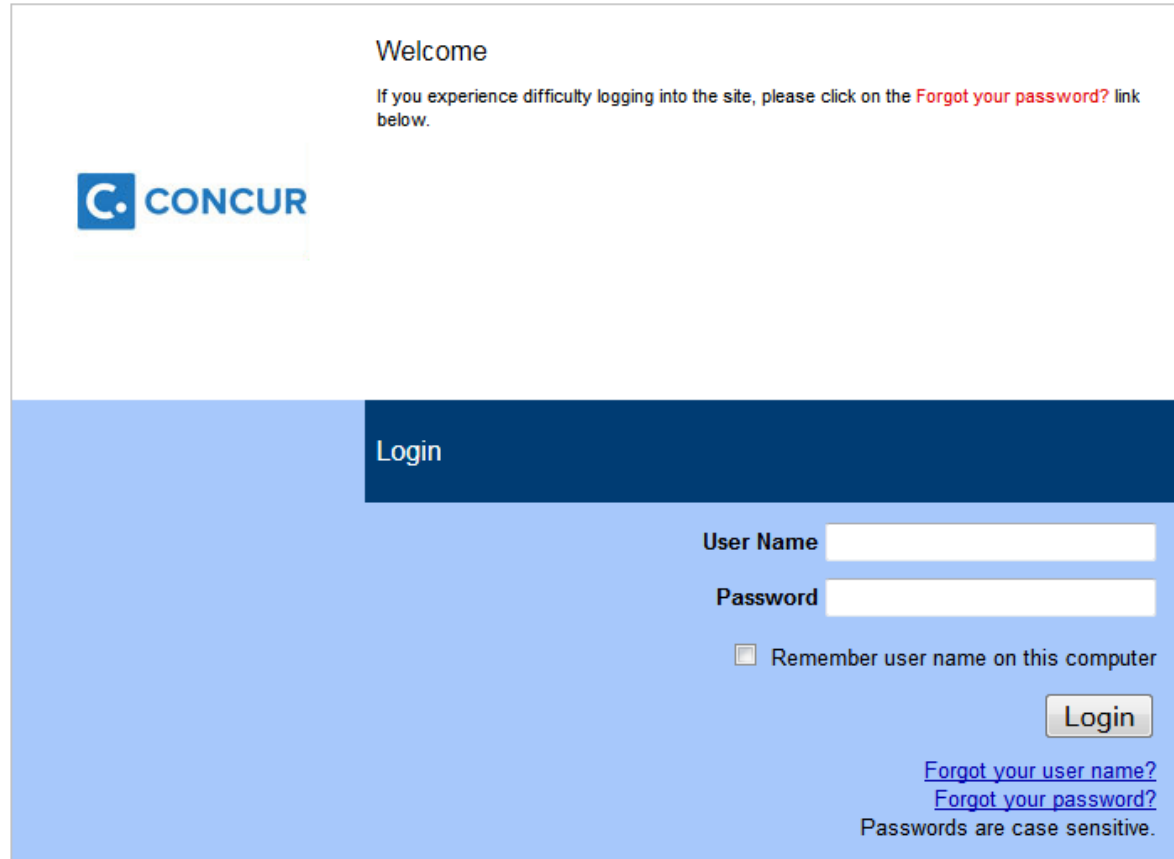


PFMC Concur Helpful Tips – Expense Claims

Make sure you have completed your bank account information, submission will not be allowed until after Concur has verified your bank information which may take 2-3 business days.


Log into Concur: <https://www.concursolutions.com/>



The screenshot shows the Concur login interface. At the top, it says "Welcome" and provides a link for "Forgot your password?". The Concur logo is on the left. Below is a dark blue "Login" header. The main area contains input fields for "User Name" and "Password", a checkbox for "Remember user name on this computer", and a "Login" button. At the bottom right, there are links for "Forgot your user name?" and "Forgot your password?", along with the note "Passwords are case sensitive."

Welcome

If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below.



Login

User Name

Password

Remember user name on this computer

[Forgot your user name?](#)
[Forgot your password?](#)
Passwords are case sensitive.

After logging in, the initial screen presented is:

• Start your expense claim by clicking here.

