

Concur – How to Enter Expenses

*Committee for Public Counsel Services
Finance*

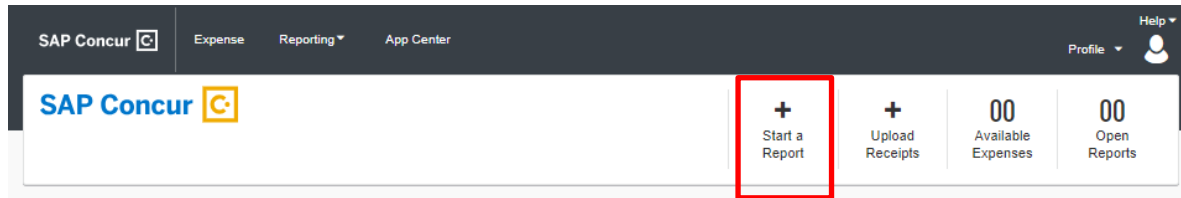


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Creating an Expense Report

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.

The screenshot shows the 'Create New Report' form. It has a title bar 'Create New Report' with a close button. The form contains several fields: 'Report Name *' (with a red border), 'Report Date' (07/27/2023), 'Division' (FINANCE / FACILITIES), 'Location *' (Boston - 75 Federal Street), 'In State *' (None Selected), and 'Training *' (None Selected). At the bottom right, there is a 'Create Report' button highlighted with a red box.

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.

The screenshot shows the 'July Travel \$0.00' report page. It has a title bar 'July Travel \$0.00' and a 'Delete Report' button. Below the title bar, it says 'Not Submitted | Report Number: 6E4QKQ'. There are three tabs: 'Report Details' (selected), 'Print/Share', and 'Manage Receipts'. Below the tabs, there is a row of buttons: 'Add Expense' (highlighted with a red box), 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. At the bottom, it says 'No Expenses' and 'Add expenses to this report to submit for reimbursement.'

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

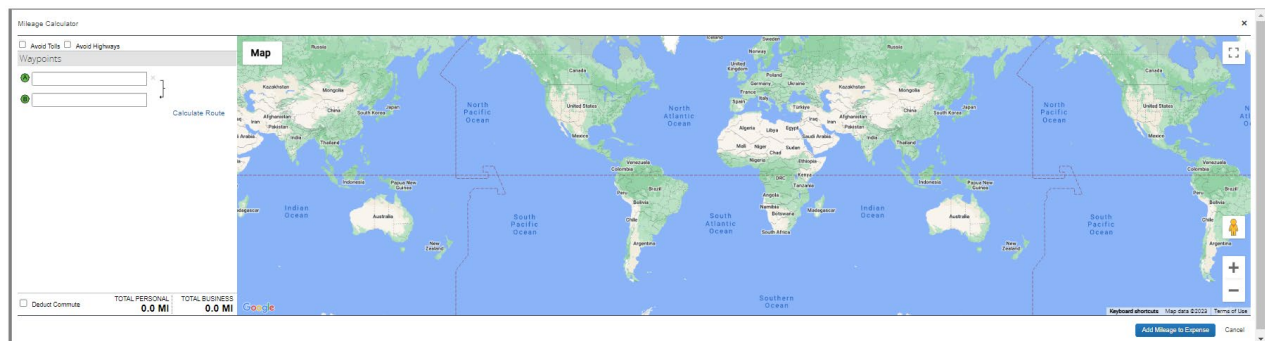
The screenshot shows the 'Add Expense' dialog box. At the top, there are two tabs: 'Available Expenses' (with a '0' icon) and 'Create New Expense' (with a '+' icon). Below the tabs is a search bar labeled 'Search for an expense type'. The main list is divided into sections. The 'Recently Used' section is expanded, showing 'Public Transport', 'Remote Work Equipment Stipend (FY23)', 'Personal Car Mileage', 'Office Supplies', and 'Mobile/Cellular Phone - Stipend'. Below this, the '01. Travel' section is expanded, showing 'Airfare', 'Airline Fees', 'Car Rental', and 'Hotel'. The '02. Transportation' section is also expanded, showing 'Bus', 'Parking', 'Personal Car Mileage', 'Public Transport', 'Taxi', 'Tolls/Road Charges', and 'Train'.

