Guide to Claiming PER Expenses

In

Concur

(York's Automated Expense Report System)

For CUPE 3903 Unit 2 Members

(Claim your PER in minutes)

WHERE TO GET HELP?

Department of Faculty Relations – for PER balances and other PER specific questions
Charles Bisram Email: bisr590@yorku.ca 416-736-2100 X 44566

Concur Online Training Material
https://emplearn.yorku.ca/ConcurExpense

Concur User Support Desk – for navigational & application assistance
By Phone (available in English 24/7/365 from Canada/US): Call **1-866-793-4040**

York Expense Desk – for policy and functional assistance
Piera Li pierali@yorku.ca 416-736-2100 X 20233
Sonia Fermin-Peat ferminps@yorku.ca 416-736-2100 X 40150
Yan Liu yliu2015@yorku.ca 416-736-2100 X 22003

STEP 1: ACCESSING YOUR CONCUR ACCOUNT

- Go to the York University website (www.yorku.ca)
- Click on Quick Links in the top right corner of your screen
- Click on Faculty & Staff Home under the **Faculty & Staff** heading
- Click on Concur - Expense Reporting under the **Faculty & Staff Quick Links** found on the right hand side of your screen
- Login using your employee **Passport York*** credentials (same as the one you use for e-reports)

  You will be launched into your Concur Homepage

> *** *Note: All active employees with an employee Passport York and Central Email account will have access to Concur. If you have not set up your Employee Passport York & Central Email Account please do so by referring to the online instructions at:***
>
> ***http://computing.yorku.ca/files/2012/02/Instructions-for-setting-up-Passport-York-and-Central-Email.docx***

STEP 2: SCAN / IMAGE YOUR RECEIPTS

- Preparing an expense report within Concur requires that all receipts be imaged / scanned and uploaded to your Concur account.

  *Note: Concur accepts receipts in the **.png, .jpg, .jpeg, .pdf, .html, .tif or .tiff** file for upload. It does not accept Word or Excel format. There is a 5 MB limit per file.*

- To scan and upload images to your Concur account, you can:

  UPLOAD FROM YOUR LOCAL WORKSTATION - Use a document scanning enabled photocopier in your area to scan your receipts and send them to your personal email account. Save the images either to a folder on your local or network drive so they can be uploaded to your expense report. You may also use your own personal scanner or document imaging device.

  OR

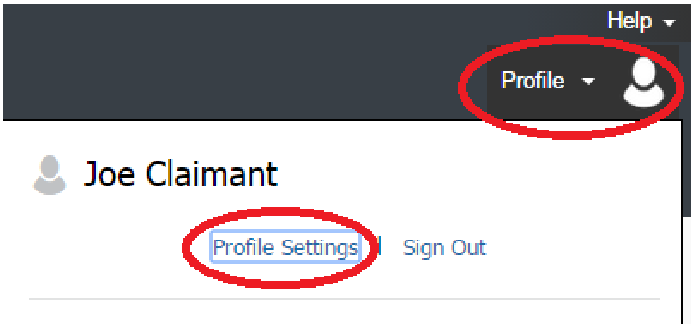
  E-MAIL RECEIPTS TO YOUR CONCUR ACCOUNT (AVAILABLE RECEIPTS) – Snap pictures of your receipts using your smartphone or tablet and email the images from your ***verified*** email address to receipts@concur.com. You can also email receipts you saved to your local or network drive from your ***verified*** email address.

  OR

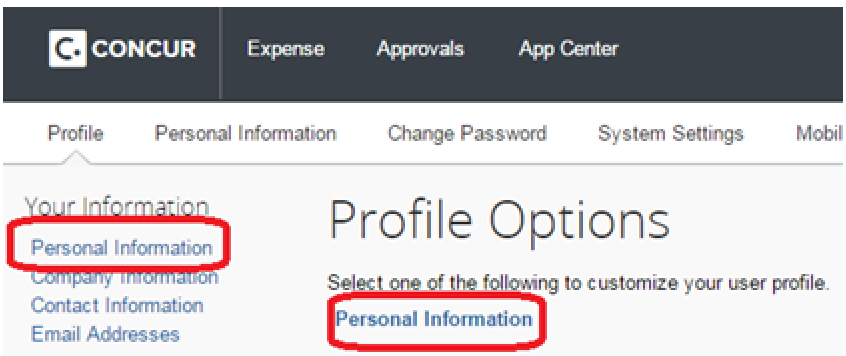
  GO MOBILE ! – Download the Concur Mobile App for Apple / Android / Windows / Blackberry (limited) smartphone or tablet and upload images directly to your expense report.

