



## Electronic Expense Reporting

Starting in 2015, all leaders and staff will report their reimbursable expenses via an electronic expense reporting system called CONCUR. This means no more paper forms! Below, you will find instructions for setting up your online account prior to program. You can even download the CONCUR app to your smartphone if you would like to take photos of your receipts and create your expense reports on your phone.

### Your Username and Password

A username has been created for each of you, and you will use this to access your CONCUR account for initial setup and each time you submit an expense report. Your username is YOUR FIRST NAME, MIDDLE INITIAL and LAST NAME followed by @ptpleader.com. There are no spaces or dots or underscores in between each part of your name.

**Example:** [JenniferNWhalen@ptpleader.com](mailto:JenniferNWhalen@ptpleader.com). (My first name is Jennifer. My middle initial is "N." My last name is Whalen.)

Everyone is given the initial password of **Welcome1**, but once you login with this the first time you will be asked to change it to a password that you create. **NOTE:** I will not have access to your password once you reset it, so please write it down.

### To Setup Your Concur Account:


1. Go to the Concur website at <https://www.concursolutions.com>
2. Login using your User Name and Password **Welcome1**
  - a. You will be asked to reset your password
3. Click on the "Profile" tab in the upper right corner of the screen and select *Personal Information* from the Profile Options

A screenshot of the CONCUR web application interface. The top navigation bar includes 'CONCUR', 'Expense', 'Approvals', 'Reporting', and 'App Center'. A 'Profile' tab is visible in the top right. Below the navigation, a dropdown menu is open under 'Profile', showing options: 'Profile', 'Personal Information', 'Change Pas...', 'Concur Insight Essentials', and 'Mobile Registration'. The main content area is titled 'Profile Options' and contains a message: 'Select one of the following to customize your user profile.' Below this, there are several sections: 'Personal Information' (with a blue arrow pointing to it), 'Expense Delegates', 'Company Car', 'Mobile Registration', 'System Settings', 'Expense Preferences', and 'Change Password'. A green notification banner at the top right of the content area says 'Your password has been change'. The left sidebar lists various settings categories like 'Your Information', 'Expense Settings', and 'Other Settings'.

4. Add your mobile number and your email address
5. Follow the prompts to verify your email address

## My Profile - Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.  
Fields marked [Required] and [Required\*\*] (validated and required) must be completed to save your profile.

[Change Picture](#) 

Title  First Name  Middle Name  Nickname  Last Name  Suffix

**Company Information** [Go to top](#)

Employee ID

[Save](#)

**Contact Information** [Go to top](#)

Mobile Phone   [Send Test Message](#)

[Save](#)

**Email Addresses** [Go to top](#)

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?](#)

[\[+\] Add an email address](#)

Email 1	Contact?
olga.burtness@peopletopeople.com <input type="checkbox"/> Not Verified <a href="#">Verify</a>	No <input type="checkbox"/> <a href="#">Add</a>

6. Once your mobile number and email address are entered into your account, you will be able to send your receipts directly to your Concur account through the Concur app or via email from your smartphone.
7. You will be given instructions for how to submit your expense report when you return home from program.

### To Download the CONCUR App to Your Smartphone:

1. Go to your smartphone's app store and search for "Concur Mobile"
2. Download the free "Concur Mobile" app.
3. Login using your User Name and Password
4. Take pictures of your receipts and upload them directly to your account.
5. You will be given instructions for how to submit your expense report when you return home from program.

