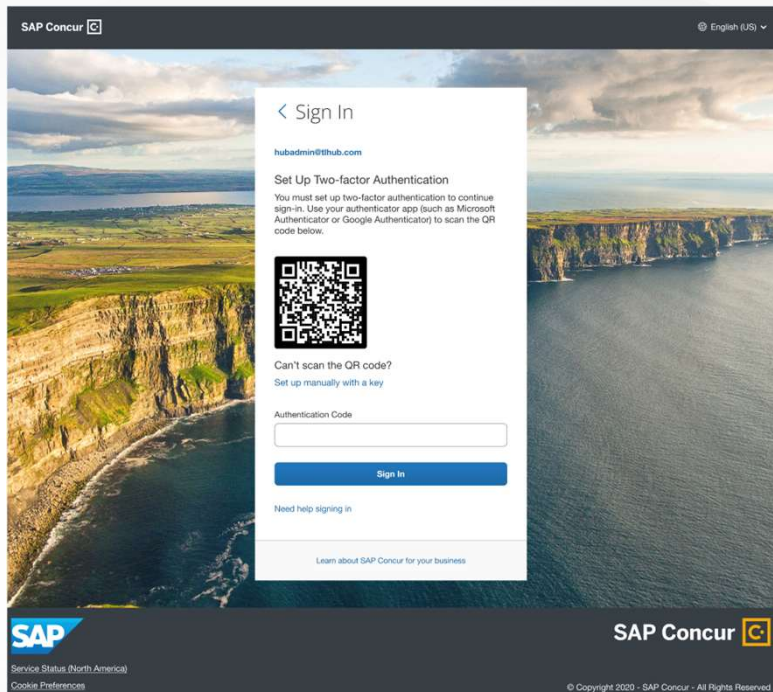
2. On the Profile Options page, select Change Password.

A screenshot of the 'Profile Options' page. The title is 'Profile Options' and the instruction is 'Select one of the following to customize your user profile.' The page is divided into two columns of settings. The left column includes: 'Personal Information' (home address and emergency contact), 'Company Information' (company name and business address), 'Credit Card Information' (store credit card info), 'E-Receipt Activation' (enable e-receipts), 'Travel Vacation Reassignment' (configure backup travel manager), 'Request Preferences' (select email notification options), 'Company Car' (company car), and 'Concur Mobile Registration' (set up access to Concur). The right column includes: 'System Settings' (time zone and workday), 'Contact Information' (how to contact you), 'Setup Travel Assistants' (allow others to book trips), 'Travel Profile Options' (carrier, hotel, rental car preferences), 'Expense Delegates' (employees who can perform work on behalf of others), and 'Expense Preferences' (select options for email notifications). The 'Change Password' link in the 'Expense Preferences' section is highlighted with a yellow box.

# Two step Authentication



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

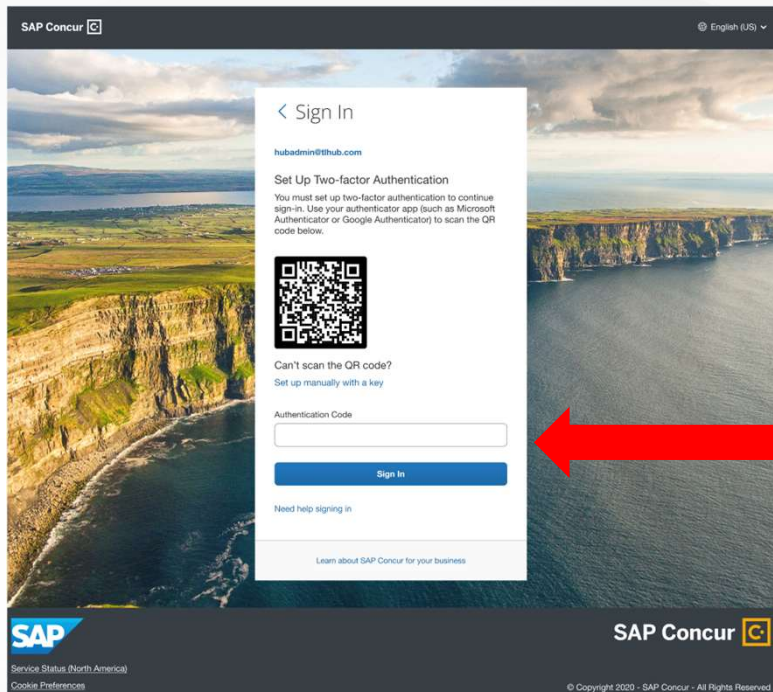


Download an authenticator app of your choice on your mobile phone. You are free to use any authenticator app- like Microsoft , Google, etc. Eg : <https://support.microsoft.com/en-us/account-billing/add-non-microsoft-accounts-to-the-microsoft-authenticator-app-7a92b5d4-d6e5-4474-9ac6-be0b6773f574>, <https://apps.apple.com/us/app/google-authenticator/id388497605>, [https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en\\_US&gl=US](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/bhghoamapcdpbohphigooaddinpkbai>. For Microsoft Edge, <https://microsoftedge.microsoft.com/addons/detail/authenticator-2fa-client/ocglkepbibnalbgmbachknglpdipeoio>



# 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](mailto: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**

A screenshot of the SAP Concur user interface. At the top left, it says 'SAP Concur' with a small icon and 'Home' with a dropdown arrow. Below this is a navigation bar with the PEF logo on the left and four buttons on the right: '+ Start a Report', '00 Required Approvals', '00 Available Expenses', and '00 Open Reports'. A large red arrow points to the '+ Start a Report' button. Below the navigation bar is a 'My Tasks' section with three task cards: '00 Required Approvals' (with a checkmark and the text 'Great! You currently have no approvals.'), '00 Available Expenses' (with a checkmark and the text 'You currently have no available expenses.'), and '00 Open Reports' (with a checkmark and the text 'You currently have no open reports.'). At the bottom of the page, there is a footer with 'THE BEST RUN' logo, the SAP logo, and 'SAP Concur' with a small icon.