The screenshot shows the Concur user interface. At the top, a navigation bar includes the Concur logo, 'Travel', 'Expense', and 'App Center' tabs, along with 'Support' and 'Help' links. A user profile dropdown is visible on the right. Below the navigation bar, a dashboard area displays 'Hello, Test' and several quick-action buttons: '+ Start a Report', '+ Enter Reservation', '+ Upload Receipts', '00 View Trips', '00 Available Expenses', and '00 Open Reports'. The main content area is divided into several sections: 'TRIP SEARCH' with an 'Air/Rail Search' form, 'ALERTS' with two notification boxes, a large 'ExpenseIt' promotional banner, 'COMPANY NOTES' with a welcome message and links to 'Self Service' and 'User Support Desk', 'MY TRIPS (0)' showing no upcoming trips, and 'MY TASKS' with two task cards for 'Available Expenses' and 'Open Reports', both showing zero counts.

Enter a report name, use the meeting you attended. (For example April Council meeting or HMSMT Meeting).

Please do not use your name, as this is populated elsewhere in the report.

Click next.

Create a New Expense Report

Report Header

Report Name

Report Date

Next >> Cancel

A pop-up box will appear asking if your report will include travel allowances – Click yes.

Travel Allowances For Report: June Council Meeting



1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
June Council Meeting

| <input type="checkbox"/> | Departure City | Arrival City | Arrival Rate Location |
|--------------------------|----------------|--------------|-----------------------|
|--------------------------|----------------|--------------|-----------------------|

No Itinerary Rows Found

New Itinerary Stop

Depart from (city)
Portland, Oregon

Date
06/09/2015

Time
7:00 PM

Arrive in (city)
Spokane, Washington

Date
06/19/2015

Time
3:00 PM

Enter your itinerary, with departure city, date, and time.

Also enter your arrival location, date, and time.

Click Save

The itinerary screen will ask for another location, enter your return trip data (city, date, time) for both departure and arrival.

Click Save

Click Next

Travel Allowances For Report: July Star Panel



- 1 Create New Itinerary
- 2 Available Itineraries
- 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

| Departure City | Date and Time | Arrival City | Date and Time | Arrival Rate Location |
|----------------------------|---------------------|------------------|---------------------|-----------------------------|
| Itinerary: July Star Panel | | | | |
| Portland, Oregon | 07/05/2015 10:00 AM | Newport, Oregon | 07/05/2015 03:00 PM | LINCOLN COUNTY, US-OR, US |
| Newport, Oregon | 07/10/2015 04:00 PM | Portland, Oregon | 07/10/2015 08:00 PM | MULTNOMAH COUNTY, US-OR, US |

Available Itineraries

Current Itineraries

Delete

Assign

| Departure City | Date and Time | Arrival City | Date and Time | Arrival Rate Location |
|---------------------------------|---------------------|---------------------|---------------------|---------------------------|
| Itinerary: June Council Meeting | | | | |
| Portland, Oregon | 06/09/2015 07:00 PM | Spokane, Washington | 06/19/2015 03:00 PM | SPOKANE COUNTY, US-WA, US |

<< Previous

Next >>

Click on your itinerary,
then click next.

Travel Allowances For Report: June Council Meeting



1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

| Exclude All <input type="checkbox"/> | Date/Location ▲ | Breakfast Amount | Breakfast Provided | Lunch Provided | Dinner Provided | Allowance |
|--|-----------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-----------|
| <input type="checkbox"/> | 06/09/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$45.75 |
| <input type="checkbox"/> | 06/10/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/11/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/12/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/13/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/14/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/15/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/16/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/17/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/18/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$61.00 |
| <input type="checkbox"/> | 06/19/2015 Spokane, Washington | <input type="text" value="\$0.00"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$45.75 |

If part of your travel did not include paid days, click on the exclude box (left side). These days will be excluded from your claim.

Click "Create Expenses"

<< Previous Cancel

Expenses Move ▾ Delete Copy View ▾ << Expense Avail

| <input type="checkbox"/> | Date ▾ | Expense | Amount | Requested |
|-------------------------------------|------------|--|---------|-----------|
| <input type="checkbox"/> | 06/19/2015 | Daily Allowance Spokane, Washington | \$45.75 | \$45.75 |
| <input type="checkbox"/> | 06/18/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/15/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/14/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/13/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/12/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/11/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/10/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input checked="" type="checkbox"/> | 06/09/2015 | Daily Allowance Spokane, Washington | \$45.75 | \$45.75 |

Action: You are not permitted to enter future dated expenses.
 Missing required field: Business Purpose.