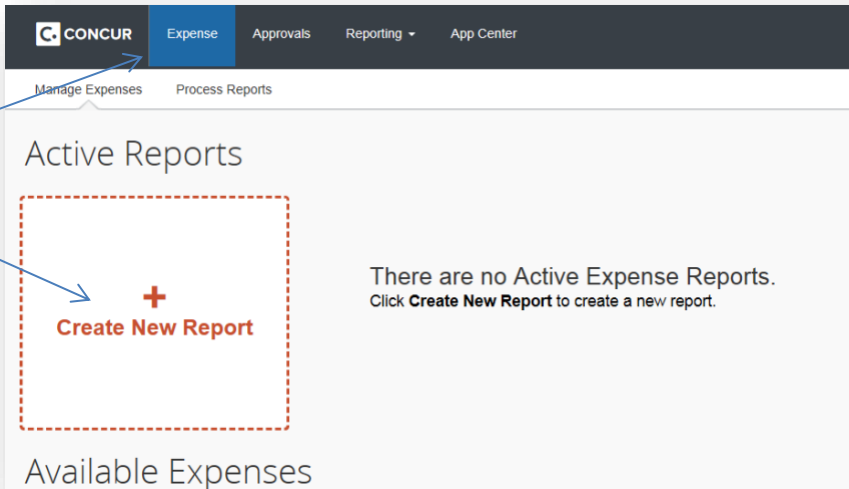


### To Send Your Receipts to Your Concur Account:

1. If you have the "Concur Mobile" app, you can upload pictures of your receipts directly to your account.
2. Once you verify your email address, you can scan and email receipts to [receipts@concur.com](mailto:receipts@concur.com) and they will connect directly to your personal Concur account.
3. You can forward receipts from your email to [receipts@concur.com](mailto:receipts@concur.com) and they will connect directly to your personal account.
4. You can email photos of your receipts to [receipts@concur.com](mailto:receipts@concur.com) and they will connect directly to your personal account.

### To Create an Expense Report:

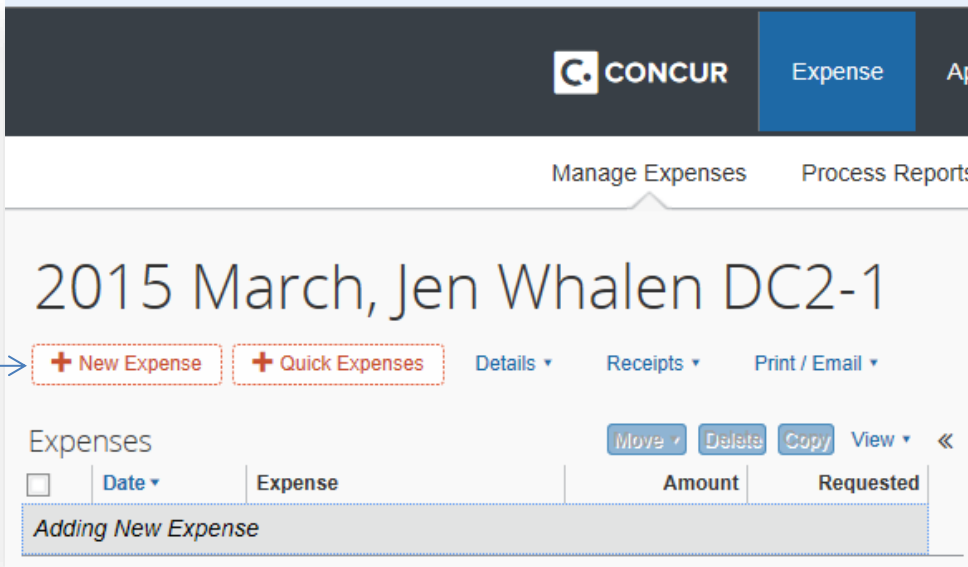
1. Go to the Concur website at <https://www.concursolutions.com>
2. Login using your User Name and Password
3. Select "Expense" on the top row of options and click "Create New Report"



4. Under **“Report Name”** please write year, expense month, your name and program code.  
Example: 2015 March, Jen Whalen DC2-1
5. Under **“Business Purpose”** please write **“LAP leader travel expense”**

The screenshot shows the 'Create a New Expense Report' form. The title is 'Create a New Expense Report' with a subtitle 'Report Header'. There are four input fields: 'Report Name' (containing '2015 March, Jen Whalen DC2-1'), 'Report Date' (containing '03/24/2015'), 'Business Purpose' (containing 'LAP leader travel expense'), and 'Comment' (containing 'Baggage fees'). A blue arrow points to the 'Business Purpose' field.

6. Write any comments that are appropriate for your expense or leave the **“Comment”** field blank.
7. Click **“Next”** at the bottom of the page in the right-hand corner
8. Select **“New Expense”** underneath your report name,



9. Click on the first type of expense you would like to add. A new box will open up and will auto-populate the **“Expense Type”** for the expense you choose.  
Your choices are:

- a. **Leadership – Mileage** (if you drove to program) under **02 Transportation**
- b. **Leadership – Baggage** (if you flew to program) under **07 Other**
- c. **Leadership - Leader Expenses – Misc.** (if you purchased a late arrival dinner) under **07 Other**