Entering Personal Car Mileage

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

This screenshot is similar to the previous one, but it highlights the 'Personal Car Mileage' option under the '02. Transportation' category with a red rectangle. The 'Recently Used' section is still expanded, showing the same list of items. The '01. Travel' section is also expanded. The '02. Transportation' section is expanded, and 'Personal Car Mileage' is highlighted. The search bar and tabs remain the same.

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 entered 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.

A screenshot of the Mileage Calculator application showing calculated results. The waypoints are "75 Federal St., 6th Floor, Boston, MA 02" (labeled A) and "8 Pleasant Street, Malden, MA 02148, U" (labeled B). The distance is "7.0 MI" and the "Personal" checkbox is selected. Below the waypoints are buttons for "Calculate Route" and "Make Round Trip". The "Directions" section shows "Suggested routes:" with three options: "I-93 N 7.0 mi. About 19 mins", "I-93 N and Salem St 8.2 mi. About 21 mins", and "I-93 N and Main St 6.4 mi. About 22 mins". Below this is a summary for "101 Federal St, Boston, MA 02110, USA" showing "7.0 mi. About 19 mins" and a list of three steps: "1. Head north on Federal St toward Franklin St 0.1 mi", "2. Turn right onto Milk St 115 ft", and "3. Turn right onto Congress St 0.3 mi". At the bottom, there are checkboxes for "Deduct Commute", "TOTAL PERSONAL 0.0 MI", and "TOTAL BUSINESS 7.0 MI".

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.

Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

Waypoints

- A 75 Federal St., 6th Floor, Boston, MA 02 7.0 MI ☐ Personal
- B 6 Pleasant Street, Malden, MA 02148, U 8.0 MI ☐ Personal
- C

[Calculate Route](#) [Make Round Trip](#)

Directions

101 Federal St, Boston, MA 02110, USA

7.0 mi. About 19 mins

1. Head north on Federal St toward Franklin St 0.1 mi
2. Turn right onto Milk St 115 ft
3. Turn right onto Congress St 0.3 mi
4. Turn left onto Atlantic Ave 0.1 mi
5. Take the Route 93 N ramp on the left to 0.4 mi

☐ Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	15.0 MI

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.

Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

Waypoints

- A 75 Federal St., 6th Floor, Boston, MA 02 7.0 MI ☐ Personal
- B 6 Pleasant Street, Malden, MA 02148, U 16.4 MI ☐ Personal
- C 35 Congress Street, Salem, MA 01970

[Calculate Route](#) [Make Round Trip](#)

Directions

101 Federal St, Boston, MA 02110, USA

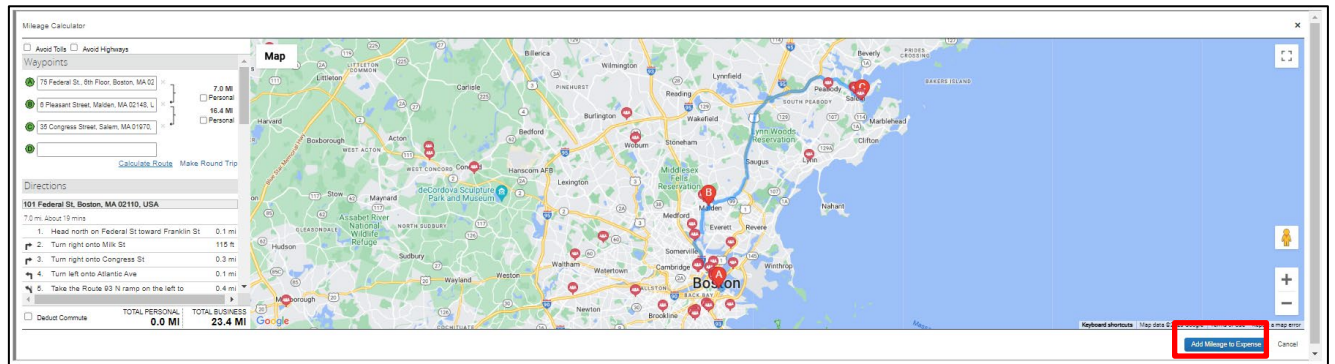
7.0 mi. About 19 mins

1. Head north on Federal St toward Franklin St 0.1 mi
2. Turn right onto Milk St 115 ft
3. Turn right onto Congress St 0.3 mi
4. Turn left onto Atlantic Ave 0.1 mi
5. Take the Route 93 N ramp on the left to 0.4 mi

☐ Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
0.0 MI	23.4 MI

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.

