**Getting Started**

* **Log on**

1. Navigate to **smu.edu/expense**.
2. Enter your **SMU ID**.
3. Enter your **Password** & click Login.

* **Update Your Profile**

1. Click **Profile Settings.**
2. Verify/update information in tabs under **Your Information**.
3. Register your mobile device under **Contact Information** if you want to use it to prepare and submit expense reports and/or email receipts using your mobile device.
4. To set up and verify any email addresses from which you will email receipts to Concur, go to **Email Addresses**, click on **[+] Add an email address**, type the email address in the box that appears and press **OK**. Select **Verify** and then copy and paste the verification code that is sent to your email where you are directed to **Enter Code**. Press **OK**. Repeat for any emails you want to add.
5. Also activate e-receipts under **E-Receipt Activation** under the **Other** Settings tab if you want electronic (level 3) receipts from participating SMU Card vendors loaded into **Available Receipts**.
6. Also download the Concur mobile app and register your mobile device in **Mobile Registration** under **Other Settings** if you want to use your mobile device to take pictures of and load receipts and/or prepare and submit reports from your mobile device.

**SUBMITTERS**

* **Log on**

1. Navigate to **smu.edu/expense**.
2. Enter your **SMU ID**.
3. Enter your **Password** & click Login.

* **Report Expenses**

1. Go to the **Expense** tab (on the bar across the top of the page) click **Create New Report** and under **Report Type**, select **Expense**

**Policy**. Provide the information requested on the form. Fields with a red bar on the left are required. The **Report Name** is a field that can

be used to describe this report and differentiate it from others in the system. Always populate from drop down boxes when they are available.

1. When complete, press **Next**. A **Travel Allowances** pop up will appear. Always select **NO** when reporting in the **Expense Policy**.
2. Select **New Expense** to request an expense reimbursement. Select **Available Expenses** (under **Import Expenses**) to report non-travel SMU Card (pCard) expenses.
3. Drag and drop SMU Card expenses you are reporting to the left side of the screen under **Adding New Expense**. Skip this step and go directly to the next step for reimbursements.
4. Select the appropriate **Expense Type** from the drop down menu and then complete all the required fields.

* **Itemization**

1. If you want to split an expense into more than one expense type/account, click on the **Add Itemization** button.
2. Select an **Expense Type** from the drop down box.
3. Complete the required information and continue to select another **Expense Type** and complete the required information as many times as needed until the itemizations total the full amount of the expense/receipt.
4. When the total itemizations equal the expense total, you will be returned to **Manage Expenses** to continue to process the expense report.

* **Allocate Expenses**

1. If you want to split an expense into more than one Org or Project number, click on the **Allocate** button.
2. Select either **Percentage** or **Amount** in the **Allocate By** drop down box.
3. Select **Add New Allocation** as many times as needed and input the percentage or dollar amounts and account information to allocate the expense to multiple orgs, projects, etc.
4. Press **Save**, **OK** and then **Done** and return to the **Manage Expenses** tab to continue or submit.

* **Submit Report**

1. When you have completed creating expenses for all your SMU Card and expense reimbursements for the month, **Save** and then click on **Submit Report**.
2. The report will be submitted into workflow for approval unless there are errors on the report. If there are errors or missing information, correct them or add the information and resubmit.

**APPROVERS**

* **Review and Approve the Report**

1. Go to the **Approvals** tab (on the bar across the top of the page) and select the report you want to review for approval.
2. Click on **SMU – Detailed Report** to see the distribution of charges for you to approve. Check the **Show Itemizations** box at the top of the page to see the greatest level of detail.
3. You can see other information, including receipts (under the **Receipts** tab) and the **Approval Flow** (under **Details**).
4. If the report is OK, press the **Approve** button and you are done.
5. If there is an issue with the report, return it to the preparer with a note of explanation by pressing the **Send Back to User** button. The preparer can make changes and resubmit.

**OTHER FEATURES**

* **Delete Receipt Images**

1. On the **Expense Report** page, you can delete all receipts from the report by clicking on **Receipts**, then **Delete.**
2. **Receipt Images** and then confirming **Yes**. This is at the report level and deletes ALL receipts on the report.
3. To delete individual receipts tied to specific expenses, either check the expense line with the receipt you want to detach and then click on the

box titled **Receipt Image** or click on the **Image** icon, then select **Detach from Entry**.

* **Missing Receipts**

1. If you do not have a receipt for the expense you are reporting, go to **Receipts** in **Manage Expenses**.
2. **Accept and Create a Missing Receipt Affidavit**.

* **Business Meetings and Entertainment: Add Attendees**

1. A list of attendees is required for various **Business Meetings** and **Entertainment Expense Types**. In **Manage Expenses**, when an **Attendees** section appears, list attendees at the function by clicking **New Attendee** and completing the information required for attendees other than faculty/staff. For faculty/staff, use the **Advanced Search** button/capability to search for and populate the attendees electronically.
2. Select **Save & Add Another** until you have included all attendees, then select **Save** and continue processing expenses.

* **Calculate Car Mileage**

1. Select the **Local Mileage Expense** In the **Expense Type** category **.08 Other**.
2. Complete the information and click on the **Mileage Calculator**. Input waypoints in the **Mileage Calculator,** select **Calculate Route** to determine the mileage and then select **Add Mileage to Expense**.

* **Email Receipts**

1. Make sure to If your email is registered in Concur (**Email Addresses** under **Your Information** tab under **Profile -** See **Getting Started**, above for further information on how to register your email address) so you can email receipts to [receipts@concur.com](mailto:receipts@concur.com) and they will be added to your **Available Receipts.**
2. If you have downloaded the Concur mobile app and registered your mobile device, go to the app and tap on **Receipt**.
3. The app will bring up the device’s camera. Take a picture of the receipt you want to load into Concur.
4. To assign the receipt to a specific expense, click on **+Expense** and when the new expense is open, click **Attach Receipt** and select the receipt to attach to that expense.