Concur – How to Enter Expenses

Committee for Public Counsel Services

Finance

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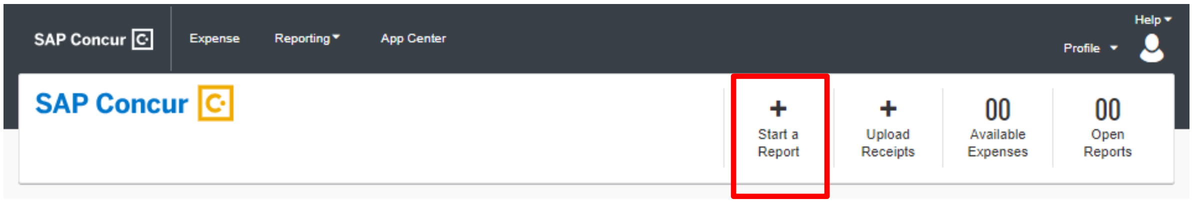
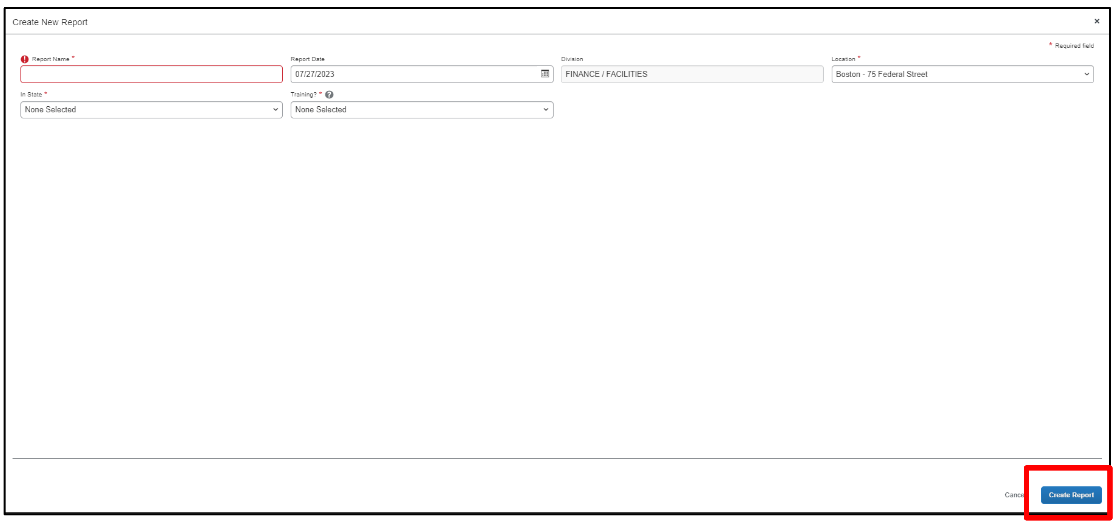
Creating an Expense Report

1. From your profile home page, select “Start a Report”.

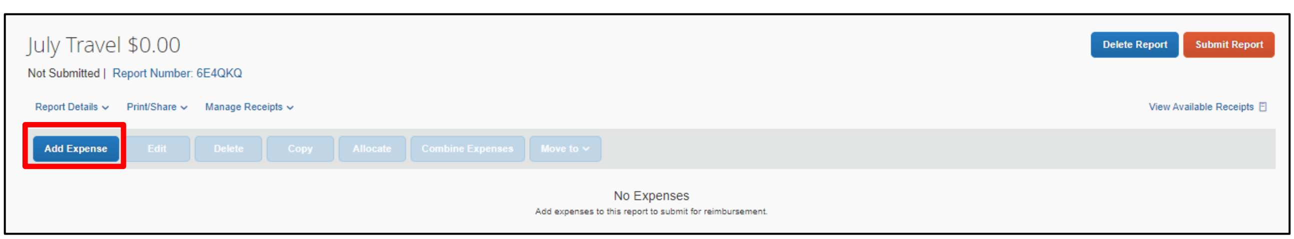


2. Enter data into the fields for your Report Header. Fields with red asterisks (*) are required. The “Report Name” field should reflect the travel month in which you are seeking reimbursement for (**example**: January Travel). After you have entered your date, select “Create Report” at the bottom right-hand corner.

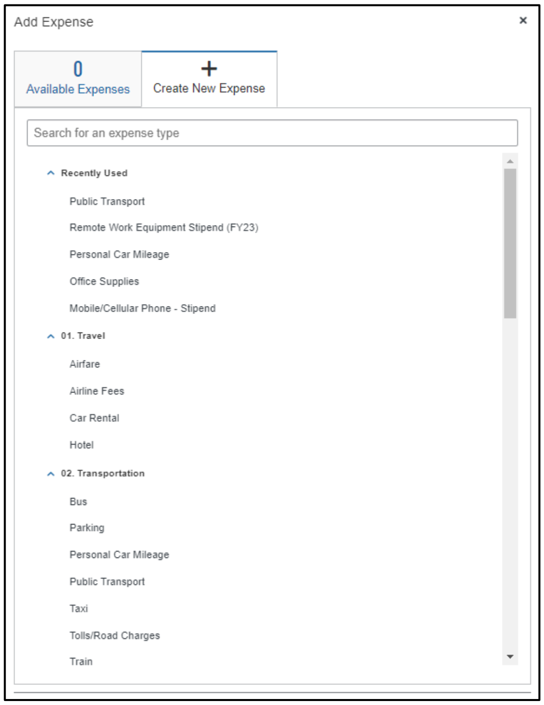


Note: The Question mark besides a field name provides additional information about the field.