Distance *	Amount
23	14.26

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

New Expense			
Details		Itemizations	
Mileage Calculator * Allocate			
Expense Type *		Transaction Date *	Business Purpose *
Personal Car Mileage		07/26/2023	Site Visit
From Location	To Location	Payment Type	Account
75 Federal St., 6th Floor, Boston, MA 02110, US	35 Congress Street, Salem, MA 01970, US	Cash / Personal Card	None Selected
Unit (Only for PCARD users)	Activity	Function	In State *
None Selected	None Selected	None Selected	Yes
Comment			
Distance *	Amount	Currency	Reimbursement Rates
23	14.26	US, Dollar	USD 0.62 per mile
Save Expense Save and Add Another Cancel			

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.

New Expense Cancel Save Expense Show Receipt

Details Itemizations

[Mileage Calculator](#) Allocate

Expense Type * Transaction Date * Business Purpose *

Personal Car Mileage 07/26/2023 Site Visit

From Location To Location Payment Type Account

75 Federal St., 6th Floor, Boston, MA 02110, US 35 Congress Street, Salem, MA 01970, US Cash / Personal Card None Selected

Unit (Only for P-CARD users) Activity Function In State *

None Selected None Selected None Selected Yes

Comment

Distance * Amount Currency Reimbursement Rates

23 14.26 US, Dollar USD 0.62 per mile

Save Expense Save and Add Another Cancel

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

July Travel \$14.26 Delete Report Copy Report Submit Report

Not Submitted | Report Number: 6E4QKQ

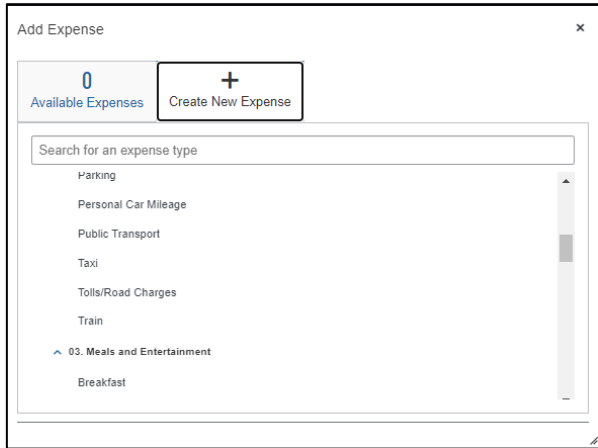
Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

☐	Receipt T1	Payment Type T1	Expense Type T1	Vendor Details T1	Date	Requested T1
☐		Cash / Personal Card	Personal Car Mileage		07/26/2023	\$14.26
						\$14.26

