



Welcome to Concur!

Concur

- This tool is what we use to process all the department's expenses
- There are 3 different types of reports:
 - Procurement Card
 - Travel Reconciliation
 - Non-Employee REimbursement
- You will need to use Procurement Card



Procurement Reports

The screenshot shows the SAP Concur Expense interface. At the top, there is a navigation bar with links for Requests, Travel, Expense (which is highlighted in blue), Approvals, and App Center. On the right side of the header are links for Help, Profile, and a user icon. Below the header, there are three main sections: "Manage Expenses", "View Transactions", and "Cash Advances".

The main content area is titled "Manage Expenses" and contains a section for "ACTIVE REPORTS". It features a large red-bordered box with a red plus sign icon and the text "Create New Report". To the right of this box, it says "THERE ARE NO ACTIVE EXPENSE REPORTS." and "Click Create New Report to create a new report." A large purple arrow points from the text "Start Here" to the "Create New Report" button.

Below the active reports section is a "AVAILABLE EXPENSES" section. It includes a dropdown menu labeled "All Cards", search fields for "Expense Detail", "Expense Type", "Source", "Date", and "Amount", and buttons for "Move", "Match", and "Unmatch". At the bottom of this section is a "All Clear" button.

- You will need to create a new report each month. Each report should only contain the expenses for that month.

Report Header

The screenshot shows the SAP Concur Expense application interface. At the top, there's a navigation bar with the SAP Concur logo, 'Requests' (disabled), 'Expense' (selected), and 'Help'. Below the navigation bar are three menu items: 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main area is titled 'Create a New Expense Report' under a 'Report Header' section. The 'Report Header' contains several input fields: 'Policy' (dropdown menu showing 'Procurement Card'), 'Report Name' (text input showing 'Name_Month Year'), 'SpeedType' (dropdown menu showing '(11037925) 11037925 - ICR Research'), 'Approver's Employee ID' (text input showing '147248'), 'Approver's Name' (text input showing 'Schneider,Margie Kiehn'), 'Comment' (text input), and 'Alternate Contact Employee' (text input). A purple box highlights the 'Policy' dropdown and the 'Report Name' input field. Arrows point from the text descriptions below to these highlighted fields.

SAP Concur Requests Expense Help

Manage Expenses View Transactions Cash Advances

Create a New Expense Report

Report Header

Policy ?
Procurement Card

Report Name ?
Name_Month Year

SpeedType ?
(11037925) 11037925 - ICR Research

Approver's Employee ID ?
147248

Approver's Name ?
Schneider,Margie Kiehn

Comment ?

Alternate Contact Employee ?

Drop down menu:
choose procurement card

All report names will be your last name, month and year

You won't need to change these boxes.

Expenses

The screenshot shows the SAP Concur Expense application interface. At the top, there's a dark header bar with the SAP Concur logo, navigation links for 'Requests' and 'Expense', and a 'Help' dropdown. Below the header is a toolbar with buttons for 'Manage Expenses', 'View Transactions', 'Cash Advances', 'Delete Report', and 'Notify Employee'. The main area has a title 'Click here to add expenses to report.' with a purple arrow pointing to the 'Import Expenses' button, which is highlighted with a purple box. To the right, a modal window titled 'Available Expenses' lists several expense items with columns for 'Expense Detail', 'Expense Type', 'Source', 'Date', and 'Amount'. A dashed purple box encloses the 'Expense Detail' column of the modal, with a purple arrow pointing from the bottom-left towards it. The overall interface is clean with a white background and blue/gray UI elements.

SAP Concur Requests Expense Help

Manage Expenses View Transactions Cash Advances Delete Report Notify Employee

Click here to add expenses to report.

+ New Expense Import Expenses Details Receipts Print / Email

Expenses Date Expense Type Amount Requested

Adding New Expense

| Date | Expense Type | Amount | Requested |
|------------|-------------------------------------|----------|-----------|
| 08/07/2018 | Lab and Tech Sho AMAZON.COM AM | \$270.70 | \$270.70 |
| 08/07/2018 | Lab and Tech Sho AMZN MKTP US | \$14.63 | \$14.63 |
| 08/07/2018 | Lab and Tech Sho AMZN MKTP US | \$65.48 | \$65.48 |
| 07/31/2018 | Prt/Pub/Repro Ser AMER PHYSIO SO | \$850.00 | \$850.00 |

Available Expenses

| Expense Detail | Expense Type | Source | Date | Amount |
|--------------------------------|-------------------------------------|--------|------------|---------|
| AMZN MKTP US AMZN.COM/BILL, WA | Lab and Tech Shop Supplies (530101) | (e) | 08/08/2018 | \$11.90 |

Drag and drop the p-card expenses into the report.