3. You will now have the ability to add expenses to your Expense Report. You can select the “Add Expense” button.

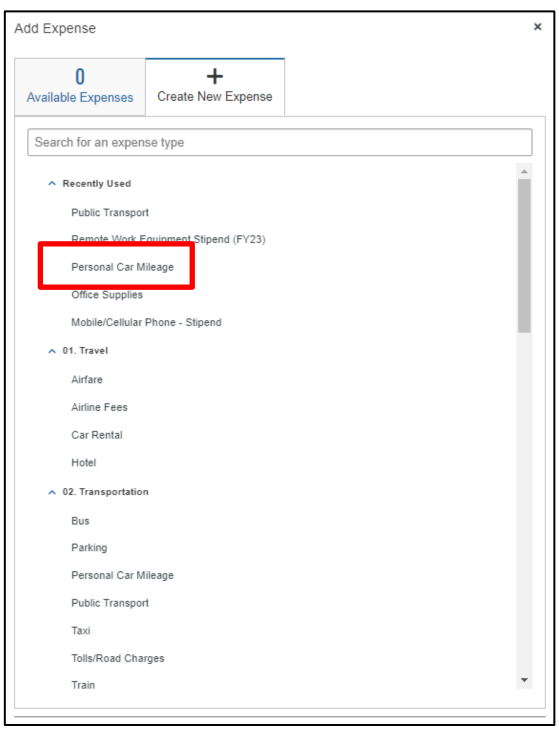


4. Select the category that closely relates to the expense type

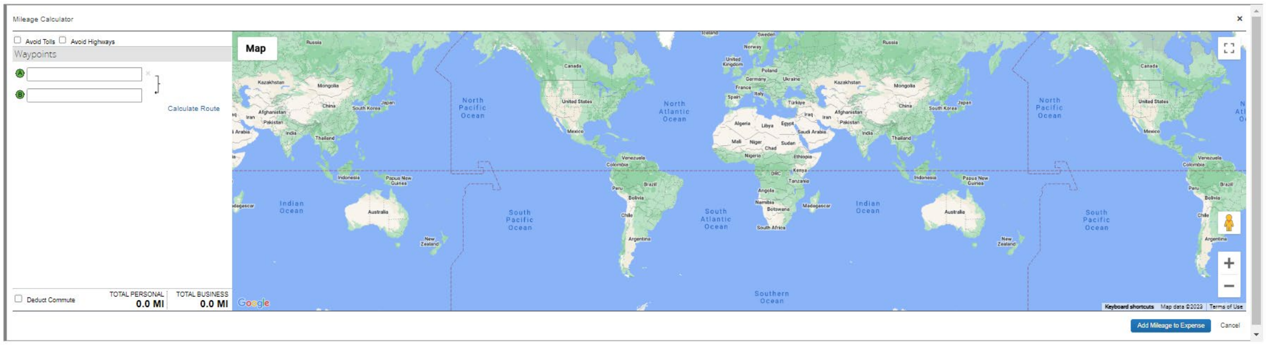


Entering Personal Car Mileage

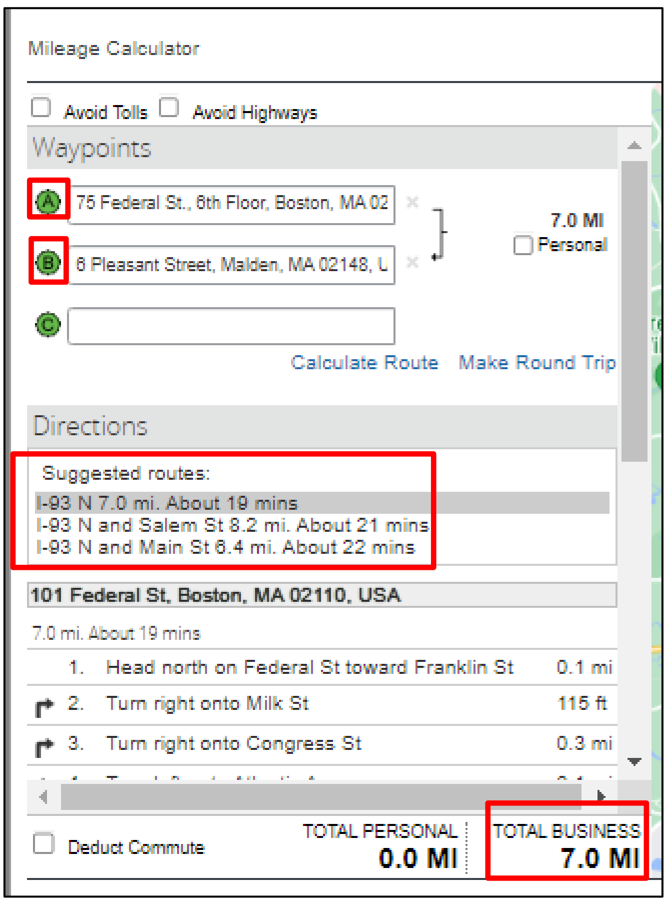
1. Under the “Transportation” category, select “Personal Car Mileage”.



2. As soon as you select “Personal Car Mileage”, you will be prompted to enter your mileage into the Mileage Calculator.

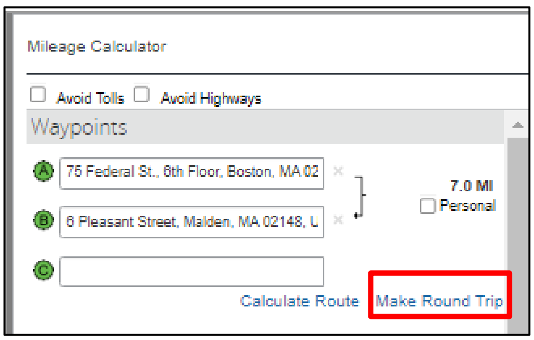


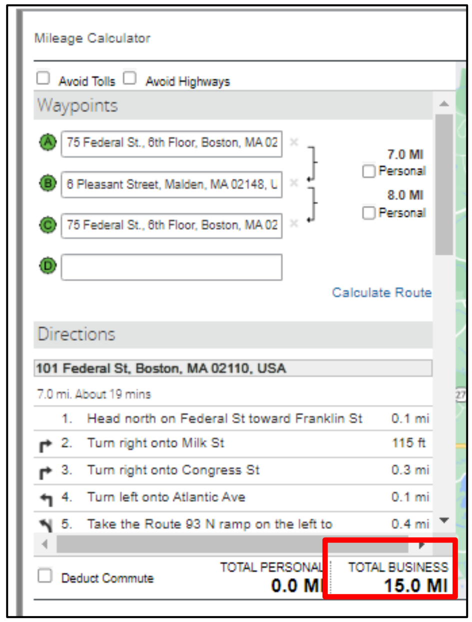
3. Enter the from address in field “A” and to address in field “B.” Once you have enter both addresses, it will calculate the miles traveled. Suggested routes appear and can be selected if it was the route traveled. It also shows the one way mileage.



Calculating Round-trip Mileage

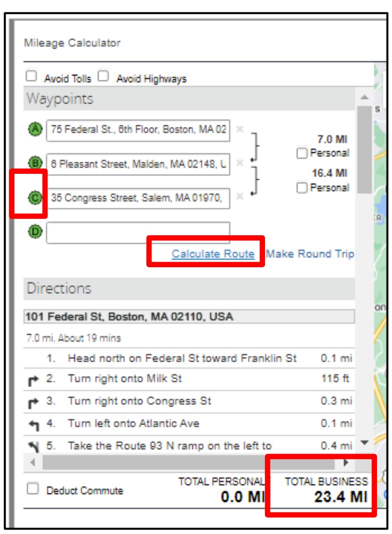
If you made a round-trip, select the “Make Round Trip” link. The final address is added to field “C”. The additional mileage is also added as well. You will see the total Round-Trip miles under the Turn by Turn directions. The amount will be rounded to a whole number and added to your entry.



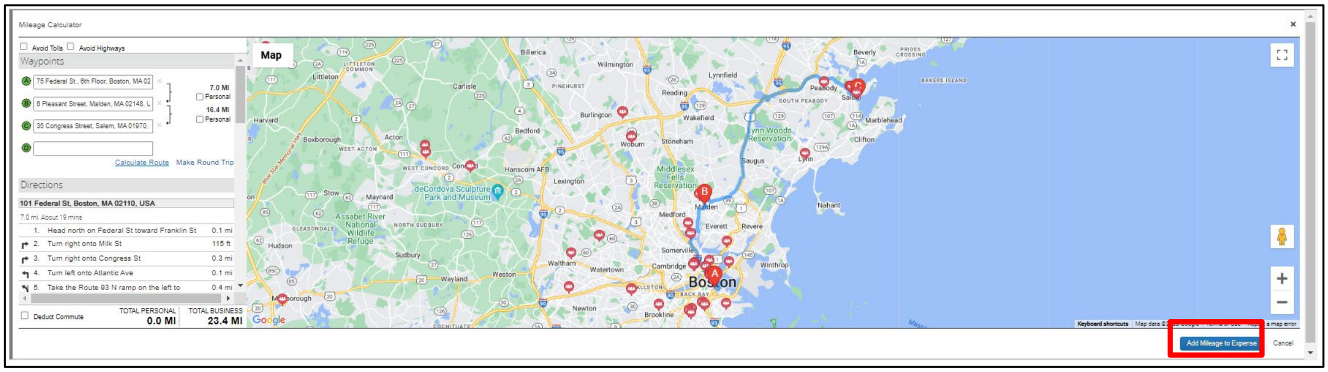


Adding Multiple Trips

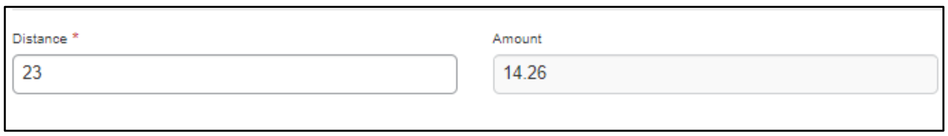
Enter the 3rd address into field “C”, and then select “Calculate Route” to update the total mileage. The new total will now appear under the Turn by Turn directions. The amount will be rounded to a whole number and added to your entry.