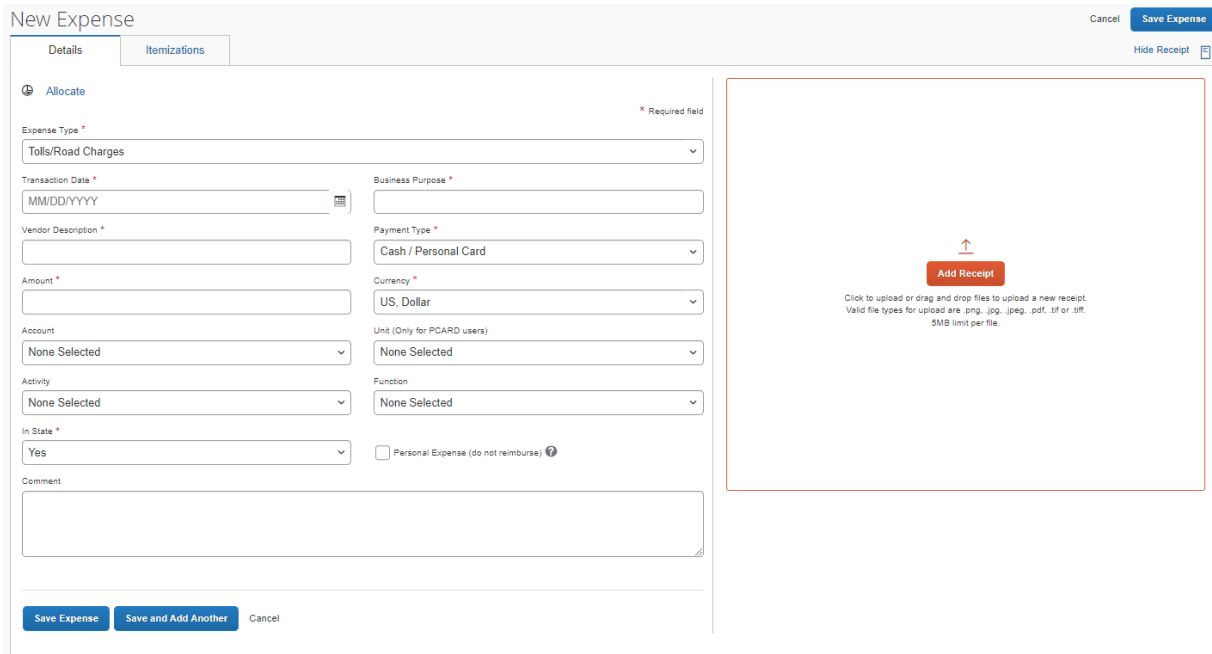
Entering a Non-Mileage Expense

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



The 'Add Expense' dialog box is shown. It has a close button (X) in the top right corner. On the left, there is a counter '0 Available Expenses' and a '+ Create New Expense' button. Below this is a search bar labeled 'Search for an expense type'. A list of expense types is displayed: Parking, Personal Car Mileage, Public Transport, Taxi, Tolls/Road Charges, Train, and a collapsed item '03. Meals and Entertainment' which has a sub-item 'Breakfast' visible below it.

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



The 'New Expense' form is displayed. It has tabs for 'Details' (selected) and 'Itemizations'. In the top right corner, there are 'Cancel' and 'Save Expense' buttons, and a 'Hide Receipt' link with a receipt icon. Below the tabs is an 'Allocate' button. The form contains several required fields marked with a red asterisk (*):
- Expense Type *: A dropdown menu with 'Tolls/Road Charges' selected.
- Transaction Date *: A date input field with a calendar icon.
- Vendor Description *: A text input field.
- Amount *: A text input field.
- Account: A dropdown menu with 'None Selected' selected.
- Activity: A dropdown menu with 'None Selected' selected.
- In State *: A dropdown menu with 'Yes' selected.
- Comment: A text area.
Other fields include:
- Business Purpose *: A text input field.
- Payment Type *: A dropdown menu with 'Cash / Personal Card' selected.
- Currency *: A dropdown menu with 'US, Dollar' selected.
- Unit (Only for PCARD users): A dropdown menu with 'None Selected' selected.
- Function: A dropdown menu with 'None Selected' selected.
- A checkbox for 'Personal Expense (do not reimburse)' with a help icon.
On the right side of the form is a large red-bordered box for uploading a receipt. It contains 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.'

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.

July Expenses \$150.00

Returned | Report Number: JJ21YV

Report Details | Print/Share | Manage Receipts

Manage Attachments
Missing Receipt Declaration

Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐			Cash / Personal Card	Remote Work Expenses (WFH)	Staples	07/28/2023	\$150.00
							\$150.00

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

Create Receipt Declaration

This is a valid business related expense for which I cannot provide a receipt.
To create a Missing Receipt Declaration, select the expenses below that require a receipt.

Expense Type	Vendor	Date	Amount
☐ Remote Work Expenses (WFH)	Staples	07/28/2023	\$150.00

This is a valid business related expense for which I cannot provide a receipt. I hereby certify under penalty of perjury that the amounts indicated are true and correct, were incurred by me in the service of the Commonwealth, and conform fully with the CPCS Employee Travel Policy (Personnel Policy). I do understand that a reimbursement may be denied at any time if I do not provide a receipt.

Cancel Accept & Create

C. Select “Accept & Create.”

Create Receipt Declaration

This is a valid business related expense for which I cannot provide a receipt.
To create a Missing Receipt Declaration, select the expenses below that require a receipt.

Expense Type	Vendor	Date	Amount
☒ Remote Work Expenses (WFH)	Staples	07/28/2023	\$150.00

This is a valid business related expense for which I cannot provide a receipt. I hereby certify under penalty of perjury that the amounts indicated are true and correct, were incurred by me in the service of the Commonwealth, and conform fully with the CPCS Employee Travel Policy (Personnel Policy). I do understand that a reimbursement may be denied at any time if I do not provide a receipt.