- The ***email verification*** process is a simple, one time process. Please follow the steps below to verify your email address:

1. Locate the Profile menu (top right of your Concur homepage) after having logged in (Step 1 above). Click Profile.



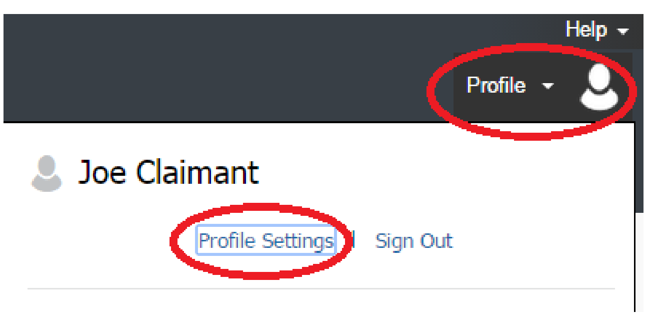
2. Click **Profile Settings**.
3. Click either of the two **Personal Information** links. *You will be launched into your Personal Information page.*



4. Scroll down to the **Email Addresses** section and verify your York University email address by clicking **<u>How do I verify my email address?</u>** and following the instructions.
5. You can add and verify up to two additional email addresses (Note: Concur communications will only be sent to your York University (@yorku.ca) email address).
6. After completing the verification process, you should see Verified next to your verified email address. You can now email receipts directly to your Concur account.

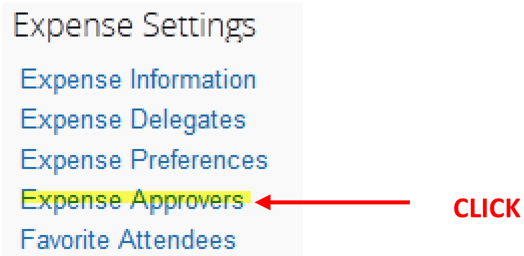
STEP 3: DESIGNATE AN APPROVER FOR MY EXPENSE CLAIMS

- Locate the Profile menu (top right of your Concur homepage). Click Profile.

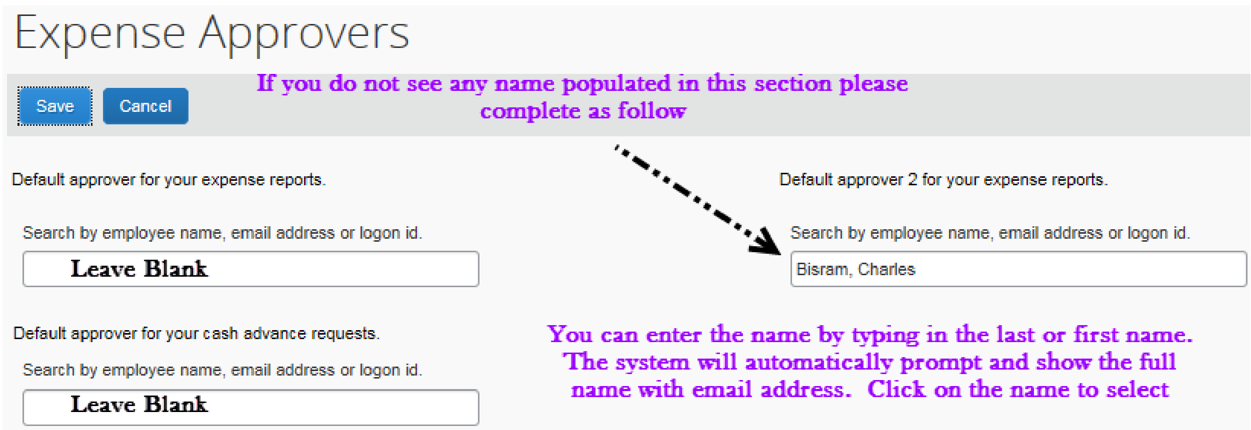


- Click **Profile Settings**

- Click on Expense Approvers link below the Expense Settings heading (left side of the screen)



- If you see names already populated in the fields indicated below - Go to Step 4



Note: Concur allows you to search for your reviewer/approvers by last name or email address.

