CONCUR

Northeastern University Quick Reference Guide

Section 1: Logging on to Concur	
1	Login to your myNEU page.
2	Click on the **Services and Links** tab
3	Scroll down to the **Employee Travel & Expense Reconciliation** information box.
3	**Click on Concur**

Section 2: Update Your Profile	
Step 1: Verify Email Address	
1	At the top of the My Concur page, click **Profile**.
2	Click **Profile Settings**
3	On the **Personal Information** menu on the left side of the page, click **Email Addresses.**
4	Click **Verify**. This will prompt a secure code to your work email.
5	Once the code is received in your email copy and paste it to the **Enter Code Box** in Concur
6	Click **OK**
Step 2: Verify Expense Information	
1	On the **Expense Settings** menu on the left side of the page, click **Expense Information**.
2	On the **Expense Information** page, verify the pre-populated information.
If any of the Expense Information is incorrect, contact your company's system administrator	
Step 3: Add an Expense Delegate	
1	On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
2	On the **Expense Delegate** page, click **Add**.
3	In **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
4	From the list of matches, select the appropriate person.
5	Select the responsibilities you wish this delegate to perform on your behalf.
6	Click **Save**.
Step 4: Change Expense Preferences	
1	On the **Expense Settings** menu on the left side of the page, click **Expense Preferences**.
2	In the **Send email when**… section, select the appropriate actions.
3	In the **Prompt**…section, select the appropriate actions.
4	Click **Save**.
Step 5: Verify Expense Approvers	
1	At the top of the My Concur page, click **Profile**.
2	On the **Expense Settings** menu on the left side of the page, click **Expense Approvers**.
3	On the **Expense Approvers** page, verify that your default expense approver is correct.
If the approver name listed is incorrect or if the field is blank, contact HRIS@neu.edu	

Section 3: Create a New Report (Use for Green Travel Cards OR Employees seeking Reimbursement)	
Step 1: Create the report	
1	Click the **Expense** tab at the top of the homepage.
2	Click **Create New Report**
3	In the **Report Name** field, enter a name for the expense report.
4	In the **Business Purpose** field, enter the business purpose for the expense report.
5	Complete all required and optional fields as directed by your company.
6	Click **Next**.
Step 2: Add an out-of-pocket expense to the new expense report (Reimbursement)	
1	Click on **New Expense** button, select the appropriate expense type.
2	Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3	In the **Amount** field, enter the amount spent on the expense.
4	Click **Save** (or click **Itemize** to itemize the expense).
Step 3: Reconciling Green Corp Card Transactions	
1	Under **Import Expenses**, check the transactions associated with this report
2	Once checked select **Move** then **To Current Report**
3	Add necessary receipts, business purposes, attendees, itemizations (Hotel or ATM) as needed
4	Click **Save** and then **Submit** if report is completed

Section 4: Allocate Expenses	
You can select multiple expenses to allocate, click ***Allocate*** *in the right-side pane, and then continue with step 4.*	
1	Complete all expenses as usual.
2	Select the expense you wish to allocate from the Expense List.
3	In the lower right-hand corner of the window, click **Allocate**.
4	From the **Allocate By** dropdown menu, select either **Percentage** or **Amount**.
5	In the **Allocate By** field, enter the **Percentage** or **Amount**.
6	Click in the field under the **Department** column heading, and then select the department. *Your company may define Department as Cost Center or some other alternative.*
7	Click **Add New Allocation**, and then repeat steps 5-6 for each new allocation.
8	Click **Save**, and then click **OK**.
9	In the **Allocate Report** window, click **Done**.

Section 5: Add Attendees	
1	On the **New Expense** tab, select Meals or Food expense type.
2	Click the **Transaction Date** field, and then use the calendar to select the date of the transaction.
3	Fill out all other required fields for this expense type as defined by your company.
4	In the **Amount** field, enter the amount of the expense.
5	Scroll down to view **Attendees** section.
6	For outside individuals select **New Attendee.** Complete the required fields, and then click **Save**

7	For Employees select **Advanced Search**, enter name **Search Attendees** window, and then click **Add to Expense**.
8	If previously used start typing the attendees name in the **Recently Used**
9	Click **Save**.

Section 6: Correct and Resubmit a report sent back by a Previewer or Approver	
1	Click on the **Expense** tab on the homepage
2	The **Returned Report** will have a comment indicating what needs to be corrected
3	Click on the **Returned Report** and make the requested changes.
4	Click **Save**.
5	Click **Submit Report**.

Section 7: Attach Receipts	
Have the Mobile App on your Smartphone	
1	Once in the App select the **Camera Icon**
2	Verify the picture is clear and shows everything required (date, dollar amount, vendor, item)
3	Save/Upload
4	View **Available Receipts** by clicking **Expense** on the homepage and scrolling to the bottom
Attach scanned images of your receipts	
1	Click in to the **Expense Report**, from the **Receipts** dropdown menu, select **Attach Receipt Images**.
2	Click **Browse**.
3	Locate the file you want to attach.
4	Click the file, and then click **Open**.
5	To attach another image, click **Browse**, and then repeat the process.
6	Click **Attach**.
7	Click **Done**, when finished.
8	To view the attached receipts, from the **Receipts** dropdown menu, select **View Receipts**.
Delete receipt images - It can only be done on a report that has not yet been submitted	
1	Within the **Expense Report**, hover over the Blue Circle indicating there is a receipt attached
2	Select **Detach from Entry.** The receipt image will go back in to your available receipts
How to Recall a Submitted Report	
1	Click on **Expense Report** you need to **Recall**
2	Click the **Recall** button in the upper right hand corner (where you previously hit submit)
3	If the button is not there the report has been processed and can no longer be recalled

Section 8: Review & Approve Expense Reports	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	On the **Expense Report** page, click the expense you want to view.
3	Click **Approve**.

Step 2: Send an expense report back to an employee	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	Click **Send Back to Employee**.
3	In the **Send Back Report** page, add comments in the **Comment** box then click **OK**
Step 3: Adjust authorized amounts on an expense report	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	On the **Expense Report** page, click the expense you want to adjust.
3	Change the amount in the **Amount** field. *Note: Previewers and Approvers have the ability to decrease out of pocket dollar amounts.*
4	Click **Save**.
5	To approve the report with the changes, click **Approve**.
Step 4: Add an additional review step for a report	
1	In the **Approval Queue** section of My Concur, click the name of the report that you want to view.
2	Click **Approve & Forward**.
3	In the **User-Added Approver** field, type the individuals name or email.
4	From the list of options, select the appropriate approver, then Click **Approve**