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| **Log on**  |
|  | Navigate to **smu.edu/expense (concursolutions.com for testing)** |
|  | Enter your SMU ID (test ID for testing).  |
|  | Enter your Password & click Login.  |

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| **Profile Information** |
|  | User Profiles need to be set up for anyone using the Concur solution. |

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| * **Report Expenses**
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| **1.** | On the **Expense** tab, click **Create New Report** and 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.  |
| **2.** | When complete, press **Next**. A **Travel Allowances** pop up will appear. Always select **NO** when reporting in the **Expense Policy**. |
| **3.** | Select either **New Expense** or **Quick Expenses** to request an expense reimbursement. Select **Available Expenses** to report PCard expenses.  |
| **4.** | Select the appropriate **Expense Type** and complete the required fields. Click **Save.**  |

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| * **Add receipts**
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| **1.** | On the **Expense Report** page, click on the **Attach Receipt** tab at the bottom of the page. |
| **2.** | Click **Browse** if the receipt(s) are filed outside of Concur or on the applicable receipt in **Available Receipts** if stored in the system. |
| **3.** | Select the file you want to attach, click on it and then select **Attach** in the **Attach Receipt** pop up box. |
| **4.** | Repeat the process as needed. |
| **5.** | Click **Save**when complete (before submitting the report. |
| **6.** | To view the attached receipts, from the **Receipts** dropdown menu, select **View Receipts**. |
|  | **Delete receipt images** |
| **1.** | On the **Expense Report** page, from either the **Receipt Image** or **the Image** icon**,** select **Detach from Entry.** |
| **2.** | In the confirmation window, click **Yes**.*When you select the Delete Receipt Images option, all images attached at the report level are deleted. You cannot delete individual receipt images at the report level* |

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| * **Missing Receipts**
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| **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 |

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| * **Itemization**
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|  **1.**  | 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 as many times as needed and complete the required information until the itemizations total the full amount of the expense/receipt. |
| **4.** | When the total itemizations equals the expense total, you will be returned to Manage Expenses to continue to process the expense report. |

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| * **Allocate Expenses**
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| **1.**  | Click on the Allocate button |
| **2.** | Select either Percentage or Amount in the Allocate By drop down box. |
| **3.** | Select Add a 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 and then Done and return to the Manage Expenses tab to continue or submit.  |

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| * **Business Meetings and Entertainment: Add Attendees**
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| **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 requested. |
| **2.** | Select Save & Add Another until you have included all attendees, then select Save and continue processing expenses. |

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| * **Calculate Car Mileage**
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| **1.** | Select the Mileage Expenses in Quick Expenses tab |
| **2.** | Complete information, click on Map icon, and input waypoints in the Mileage Calculator and then select Add Mileage to Expense. |
| **3.** | Save |
| **4.** | You will be returned to Manage Expenses. Under Receipts, Accept and Create a Missing Receipt Affidavit (We have requested changes so that this is not required for mileage). |

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| * **Submitting Report**
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| **1.** | When you have completed creating expenses for all of your pcard and expense reimbursements for the month, click on Submit Report. |
| **2.** | The report will be submitted for approval unless there are errors in the report. If there are errors, correct them and re-submit. |

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| * **Review & Approve Expense Report**
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|  | If the report is OK, Approve |
|  | If there is an issue with the report, return it to the preparer with a note of explanation. The preparer can resubmit. |