Cancel Accept & Create

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

July Expenses \$150.00 Delete Report Copy Report Submit Report

Returned | Report Number: JJZ1YV

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

☐	Comment ⌵	Receipt ⌵	Payment Type ⌵	Expense Type ⌵	Vendor Details ⌵	Date ⌵	Requested ⌵
☐	⋮		Cash / Personal Card	Remote Work Expenses (WFH)	Staples	07/26/2023	\$150.00
							\$150.00

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

New Expense Cancel Save Expense

Details Itemizations Hide Receipt

Allocate

* Required field

Expense Type *
Tolls/Road Charges

Transaction Date *
07/26/2023

Business Purpose *
Site Visit

Vendor Description *
E-ZPass

Payment Type *
Cash / Personal Card

Amount *
2.00

Currency *
US, Dollar

Account
None Selected

Unit (Only for PCARD users)
None Selected

Activity
None Selected

Function
None Selected

In State *
Yes

☐ Personal Expense (do not reimburse) ?

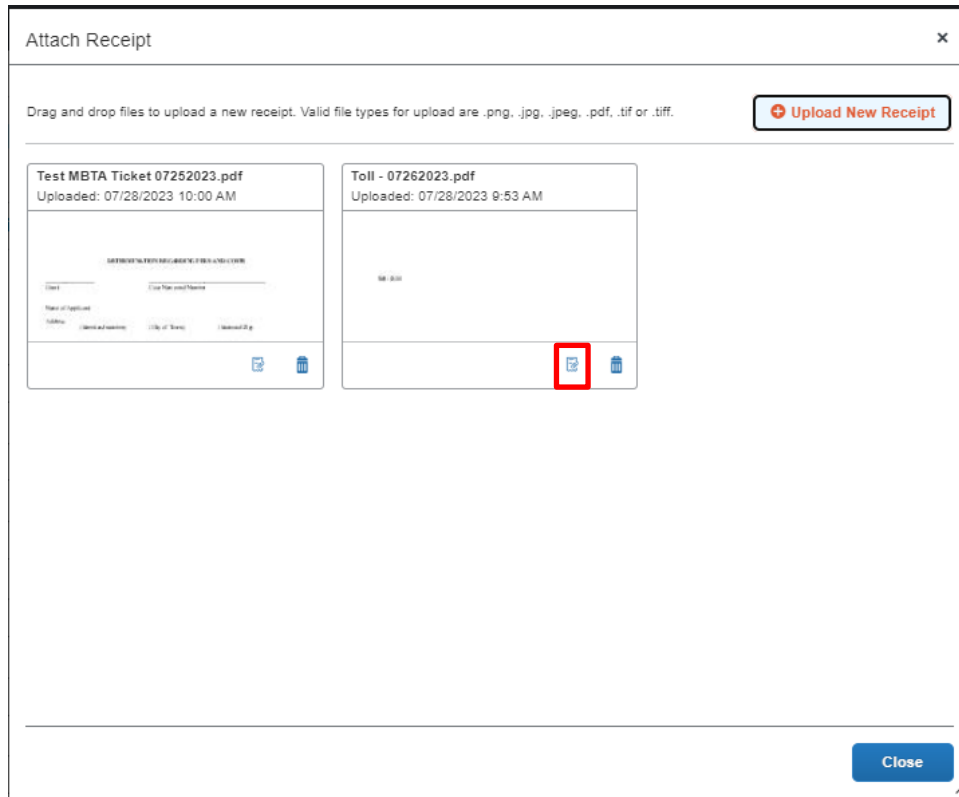
Comment

Save Expense Save and Add Another Cancel

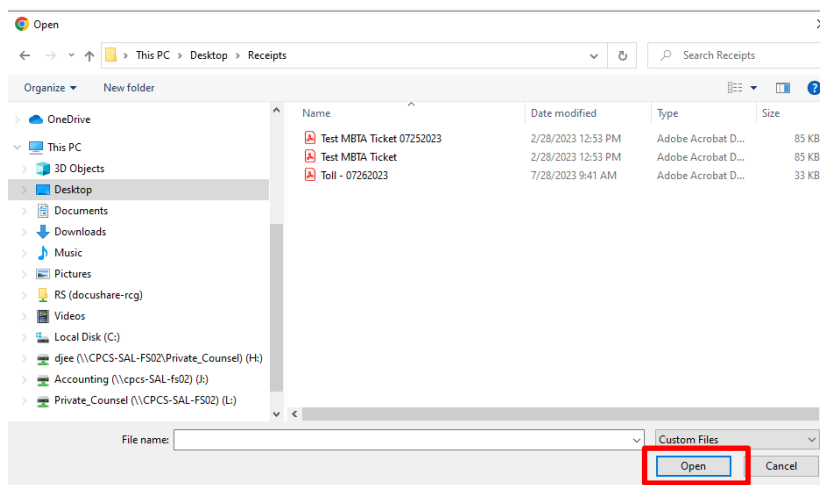
Add Receipt

Click to upload a receipt or attach a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

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. **Make sure your receipt image is clear and legible.**

The screenshot shows the 'New Expense' form with the 'Details' tab selected. The form contains various input fields for expense details. On the right, a receipt image is displayed, showing a toll for \$2.00. Below the receipt image, there is a red rectangular box highlighting a 'Remove' button. The form also includes a 'Comment' field and several save buttons at the bottom.