# 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 Expense system's 'Create New Report' form. The form is titled 'Create New Report' and has a close button (X) in the top right corner. It contains three required fields, each marked with a red asterisk: 'Report Name', 'Report Date', and 'Purpose'. The 'Report Date' field is pre-filled with '10/20/2023'. Below these fields is a 'Comment' text area. At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Report'. A large red arrow points down to the 'Create Report' button. The top of the browser window shows 'SAP Concur Expense' and a user profile icon.

# 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

The screenshot shows the SAP Concur home interface. At the top left, there is a navigation bar with 'SAP Concur' and a 'Home' dropdown menu. Below this is a dashboard with a 'PEF' logo on the left and four summary cards on the right: '+ Start a Report', '00 Required Approvals', '00 Available Expenses', and '01 Open Reports'. Underneath is a 'My Tasks' section with three task cards: '00 Required Approvals' (with a message 'Great! You currently have no approvals.' and a checkmark), '00 Available Expenses' (with a message 'You currently have no available expenses.' and a checkmark), and '01 Open Reports' (with a message '10/20 Test' and a red arrow pointing to it). Each task card has a right-pointing arrow.

# 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.

The screenshot shows the SAP Concur interface for entering expenses. At the top, there are navigation links for 'SAP Concur', 'Expense', 'Manage Expenses', and 'Processor'. The main content area displays a report titled 'Test \$0.00' with a status of 'Not Submitted' and a report number 'I4X09R'. There are buttons for 'Delete Report' and 'Submit Report'. Below this, there are links for 'Report Details', 'Print/Share', 'Manage Receipts', and 'View Available Receipts'. A row of action buttons includes 'Add Expense', 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move to'. A red arrow points to the 'Add Expense' button. Below the buttons, there is a 'No Expenses' message with a document icon and a sub-message: '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 4/1/25	\$15.00 * \$20.00 4/1/25
Lunch	\$20.00 * \$23.00 4/1/25	\$23.00 * \$28.00 4/1/25
Dinner	\$45.00 * \$50.00 4/1/25	\$50.00 * \$60.00 4/1/25

# 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 Expense entry interface. The main page shows a report titled "Test \$0.00" with a status of "Not Submitted" and a report number of "I4X09R". There are buttons for "Add Expense", "Edit", "Delete", "Copy", and "Cancel". A modal window titled "Add Expense" is open, showing "0 Available Expenses" and a "Create New Expense" button. Below this is a search bar "Search for an expense type" and a list of expense categories: "Recently Used" (Lunch, Breakfast) and "Uncategorized" (Auto Club Expense, Baggage Fees, Breakfast). On the right side of the main page, there are buttons for "Delete Report" and "Submit Report", and a link for "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 two tabs: 'Details' (selected) and 'Itemizations'. At the top right, there are buttons for 'Cancel', 'Save Expense', and 'Hide Receipt'. The form contains several required fields marked with a red asterisk: '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 'Comment'. There is also a 'Personal' checkbox which is unchecked. On the right side of the form, there is a large blue-bordered box containing an 'Add Receipt' button with an upload icon 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.'



# 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

[Details](#) [Itemizations](#) Show Receipt

[Mileage Calculator](#)

Expense Type \* Mileage - Personal Car Date \* 10/20/2023 Description \*

From Location \*  To Location \*   Personal Department/Committee \* (060-000) Executive Board

Meal Expense Location None Selected Comment

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

A screenshot of a web-based 'Mileage Calculator' interface. The interface is divided into several sections. At the top, there are checkboxes for 'Avoid Tolls' and 'Avoid Highways'. Below that is a 'Waypoints' section with two input fields: '20 W 34th St, New York, NY 10118, US' and '1168 Troy Schenectady Rd, Latham, NY'. A bracket indicates a distance of '158.3 MI' between these points, with a 'Personal' checkbox. Below the waypoints are 'Calculate Route' and 'Make Round Trip' buttons. The 'Directions' section lists 'Suggested routes' with options like 'I-87 N 159 mi. About 2 hours 39 mins'. A red pin 'A' marks the starting point at '20 W 34th St, New York, NY 10118, USA'. Below this, a list of directions is shown: '1. Head northwest on W 34th St toward 6th Ave 0.7 mi' and '2. Turn right onto Dyer Ave 0.1 mi'. At the bottom, a summary table shows 'TOTAL PERSONAL 0.0 MI' and 'TOTAL BUSINESS 158.3 MI'. To the right of the calculator is a map showing the route from Albany to New York City. A red arrow points from the 'Add Mileage to Expense' button at the bottom right of the calculator to the right edge of the image.

# 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 Report Copy 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](#)

<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
						<b>\$99.08</b>



# 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 ☐ x

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**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.

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# 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.