- After entering the name of the individual who will be reviewing/approving your expense claims, you are now ready to save your selections.
- Click Save

STEP 4: CREATE AN EXPENSE REPORT

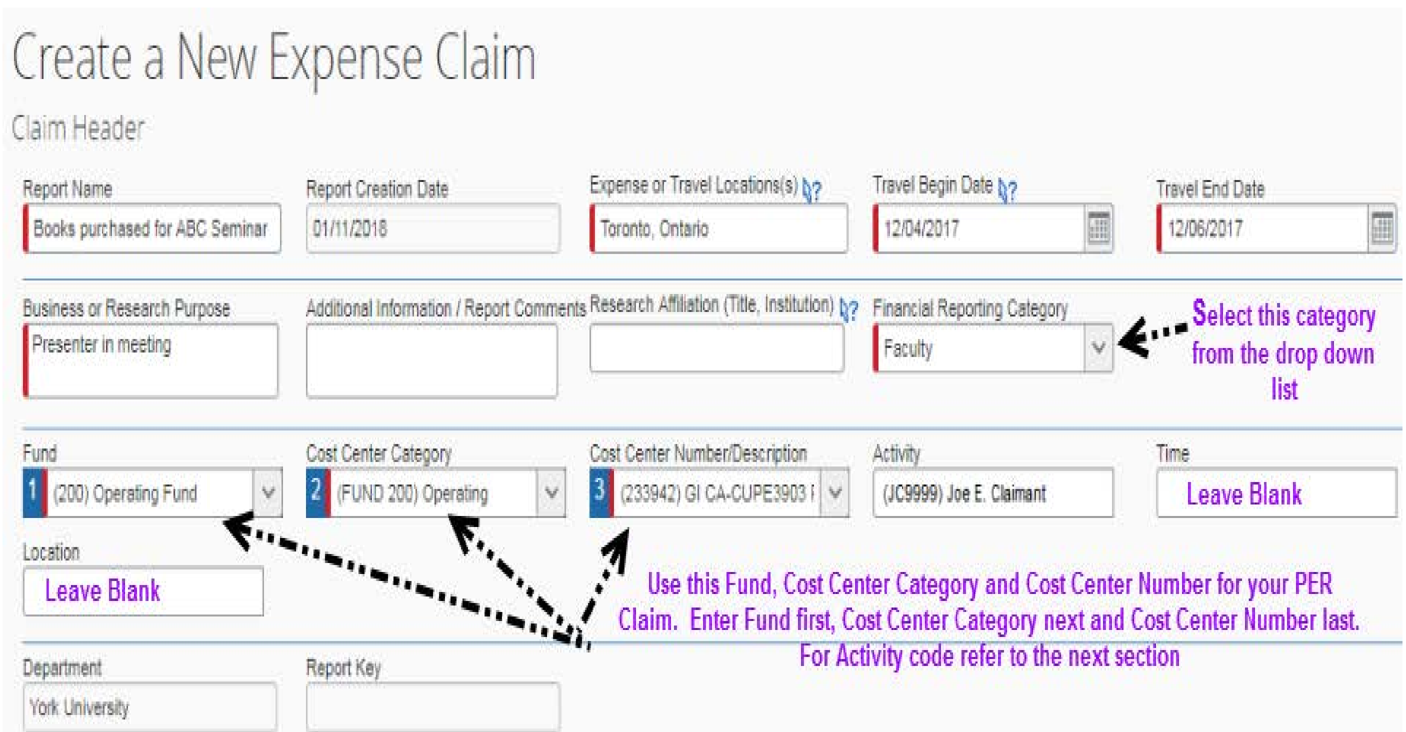
- Click the CONCUR icon at the top left of your screen to return to your Concur homepage.
- Hover on the **+ New** task icon on the Quick Task Bar at top of your Concur homepage

- Click on **Start a Report** and you will be launched into the ***Report Header***.
- Complete all mandatory fields (indicated by the red bar on the left side of the field).