New Expense Cancel Save Expense

Details **Itemizations**

Allocate

* Required field

Expense Type *
Tolls/Road Charges

Transaction Date *
07/26/2023

Business Purpose *
Site Visit

Vendor Description *
E-ZPass

Payment Type *
Cash / Personal Card

Amount *
2.00

Currency *
US, Dollar

Account
None Selected

Unit (Only for PCARD users)
None Selected

Activity
None Selected

Function
None Selected

In State *
Yes

☐ Personal Expense (do not reimburse) ?

Comment

Save Expense Save and Add Another Cancel

1 / 1 | - + ↺

Toll - \$2.00

Toll - 07262023.pdf

Remove

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.

This screenshot is similar to the previous one, but it highlights the 'Save Expense' button at the top right of the form with a red rectangular box. It also highlights the 'Save Expense' and 'Save and Add Another' buttons at the bottom left of the form with a red rectangular box. The receipt image and other form fields remain the same.

New Expense Cancel Save Expense

Details **Itemizations**

Allocate

* Required field

Expense Type *
Tolls/Road Charges

Transaction Date *
07/26/2023

Business Purpose *
Site Visit

Vendor Description *
E-ZPass

Payment Type *
Cash / Personal Card

Amount *
2.00

Currency *
US, Dollar

Account
None Selected

Unit (Only for PCARD users)
None Selected

Activity
None Selected

Function
None Selected

In State *
Yes

☐ Personal Expense (do not reimburse) ?