Expense Type: Daily Allowance ▾ Transaction Date: 06/09/2015 Business Purpose:

Enter Vendor Name: City of Purchase: Spokane, Washington Payment Type: Individual Pay ▾

Amount: 45.75 USD ▾ Personal Expense (do not reimburse) Comment: Grant Year:

[Show fixed allowances for 06/09/2015](#)

Each Daily allowance expense will need to be opened and business purpose described, please use “per diem”.
 Included the year of the meeting in the “grant year” field.

New expenses can now be added, using the following expense types:

New Expense [Available Receipts](#)

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 page.

Recently Used Expense Types

Airfare

All Expense Types

| | | | | | |
|--|---|---|---|---|---|
| 01. Travel Expenses Hotel Laundry | ...02. Transportation Fuel Parking Personal Car Mileage Public Transport Taxi Tolls/Road Charges | ...02. Transportation Train 03. Meals Breakfast Business Meals (Attendees) Dinner Lunch | 05. Office Expenses Courier/Shipping/Freight Office Equipment/Hardware Office Supplies/Software Postage Printing/Photocopying | ...06. Communications Mobile/Cellular Phone Telephone/Fax 07. Fees Agency Booking Fees Bank Fees Currency Exchange Fees | 08. Other Miscellaneous Seminar/Course fees Tips/Gratuities Tuition/Training Reimbursement |
|--|---|---|---|---|---|

06. Communications
Internet/Online Fees

Please remember not all of these expenses are reimbursable by PFMC. Please see the travel rules or contact Council staff if you have questions.

All items with the red bar on the left side of the box is a required field.

New Expense Available Receipts

Expense Type: Parking
Transaction Date:
Business Purpose:
Enter Vendor Name:
City of Purchase:
Payment Type: Individual Pay
Amount: USD
 Personal Expense (do not reimburse)
Comment:
Grant Year:

Save Itemize Allocate Attach Receipt Cancel

Add comments as appropriate with more details.

Receipts are required for expense more than \$25.00. Receipts can be emailed to Concur by sending to receipts@concur.com, scanned to your computer or flash drive, or by taking a photo if you are using the Concur app on your smartphone or tablet. To add a receipt click “attach receipt.”

June Council Meeting

Delete Report Submit Report

+ New Expense Available Expenses Details Recepts Print / Email

| Expense | Date | Amount | Exception |
|-----------------|------------|---------|---|
| Daily Allowance | 06/09/2015 | \$45.75 | Action: You are not permitted to enter future dated expenses. |
| Daily Allowance | 06/10/2015 | \$61.00 | Action: You are not permitted to enter future dated expenses. |
| Daily Allowance | 06/11/2015 | \$61.00 | Action: You are not permitted to enter future dated expenses. |

| Expenses | Date | Expense | Amount | Requested |
|--------------------------|------------|--|---------|-----------|
| <input type="checkbox"/> | 06/19/2015 | Daily Allowance Spokane, Washington | \$45.75 | \$45.75 |
| <input type="checkbox"/> | 06/16/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/15/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/14/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/13/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/12/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/11/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/10/2015 | Daily Allowance Spokane, Washington | \$61.00 | \$61.00 |
| <input type="checkbox"/> | 06/09/2015 | Daily Allowance Spokane, Washington | \$45.75 | \$45.75 |

TOTAL AMOUNT \$518.50 TOTAL REQUESTED \$518.50

New Expense

Expense *

Recently Used Expense Types

Airfare

All Expense Types

| | | | | | |
|----------------------------|------------------------------|------------------------------|----------------------------|------------------------------|--------------------------------|
| 01. Travel Expenses | ...02. Transportation | ...02. Transportation | 05. Office Expenses | ...06. Communications | 08. Other |
| Hotel | Fuel | Train | Courier/Shipping/Freight | Mobile/Cellular Phone | Miscellaneous |
| Laundry | Parking | 03. Meals | Office Equipment/Hardware | Telephone/Fax | Seminar/Course Fees |
| 02. Transportation | Personal Car Mileage | Breakfast | Office Supplies/Software | 07. Fees | Tips/Gratuities |
| Airfare | Public Transport | Business Meals (Attendees) | Postage | Agency Booking Fees | Tuition/Training Reimbursement |
| Airline Fees | Taxi | Dinner | Printing/Photocopying | Bank Fees | |
| Car Rental | Tolls/Road Charges | Lunch | 06. Communications | Currency Exchange Fees | |
| | | | Internet/Online Fees | | |

When completed with report (and no red exclamation marks are showing), click on "Submit Report".

Questions?

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