Expense Type

SAP Concur Requests Expense

Manage Expenses View Transactions Cash Advances ▾

Help ▾ [REDACTED]

+ New Expense Import Expenses Details ▾ Receipts ▾ Print / Email ▾ Delete Report Notify Employee Hide Exceptions

Exceptions

| Expense Type | Date | Amount | Exception |
|------------------|------------|---------|---|
| Lab and Tech ... | 08/08/2018 | \$11.90 | ! Missing required field: Business Purpose. |

Expenses

| | Date | Expense Type | Amount | Requested |
|---|------------|---|----------|-----------|
| <input checked="" type="checkbox"/> | 08/08/2018 | Lab and Tech Shop Supplies (! AMZN MKTP US) | \$11.90 | \$11.90 |
| Missing required field: Business Purpose. | | | | |
| <input type="checkbox"/> | 08/07/2018 | Lab and Tech Shop Supplies (! AMAZON.COM AMZN.COM/BIL) | \$270.70 | \$270.70 |
| <input type="checkbox"/> | 08/07/2018 | Lab and Tech Shop Supplies (! AMZN MKTP US) | \$14.63 | \$14.63 |
| <input type="checkbox"/> | 08/07/2018 | Lab and Tech Shop Supplies (! AMZN MKTP US) | \$65.48 | \$65.48 |
| <input type="checkbox"/> | 07/31/2018 | Prt/Pub/Repro Services (48760 AMER PHYSIO SOC) | \$850.00 | \$850.00 |

Expense

Expense Type: Lab and Tech Shop Supplies Transaction Date: 08/08/2018 Enter Vendor Name: AMZN MKTP US Business Purpose: Amount: 11.90 USD If Required,
 Is Receipt Included? Comment: Yes

You will need to choose the expense type. Senior Design should use either lab and tech shop supplies (530101) or printing publication service (487602). Lab tech supplies for all materials purchased and Printing for any printing project papers.

Business Purpose

The screenshot shows the SAP Concur Expense application interface. At the top, there are navigation tabs: SAP Concur (with a logo), Requests, and Expense (which is highlighted in blue). Below the tabs are three main menu items: Manage Expenses, View Transactions, and Cash Advances. On the right side of the header, there are links for Help, Delete Report, and Notify Employee.

In the main content area, there is a toolbar with several buttons: + New Expense, Import Expenses, Details, Receipts, Print / Email, Delete Report, and Notify Employee. Below this, there is a section titled "Exceptions" with a table header: Expense Type, Date, Amount, and Exception. A single row is shown: Lab and Tech ... on 08/08/2018 with an amount of \$11.90. A red exclamation mark icon next to the date indicates a required field error: "Missing required field: Business Purpose".

Below the exceptions section is a table titled "Expenses" with columns: Date, Expense Type, Amount, and Requested. One row is selected, showing a purchase on 08/08/2018 for Lab and Tech Shop Supplies from AMZN MKTP US with an amount of \$11.90. A red exclamation mark icon next to the date also indicates a required field error: "Missing required field: Business Purpose".

To the right of the expense table is a detailed view of the selected expense. It includes fields for Expense Type (Lab and Tech Shop Supplies), Transaction Date (08/08/2018), Enter Vendor Name (AMZN MKTP US), and Business Purpose (which is currently empty and highlighted with a red border). There are also fields for Amount (\$11.90), If Required,
 Is Receipt Included? (Yes), and Comment.

Text: Then you will need to fill in the business purpose. The business purpose must include your team name and what the charge was for. For example; EMU Aluminum Sheeting, EMU Project Printing or EMU Project supplies if you have several different items on one purchase.

Text: After the business purpose is filled in you will need to attach the receipt.



Manage Expenses

View Transactions

Cash Advances ▾

Delete Report

Notify Employee

+ New Expense

Import Expenses

Details ▾

Receipts ▾

Print / Email ▾

Expenses



Attach Receipt

Click Browse and select a .png, jpg, jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.

File Selected for uploading:

Browse...



No file selected

Or choose an image from your Available Receipts.