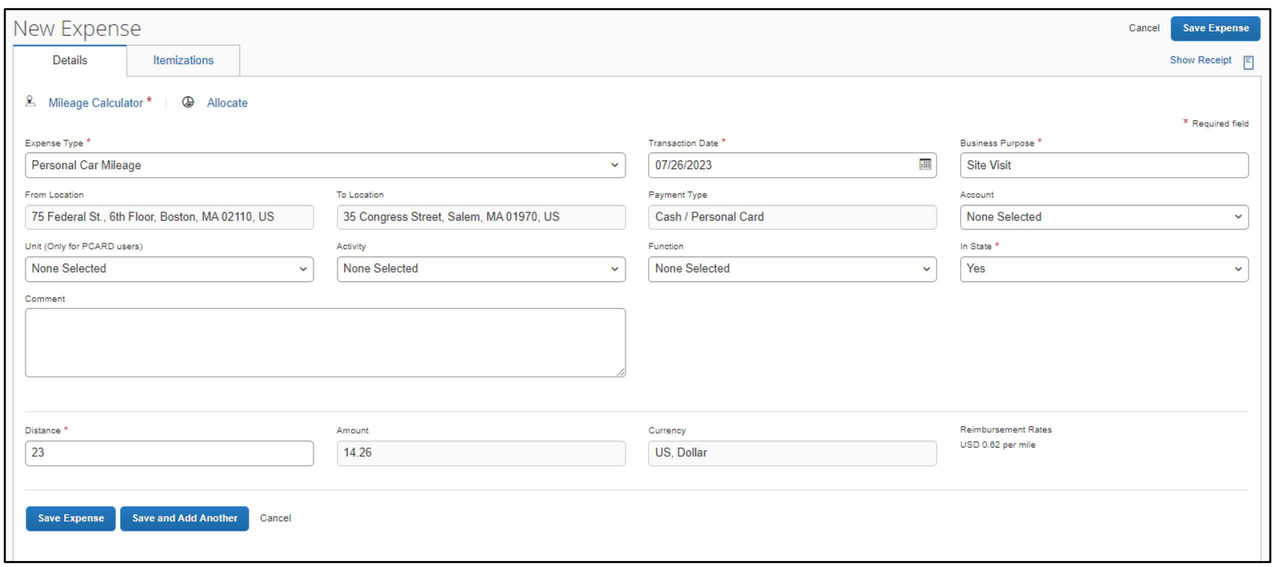
4. Select the “Add Mileage to Expense” button in the bottom right-hand corner.



5. The total distance and dollar amount will prepopulate in the “Distance: Amount” fields.

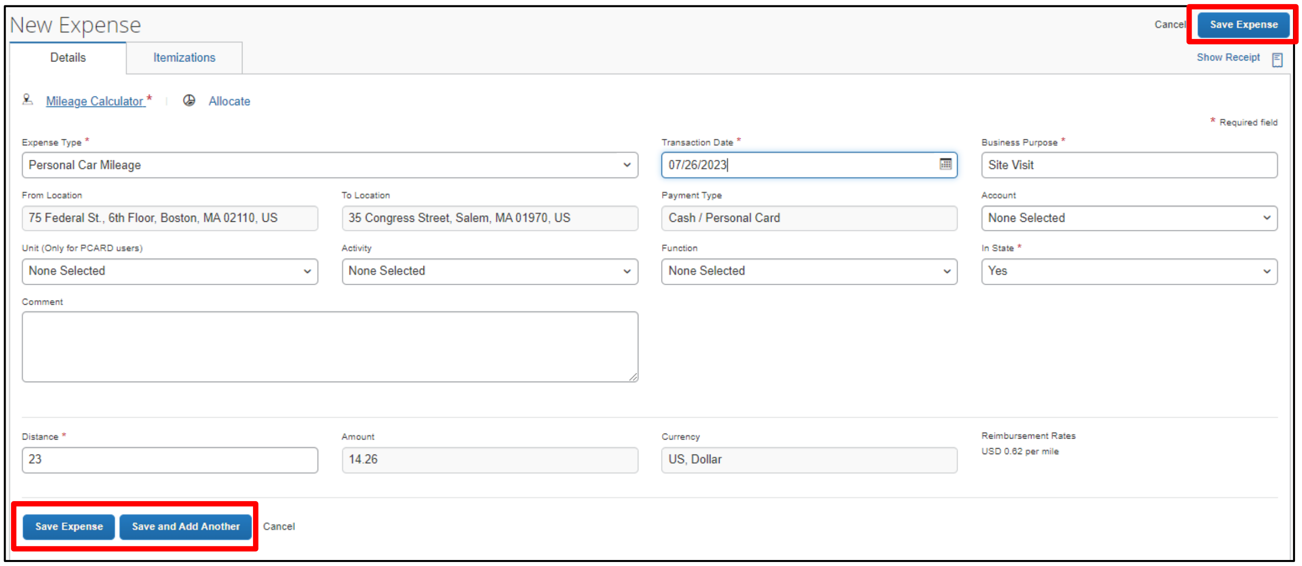


6. You will now be able to enter the details for your Personal Car Mileage. Fields with red asterisks are required.

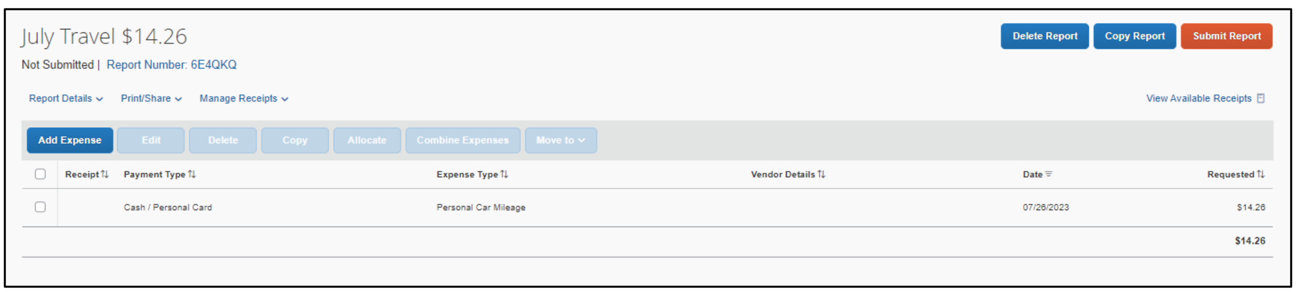


Note: You will see the starting address and the ending address populate in the “From Location”and “To Location” fields respectively.

7. Once you are satisfied with the data entered, select either of the “Save Expense” buttons or the “Save and Add Another” button if you want add another expense to this report.

