Concur Expense Training
Introductions

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Stephanie Abisi, Special Projects & Operations Administrator

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What should we expect to learn?

- Overview of Concur Expense
- Why the switch?
- Step by step instructions
- Question and answers
Concur Travel

Welcome to Concur Travel!

To check the status of Concur please click here: http://concuropenstatus.concur.com Make sure that click the link on the date to see what issues they might be having at that time.

Important Reminders:
- Please be sure to review and update your profile:
  - Telephone Numbers
  - Assistant and/or Travel Arranger Information
  - Credit Card
  - Seat Preference
- To Review your profile:
  - Select "Profile" from the blue bar near the top of the page
  - Select "Personal Information" and the profile page will display

Agency contact information:
For general questions regarding Concur Travel and/or Expense please contact your Company Administrator: Nicole Chernish / nchernish@ legion-aux.org / (317) 569-4500 or Stephanie Ablit / sables@ legion-aux.org / (317) 569-4500

For questions about your confirmed trip or other travel related questions please contact your Travel Administrator or Travel Leaders at 888-434-6500 (250) 434-6570 / corp@travlead.com

For Concur administrative support please contact Travel Leaders at 888-959-9265 / (260) 434-6580 / concur@travlead.com

Serving veterans, their families and their communities
Concur Expense

Manage Expenses

ACTIVE REPORTS

THERE ARE NO ACTIVE EXPENSE REPORTS.
Click Create New Report to create a new report.

AVAILABLE EXPENSES

<table>
<thead>
<tr>
<th>Expense Detail</th>
<th>Expense Type</th>
<th>Source</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
</table>

All Clear

AVAILABLE RECEIPTS

Upload New Receipt
Click here or drag & drop files to upload new receipt images.
Why the switch?

- Convenience
- Fewer errors
- Travel policy compliance
- Potentially faster turn around
- Reduces misplaced receipts
- Easier auditing process
How to Log In

www.concursolutions.com
First time to log in—VERIFY EMAIL ADDRESS

There are no active expense reports. Click Create New Report to create a new report.
**Serving veterans, their families and their communities**

### Home Address

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State/Province</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td>Country</td>
<td>United States of America</td>
</tr>
</tbody>
</table>

### Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Phone</td>
<td>[Required**]**</td>
<td></td>
</tr>
<tr>
<td>Work Extension</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Fax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd Work Phone/Remote</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td>[Required**]**</td>
<td></td>
</tr>
<tr>
<td>Pager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile Phone</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**You must specify either a home phone or a work phone.**

### 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?**

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Verify</th>
<th>Contact?</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:meetings@alaforveterans.org">meetings@alaforveterans.org</a></td>
<td><img src="image" alt="Verify" /></td>
<td>Yes</td>
<td><img src="image" alt="Edit" /></td>
</tr>
</tbody>
</table>
Starting a report

Manage Expenses

ACTIVE REPORTS

THERE ARE NO ACTIVE EXPENSE REPORTS. Click Create New Report to create a new report.

AVAILABLE EXPENSES

<table>
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<th>Date</th>
<th>Amount</th>
</tr>
</thead>
</table>

All Clear

AVAILABLE RECEIPTS

Upload New Receipt

Click here or drag & drop files to upload new receipt images.
Create a New Expense Report

Report Header

Report Name: DC Test
Report Date: 02/19/2017
Comment:
Fund: 110
Program: 01 (110-01)
Activity:

Travel Allowances

Per Diem?

Yes  No
If travel booked through Concur or Travel Leaders
If travel booked through Concur or Travel Leaders
Driving or did not use ALA to arrange travel?
Driving or did not use ALA to arrange travel
Serving veterans, their families and their communities
### Travel Allowances For Report: DC Test

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Breakfast Provided</th>
<th>Lunch Provided</th>
<th>Dinner Provided</th>
<th>Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/26/2017</td>
<td>Washington, District of Columbia</td>
<td>Yes</td>
<td></td>
<td></td>
<td>$50.00</td>
</tr>
<tr>
<td>02/27/2017</td>
<td>Washington, District of Columbia</td>
<td></td>
<td></td>
<td></td>
<td>$60.00</td>
</tr>
<tr>
<td>02/28/2017</td>
<td>Washington, District of Columbia</td>
<td></td>
<td></td>
<td></td>
<td>$34.00</td>
</tr>
</tbody>
</table>

**Update Expenses**
# DC Test

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/28/2017</td>
<td>Daily Allowance Washington, District of Columbia</td>
<td>$34.50</td>
<td>$34.50</td>
</tr>
<tr>
<td>02/27/2017</td>
<td>Daily Allowance Washington, District of Columbia</td>
<td>$69.00</td>
<td>$69.00</td>
</tr>
<tr>
<td>02/26/2017</td>
<td>Daily Allowance Washington, District of Columbia</td>
<td>$53.00</td>
<td>$53.00</td>
</tr>
<tr>
<td>02/25/2017</td>
<td>Daily Allowance Washington, District of Columbia</td>
<td>$69.00</td>
<td>$69.00</td>
</tr>
</tbody>
</table>

**Total Amount**: $225.50  
**Total Requested**: $225.50

### Expense Type

- 01. Travel Expenses
  - 01. Airline Fees
  - 01. Parking
  - 01. Taxi
- 01. Travel Expenses
  - 01. Hotel
  - 01. Public Transport
  - 01. Train
- 01. Travel Expenses
  - 01. Meals
  - 01. Dinner
  - 01. Tips/Gratuities
- 08. Other
  - 08. Other

*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.*
Adding mileage to your report
Adding mileage with Mileage Calculator
Adding expenses that require receipts
Adding expenses that require receipts
Adding expenses that require receipts
Adding expenses that require receipts
Ready to submit?
Ready to submit
After report submitted

- Processing system same as paper report
- 15 business day lead time
- Automatic emails with process updates
- Special processing requests, please let us know
- One report per person
What happens now?

• **If there are mistakes:**
  – Sent back through the system with instructions on how to correct
  – Events Team may email you
  – Correct and resubmit

• **Several levels of auditing, including all of accounting**

• **Report processed, check cut and mailed within 15 business days**
QUESTIONS?

• No smart phone or scanning capabilities? Please meet in the back after session.

• Curious about the Concur app? If interested, we can go through the app after website questions are answered.