Comment

Save Expense Save and Add Another Cancel

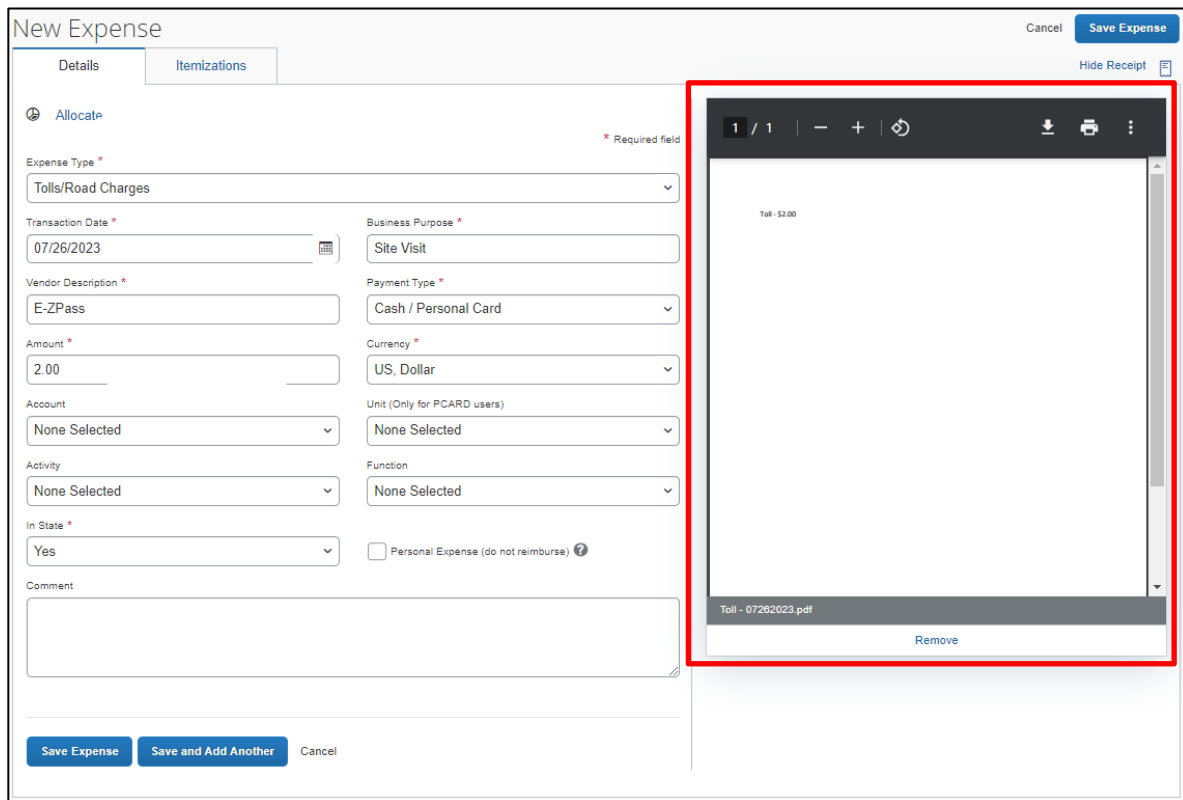
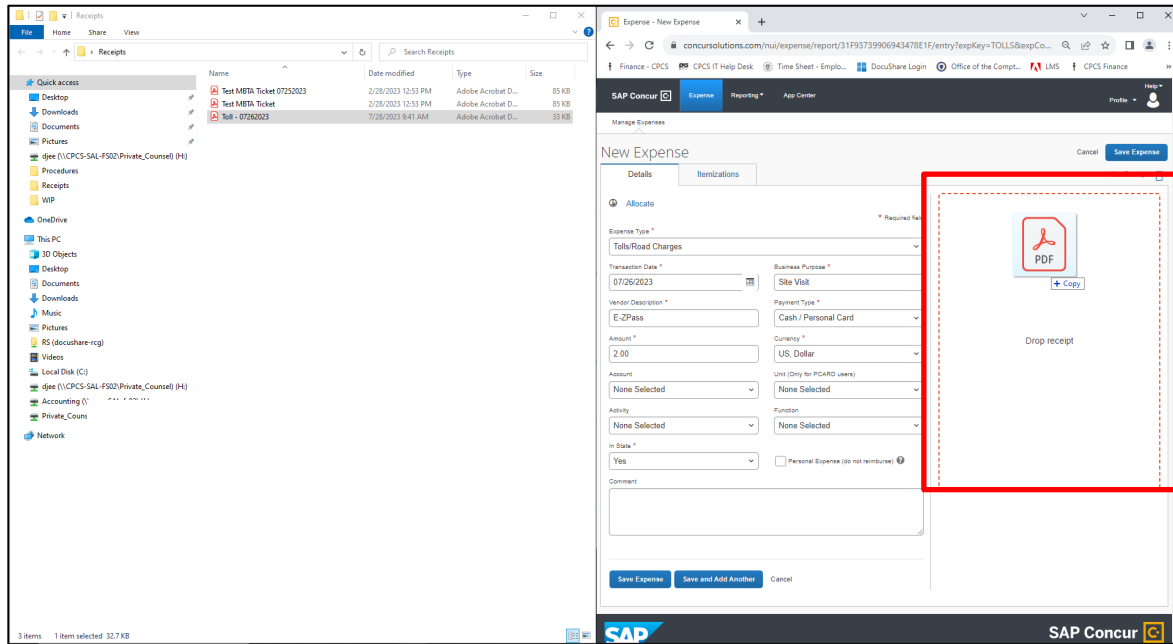
1 / 1 | - + ↺

Toll - \$2.00

Toll - 07262023.pdf

Remove

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.

July Expenses \$2.00
Not Submitted | Report Number: JJZ1YV

Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts □

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

☐	Receipt ⓘ	Payment Type ⓘ	Expense Type ⓘ	Vendor Details ⓘ	Date ⓘ	Requested ⓘ
☐		Cash / Personal Card	Tolls/Road Charges	E-ZPass	07/26/2023	\$2.00
						\$2.00

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”.