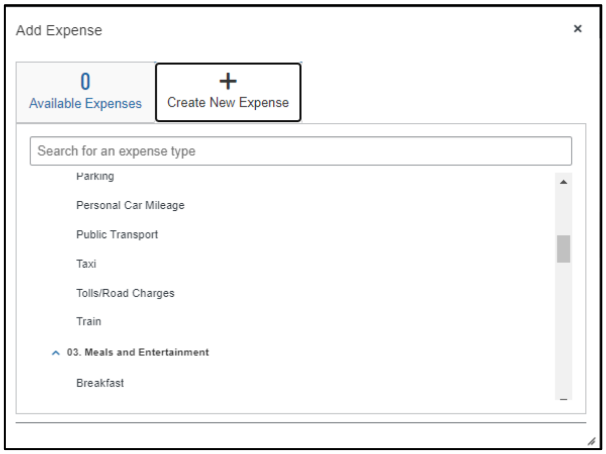


8. The saved entry will appear along with the total amount of the reimbursement.

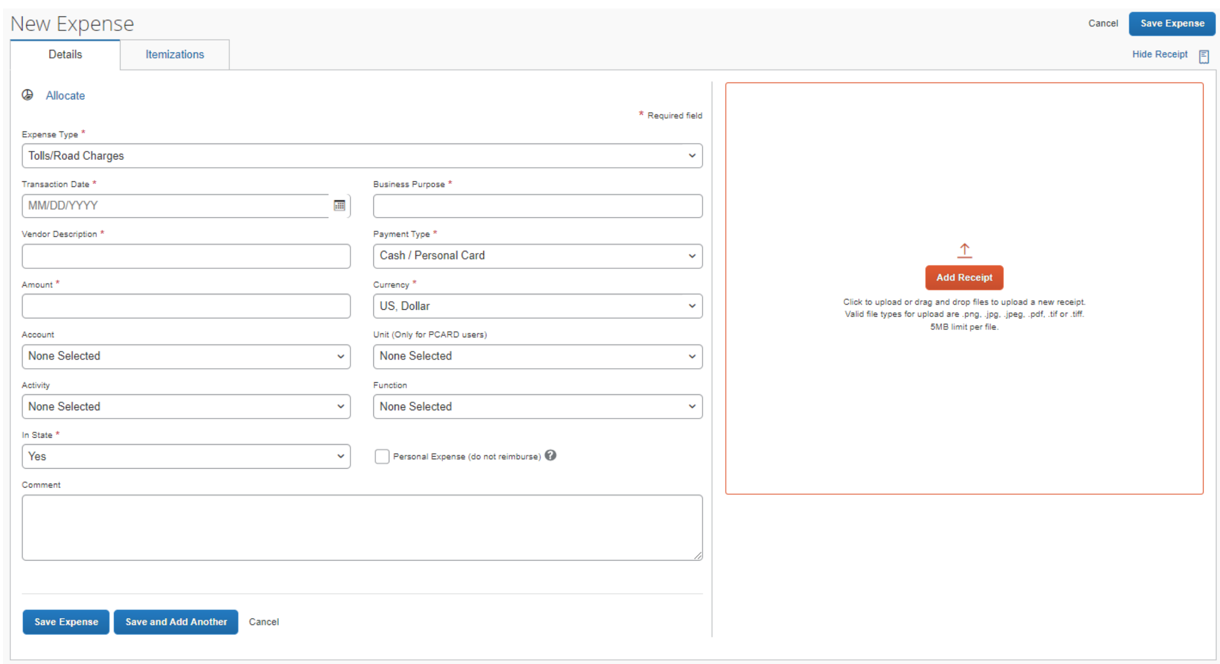


Entering a Non-Mileage Expense

1. Select the expense from the list of expense types.



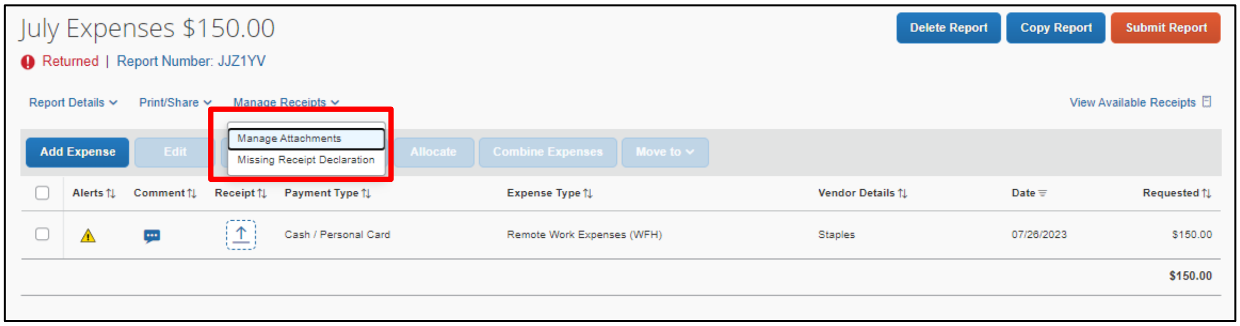
2. Enter the data into the fields. Fields with red asterisks (*) are required.



Attaching Receipts to a Non-Mileage Expense

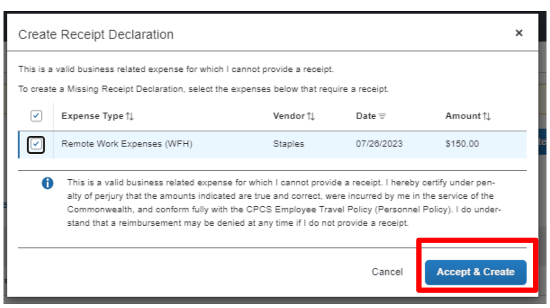
NOTE: If a receipt cannot be provided:

A. Select the “Manage Receipts” drop down menu. Select “Missing Receipt Declaration.” A pop up box appears.



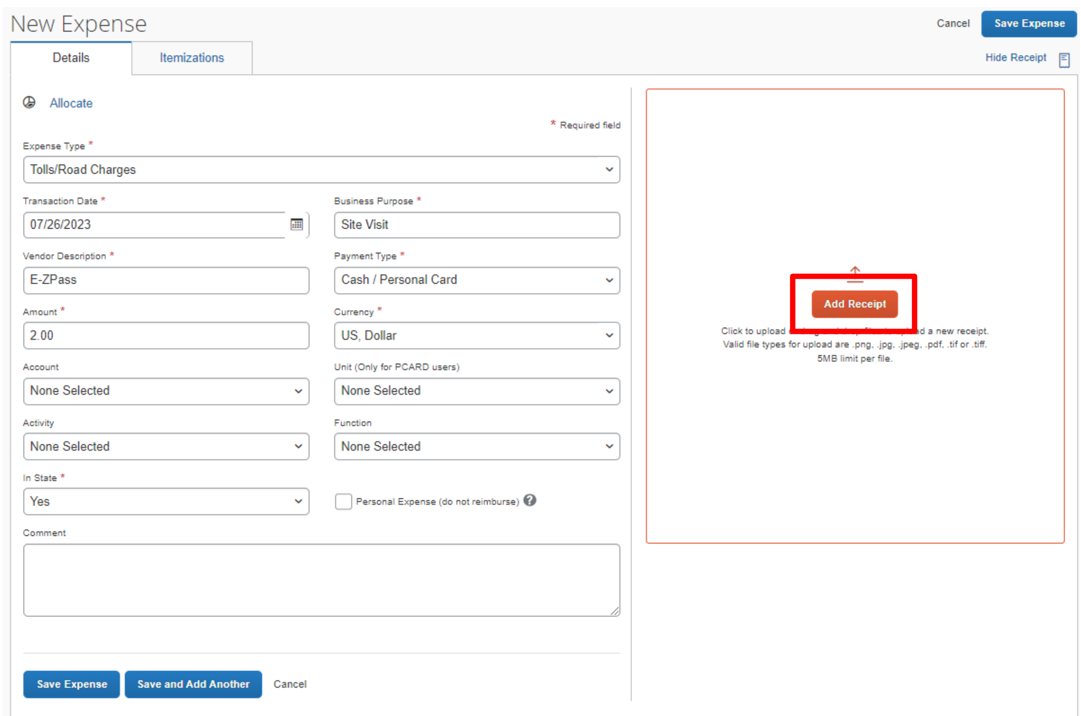
B. Review the declaration and select the missing expense(s).

