



Welcome to Concur!

# Concur

- This tool is what we 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

SAP Concur

Requests Travel **Expense** Approvals App Center

Manage Expenses View Transactions Cash Advances

## Manage Expenses

ACTIVE REPORTS

Report Library →

+

Create New Report

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

AVAILABLE EXPENSES

All Cards

Move Match Unmatch

<input type="checkbox"/> Expense Detail	Expense Type	Source	Date ▲	Amount
All Clear				

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

# Report Header

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 Resear	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

SAP Concur

RequestsExpense

Help

Manage ExpensesView TransactionsCash Advances

Click here to add expenses to report.

Delete ReportNotify Employee

+ New Expense

Import Expenses

DetailsReceiptsPrint / Email

Expenses

MoveDeleteCopyView

	Date	Expense Type	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	08/07/2018	Lab and Tech Sho AMAZON.COM AM	\$270.70	\$270.70
<input type="checkbox"/>	08/07/2018	Lab and Tech Sho AMZN MKTP US	\$14.63	\$14.63
<input type="checkbox"/>	08/07/2018	Lab and Tech Sho AMZN MKTP US	\$65.48	\$65.48
<input type="checkbox"/>	07/31/2018	Prt/Pub/Repro Ser AMER PHYSIO SO	\$850.00	\$850.00

Available Expenses

All Cards

MoveMatchUnmatch

Expense Detail	Expense Type	Source	Date	Amount
<input type="checkbox"/> AMZN MKTP US AMZN.COM/BILL, WA	Lab and Tech Shop Supplies (530101)		08/08/2018	\$11.90

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

# Expense Type

SAP Concur

RequestsExpense

Help

Manage ExpensesView TransactionsCash Advances

+ 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

Available Receipts

Expense Type

Transaction Date

Enter Vendor Name

Business Purpose?

Amount

If Required, <br> Is Receipt Included?

Comment

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

SAP Concur

RequestsExpense

Help

Manage ExpensesView TransactionsCash Advances

+ New Expense

Import Expenses

Details

Receipts

Print / Email

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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

Available Receipts

Expense Type

Transaction Date

Enter Vendor Name

Business Purpose

Amount

If Required, Is Receipt Included?

Comment

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.

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

+ New Expense

Import Expenses

Details

Receipts

Print / Email

## Expenses

Move

Delete

Copy

View

Expense

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	08/08/2018	Lab and Tech Shop Supplies (t AMZN MKTP US	\$11.90	\$
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (t AMAZON.COM AMZN.COM/BIL	\$270.70	\$2
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (t AMZN MKTP US	\$14.63	\$
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (t AMZN MKTP US	\$65.48	\$
<input type="checkbox"/>	07/31/2018	Prt/Pub/Repro Services (48760 AMER PHYSIO SOC	\$850.00	\$8

## 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...

Attach

No file selected

Or choose an image from your Available Receipts.

Available Receipts

Attach



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



+ New Expense

Import Expenses

Details

Receipts

Print / Email

## Expenses

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	08/08/2018	Lab and Tech Shop Supplies (f AMZN MKTP US	\$11.90	\$11.90
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (f AMAZON.COM AMZN.COM/BIL	\$270.70	\$270.70
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (f AMZN MKTP US	\$14.63	\$14.63
<input type="checkbox"/>	08/07/2018	Lab and Tech Shop Supplies (f 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

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 Surveillance System

Sold by: Exgoftt ([seller profile](#)) | Product question? [Ask seller](#)

Condition: New

## Price

\$11.90

## Shipping Address:

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

## Shipping Speed:

Two-Day Shipping

Item(s) Subtotal: \$11.90

Shipping &amp; Handling: \$0.00

Total before tax: \$11.90

Sales Tax: \$0.00

Total for This Shipment: \$11.90

## Payment information

## Payment Method:

Visa | Last digits: 7165

## Billing address

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

Item(s) Subtotal: \$11.90

Shipping &amp; Handling: \$0.00

Total before tax: \$11.90

Estimated tax to be collected: \$0.00

Grand Total: \$11.90

## Credit Card transactions

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

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

## Allocations for Report: Anderson\_August 2018

## Expense List

Allocate Selected Expenses

Clear Selections

View

Select Group

<input type="checkbox"/>	Date	Expense T...	Group	Amount
<input checked="" type="checkbox"/>	08/08/2018	Lab and Te...		\$11.90
<input type="checkbox"/>	08/07/2018	Lab and Te...	2	\$270.70
<input type="checkbox"/>	08/07/2018	Lab and Te...	3	\$14.63
<input type="checkbox"/>	08/07/2018	Lab and Te...	4	\$65.48
<input type="checkbox"/>	07/31/2018	Prt/Pub/Re...	1	\$850.00

## Allocations

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

Allocate By

Add New Allocation

Delete Selected Allocations

Favorites

Add to Favorites

☒ Percentage

\* SpeedType

Code

☒ 100

13011255 - Interz

11037925

Type to search by:

☒ Text☐ Code☐ Either

Text (Code)

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

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.