Available Receipts

Business Purpose VR Project



Cancel

Click here to upload a receipt image from the computer

Click here to add the receipt

TOTAL AMOUNT
\$1,212.71TOTAL REQUESTED
\$1,212.71

Save

Itemize

Allocate

Attach Receipt

Cancel

Manage Expenses

View Transactions

Cash Advances ▾

Delete Report

Notify Employee

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

| Date | Expense Type | Amount | Requested |
|------------|--|----------|-----------|
| 08/08/2018 | Lab and Tech Shop Supplies (AMZN MKTP US) | \$11.90 | \$11.90 |
| 08/07/2018 | Lab and Tech Shop Supplies (AMAZON.COM AMZN.COM/BIL) | \$270.70 | \$270.70 |
| 08/07/2018 | Lab and Tech Shop Supplies (AMZN MKTP US) | \$14.63 | \$14.63 |
| 08/07/2018 | Lab and Tech Shop Supplies (AMZN MKTP US) | \$65.48 | \$65.48 |
| 07/31/2018 | Prt/Pub/Repro Services (48760 AMER PHYSIO SOC) | \$850.00 | \$850.00 |

Make sure the amount matches the expense. If it does not match your report will be rejected.

Once the receipt has been added it will show up under this tab.

Expense Receipt Image

amazon.com Final Details for Order #114-2253678-8202604 Print this page for your records.

Order Placed: August 7, 2018
Amazon.com order number: 114-2253678-8202604
Order Total: \$11.90

Shipped on August 7, 2018

Items Ordered
1 of: Bullet Camera Bracket Mount Pack of 4 Metal Outdoor/indoor Use Security Housing Bracket for CCTV Suvellicance System \$11.90
Sold by: Exgooff (seller profile) | Product question? Ask Seller
Condition: New

Shipping Address:
University of Colorado Boulder
1111 ENGINEERING DR.
RM ECAE 115, C/O ALLISON ANDERSON
BOULDER, CO 80309
United States

Item(s) Subtotal: \$11.90
Shipping & Handling: \$0.00
Total before tax: \$11.90
Sales Tax: \$0.00
Total for This Shipment: \$11.90

Shipping Speed:
Two-Day Shipping

Payment information
Payment Method: Visa | Last digits: 7165
Item(s) Subtotal: \$11.90
Shipping & Handling: \$0.00
Total before tax: \$11.90
Estimated tax to be collected: \$0.00
Grand Total: \$11.90

Billing address
University of Colorado Boulder
University of Colorado Boulder Aerospace Engineering
429 UCB
Boulder, CO 80309
United States

Credit Card transactions
Visa ending in 7165: August 7, 2018: \$11.90

To view the status of your order, return to [Order Summary](#).

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Manage Expenses

View Transactions

Cash Advances ▾

Allocations for Report: Anderson_August 2018

Expense List

[Allocate Selected Expenses](#) [Clear Selections](#) [View ▾](#)

Expenses

| Date | Expense T... | Group | Amount |
|------------|---------------|-------|----------|
| 08/08/2018 | Lab and Te... | | \$11.90 |
| 08/08/2018 | Lab and Te... | 2 | \$270.70 |
| 08/07/2018 | Lab and Te... | 3 | \$14.63 |
| 08/07/2018 | Lab and Te... | 4 | \$65.48 |
| 07/31/2018 | Prt/Pub/Re... | 1 | \$850.00 |

Allocations

[Allocate By:](#) [Add New Allocation](#) [Delete Selected Allocations](#) [Favorites ▾](#) [Add to Favorites](#)

Total:\$11.90 Allocated:\$11.90 (100%) Remaining:\$0.00 (0%)

Select Group ▾

 Date ▾ Expense T... Group Amount Percentage 100

* SpeedType ▾?

 Code 13011255 - Interac

11037925

 Type to search by: Text Code Either

Text (Code)

13011255 - Interactive Space Vehicle Desi - 30-10322-1556052 (1)

4 >

Type in the speedtype here. If you have EEF funding those funds must be used before your primary funding. Please email me and I will provide your ST.