C. Select “Accept & Create.”

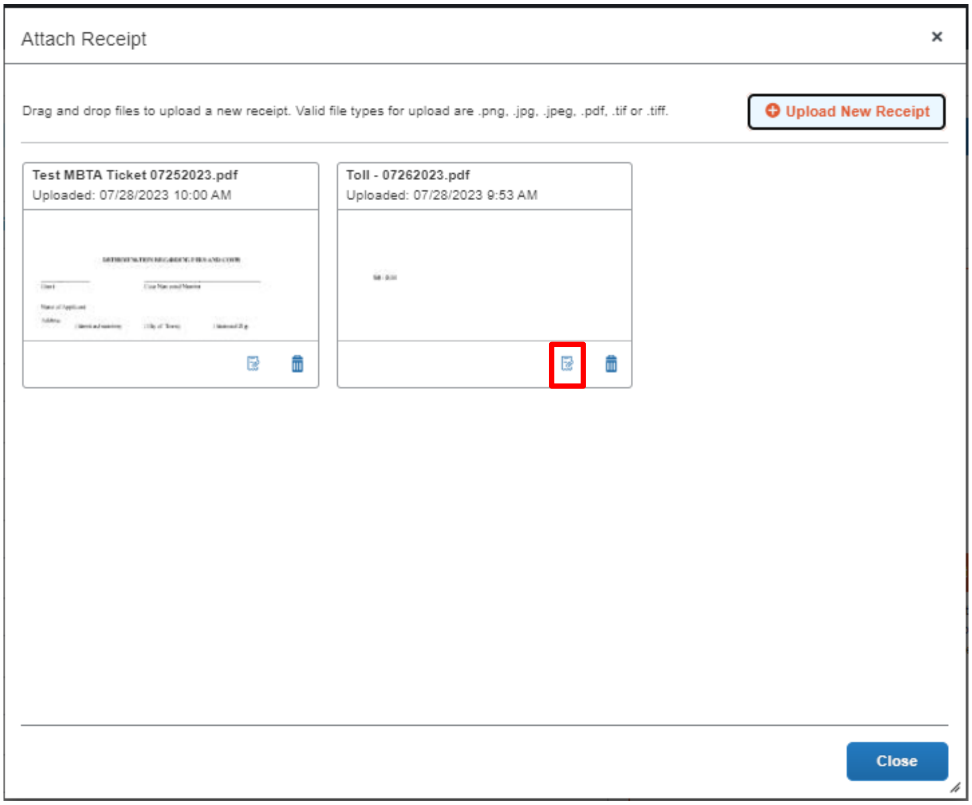


D. It resolves the Alert and creates a declaration statement for the expense item(s).

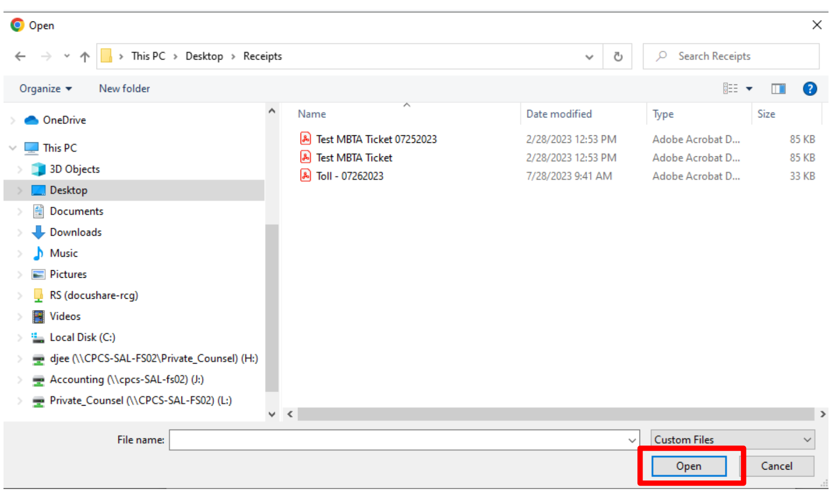
3. Attach a copy of the receipt, select the "Add Receipt" button.



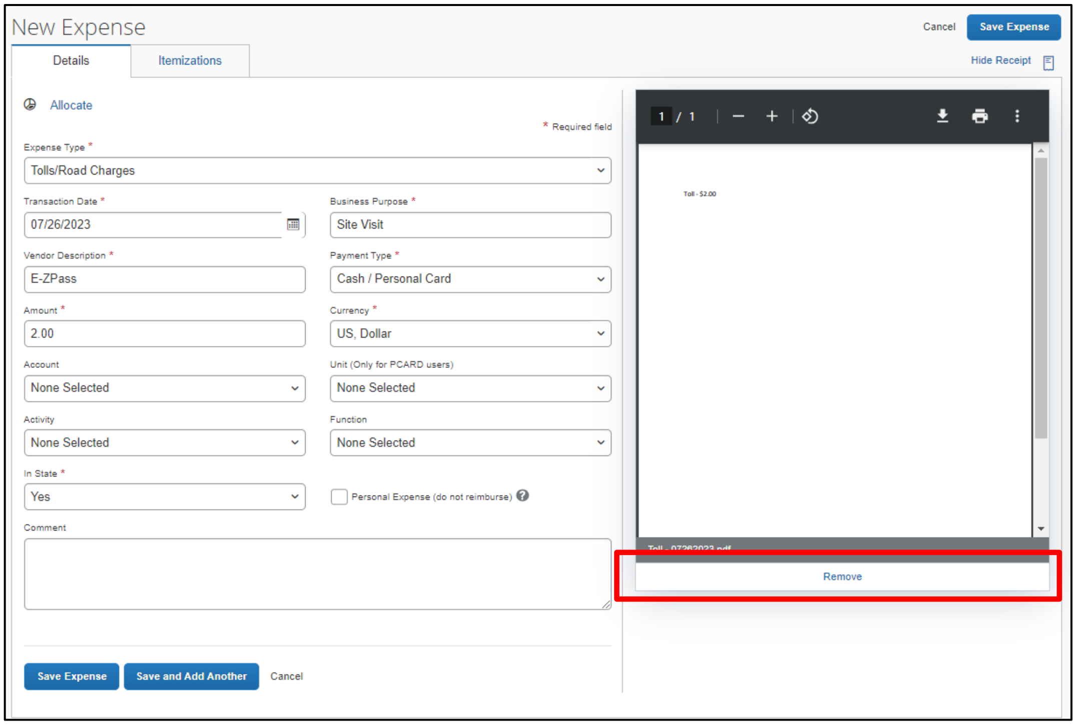
4. If the receipt has already been uploaded, click the “Attach” icon.