Click here to allocate the expense

Save

Cancel

Done

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

Save

Itemize

Allocate

Attach Receipt

Cancel

# Procurement Reports

SAP Concur

RequestsExpense

Help

Manage ExpensesView TransactionsCash Advances

Receipt

Allocation

+ New ExpenseImportPrint / Email

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
<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

ExpenseReceipt image

Expense Type

Transaction Date

Enter Vendor Name

Business Purpose

Amount

If Required, <br> Is Receipt Included?

Comment

Delete Report

Notify Employee

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.

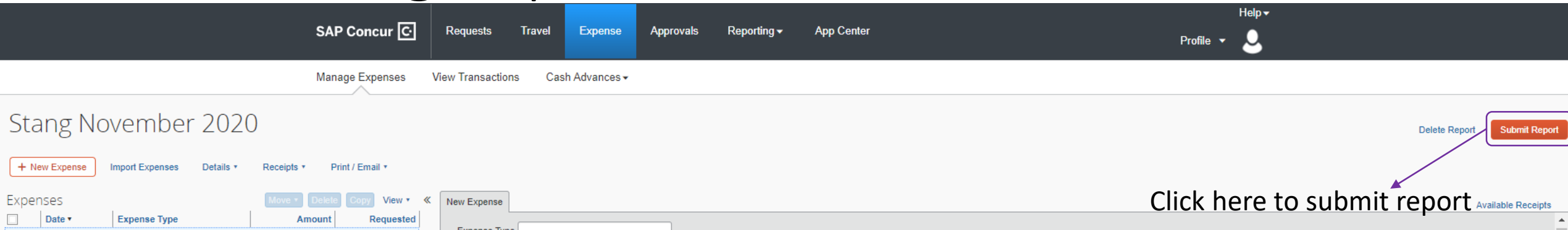
# Procurement Reports

- 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 displays the SAP Concur Expense Management interface. The top navigation bar includes the SAP Concur logo, tabs for 'Requests' and 'Expense' (which is active), and a 'Help' dropdown. Below the navigation bar, there are links for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main section is titled 'Manage Expenses' and 'ACTIVE REPORTS'. On the right, there is a 'Report Library' link. The interface shows three report cards. The first card is a 'Create New Report' button with a red plus icon. The second and third cards are for existing reports, both marked 'NOT SUBMITTED' and 'Ready for Review' with a green checkmark icon. The second report is titled 'Space Robotics Workshop' with a date of 07/02/2018 and an amount of \$600.12. The third report has a redacted title, a date of 07/02/2018, and an amount of \$335.00.

Report Title	Date	Amount	Status
Create New Report			
Space Robotics Workshop	07/02/2018	\$600.12	Ready for Review
[Redacted]	07/02/2018	\$335.00	Ready for Review

# Submitting Reports



The screenshot shows the SAP Concur Expense Reporting interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted), 'Approvals', 'Reporting', and 'App Center'. On the right, there are links for 'Help', 'Profile', and a user icon. Below the navigation bar, there are tabs for 'Manage Expenses', 'View Transactions', and 'Cash Advances'. The main content area displays 'Stang November 2020' and a list of expenses. A 'Submit Report' button is visible in the top right corner of the main area. A purple arrow points from the text 'Click here to submit report' to this button.

Stang November 2020

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

Move Delete Copy View << New Expense

Expense Type Amount Requested

Submit Report

Click here to submit report



The 'Final Review' dialog box is shown, containing a 'Certification Statement' section. The text 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 right, there are two buttons: 'Accept & Submit' and 'Cancel'. A purple arrow points from the text 'Click here to state that all expenses are for your project and do not violate any fiscal policies.' to the 'Accept & Submit' button.

Final Review

**Certification Statement**

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](#)

Accept & Submit Cancel

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

# Submitting Reports

SAP Concur

Requests Travel Expense Approvals Reporting App Center

Manage Expenses View Transactions Cash Advances

Stang November 2020

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

Date	Expense Type	Amount	Requested
11/10/2020	Lab and Tech Shop Supplies (AMAZON.COM*2821Z3S12 AMZ	\$32.98	\$32.98

New Expense

Expense Type

To create a new expense...

Recently Used

Lab and Tech Shop Supplies (AMAZON.COM\*2821Z3S12 AMZ

Operating Supplies

Building Renovations

All Expense Types

A TRAVEL-OTHER

RTD Bus Pass

ADVERTISING

Advertising - Non

Advertising - Non

Advertising - Rec

Advertising - Rec

Promotions (5087

Signs/Murals/Ban

COMMERCIAL CARD

Commercial Card

Commercial Card

Commercial Card Personal Charge (013109)

Commercial Card Unallowable Card Purchases (553201)

COST OF GOODS SOLD

CGS Freight Inventory (450235)

Approval Flow for Report: Stang November 2020

Procurement Approval

Schneider, Margie K.

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.

Submit Report Cancel

Background Check Expense (552780)

Chemicals (530134)

Fees/Licenses (552626)

Other Operating Contract Services (552605)

Click here after you have the correct approver.

If you have any further questions please email me at:

[Jacquelyn.Stang@Colorado.edu](mailto:Jacquelyn.Stang@Colorado.edu)

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