[Save](#) [Cancel](#)[Done](#)

Click here to allocate the expense

Procurement Reports

The screenshot shows the SAP Concur Expense application interface. At the top, there's a navigation bar with the SAP Concur logo, 'Requests', 'Expense' (which is highlighted in blue), 'Manage Expenses', 'View Transactions', 'Cash Advances', and 'Help'. Below the navigation bar, the main content area has a title 'Receipt' and a sub-section 'Allocation'. On the left, there's a table titled 'Expenses' listing several entries with columns for Date, Expense type, Amount, and Requested. The first entry for 08/08/2018 has three small circular icons next to it, which are highlighted with a purple oval. On the right, there's a detailed view of an expense entry with fields for Expense Type (set to 'Lab and Tech Shop Supplies'), Transaction Date (08/08/2018), Enter Vendor Name (AMZN MKTP US), Business Purpose (VR Project), Amount (11.90 USD), and a dropdown for 'If Required, Is Receipt Included?' set to 'Yes'. A comment field is also present. At the bottom of the screenshot, there's a large text box containing the following message:

You will know you are done with an expense when All fields are filled and there are no error messages. You should see three blue bubbles next to all expenses. One for the receipt, the transaction and one for the allocation.

Procurement Reports

- When you have finished a report, you must notify me to review before submitting them. All reports will be rejected without my review and approval. When I have reviewed it and approve it for submittal, you will see a green bubble with a check mark saying ready for review.

The screenshot shows the SAP Concur Expense application interface. At the top, there is a navigation bar with the SAP Concur logo, 'Requests' (disabled), 'Expense' (selected), and 'Help'. Below the navigation bar, there are links for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main area is titled 'Manage Expenses' and contains a section for 'ACTIVE REPORTS'. On the left, there is a red-bordered box with a plus sign and the text 'Create New Report'. Two reports are listed under 'ACTIVE REPORTS':

- Space Robotics Workshop** (NOT SUBMITTED)
07/02/2018
\$600.12
 Ready for Review
- [REDACTED]** (NOT SUBMITTED)
07/02/2018
\$335.00
 Ready for Review

On the right side of the screen, there is a link 'Report Library →'.

Submitting Reports

The screenshot shows the SAP Concur Expense application interface. At the top, there's a navigation bar with links for Requests, Travel, Expense (which is highlighted in blue), Approvals, Reporting, App Center, Help, and Profile. Below the navigation bar, there are links for Manage Expenses, View Transactions, and Cash Advances. The main area displays a report titled "Stang November 2020". On the left, there are buttons for "+ New Expense", "Import Expenses", "Details", "Receipts", and "Print / Email". The main table lists expenses with columns for Date, Expense Type, Amount, and Requested. A modal window titled "Final Review" is open, containing a "Certification Statement" which reads: "By submission of this expense report, I certify that I have read and agree to the University's certification statements which are found at [Certification Statement](#)". At the bottom of the modal are two buttons: "Accept & Submit" (highlighted with a red box and a purple arrow) and "Cancel". To the right of the modal, there's a callout text "Click here to submit report" with a purple arrow pointing to the "Submit Report" button in the top right corner of the modal.



Click here to state that all expenses
are for your project and do not violate
any fiscal policies.

Submitting Reports

The screenshot shows the SAP Concur Expense application interface. At the top, there is a navigation bar with links for Requests, Travel, Expense (which is highlighted in blue), Approvals, Reporting, App Center, Help, Profile, and a user icon. Below the navigation bar, there are three main tabs: Manage Expenses, View Transactions, and Cash Advances. The main content area displays a report titled "Stang November 2020". On the left, there is a table for "Adding New Expense" with columns for Date, Expense Type, Amount, and Requested. A row is shown for "11/10/2020 Lab and Tech Shop Supplies (! AMAZON.COM*2821Z3S12 AMZ" with amounts \$32.98 and \$32.98. To the right of this table is a "New Expense" button and a "View" button. Further down, there is a section for "Expense Type" with a dropdown menu showing "Recently Used" items like "Lab and Tech Sh" and "Operating Supplie". A purple box highlights the "Procurement Approval" section, which contains the name "Schneider, Margie K." with a plus sign to add more approvers. A large callout box with a purple arrow points from this section to the following text: "Margie Schneider should be listed here. If she is not clear out the name of who is there and type in Margie's last name. A drop down should appear, and you can select her." To the right of the approval section, there is a "Submit Report" button and a "Cancel" button. The background of the entire interface is grayed out, indicating the focus is on the approval dialog.

Margie Schneider should be listed here. If she is not clear out the name of who is there and type in Margie's last name. A drop down should appear, and you can select her.

Click here after you have the correct approver.

If you have any further questions please email me at:
Jacquelyn.Stang@Colorado.edu

I will be happy to set up a Zoom training with you if needed.