CREATING A NEW EXPENSE REPORT

Just like booking travel, you begin in the same system:

- Login to the site at: [https://www.concursolutions.com/](https://www.concursolutions.com/).
- To login in, follow the instructions below:
  - Login: the email you were given at the time of set up. (Note: If your existing email is used for another Concur system, you were given a variation of the email that included “sfn” in it. Example: Mike.Thompson@sfn.gmail.com.)
  - Password: welcome (the original password, but you were prompted to change it.) If your password does not work, then contact: kpettiford@sfn.org or msankoh@sfn.org.
When you need to create an expense report that does not include previous travel bookings, you can start the report either from the Quick TaskBar or the Expense tab on the menu bar. In this example, you will use the Quick Task Bar.

1. Place your mouse pointer over **New**, and then click **Start a Report**.

2. Complete the required and optional **Report Header** fields as appropriate on the **Report Header** page (required fields are indicated by a red bar).

On the **Report Header** page, you enter general information for your expense report. Your company
defines the fields that appear on this page. Note that some fields are already pre-populated.

3. Click **Next**.
4. You can now **New Expense** to create out-of-pocket expenses.

5. You can click on 1 or 2 above. If you have purchased your travel ticket (air or train) outside of Concur/Gant, then you will need to click 1. Create New Itinerary (See page 3). If you purchased your ticket through Concur/Gant, then you will select 2. Available Itineraries (Go to Page 9).
6. You must add the individual stops of the trip (you don’t have to add the layovers, just the beginning and ending stops of the trip). Click **Next**.

7. Click the available itinerary to assign the trip to your expense report. Click **Next**.
8. Use the boxes to check off which meals were provided at your committee meeting/event. The system will automatically calculate the correct per diem amount. Click **Create Expenses**.

9. You must add the Business Purpose for each of the per diem amounts. You do not need receipts for per diem amounts. Click **Save**.
10. Add new expenses (e.g. ground transportation, baggage fees (air & train transportation), taxis/ubers, personal car mileage, etc.) by selecting from the items on the right or Click New Expense.
Example: TAXI – Complete all required fields and click save.

Example: BAGGAGE FEES – Complete all required fields and click save.
Example: PERSONAL CAR MILEAGE – Complete all required fields and click save. Click on Mileage Calculator to get the correct mileage/amount. Click on round trip to calculate to/from amount. Click Add Mileage to Expense.
NOTE: If your ticket (air/train) was purchased through the Concur system (i.e. SfN paid for it up front) then your expense related to the fare should be checked as a personal expense. This will deduct the amount from your total reimbursement to give you the correct amount requested.
USING AVAILABLE ITINERARIES:

If you booked your travel (air/train) through Concur/Gant, then your itinerary will be available in the Available Itineraries section. Click there to Assign the travel to this expense report and follow steps from Pages 3-7.
ADDING RECEIPTS TO EXPENSE REPORTS:

There are 2 ways to attach receipts:

1. Upload an image into Expense:
   - With the report open and the expense open, click Attach Receipt.
   - Click Browse (or Choose File, depending on browser).
   - Navigate to the image file, then click Open.
   - Click Attach.
   - Click Close.

2. Email an electronic image to Concur; it is automatically saved to the Available Receipts library, where later you can attach it at the expense entry level:
   - Verify your email address by clicking ‘Profile’ on the upper right hand corner of the screen
   - Click on ‘Profile Settings’ Personal Information’ and scroll down to ‘Email Addresses’
   - Add your email address to the list (add all, including personal email if you will send receipts from that email address).
   - Click ‘Verify’ to send a verification code to your email. Each email should be verified.
   - Follow the instructions in the email to enter the code. Once your email is verified, receipts can be emailed to: receipts@concur.com.
   - Save your changes. (Click Save anywhere on the screen.)

Receipts are required for all expenses with the icon next to it. Click the Receipts menu or the expense itself to add the receipt. You can scan and save the receipt and upload it to the receipt images in order to add it to the expense item. The icon will go away when the receipt is added. Once all receipts and expenses are added, Click Submit Report.
Spring 19 Prog Committee

Expenses

- Daily Allowance
  - San Diego, California
  - $71.00
- Daily Allowance
  - San Diego, California
  - $71.00
- Daily Allowance
  - San Diego, California
  - $71.00
- Daily Allowance
  - San Diego, California
  - $71.00
- Taxi
  - San Diego, California
  - $20.00
- Air & Train Transportation
  - American Airlines, San Diego, C
  - $25.00
- Personal Car Mileage
  - $34.88

Total Amount: $576.88

Receipts Required
- Check
- Attach Receipt Images
- View Available Receipts
- Missing Receipt Affidavit

Transaction Date: 01/01/2019
Business Purpose:
City of Purchase:
San Diego, California
Payment Type:
Cash
Personal Expense (do not reimburse): False
Comment:

Attach Receipt

Click Browse and select a .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 5 MB limit per file.
No Receipt? Create a missing Receipt Affidavit here.

File Selected for uploading:
Browse...
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.

Change Password
Change your password.

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
Car, 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.

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

Other Settings
E-Receipt Activation
System Settings
Connected Apps
Concur Connect
Change Password
Travel Vacation Reassignment
Concur Mobile Registration

Reporting Settings
Reporting Budget
Notification Settings

Email Addresses

Please add at least one email address.

- How do I add an email address?
- Travel Arrangers / Delegates
- Why should I verify my email address?
- How do I verify my email address?

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<th>Email Address</th>
<th>Verified</th>
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<th>Contact?</th>
<th>Actions</th>
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<td>Yes</td>
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