5. If the desired receipt is not listed under “Attach Receipt”, select the “Upload New Receipt” button to locate the file on your computer. Once you have located the file, select the file and then select “Open”.

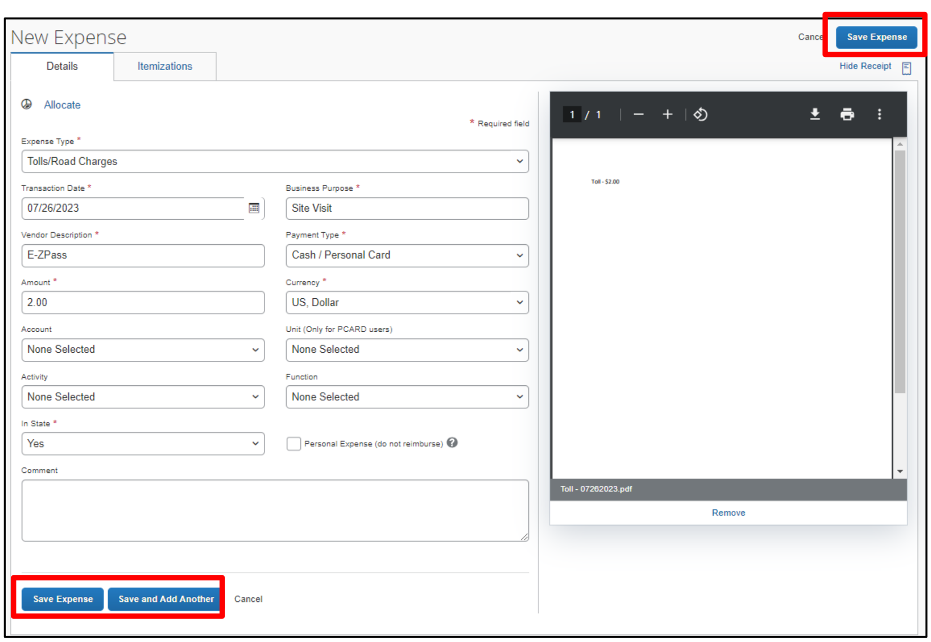


6. Once the file has been uploaded successfully, it will appear in the receipt section of the New Expense entry. **<u>Make sure your receipt image is clear and legible.</u>**

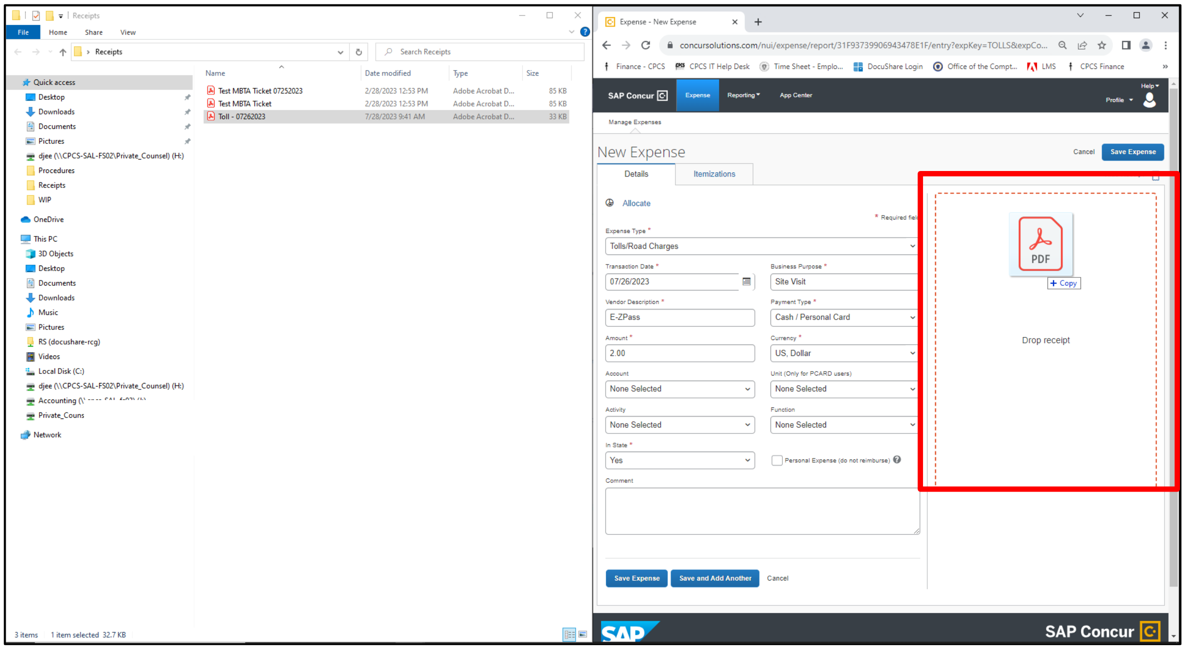


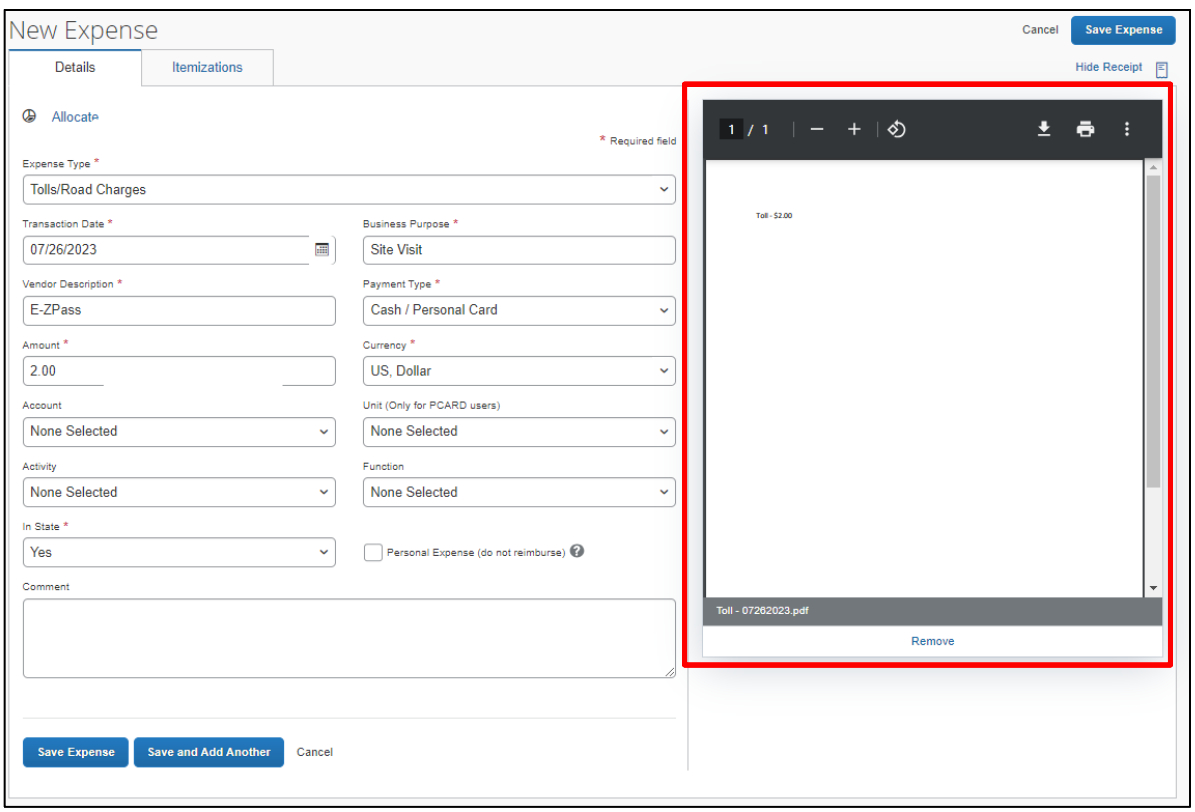
Note: If you need to remove the receipt, select the "Remove" button below the image of the receipt.