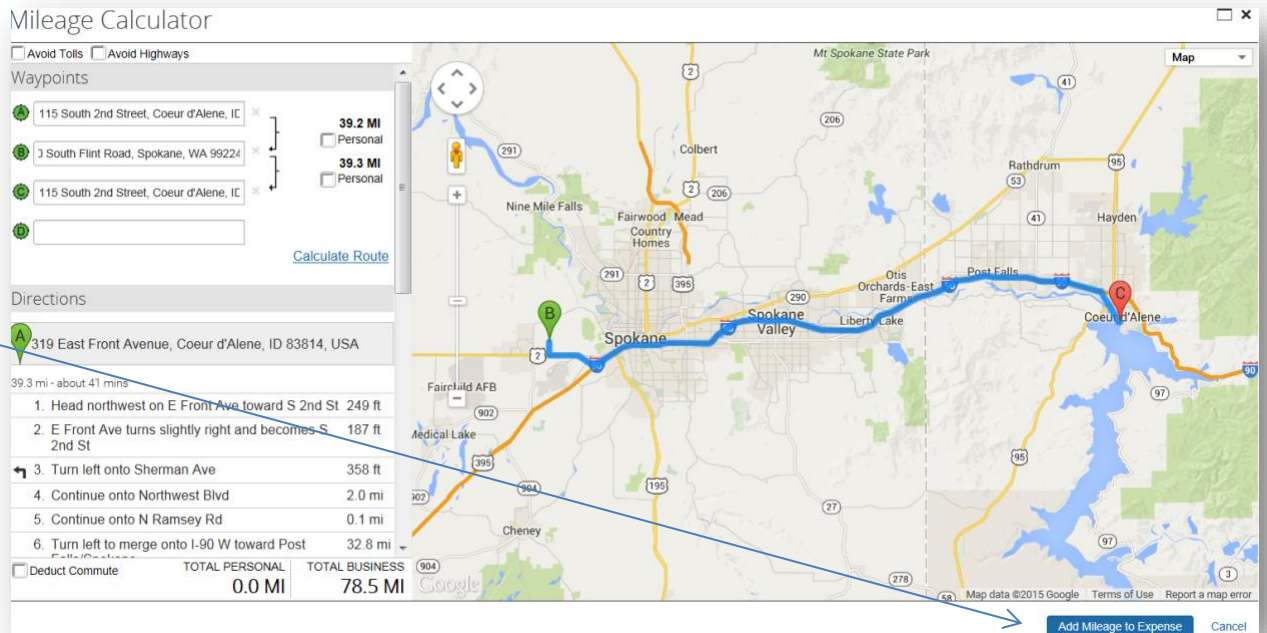
10. Fill out all the fields and select the appropriate program from the Internal Order dropdown. (Follow the detailed instructions and screenshots below.)

11. For a “Leadership - Mileage” entry, follow these steps:

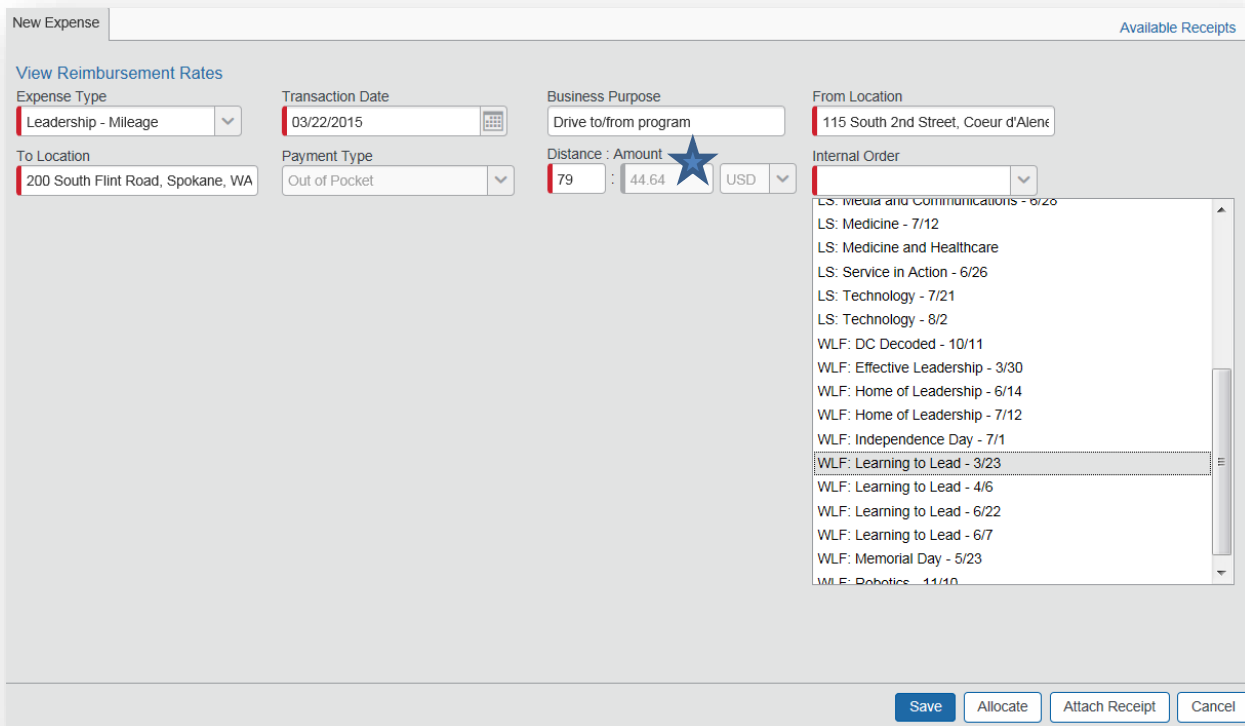
- a. Click on “Leadership – Mileage” in the right column under **02 Transportation**
- b. In the expense box, enter the “Transaction Date” for this expense or click on the calendar icon to choose the date.
- c. For “Business Purpose,” write “Drive to/from program”
- d. Click the “Mileage Calculator” icon. NOTE: Your location in the screen below will populate once you have filled out the Mileage Calculator