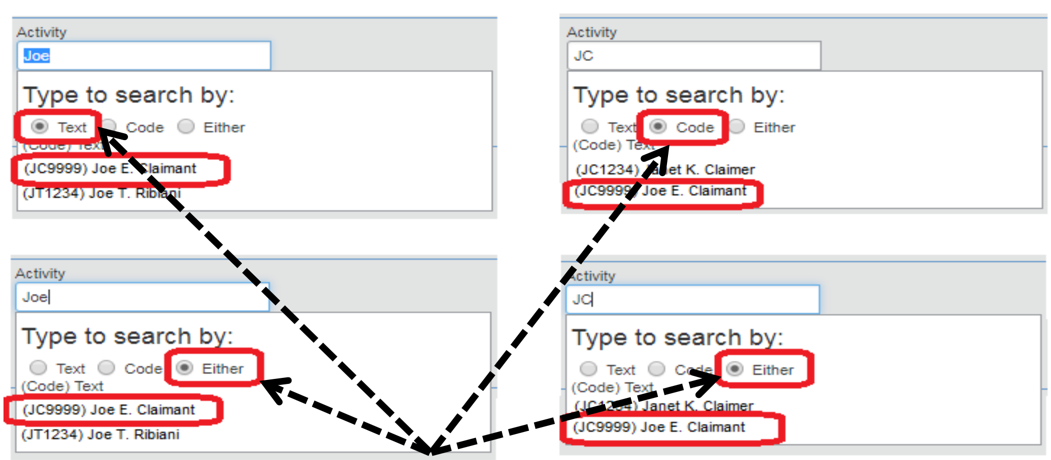
<u>Helpful hint</u>: Look for the Tool Tip icon above certain fields. Tool tips give you additional information on how to complete the required field. Hover over the icon to view the tip.

- CUPE 3903 PER claims should be charged to:

  - Fund: **(200) Operating Fund**
  - Cost Center Category: **(FUND 200) Operating**
  - Cost Centre Number/Description: **(233942) GIFR-CUPE 3903-2 PEA**
  - Activity Code: CUPE 3903-2 members will each have a unique Activity Code. The format of the code will be the initials of your first and last name followed by the last 4 digits of your employee ID. The activity code name will be your full name. For example, a 3903-2 member named Joe E. Claimant with employee ID 102999999 will appear as (JC9999 Joe E. Claimant)



- **Important**: You can search for your activity code directly in the activity code field by code, text (i.e. activity code name), or both (either).



Select the appropriate search type. You can search for your activty code by text (i.e. your), code (i.e. your first and last initial followed by the last 4 digits of your employee ID, or either. Begin typing your name or initial and a list of options will be presented to you. Select your activity code.

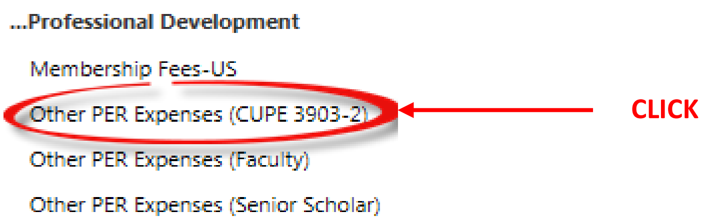
- After completing the Report Header, click 