7. If you are satisfied with the data entered, select one of the "Save Expense" buttons. If you would like to add another expense to this report, select the "Save and Add Another" button. If you would like to cancel this entry, select one of the "Cancel" links.

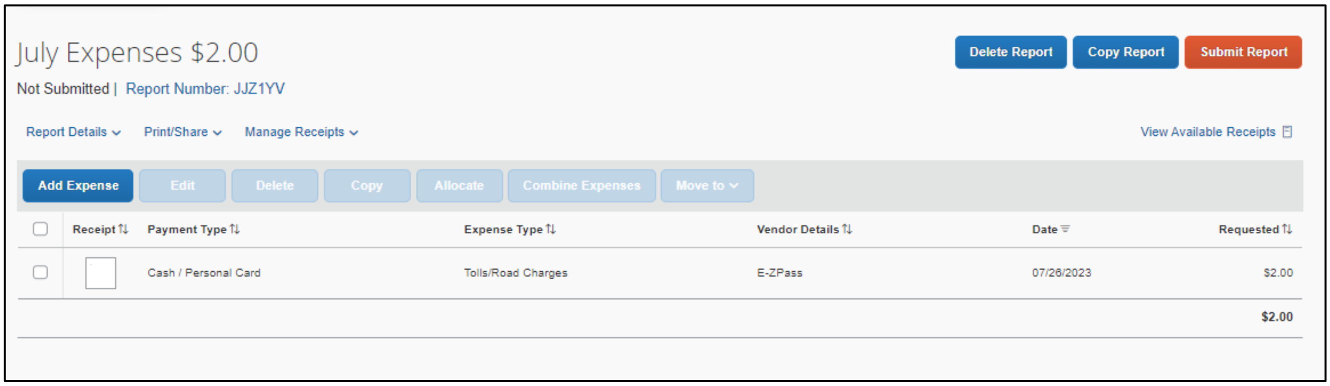


8. Alternatively, you can drag and drop files into the Add Receipt section.   Your browser should not be maximized. Select the file you would like to upload. Drag and drop it to the Add Receipt section in Concur. You should see the section change and “Drop receipt” appear. Once dropped, it will upload the file and display the receipt. **Make sure your receipt image is clear and legible.**



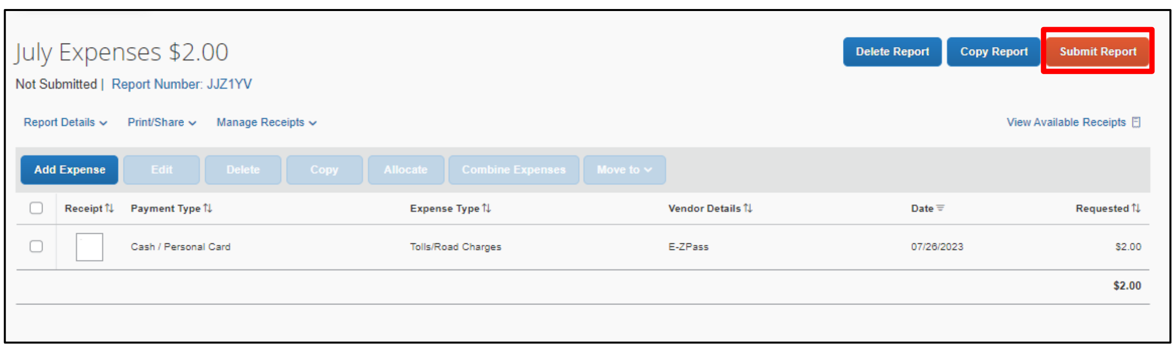


9. You will now see the saved expense listed under the “Expenses” Column, along with the updated total.

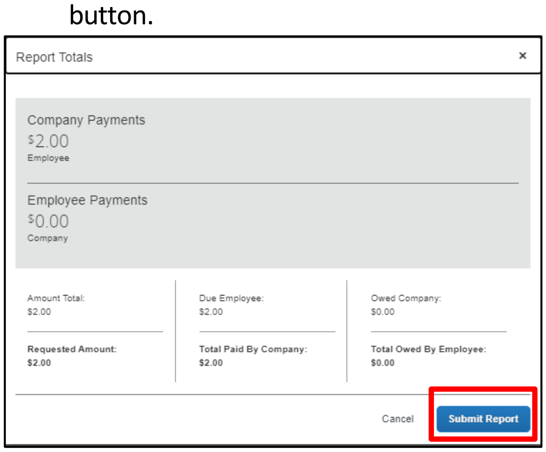


Submitting your Expense Report

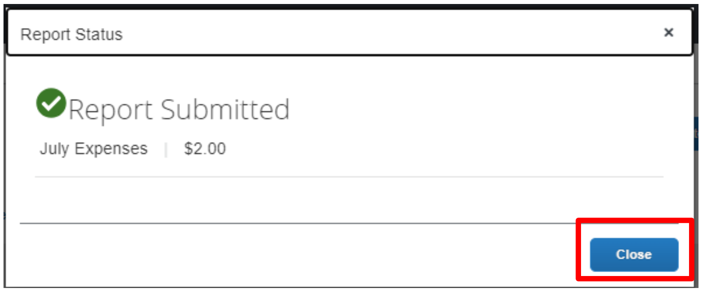
1. If you are satisfied with your expense entries and total amount, select “Submit Report” in the upper right-hand corner. If you would like to delete your report completely, select “Delete Report”.



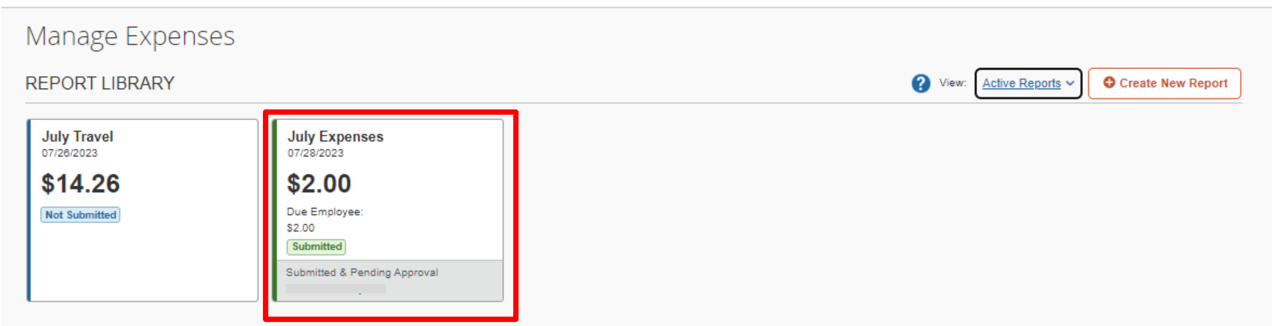
2. It will show a final summary of your expenses. Confirm you’re the totals are correct and select the “Submit Report” button.



3. You will receive a confirmation that your report has been submitted successfully. Select the “Close” button to close the message box.