- e. Enter your starting address as Point A
- f. Enter the program address as Point B
- g. Enter additional stops or click “Make Round Trip” to complete your route.

- h. Click “Calculate Route”
- i. Click “Add Mileage to Expense” in the bottom right corner.



- j. This will cause the **“From Location,”** **“To Location”** and **“Distance: Amount”** fields to auto-populate.
- k. For the **“Internal Order”** box, choose your exact program/start date from the drop-down menu.
- l. Leave the **“Vendor Number”** box blank
- m. Leave the **“Project”** box blank
- n. For the **“Department”** box, choose **“00 Not Applicable”**
- o. Click **“Save”** at the bottom of the expense box. The expense will show on the left column of your report.



- 12. For a “Leadership - Baggage” entry, follow these steps:**
- a. In the expense box, enter the **“Transaction Date”** for this expense.
  - b. For **“Business Purpose,”** write **“Checked baggage fees.”**

- c. For **“Vendor Description,”** write the name of your airline.
- d. In the **“Amount”** box, write the amount as shown on the receipt for this expense.
- e. For the **“Internal Order”** box, choose your exact program/start date from the drop-down menu.
- f. Leave the **“Vendor Number”** box blank
- g. Leave the **“Project”** box blank
- h. For the **“Department”** box, choose **“00 Not Applicable”**
- i. Add a **“Comment”** only if necessary to explain an expense, otherwise leave this field blank.
- j. Click **“Attach Receipt”** to attach the uploaded receipt that matches this expense. You can either:
  - i. Upload the receipt from a picture you saved on your computer
  - ii. Choose the image from **“Available Receipts”** if have sent the images directly to Concur via mobile phone or email
- k. Click **“Save”** at the bottom of the expense box. The expense will show on the left column of your report.

**13. For a “Leadership – Leader Expenses – Misc.” entry, follow these steps:**

- a. In the expense box, enter the **“Transaction Date”** for this expense.
- b. For **“Business Purpose,”** write **“Late Arrival Meal.”**
- c. For **“Vendor Description,”** write the name of the restaurant.
- d. In the **“Amount”** box, write the amount as shown on the receipt for this expense.
- e. For the **“Internal Order”** box, choose your exact program/start date from the drop-down menu.
- f. Leave the **“Vendor Number”** box blank
- g. Leave the **“Project”** box blank
- h. For the **“Department”** box, choose **“00 Not Applicable”**
- i. Add a **“Comment”** only if necessary to explain an expense, otherwise leave this field blank.
- j. Click **“Attach Receipt”** to attach the uploaded receipt that matches this expense.
- k. Click **“Save”** at the bottom of the expense box. The expense will show on the left column of your report.

14. Once you have entered all of your expenses, verify that the number in your **“Total Amount”** and **“Total Requested”** entries at the bottom left of the page reflect the same amount.

Confirm that you have attached each of your receipts to the correct expense.

15. Click **“Submit Report”** in the upper right corner.

CONCUR Expense Approvals Reporting App Center Help Profile

Manage Expenses

## 2015 March, Jen Whalen DC2-1

Delete Report Submit Report

+ New Expense + Quick Expenses Available Expenses Details Receipts Print / Email

Expenses

Date	Expense	Amount	Requested
Adding New Expense			

New Expense

Expense

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 menu.

16. The report will be submitted directly to Jen Whalen for approval. Payment will be processed within 15 days.