July Expenses \$2.00
Not Submitted | Report Number: JJZ1YV

Report Details ▾ Print/Share ▾ Manage Receipts ▾ View Available Receipts □

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

☐	Receipt ⓘ	Payment Type ⓘ	Expense Type ⓘ	Vendor Details ⓘ	Date ⓘ	Requested ⓘ
☐		Cash / Personal Card	Tolls/Road Charges	E-ZPass	07/26/2023	\$2.00
						\$2.00

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

Report Totals

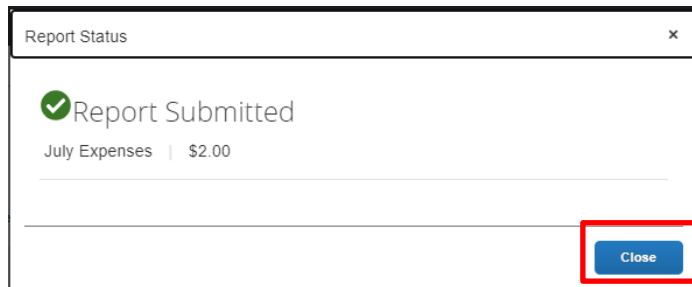
Company Payments
\$2.00
Employee

Employee Payments
\$0.00
Company

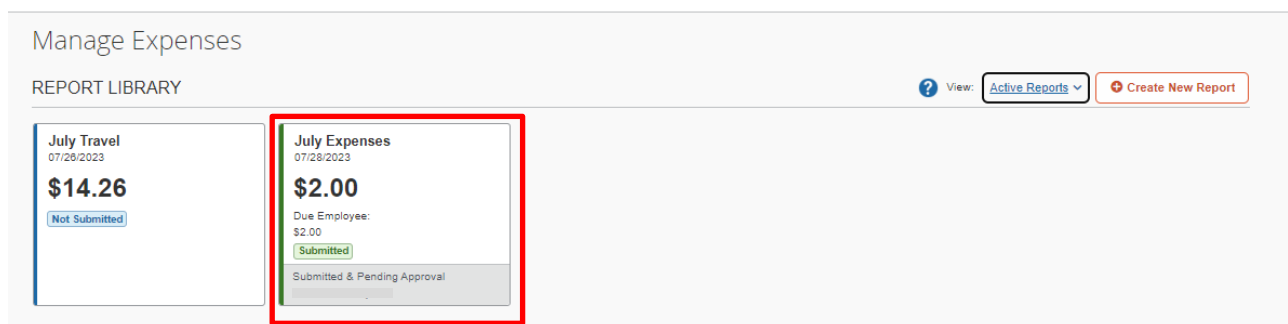
Amount Total: \$2.00	Due Employee: \$2.00	Owed Company: \$0.00
Requested Amount: \$2.00	Total Paid By Company: \$2.00	Total Owed By Employee: \$0.00

Cancel Submit Report

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”.

Manage Expenses

REPORT LIBRARY

View Active Reports Create New Report

July Travel
07/28/2023
\$14.26
Not Submitted

July Expenses
07/28/2023
\$2.00
Due Employee:
\$2.00
Submitted
Submitted & Pending Approval

2. Select “Recall” in the upper right-hand corner.

July Expenses \$2.00

Submitted & Pending Approval | Report Number: JJZ1YV

Report Details Print/Share Manage Receipts

Receipt ⓘ	Payment Type ⓘ	Expense Type ⓘ	Vendor Details ⓘ	Date ⓘ	Requested ⓘ
	Cash / Personal Card	Tolls/Road Charges	E-ZPass	07/28/2023	\$2.00
					\$2.00

Copy Report Recall Report

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

Confirm

Are you sure you want to recall this report?

No Yes

- 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.

July Expenses \$2.00

Returned Report Number: JJZ1YV

Delete Report Copy Report Submit Report

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐	☐ Cash / Personal Card	Tolls/Road Charges	E-ZPass	07/26/2023	\$2.00
					\$2.00

Returned/Rejected Expense Report

Manage Expenses

REPORT LIBRARY

View: **Active Reports** Create New Report

July Travel
07/28/2023

\$14.26

Returned

Sent Back to Employee
[Name] [Address]

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.