- *You will be launched into your **Expense Report***

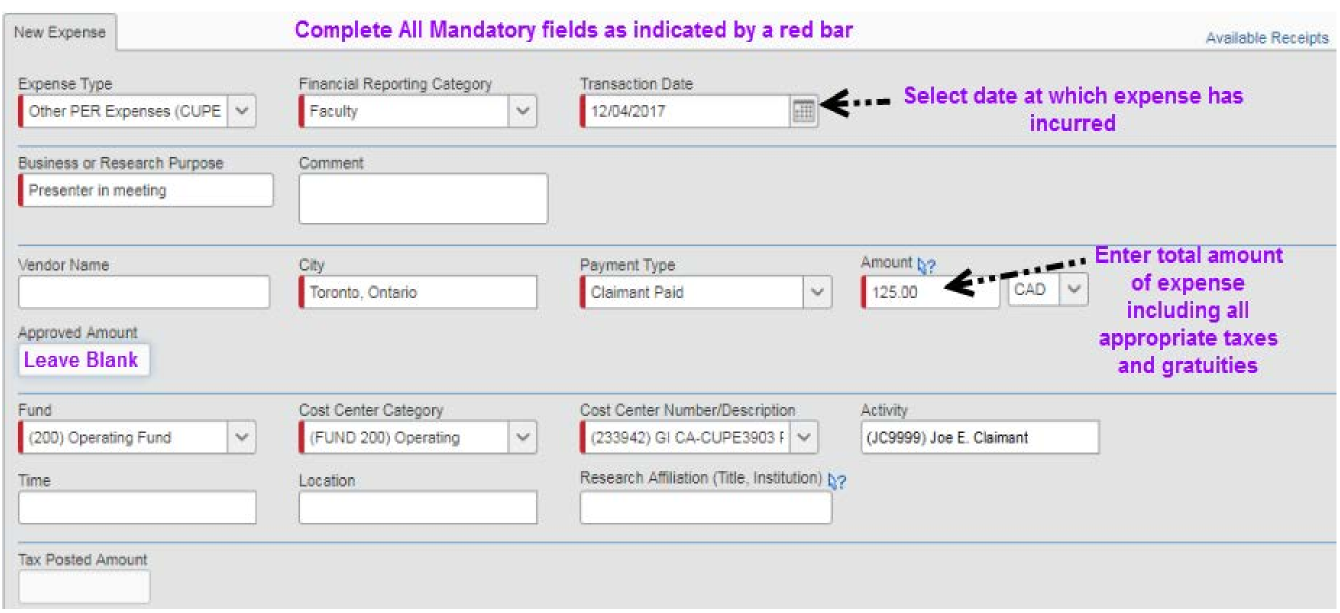
STEP 5: ADD YOUR PER EXPENSES

- All Expense Types are listed in the pane on the bottom right of the expense report screen.
- If the New Expense listing does not appear, locate the *menu bar* below your *expense report name* and click the **New Expense** icon

- Scroll through the expense type listing and select **Other PER Expenses (CUPE 3903-2)** located under the **Professional Development** category.



- The **Expense Entry Form** will be launched on the right side of the screen. Complete all the required fields (indicated by the red bar on the left side of the field), including the City of purchase and the amount of the expense. Include any comments that would be helpful to those approving your expense report.

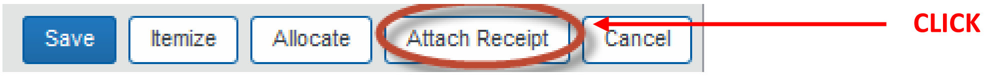


IMPORTANT: Your CUPE 3903-2 PER expense report should only contain PER eligible expenses. If you have other business expenses that you need to submit for reimbursement, please create a separate expense report and send it to the appropriate approver.

STEP 6: ATTACH YOUR RECEIPT IMAGES

(These are the receipt images you created in Step 2)

- Click **Attach Receipt** (located at the bottom right of the **Expense Entry Form**) and follow the instructions below depending on where you have saved your receipt:



To attach a receipt that you e-mailed to your receipt store:

- Under **Available Receipts** in the **Attach Receipt** window, select the appropriate Receipt Image from the gallery.
- Click **Attach**

To attach a receipt that you saved to your local workstation

- Under **File Selected for uploading:** in the **Attach Receipt** window, click **Browse**
- Navigate to the local folder where you saved your receipt images and select the Receipt Image.
- Click **Open**
- Click **Attach**

- Click Save at the bottom of the **Expense Entry Form**
- When you successfully attach a receipt to your expense, you will see the blue **attached receipt** icon on the left side of your expense entry (below the date).
- If you hover over the blue attached receipt icon, the receipt image will appear.
- If you did not successfully attach a receipt to your expense, you will see the yellow **receipt image required** icon on the left side of your expense entry (below the date).
- Repeat these steps for all receipts that support the claim.