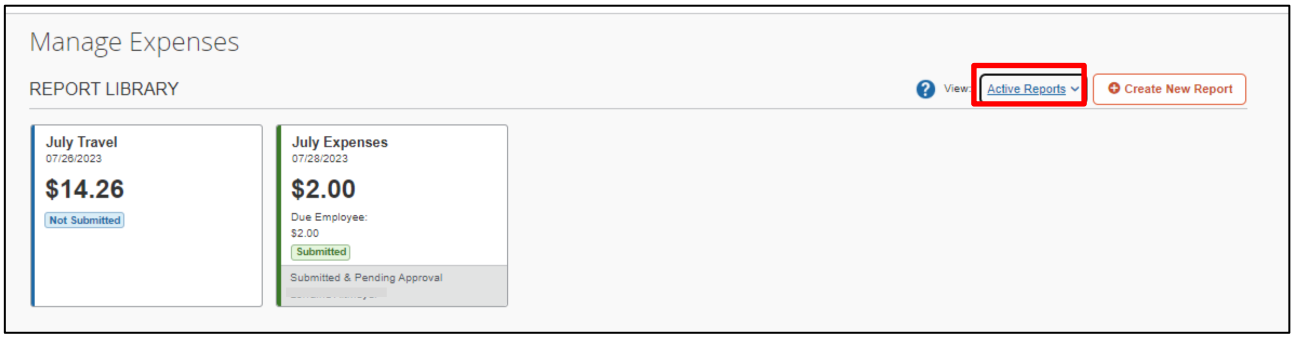
4. Your submitted report will now appear under “Active Reports”, pending the approval of your Supervisor.



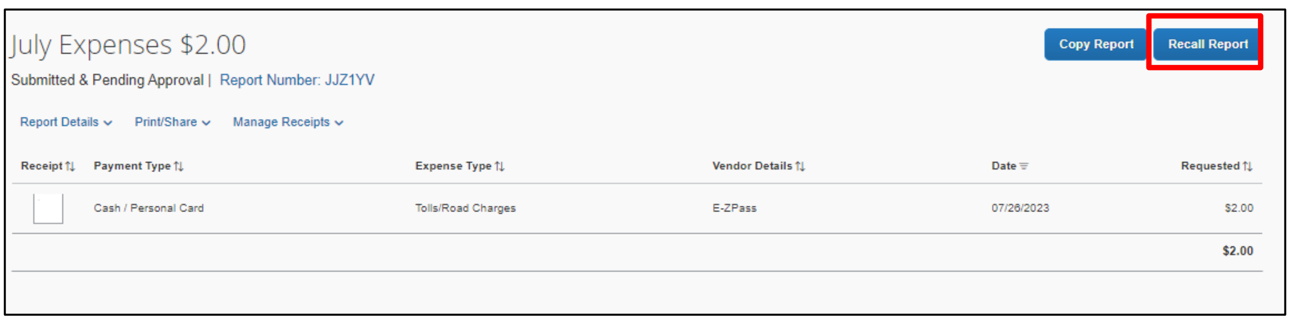
Appendix

Recall a Report

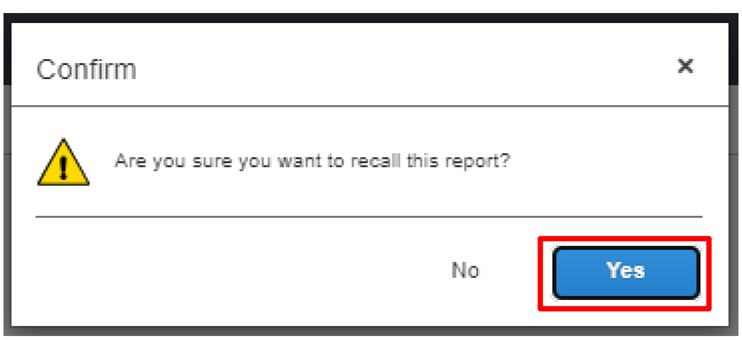
1. You can recall a submitted report so that you can make corrections. The report will still have to be pending the approval of your Supervisor in order for you to complete this task. Select the report that you would like to recall under "Active Reports".



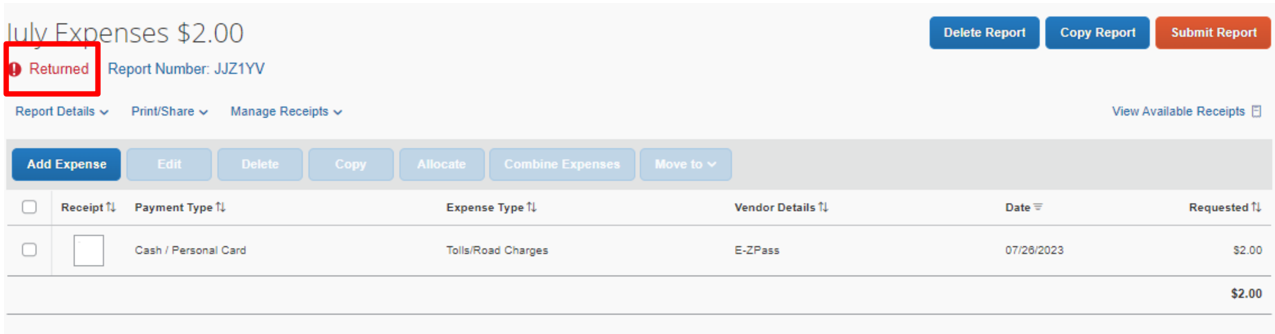
2. Select "Recall" in the upper right-hand corner.



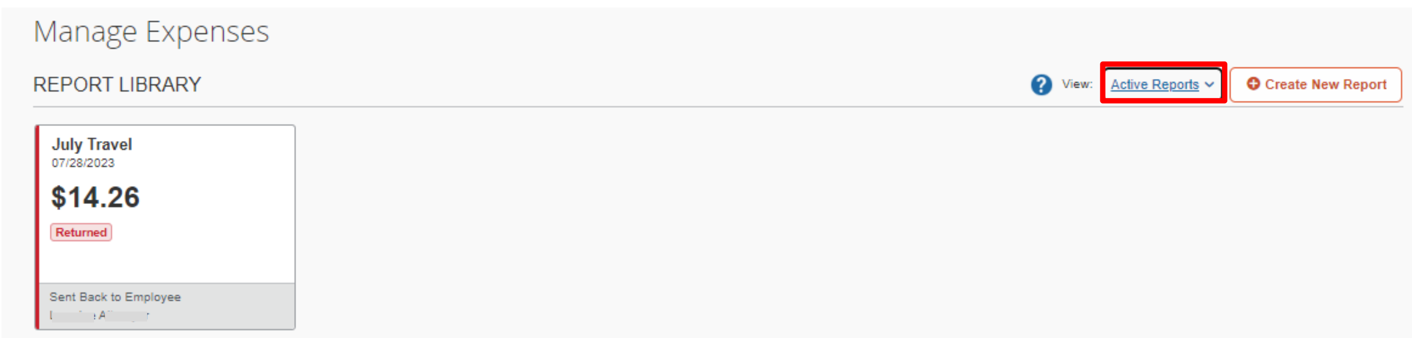
3. Confirm that you would like to recall the report by selecting the "Yes" button.



4. Once the report has been successfully recalled, you will be able to add/delete/edit entries. You will then have to resubmit the report for approval and processing.



Returned/Rejected Expense Report



If a report has been returned/rejected by your Supervisor, it will appear under "Active Reports" in the Report Library section. You can click the report and make any corrections as needed. Once you make all necessary corrections, you will then have to resubmit the report.