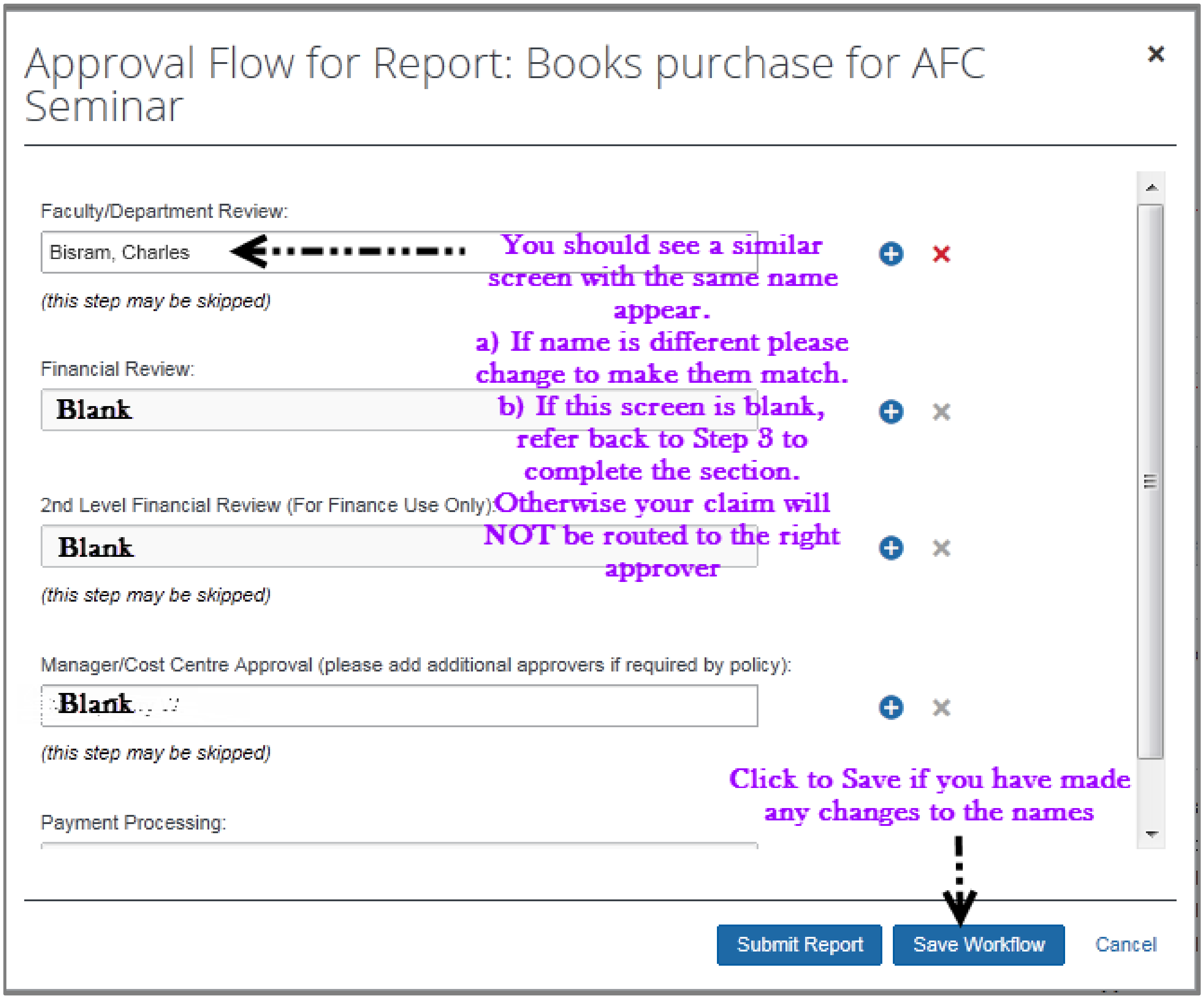
STEP 7: REVIEW/CHANGE AN APPROVAL FLOW

- Your expense report approval flow determines how your expense report will be routed electronically for approval.
- Click on **Details** button (top left side of screen)

- Select **Approval Flow** from the drop down menu.

- The **Approval Flow for Report** window will open.

  Notice that the individual you entered in Step 3 should be prepopulated into your approval flow. You can edit your approval flow by clicking in the **Faculty/Department Review** field to edit the name. If this field is blank, please go back to Step 3 and complete your profile.



STEP 8: SUBMIT YOUR EXPENSE REPORT

After you have reviewed your **Approval Flow** you are now ready to submit the expense report for approval.

- Click on Submit Report button
- After reading the declaration, click on Accept & Submit button within the **Final Review** box.
- Click on Submit Report button within the **Approval Flow** screen.
- Click **Close** on the Concur Survey screen. *Your expense report has now been submitted.*

Please do not send in your original expense receipts with this report.
Please retain original receipts for 90 days after the expense report is approved.